Oxfordshire Cotswolds Garden Village and West Eynsham SDA

Housing Strategy Advice

Iceni Projects Limited on behalf of
West Oxfordshire District Council

July 2019

JULY 2019

ICENI PROJECTS LIMITED ON BEHALF OF WEST OXFORDSHIRE DISTRICT COUNCIL

Oxfordshire Cotswolds Garden Village and West Eynsham SDA

Iceni Projects
London: Da Vinci House, 44 Saffron Hill, London, EC1N 8FH
Glasgow: 177 West George Street, Glasgow, G2 2LB
Manchester: 68 Quay Street, Manchester, M3 3EJ

t: 020 3640 8508 **| w:** iceniprojects.com | **e:** mail@iceniprojects.com
linkedin: linkedin.com/company/iceni-projects | **twitter**: @iceniprojects

CONTENTS

1. EXECUTIVE SUMMARY

Context

1.1 West Oxfordshire District Council's adopted Local Plan allocates two strategic sites for development near Eynsham. The West Eynsham Strategic Development Area (SDA) is allocated for the delivery of about 1,000 homes and will see the western expansion of the existing settlement. Land to the north of the A40 is identified as the 'Oxfordshire Garden Village Strategic Location for Growth (SLG)' - a free-standing garden village with a working assumption of about 2,200 homes.

1.2 To guide the development of these two sites, West Oxfordshire District Council is in the process of preparing an Area Action Plan (AAP) for the Oxfordshire Cotswolds Garden Village site; and a Development Framework for the West of Eynsham SDA which is intended to be adopted as a Supplementary Planning Document (SPD). The Garden Village AAP will form part of the statutory development plan for West Oxfordshire alongside the West Oxfordshire Local Plan 2031.

1.3 To help inform the AAP and SPD, West Oxfordshire District Council has commissioned Iceni Projects to develop evidence regarding the mix of housing needed in each of these two strategic sites.

Housing Mix within the West Eynsham SDA

1.4 The West Eynsham SDA is envisaged as an urban extension to the existing settlement. It provides an opportunity to address gaps in the settlement's existing housing offer and socio-economic profile in order to contribute to delivering a more balanced, sustainable community.

1.5 The profile of homes in Eynsham is focused particularly towards 3-bed housing and semi-detached properties. There is a limited proportion of flats and 1-bed properties albeit that this is characteristic of villages and their role within a wider hierarchy of settlements. Levels of home ownership are high, albeit that the Private Rented Sector is likely to have grown in size since 2011. There is a high proportion of families with school age children and older persons in Eynsham; and a low proportion of social housing.

1.6 Through the delivery of the West Eynsham SDA there is an opportunity to attract and retain younger people in their 20s and 30s, the representation of which is currently relatively low in Eynsham. This can be achieved by increasing the availability of affordable housing and smaller, more affordable market housing. There is a clear local aspiration for this.

Affordable Housing

1.7 The West Oxfordshire Local Plan sets out that 50% of homes should be affordable (subject to scheme viability). Iceni considers that the evidence supports the policy split of affordable housing provision in the Local Plan with 66% (two-thirds) being for rented housing and 33% (one third) for intermediate and low cost home ownership products.

1.8 However, it is important that both rental levels for affordable homes and the discounts applied to homes for sale are sufficient that it makes housing genuinely affordable for local people. Iceni would recommend that rental levels should not be allowed to exceed Local Housing Allowance levels for different sizes of property and are set having regard to what represent 'living rents' within West Oxfordshire.

1.9 It would be appropriate to seek to deliver a mix of low cost home ownership options within the SDA including both shared ownership and discounted market sale homes. Consideration should be given to the pricing of these so that they are affordable to households locally within the 'rent-to-buy gap.' Based on the current position, this is households with an income of between £30,000 - £67,500. Discounts on OMV or the householders' share for shared ownership properties should be assessed to ensure housing is affordable to those in this income bracket.

1.10 Turning to the sizes of affordable housing to be delivered, Iceni's analysis points to a need for a mix of different property sizes. Our recommended mix of different sizes of affordable homes is set out in the Table below. Iceni consider that regard however should also be had to the profile of need revealed by the Council's Housing Register, taking account of not just the overall needs profile but relative priority needs.

Table 1.1 Recommended Affordable Housing Size Mix

	1-bed	2-bed	3-bed	4+-bed
Social/Affordable Rented	30-35%	30-40%	30-35%	5%
Affordable Home Ownership	20-25%	40%	25-30%	5-10%

1.11 Delivery of the mix of housing set out, taking account of the policy position seeking 50% affordable housing through new developments, will assist in rebalancing the overall profile of homes in Eynsham; and increasing access to housing amongst younger age groups.

Market Housing Mix

1.12 Iceni's analysis points to a strong sales market in Eynsham which is influenced by the settlement's attractiveness as a place to live – including facilities in the settlement and its schools, proximity and access to Oxford, and local employment opportunities. It sees people moving from Oxford as prices are lower and you can therefore 'get more for your money,' with the evidence suggesting prices for houses are £65,000 + cheaper than those in the City. The profile of demand is focused more towards houses than flats (where values are more similar to those in Oxford).

1.13 There is a limited market in West Oxfordshire for 1-bed properties, with these typically accounting for < 10% of supply. The market profile is focused on two-, three- and four-bed houses, with the greatest relative demand for 3- and 4-bed properties. The split of housing within the two consented phases of the SDA is however relatively strongly focused towards larger 4+ bed properties, which account for 69% of supply.

1.14 Iceni consider that the Masterplan for the West Eynsham SDA should seek to achieve the balance of market housing indicated in the table below across the development scheme. The Council should monitor delivery against this whilst exercising some flexibility in the mix allowed within individual phases of development/ planning applications to respond to changing market circumstances. Any substantive deviation from the recommended mix should be supported by clear evidence as part of planning applications to justify this.

Table 1.2 Recommendations on Market Housing Mix for the West Eynsham SDA

	1-bed	2-bed	3-bed	4+-bed
Recommended Mix for New Market Homes in SDA: 500 Dwellings	5%	35%	40%	20%

Meeting Specific Housing Needs

1.15 Iceni consider that there is some potential for the West Eynsham SDA to contribute to providing specialist older persons housing, should there be interest from a specialist developer to deliver this. We consider that there is probably greater potential for the delivery of Build-to-Rent development within the larger Garden Village scheme, but policy should not preclude provision within the SDA should there be market interest.

1.16 Iceni find the Local Plan position of requiring at least 5% of plots to be made available for self- or custom-build development to be justified. The Council are undertaking further work with the Right to Build Taskforce to consider delivery models. Our analysis has similarly found that the requirements for accessible and adaptable homes are justified; and that it would be reasonable to provide at least 5% of homes as wheelchair adaptable homes.

Housing Mix within the Garden Village

1.17 The Oxfordshire Cotswolds Garden Village is intended to function more as a standalone settlement, albeit one which is in close proximity to Eynsham and with links to it. Starting with a relatively blank canvas in these terms, there are opportunities for the scheme to deliver a range of housing. The Council is keen that the scheme includes a range of different types, sizes and tenures of homes and is an exemplar of new models of housing delivery. Iceni have considered its potential with this in mind.

1.18 The West Oxfordshire Local Plan sets out that 50% of homes should be affordable, comprising both social and affordable rented properties and various 'affordable home ownership' products; with 50% market housing (which is likely to comprise a mix of owner occupied properties, and those owned by landlords and available for private rent). The evidence in this report supports this.

Affordable Housing Mix

1.19 As with the SDA both 'need' and 'viability' are relevant considerations in setting policies for the mix of housing, and in particular the level and mix of affordable housing. Iceni considers that the evidence supports a split whereby 20% of homes are provided for affordable home ownership (using the 2019 NPPF definition) and 30% for social or affordable rented homes. Of the total affordable housing, this equates to a mix of 40/60 split between affordable home ownership and rented affordable products.

1.20 Iceni recommend that the Garden Village AAP specify that 30% of new homes should be delivered as affordable housing for rent, and 20% as affordable home ownership subject to viability. Affordable home ownership should be defined in a consistent way to the NPPF, including shared ownership and shared equity housing; starter homes and other discounted market sale housing.

1.21 It is important that both rental levels for affordable homes and the discounts applied to homes for sale are sufficient that it makes housing genuinely affordable for local people.

1.22 Rents for rented affordable housing should be set having regard to what represents a "living rent" in West Oxfordshire/ Oxford based on the methodology set out in this report and should not exceed Local Housing Allowance rates for different property sizes. A sizeable proportion of rented affordable housing (50%+) should be delivered at social rent levels to ensure that it is genuinely affordable and limits benefit dependency

1.23 It would be appropriate to seek to deliver a mix of low cost home ownership options within the Garden Village development including both shared ownership and discounted market sale homes. Consideration should be given to the pricing of these seeking to promote delivery of homes which are affordable to households locally within the 'rent-to-buy gap.' Based on the current position, this is households with an income of between £30,000 - £67,500. Discounts on OMV or the householders' share for shared ownership properties should be assessed to ensure housing is affordable to those in this income bracket.

1.24 Turning to the sizes of affordable housing to be delivered, Iceni's analysis points to a need for a mix of different property sizes. Our recommended mix of different sizes of affordable homes is set out in the Table below. Iceni consider that regard however should also be had to the profile of need revealed by the Council's Housing Register, taking account of not just the overall needs profile but relative priority needs.

Table 1.3 Recommended Affordable Housing Size Mix

	1-bed	2-bed	3-bed	4+-bed
Social/Affordable Rented	30-35%	30-40%	30-35%	5%
Affordable Home Ownership	20-25%	40%	25-30%	5-10%

1.25 Delivery of the mix of housing set out, taking account of the policy position seeking 50% affordable housing through new developments, will assist in rebalancing the overall profile of homes in Eynsham; and increasing access to housing amongst younger age groups.

Market Housing Mix

1.26 The delivery of the Garden Village will support in-migration to the Eynsham area, including from Oxford; other parts of West Oxfordshire and potentially further afield. Iceni consider that it is appropriate that there is some flexibility in the mix of housing expected, to allow phases of the development to respond to up-to-date market information and prevailing market conditions at the time at which reserved matters applications for individual phases are brought forward. However, it is helpful to provide an overall guide mix for the development scheme as a whole to inform masterplanning; and to ensure that a balanced, mixed community is supported which provides housing for a range of households.

1.27 We recommend for the Garden Village a housing mix profile for market housing, as set out in the Table below, which is relatively similar to the existing profile of homes in Eynsham and across West Oxfordshire (across all tenures). But it should be borne in mind that the high proportion of affordable housing envisaged as part of the development scheme will shift the overall profile of homes more towards smaller properties.

Table 1.4 Recommended Market Housing Size Mix

	1-bed	2-bed	3-bed	4+-bed
Market Housing	5-10%	20-25%	40-45%	25-30%

1.28 There is a lack of schemes which have tested the market for build-to-rent development in Oxfordshire, including in Oxford City. Iceni consider that it would be sensible for a small scheme of 50 units – or more, should it be supported by the market - to be incorporated in early phases of the Garden Village development in order to test the market, and demonstrate that demand exists for Build-to-Rent development at this location. The success of this could then support further PRS development within subsequent phases. A Build-to-Rent scheme should be located at an accessible location with the development with strong public transport accessibility.

Older Persons Housing within the Garden Village

1.29 Taking account of demographic and market dynamics, Iceni considers that there is good potential for the Garden Village scheme to include specialist housing for older people, including both supported housing and housing with care. This caters for a different market segment and can therefore help to drive overall housing delivery rates.

1.30 We consider that it would be appropriate for the Council to exercise a level of flexibility in respect of the nature and scale of development for older persons housing. A need exists for both sheltered/ retirement housing and for more specialist ‘housing with care’ provision. However, the scale of provision for specialist housing within the scheme is likely to influence the level of in-migration to the Eynsham area, and therefore the assessed need should not necessarily be considered as a cap on provision.

1.31 Housing with care provision, depending on the specific nature of provision, might fall within a C2 Use Class. The viability evidence prepared in support of the Local Plan suggested that on-site provision of affordable housing in sheltered housing and extra-care housing schemes is achievable (at varying percentages); however further viability testing for the Garden Village and the SDA may warrant further consideration once more information on development costs are known. There are also practical considerations to take into account, including whether affordable housing can be effectively integrated into the development on-site and whether affordable residents will have access to on-site facilities and the affordability of service charges.

1.32 We would envisage that to deliver a viable scheme with sufficient critical mass to support a range of facilities and services on-site, an extra care scheme would typically have between 60-150 units; and a care home scheme between 60-100 units. In addition, there is potential for retirement housing / over 55 development. Iceni consider that the AAP should support provision of both sheltered/ retirement housing and housing with care within the AAP. These should be located in areas with strong access to local amenities and public transport services. The Council should consider carefully how Policy H3 is applied to these forms of provision on-site.

1.33 It will remain equally important to ensure that general housing is adaptable to households changing needs, and the standards that the Council has set out in the Local Plan regarding accessible and adaptable homes are justified. Iceni also find that it would be reasonable to provide at least 5% of homes as wheelchair adaptable homes. The Council might also consider the potential role of bungalows as part of the future mix of housing in the Garden Village.

Self- and Custom-Build Development

1.34 It is clear that there is a level of demand for self-build and custom housebuilding serviced plots of land in the District. There has been 98 expressions of interest in serviced plots of land over the 3.5 year period considered; as drawn from the register. There are also 506 people registered on the Buildstore's Custom Build Register and 879 subscribers' to Plotsearch and this may under-estimate provision. Local estate agents have also highlighted that there are people searching for plots; but ultimately there are land availability issues – particularly in and around Eynsham.

1.35 There is clear evidence of need/ demand which justifies the Council's policies requiring 5% of plots to be made available for self- and custom-build development as part of the Garden Village scheme.

Graduate and Employer-Linked Housing

1.36 The Garden Village and the SDA present an opportunity to meet the housing needs of essential local workers and junior skilled staff required by high-tech businesses, health and education institutions located in Eynsham, as well as Witney and Oxford. As a result of the proximity to Oxford and its universities, there is also an opportunity to meet the needs of post-graduate students and academic staff.

1.37 At present, proposals being considered include a new University NHS Trust and Oxford Brookes University linked training cluster with accommodation which would provide an anchor for essential local workers and support medical training as well as nearby tech-companies in Eynsham.

1.38 There is also support from some of the site promoters at the West Eynsham SDA who see the provision of key worker housing for the universities as important to the scheme; and are open to explore the provision of housing for postgraduates and academics. It is considered that proposals for such housing should be strongly supported. However, key worker housing would be justified regardless of whether this specific concept comes forward.

1.39 Iceni recommend that the AAP and SPD should include a policy which supports graduate and employer-linked housing if brought forward by the university or any enabling organisation.

Space Standards

1.40 The Government has set out a Nationally Described Space Standard which deals with internal space and addresses the minimum gross internal floor area and storage requirements for different sizes of dwellings.[1] Detailed data on the square footage of homes being built in West Oxfordshire is not available. Iceni has however reviewed the sizes of properties proposed at Taylor Wimpey's Thornbury Green Scheme. 90% of properties at this scheme appear to sit within or above the space standards for the number of bedrooms indicated.

1.41 The evidence in this report does not point to particular issues of overcrowding in West Oxfordshire. There are clear affordability issues in West Oxfordshire which suggest that policies which encourage delivery of larger homes could impact negatively on householders' ability to afford new homes. We do not consider that policies requiring homes to be constructed to national space standard can therefore be justified.

Acceleration of Housing Delivery

1.42 The timely delivery of the two strategic sites will be important in ensuring that West Oxfordshire District Council can maintain a five year housing land supply. In the absence of this, it risks seeing unplanned development brought forward through speculative planning applications on non-allocated sites.

1.43 We have considered four key factors in this report which relate to the Council's role in accelerating housing delivery. The key conclusions for each are set out below.

Process Management

1.44 The Council is bringing together a range of stakeholders to put in place a clear policy framework through the Garden Village AAP and West Eynsham SPD against which planning applications can be assessed; which is a positive approach. It is clear that there is extensive collaborative working taking place between both the developers, the district and County Councils, infrastructure providers and other statutory consultees. This upfront work will provide a strong basis for the timely determination of planning applications.

1.45 The Council has already signed a Planning Performance Agreement with Grosvenor on the Garden Village site and the intention is to twin-track the AAP with the submission of the outline planning application to ensure it is submitted as quickly as possible. There are also member workshops ongoing in respect of both sites, to ensure that decision-takers are fully informed. This should support the efficient determination of planning applications. Moving forward, the Council should carefully

[1] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/524531/160519_Nationally_Described_Space_Standard____Final_Web_version.pdf

consider and limit, where possible, pre-commencement conditions to ensure the timely delivery of phases of development.

Placemaking Investment and Infrastructure Delivery

1.46 The success of large-scale residential developments is very much dependent on the provision of local amenities, shops, workplaces, schools, public spaces and recreational space. These all help to build a strong community and supports vibrant, economically successful places. We have reviewed research in this report which has shown that upfront placemaking investment makes the development more appealing and has a positive influence on the pace of delivery and sales, as well as residential values.

1.47 The delivery of infrastructure within early phases of development can also help to create place and underpin levels of demand. It has been noted in this report that research shows that investment in schools is particularly important, as they can provide an immediate draw to the development attracting potential buyers, but also help to create footfall.

1.48 The Council should consider how it leverages its own resources and work with the County Council to contribute to early infrastructure delivery, where possible, to support housing delivery rates.

Product Differentiation and Build out Rates

1.49 A key issue across both strategic sites is build out rates. The most notable conclusion from Sir Oliver Letwin's *Independent Review of Build Out* is a need to increase diversity in the products delivered on large sites and the diversity in those who are building homes. In his report, Letwin recommended that each phase of development should be subject to housing diversity requirements – and including different housing products, types, tenures and styles. The Council should encourage this in the AAP and SPD whilst recognising that different locations within a strategic development may have a different product mix.

1.50 The AAP and SPD should adopt the principle set out in the Letwin Review of diversity in the overall scheme, and where appropriate by phase, to help support build-out rates.

1.51 Furthermore, Iceni recommend that consideration is given to the number of sales outlets and accesses; product differentiation; the integration of affordable housing in different phases of development and how schemes can cater for different specialist market segments, to help support build-out rates. These issues should inform and be embedded within the masterplan for both sites; and this should be supported by clear policy or principles addressing product diversity within the AAP and SPD.

Modern Methods of Construction

1.52 The Government has recognised that homes constructed off-site through 'modern methods of construction' can be built up to 30% quicker than by traditional methods of construction, and with potentially a 25% reduction in costs; and Government has sought to encourage growth in their use.

1.53 Through using a high proportion of precision-manufactured components, materials and manufacturing systems, housing delivered in this way can also be of a superior quality to that delivered through traditional construction, and can achieve better energy performance; can reduce the effects of site deliveries, noise and pollution by shortening the construction period and thus reducing disruption to local communities; and can require lower levels of workers, helping to mitigate and manage the potential effects of construction skills shortages.

1.54 To maximise the role which modern methods of construction can have in accelerating delivery, it is critical that this type of construction requires a highly detailed design to be agreed at an earlier stage, with the ability to make changes to the design and space planning subsequent to this being quite limited. Iceni therefore recommend that the Council encourage the use of modern methods of construction; recognising the benefits of it in delivering housing at high volumes; and should work with the site promoters to actively engage potential delivery partners; and should consider how the planning process can effectively support delivery through this method.

Maintenance and Management of the Housing Stock

1.55 The delivery of a successful new community requires a clear understanding of how assets generated by the development process will be managed in perpetuity. The Garden City Principles as set out in the introduction to this report acknowledge that maintenance and management is undertaken for the benefit of the community; but it can also benefit Councils and indeed developers and site promoters.

1.56 This report has set out the key principles to be followed for achieving success in the long-term; and it is clear that new communities will not be sustainable without well organised management structures and a reliable revenue stream. The Council will be able to facilitate this through a framework to maintain and manage those assets; as well as providing reassurance to new residents of the community and providing them with genuine involvement in the development of their community.

1.57 There are various options and ideas which could be taken forward by the Council; however, at this stage there is no agreed masterplan for either site which can be used to inform a framework for maintenance and management and potential options need careful consideration through engagement of a range of stakeholders. This report has set out an overview of the bodies that can drive the long-term management of the development and the models which are used to support this; as well as case studies where this has been successful.

2. INTRODUCTION

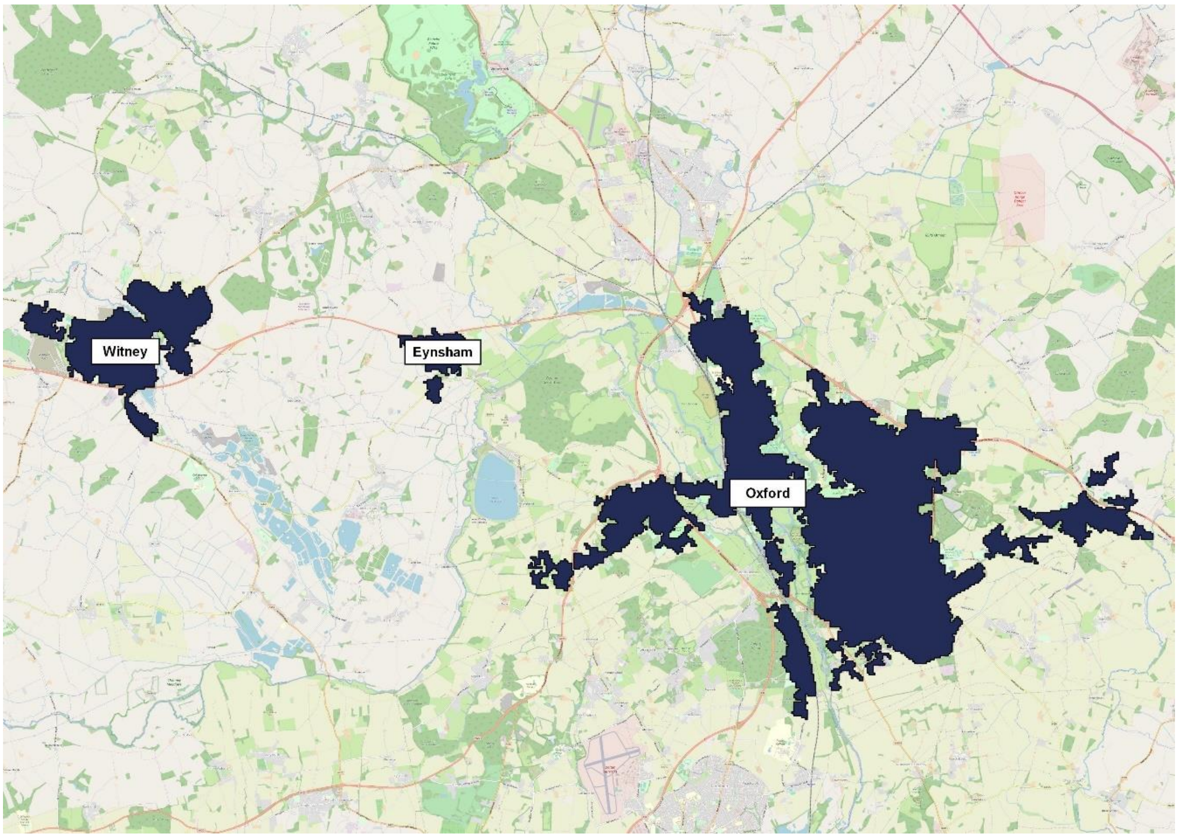
2.1 West Oxfordshire District Council's adopted Local Plan allocates two strategic sites for development near Eynsham. The West Eynsham Strategic Development Area (SDA) is allocated for the delivery of about 1,000 homes and will see the western expansion of the existing settlement with delivery of housing as well as a new primary school, a western spine road, green infrastructure and other supporting infrastructure. Land to the north of the A40 is identified as the 'Oxfordshire Garden Village Strategic Location for Growth (SLG)' - a free-standing garden village with a working assumption of about 2,200 homes. The Garden Village is intended to be a free-standing new settlement but connected and integrated with Eynsham as appropriate. It is intended to be developed consistent with the Town and Country Planning Association's garden settlement principles, delivering homes, primary and secondary education as well as major new science-based employment, extensive green infrastructure and community facilities and transport improvements, including a new park and ride site.

2.2 Both strategic sites are proximate to Eynsham, which is a settlement of around 5,000 people located in the east of the District, 5 miles north-west of Oxford. The existing settlement lies to the south of the A40 which runs west from Oxford through the Cotswolds to Cheltenham and Gloucester. The settlement pattern of the surrounding area is of dispersed local villages such as Freeland, Hanborough, Barnard Gate, Cassington and Stanton Harcourt with populations of between 750 – 2,700 persons. The B4044 also connects Eynsham and Oxford. A context plan is shown in Figure 2.1.

2.3 To guide the development of these two sites, West Oxfordshire District Council is in the process of preparing an Area Action Plan (AAP) for the Oxfordshire Cotswolds Garden Village site; and a Development Framework for the West Eynsham SDA which is intended to be adopted as a Supplementary Planning Document (SPD). The Garden Village AAP will form part of the statutory development plan for West Oxfordshire alongside the West Oxfordshire Local Plan 2031. The West Eynsham SPD will not be part of the statutory development plan but will be an important material consideration for any subsequent planning application/s at West Eynsham.

2.4 To help inform the AAP and SPD, West Oxfordshire District Council has commissioned Iceni Projects Ltd ("Iceni") to develop evidence regarding the mix of housing needed in each of these two strategic sites. This is intended to inform policies/principles regarding the types of housing which the Council expects to be brought forward within the two development schemes, including house types, size and tenures; affordable housing requirements and implementation including opportunities for custom/self-build, employment and education linked housing, acceleration of delivery and long-term maintenance and management. Iceni have been supported by Justin Gardner Consulting (JGC).

Figure 2.1: Context Plan



2.5 Iceni's advice, as set out in this report, is informed through a combination of analysis, research and stakeholder engagement including with local estate agents, housing associations and developers of the two sites.

The Garden City Principles

2.6 In considering the Oxfordshire Cotswold Garden Village, Iceni's advice has also been informed by the Garden City Principles, which are described by the Town and Country Planning Association as an indivisible and interlocking framework for the delivery of Garden Villages and Settlements.

2.7 A Garden City is a holistically planned new settlement which enhances the natural environment and offers high-quality affordable housing, and locally accessible work in beautiful, healthy and social communities. The principles include:

- Land value capture for the benefit of the community.
- Strong vision, leadership and community engagement.
- Community ownership of land and long-term stewardship of assets.

- Mixed-tenure homes and housing types that are genuinely affordable.
- A wide range of local jobs in the Garden City within easy commuting distance of homes.
- Beautifully and imaginatively designed homes with gardens, combining the best of town and country to create healthy communities, and including opportunities to grow food.
- Development that enhances the natural environment, providing a comprehensive green infrastructure network and net biodiversity gains, and that uses zero-carbon and energy-positive technology to ensure climate resilience.
- Strong cultural, recreational and shopping facilities in walkable, vibrant, sociable neighbourhoods.
- Integrated and accessible transport systems, with walking, cycling and public transport designed to be the most attractive forms of local transport.

2.8 These principles are recognised as a distillation of the key elements that have made the Garden City model so successful; and have therefore underpinned the recommendations set out in this report in respect of the Garden Village.

Structure of the Report

2.9 The structure of the remainder of the report is as follows:

- Section 3: Policy Framework;
- Section 4: Baseline Profile:
- Section 5: Market Housing Demand;
- Section 6: Affordable Housing Need;
- Section 7: Specialist Housing Needs;
- Section 8: Self- and custom-build development;
- Section 9: Accelerating housing delivery;
- Section 10: Long-term maintenance and management of the housing stock;
- Section 11: Conclusions and Recommendations.

3. POLICY FRAMEWORK

3.1 This section provides a brief review of national planning policies and those in the West Oxfordshire Local Plan 2031 as they relate to issues regarding housing mix. It then goes on to consider the submission draft Eynsham Neighbourhood Plan (V3.12) and the findings from the initial consultation on the Garden Village AAP and West Eynsham SDA Issues Papers, which the Council consulted on in 2018.

National Planning Policy Framework (February 2019)

3.2 The National Planning Policy Framework (NPPF) sets out the Government's planning policies for England and how these could be applied. It is a material consideration in the determination of planning applications; and new plans, such as the Garden Village AAP, need to meet the 'soundness' tests set out within it which includes being consistent with the policies in the NPPF.

3.3 The NPPF is clear that the purpose of the planning system is to contribute to the achievement of sustainable development.

3.4 Policies for housing are set out in Section 5 of the NPPF. This states that to support the Government's objective of significantly boosting the supply of homes, it is important that a sufficient amount and variety of land can come forwards where it is needed, that the needs of groups with specific housing requirements are addressed and that land with permission is developed without necessary delay (Para 59).

3.5 Para 61 then goes on to state that *"the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies (including, but not limited to, those who require affordable housing, families with children, older people, students, people with disabilities, service families, travellers, people who rent their homes and people wishing to commission or build their own homes*."

3.6 Para 62 states that planning policies should specify the type of affordable housing required and Government's presumption that it is met on-site. Where major development is proposed, Para 64 states that "*planning policies and decisions should expect at least 10% of the homes to be available for affordable home ownership, unless this would exceed the level of affordable housing required in the area, or significantly prejudice the ability to meet the identified affordable housing needs of specific groups."* The 10% figure forms part of the overall affordable housing contribution for the site. Exceptions to this requirement are set out for Build-to-Rent homes, specialist accommodation for people with specific needs (such as purpose-built accommodation for the elderly or students);

schemes by people who wish to build or commission their own homes; and developments exclusively for affordable housing.

3.7 Para 72 supports planning for larger scale development, such as new settlements or significant extensions to existing villages and towns. There are five bullet points set out under this paragraph which include references to ensuring that the size and location of such developments will support a sustainable community; setting clear expectations on the quality of development; ensuring that a variety of homes are delivered to meet the needs of different groups in the community; and identifying opportunities for supporting rapid implementation.

Further Evolution of National Policy

3.8 National policy continues to evolve and in October 2018 the Government published the findings of an *Independent Review of Build Out Rates*, prepared by Rt Hon Sir Oliver Letwin MP.[2] This focused on the factors which contribute to the delivery rate on large sites of over 1,500 homes concluding that the homogeneity of types and tenure of homes on offer on these sites, and limits on the rate at which the market will absorb these, influence the build-out rate of sites. It recommended greater differentiation in the types, tenures and design of housing delivered on large sites to increase delivery rates.

3.9 The Review made a series of recommendations; and in March 2019 the Government responded to these setting out that Government would publish additional planning guidance on housing diversification – to further encourage large sites to support a diverse range of housing need and help them build out more quickly. At the time of writing, this has yet to be published; but is something which we would recommend that the Council review on its publication.

Key Points

Government policy supports strategic development and expects such development schemes to meet a range of identified housing needs and deliver high quality development. It encourages Councils to assess housing needs and then to reflect the need identified in planning policies. But is has also been looking at how the pace of delivery of large sites can be sped-up including through the Letwin Review. Government is due to release guidance on housing diversification in due course, which the Council should review on its publication.

[2] Sir Oliver Letwin MP (Oct 2018) *Independent Review of Build-Out Rates*

3.10 West Oxfordshire District Council adopted a new Local Plan in September 2018. This seeks to guide development in the District over the period to 2031.

Policies for Housing

3.11 The Plan's strategic objectives include a number of housing-related objectives, which include to "*plan for the timely delivery of housing to meet forecasts needs and support sustainable economic growth*" (CO5); and to *"plan for an appropriate mix of new residential accommodation which provides a variety of sizes, types and affordability with special emphasis on the provision of homes for local people in housing need who cannot afford to buy or rent at market prices including those wishing to self-build, as well as homes to meet the needs of older people, younger people, black and minority ethnic communities, people with disabilities, families and travelling communities."*

3.12 Policies for housing are set out in Section 5 of the Local Plan. Policy H1 states that provision will be made for at least 15,950 homes over the 2011-31 plan period comprising 13,200 homes to meet West Oxfordshire's identified housing needs (as identified in the 2014 Oxfordshire Strategic Housing Market Assessment (SHMA)) and a further 2,750 homes in the period 2021-31 to meet Oxford City's identified housing needs (based on the apportionment of Oxford's unmet need agreed by the Oxfordshire Growth Board). Policy H2 addresses the phasing of housing delivery at a district-wide level on this basis, adopting a 'stepped' approach whereby the annual housing requirement increases from 2021/22 onwards.

3.13 Policy H1 states that 5,596 homes are expected to be delivered in the Eynsham-Woodstock sub-area which includes the 2,750 homes to provide for Oxford's unmet housing need. It states that these additional 2,750 homes "*will be delivered through a strategic urban extension to the west of Eynsham and a new Garden Village to the north of the A40 near Eynsham."* Para 5.15 within the supporting text clarifies that of the 1,000 homes at the West Eynsham SDA, 450 homes will contribute to meeting West Oxfordshire's own housing needs; and 550 homes to Oxford's unmet housing need. Para 5.16 states that the working assumption is that the Garden Village site north of the A40 will provide around 2,200 new homes (all of which will contribute to Oxford's unmet needs[3]), that the scheme has secured Government backing and there will be a strong emphasis on accelerated delivery.

3.14 Policy H3: Affordable Housing states that the Council will require 'qualifying' market housing schemes to make an appropriate contribution to the provision of affordable housing. It defines the affordable housing requirement having regard to a number of 'value zones' shown in Figure 5a. Eynsham and the Garden Village site fall in the high value zone where Policy H3 seeks 50%

[3] As set out in Para 5.27

affordable housing provision. For Sheltered Housing a 50% affordable housing requirement is set; and for extra care housing a 45% requirement within this zone.

3.15 Policy H3 states that "*in circumstances where it can be demonstrated that the level of affordable housing being sought would make a scheme unviable, a revised mix and type of housing will be considered before a lower level of affordable housing provision is accepted*." It is clear that public funding should be expected to add value, stating "*to ensure affordability of rental levels or to increase the number or to change tenure or type of homes to meet priority needs*." But the mix and tenure will also be responsive to identified local needs and site specific opportunities.

3.16 The supporting text defines affordable housing in a local context as "*that which is affordable to those who cannot afford market priced housing locally to rent or purchase. It is housing provided with either public or private subsidy for people who would otherwise be unable to resolve their housing requirements in the local housing market because of the relationship between housing costs and incomes"* (Para 5.48). It includes social rented housing, affordable rented housing, and intermediate housing for low cost sale and rent as well as starter homes (Para 5.49 – 5.50). The Plan references a need for 274 affordable homes a year (Para 5.51) derived from the 2014 Oxfordshire SHMA.

3.17 Para 5.64 in the Plan provides guidance on the type and size of affordable homes, setting out a guide mix as follows:

- 65% one and two-bed homes to meet the needs of younger single and couple households, older people and smaller family households; and
- 35% to be three and four-bedroom homes.

3.18 Para 5.65 states that as a general guide, a 2:1 ratio between affordable rented homes and intermediate housing is expected (i.e. 66% affordable rented; 33% intermediate) but that the precise mix will be determined on a case-by-case basis.

3.19 Para 5.73-78 address the need for different sizes of market housing. It identifies that West Oxfordshire's existing housing stock is focused towards larger properties and that as a general guide the following mix of market housing should be sought:

- 4.8% 1-bed properties;
- 27.9% 2-bed properties;
- 43.4% 3-bed properties;
- 23.9% 4+ bed properties.

3.20 This, derived from the 2014 Oxfordshire SHMA, is intended to provide a starting point for negotiations, Para 5.76 recognising the need for "*development to be of a character that is appropriate for its location, in the interests of creating sustainable communities*."

3.21 Policy H4: Type and Mix of New Homes states that all residential developments will be required to provide or contribute towards the provision of a good balanced mix of property types and sizes. Developers will be required to demonstrate how their proposal would help to create a more balanced stock within the District and meet the needs of a range of different groups having regard to specific local needs. The policy states that particular support will be given to proposals for specialist housing for older people. In larger housing developments of 50 or more homes, at least 25% of market and affordable homes are expected to be designed to be accessible and adaptable (in accordance with Building Regulations Part M4(2). The policy states that provision of at least 5% wheelchair-adaptable homes (in accordance with Part M4(3)) will be sought through negotiation. Where wheelchair adaptable homes are provided, they will be counted as contributing towards the 25% accessible and adaptable homes requirement.

3.22 The supporting text to the policy references evidence that the level of specialist accommodation for older persons in the district is below wider averages; the SHMA identifying an indicative need for 2,588 new properties over the plan period (129 pa) in net terms. The supporting text also identifies a need for specialist properties for those with disabilities.

3.23 Policy H5: Custom and Self-build Housing requires all housing developments of 100 or more dwellings to include 5% of the residential plots to meet custom and self-build housing needs (which can include partial completion of units for self-finish) or to provide serviced land for an equivalent number of plots in another suitable, sustainable location. The policy allows for any of the serviced plots/units to be built out by the developer if they remain unsold after a period of 12 months marketing.

Policies for Strategic Development at Eynsham

3.24 Chapter 9 in the Local Plan sets out a series of sub-area strategies including for the Eynsham - Woodstock Sub-Area.

3.25 Policy EW1: Oxfordshire Cotswolds Garden Village Strategic Location for Growth allocates land to the north of the A40 near Eynsham to accommodate a free-standing exemplar Garden Village. It states that the comprehensive development of the site will be led by an Area Action Plan (AAP); the development to include: around 40 hectares of business land in the form of a 'campus-style' business park; a new park and ride site (1000 spaces) with associated bus priority lane along the A40; up to two primary schools on site plus financial contributions to secondary education; as well as wider transport infrastructure, including improving links to Hanborough Station; landscaping, open space and green infrastructure etc. The policy sets out that the 'working assumption' is of provision of about

2,200 homes with a balanced and appropriate mix of house types and tenures to meet identified needs including affordable housing.

3.26 The supporting text makes clear the Council's ambitions for an exemplar development which meets a wider range of housing needs, including needs from Oxford City; creates a major new long-term employment opportunity; and that the development remains distinct from Eynsham. It is clear (Para 9.5.45) that it should incorporate new models and new delivery mechanisms to accelerate housing delivery, and should allow for a diverse range of delivery partners such as SMEs, self-builders, major housebuilders, housing associations, community land trusts, employers etc.

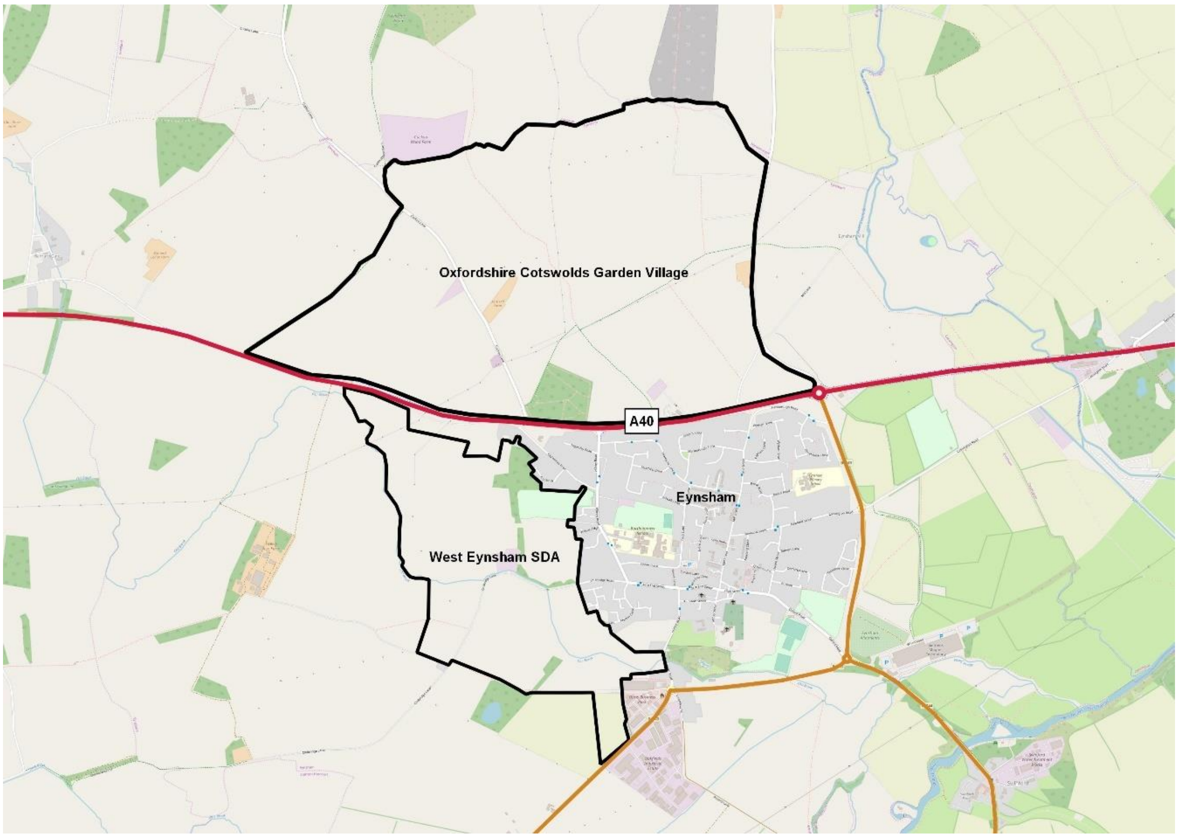
3.27 Para 9.5.49 states that the AAP will define the site boundary, vision and objectives, quantum of development and mix of uses, housing types and tenures and delivery partners, phasing and implementation; and will look at potential scope for longer-term growth. Para 9.5.51 states the Council's objective is to secure at least 20% of the overall number of dwellings in the form of low cost home ownership options; as well as a strong emphasis on self-build.

3.28 Policy EW2: West Eynsham Strategic Development Area states that land to the west of Eynsham will be developed as an sustainable integrated community to include about 1,000 homes with a balanced and appropriate mix of house types and tenures to meet identified needs including affordable housing. It sets out that an agreed masterplan will be developed. The development will deliver a new western spine road; a new primary school; contribute to wider transport infrastructure; as well as create/strengthen green infrastructure.

3.29 Within the SDA Area, the supporting text makes clear that the former Eynsham Nursery and Garden Centre site has planning consent (for 77 homes); and outline planning permission also exists for Land west of Willows Edge/Thornbury Road (160 homes). The latter site is now the subject of a reserved matters approval and is currently under construction.

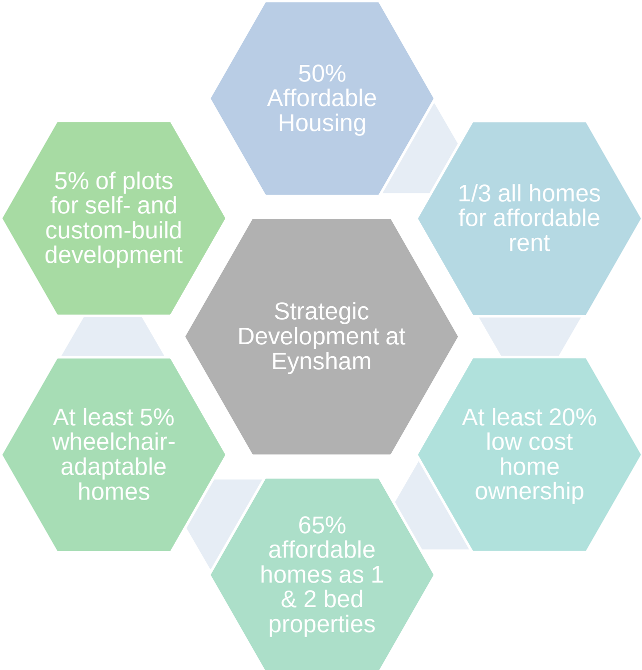
3.30 Both EW1 and EW2 reaffirm the requirement that the developer will be required to set aside 5% of developable plots for those wishing to undertake custom/self-build.

Figure 3.1: The SDA and Garden Village Sites



3.31 A number of the core policy requirements are brought together in the diagram below.

Figure 3.2: Core Policy Requirements for Housing Mix



3.32 The draft Eynsham Neighbourhood Plan has been submitted to West Oxfordshire District Council following the final stage of consultation which ran from 17th January 2019 to 28th February 2019. It is however yet to be examined.

3.33 The draft Plan's Vision for Eynsham is as follows:

> *"Our vision for the Parish of Eynsham at the end of the plan period (2031) is that both new and existing residents will be enjoying the same benefits of living in the village as current residents do and that the area will be an even more attractive community in which to live and work".*

3.34 The draft Plan sets out eight primary objectives in order to deliver this vision. These objectives are broad, but include a focus on delivering a mix of housing under objective ENV1 Housing which states that:

> *"**New development shall ensure a mix of housing types and tenures to make a balanced community suitable for this area of West Oxfordshire close to the city of Oxford.** The ideal community will have a range of ages, incomes, education and skills so that the community could be largely self-sustaining".*

3.35 The Plan's objectives also focus on the economy with ENV6 Economy – Industry, Commerce and Retail requiring:

> *"**New developments shall ensure that Eynsham continues to offer a range of employment opportunities that reflects its location on the edge of the 'knowledge spine' around Oxford city and that potentially utilises a full range of skills from manual through to post-graduate levels.** Development should also ensure the continued viability of the excellent range of local shops that allow residents to shop for day to day needs within the village".*

3.36 The eighth objective relates to a new settlement and states that the first seven objectives shall be shared by the new settlement which shall be built according to Garden Village principles as a new, separate, community. The Plan notes that settlements should be largely independent but with any shared facilities for their mutual benefit and without causing harm to either.

3.37 Building on the first objective of the Plan, draft Policy ENP1: Housing states that all new development shall ensure that both Eynsham and the Garden Village has a mix of housing types and tenures to make balanced communities. The ideal community will include a wide range of ages, incomes, education and skills so that the community could be largely self-sustaining. This policy will be achieved by:

- Implementing Policy H4 of the West Oxfordshire Local Plan with a presumption in favour towards Eynsham's existing housing balance favouring smaller homes for market, affordable and social housing;
- Ensuring affordable housing addresses the particular local need for staff to support local tech businesses, medical and other similar activities typical of a location close to Oxford;
- Ensuring developments include homes to meet different requirements of starter homes and for older residents to downsize to – typically properties with 2 to 3 bedrooms; and
- Locating development close to key village facilities

3.38 The supporting text to the draft policy notes that the evidence presented in the SA Scoping Report and consultation with residents and businesses indicates that Eynsham is particularly in need of smaller homes, typically 2 bedrooms for groups including those on the affordable housing register, young families who want open market starter homes, junior skilled staff required by high-tech businesses and older people looking to downsize.

3.39 The supporting text also references data from the Rural Community Profile for Eynsham, which indicates that the existing housing mix in the settlement is in reasonable balance with local demand apart from the need for smaller properties as set out above.

3.40 The draft Neighbourhood Plan also sets out two policies which deal with the provision of new settlements and strategic development areas under Policy ENP16 and ENP17 respectively. Policy ENP16 requires a new settlement to be in accordance with the Eynsham Neighbourhood Plan and conform to the principles of a Garden Village with development to take place in accordance with a Masterplan to be approved by West Oxfordshire District Council.

3.41 In the supporting text to the policy, the Plan notes that a new settlement presents an excellent opportunity for housing for extra elderly care and disabled should be prioritised close to the local facilities such as shops and community buildings. It is also made clear that any new settlement should be separate from Eynsham but connected and integrated where appropriate.

Oxfordshire Cotswold Garden Village Issues Paper (June 2018)

3.42 The Oxfordshire Cotswold Garden Village Issues Paper was published for consultation in June 2018; and the consultation ran from 22nd June 2018 to 3rd August 2018. As a 'first step' document, the paper's purpose was to seek early views on how to tackle important issues such as housing through the Area Action Plan (AAP).

3.43 The issues paper identifies a range of potential opportunities offered by the Garden Village including new homes, jobs and supporting infrastructure. The paper recognises that the demographic breakdown in Eynsham is skewed towards older people with a lower than average proportion of young and working age residents; as well as notable housing affordability issues such as higher than average house prices and considers the opportunities presented to balance these.

3.44 The paper recognises that the garden village presents an opportunity to deliver a significant number of new homes to help meet identified needs; and sets out that the overall aim is to achieve a better balance of house types to rebalance the current predominance of larger properties and improve affordability.

3.45 In terms of dwelling sizes, the paper draws on the Oxfordshire Strategic Housing Market Assessment's recommended policy mix as set out earlier in this chapter; and in addition, highlights the particular need for smaller homes as identified in the draft Eynsham Neighbourhood Plan. The paper says that in light of these two sources; an indicative range for dwelling size mix could be along the lines of that set out in the Table below.

Table 3.1 Indicative Dwelling Size Mix – Garden Village Issues Paper

Beds	Market Housing	Affordable Housing
1 Bedroom	5-10%	20-30%
2 Bedrooms	25-30%	30-40%
3 Bedrooms	35-45%	30-35%
4 Bedrooms	20-25%	5-10%

3.46 The potential market housing mix sees a particular focus on 3-bed properties, with limited numbers of 1-beds. The potential affordable mix is focused more towards two- and three-bed properties.

3.47 The paper highlights that Eynsham is characterised by a predominance of semi-detached and terraced properties which is in contrast to overall position in West Oxfordshire which is characterised by a higher proportion of detached properties. The initial view set out by the Council is that the AAP should seek to ensure a good, overall balanced mix of property types within the garden village rather than be overly specific about the type of new homes to be built.

3.48 The paper recognises housing affordability as a major problem in the county and in the village. In response, the Council highlight that in line with West Oxfordshire Local Plan and Oxford City Local Plan which both seek provision of 50% affordable housing, based on the working assumption of 2,200 homes at the Garden Village, would mean 1,100 of the new homes being affordable. In respect of type, the paper states a ratio of 2:1 in favour of affordable rented homes over intermediate will be generally sought however this is a general guide only.

3.49 In respect of meeting the needs of different groups, the paper notes there will be opportunities for custom build housing; specialist purpose-built older persons housing including extra-care; housing for families and younger people including students and '*given the proximity of Oxford and Witney which have a number of further education institutions, the garden village also presents an excellent opportunity to provide new student accommodation with Oxford University having recently confirmed a need for additional provision*'. There are also opportunities to provide housing for essential local workers through new affordable housing for sale or rent.

3.50 The paper also deals briefly with residential space standards and notes that the AAP could potentially present the opportunity to stipulate the use of national standards to ensure any new homes provided at the garden village are well proportioned and enable a good quality of life; or the standards could be set locally, or this issue could be left to the site promoter.

3.51 Finally, in respect of housing, the paper recognises that the garden village also presents the opportunity to think about delivery; and innovative approaches to delivering new homes which could increase the rate of delivery. This includes encouraging the use of modern methods of construction and opening up the development to a range of different housebuilders including small and medium sized enterprises.

Consultation Summary Report (November 2018)

3.52 In November 2018, a consultation summary report was published by West Oxfordshire District Council which sought to identify the key issues raised by respondents to the Garden Village Issues Paper. In respect of housing, the following issues are highlighted within the report:

- Affordable housing must be affordable for local people, young people, families and key workers;
- In respect of size, smaller 1, 2 and 3-bedroom houses and flats are preferred. Respondents set out that houses should not be larger than 3 bedrooms to ensure it is affordable to younger people and to address Eynsham's shortage of smaller dwellings. Another respondent noted there is little need for 4 and 5-bedroom homes;
- Purpose-built housing for elderly and/or disabled people is needed, including extra care and sheltered homes with flexible support, as well as bungalows for those downsizing. Housing for the elderly and/or disabled should be close to the village centre;
- Developers must be made to adhere to specific standards and delivery targets to ensure housing truly meets local need; and
- The use of small and medium sized house builders is supported to help increase delivery speed and to add variety.

West Eynsham Strategic Development Area Issues Paper (July 2018)

3.53 The West Eynsham SDA Issues Paper was published for consultation in July 2018; and the consultation ran to 21st September 2018. On a similar basis to the Garden Village Issues Paper, it represents a 'first step' document which is intended to stimulate early debate around the key issues and priorities to be addressed as the site is taken forward.

3.54 The Paper recognises that the West Eynsham SDA has the potential to deliver a number of positive benefits including the provision of a large number of new homes including affordable housing to meet the needs of those who cannot buy or rent in the open market.

3.55 The key issues and priorities for the SDA are wide ranging but include achieving effective integration with Eynsham. The paper notes that, unlike the Garden Village which will be a separate, self-contained new settlement, the SDA is intended to be a well-integrated extension of Eynsham that forms a positive extension to the village. This is clearly relevant in housing terms.

3.56 Another key priority relates to meeting identified housing needs. In relation to property sizes, the SDA paper largely mirrors the Garden Village paper – and the same indicative mix is proposed as a guide, as set out in Table 2.1 above. The SDA paper is also, inevitably, similar to the Garden Village paper on issues including affordable housing and housing for specific groups. The principal difference, as set out in the paragraph above, is the need to ensure that any provision is well-integrated with Eynsham's existing profile.

Consultation Summary Report (January 2019)

3.57 In January 2019, a consultation summary report was published by West Oxfordshire District Council which sought to identify the key issues raised by respondents to the West Eynsham SDA Issues Paper.

3.58 The consultation summary report notes that two of the key housing priorities for the West Eynsham SDA identified by respondents are as follows:

- Housing provision must result in truly affordable housing for local people, especially young families, 'key workers' and single people. Smaller and more affordable homes with a range of tenure options should be required; and
- A retirement home or sheltered housing for older people should be included in the plans near to a local centre.

3.59 In respect of the wider priority of meeting identified housing need, the summary report notes with regards to the provision of a mix of housing sizes, that most respondents advocated for a larger proportion of more densely distributed smaller, affordable homes including semi-detached houses, terraces, studios and flats. Conversely, there was significant objection to the delivery of large 3+ bedroom detached homes.

3.60 The report set out that the emphasis on smaller and more affordable homes reflects both the draft Eynsham Neighbourhood Plan and local housing needs. Respondents note that there is a crucial need to provide more opportunities for young adults leaving home, single people, new and local families needing to up-size, as well as older people who want to remain living in the village but whose accommodation is no longer suitable.

3.61 Housing for key workers and those with complex needs were also addressed in a number of responses. Additionally, the County Council have also noted that there is an increasing need for supported living among all groups, but particularly for those with Learning Disabilities with complex needs and Autism, as well as for the Young Person supported pathway and care leavers. As part of the Autism strategy the County Council aims to provide one specialist scheme per District area; and the SDA could provide an opportunity to deliver this.

3.62 With regards to tenures, an emphasis on affordable rented housing, shared ownership, a range of social housing, self-build sites for individuals and groups, and key worker housing was supported. Again, there was a clear and strong emphasis on affordable options that are genuinely affordable to local people and meet local needs. Since a portion of the West Eynsham SDA is owned by Oxfordshire County Council, it was also suggested that the land should be used to deliver Council housing.

Key Points – Policy Framework

The Local Plan is clear that the Oxfordshire Cotswolds Garden Village and West Eynsham SDA are contributing to meeting Oxford's housing needs, as well as (particularly in the case of the SDA) addressing local housing needs. The Plan seeks to deliver a sustainable community in both. For the West Eynsham SDA this means that the housing mix as part of the new development needs to have regard to the mix of existing homes in the settlement (and those expected to be delivered on the two sites which currently have planning consent). In contrast, the Garden Village is seeking to deliver a new standalone settlement, and is therefore to some degree starting from a blank canvas.

The SDA Issues Paper and the responses to this promote a focus on smaller and more affordable homes as part of the SDA. This aims to rebalance the profile of housing in Eynsham and support greater access to housing for younger households and those on lower incomes.

For the Garden Village, the Council aspires to deliver 20% of housing to support affordable home ownership. Product differentiation, in terms of delivering a variety of housing and encouraging investment by different types of developers, is identified as important in accelerating housing delivery. The mix of homes to be delivered will be important in influencing build-out rates for housing, and in doing so supporting the Council’s ability to maintain a five year housing land supply.

4. BASELINE PROFILE

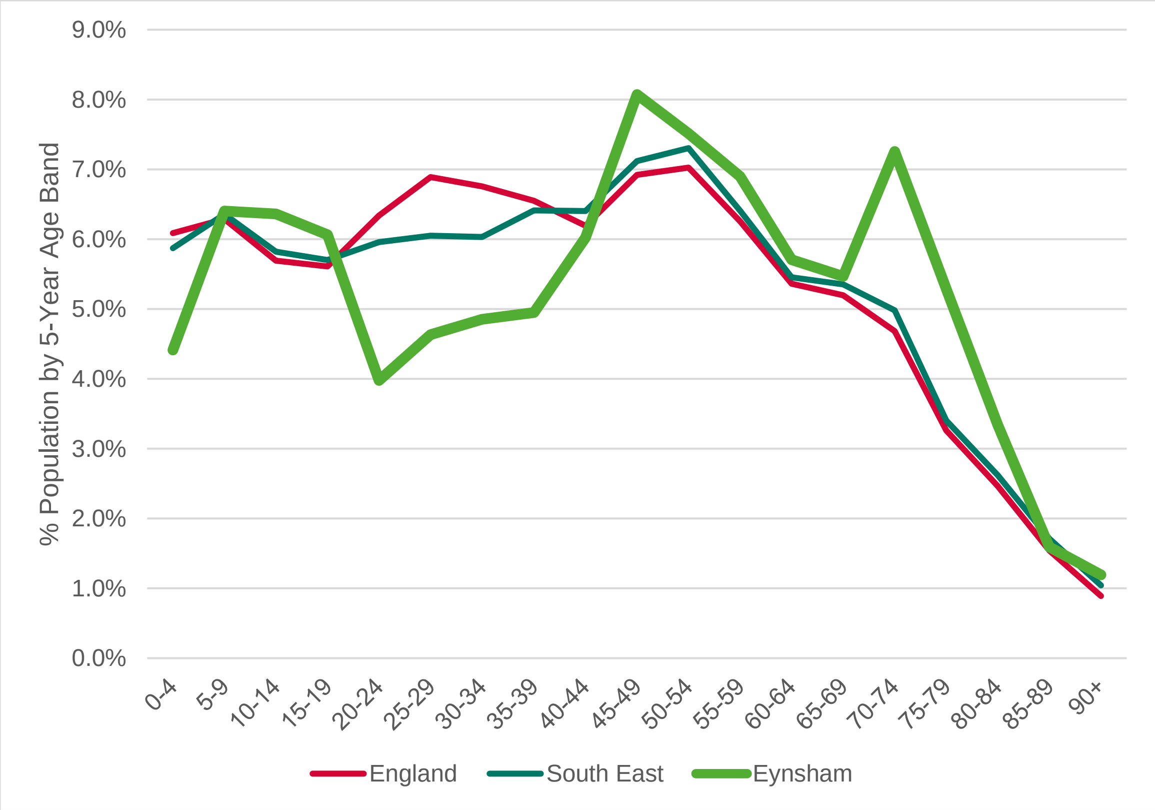
4.1 This section provides a baseline profile of the existing housing offer in the Parish of Eynsham and the socio-economic characteristics of its residents. It draws on data which is available at a local authority level. In some instances robust data is only available at the local level from the 2011 Census, but Iceni has sought to use wider data to consider what may have changed over the subsequent period.

Socio-Economic Profile

4.2 The latest ONS Mid-Year Population Estimates (2017) indicate that around 5,030 persons reside in the Parish of Eynsham, West Oxfordshire. Eynsham is therefore the fourth largest settlement in West Oxfordshire after Witney, Chipping Norton and Carterton.

4.3 The settlement currently has an older population structure relative to wider benchmarks as shown in Figure 4.1 below. It has a higher proportion of people relative to wider benchmarks aged 45 and over; together with school age children.

Figure 4.1: Age Structure (ONS Mid-Year Population Estimates, 2017)



4.4 The graph shows that almost a quarter of those people living in Eynsham (24.1% of all persons) are aged 65 and over. This compares with 19.1% in the South East and 18% across England. Conversely, the proportion of residents in their 20's and 30's residing in Eynsham accounts for only 18.4% of all persons, which is relatively low when compared to the South East at 24.4% and England at 26.5%. This age profile is likely to be in part influenced by the housing offer and relative affordability of housing in the settlement.

4.5 The 2011 Census showed the ethnicity profile of Eynsham's residents to be largely White British (92.2% vs. 79.8% nationally). The Parish is less ethnically diverse than average; with the Black and Minority Ethnic (BME) population at 7.8% of all persons, compared with 20.2% nationally.

4.6 The Census showed relatively strong levels of economic participation, with 74% of those aged 16-74 being economically active. Within this, the proportions in part-time work and self-employed were slightly above wider averages (see Table 4.1 below), as were the numbers of those who were retired.

Table 4.1 Economic Activity (Aged 16 to 74, Census 2011)

Economic Activity	Eynsham	% of Population	West Oxfordshire	Oxfordshire	England
Economically Active; of which are:	**2,490**	**73.6%**	**76.8%**	**72.6%**	**69.9%**
Full-Time Employees	1,398	41.3%	45.0%	42.6%	38.6%
Part-Time Employees	545	16.1%	14.3%	13.4%	13.7%
Self-Employed	396	11.7%	12.4%	10.5%	9.8%
Unemployed	76	2.2%	2.3%	2.7%	4.4%
Full-Time Student	75	2.2%	2.4%	3.5%	3.4%
Economically Inactive; of which are:	**895**	**26.4%**	**23.2%**	**27.4%**	**30.1%**
Retired	585	17.3%	13.7%	11.8%	13.7%
Other	310	9.2%	9.4%	15.6%	16.4%
Total	**3,385**	**100%**	**100%**	**100%**	**100%**

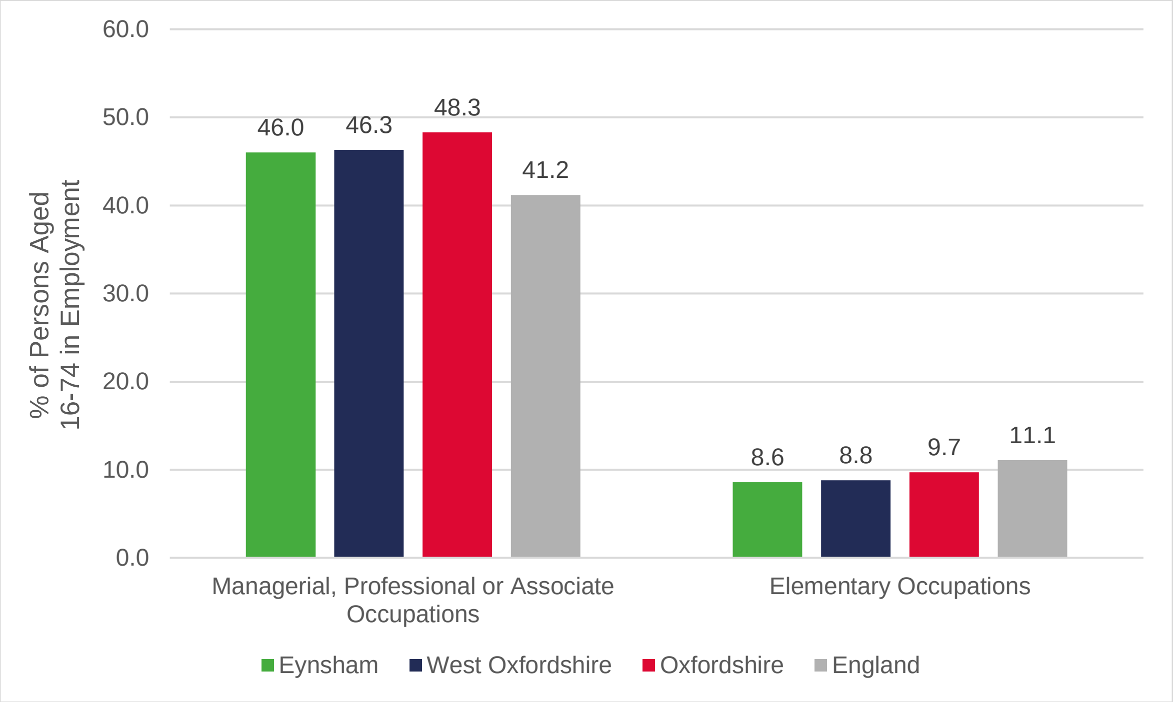
4.7 The skills profile of residents is reasonably strong, with a third of the population aged over 16 having level 4 or above qualifications (equivalent to degree level), albeit this is not quite as high as across Oxfordshire as a whole. It is clear that there is a relatively low proportion of 16+ residents with no qualifications at 20% in comparison to the national average of 25.5%; albeit this proportion is higher than across West Oxfordshire and Oxfordshire at 17.6% and 16.7% respectively. It is notable that the skills profile is not as strong as in some other parts of Oxfordshire.

Table 4.2 Qualifications (Aged 16 and Over, Census 2011)

Qualifications	Eynsham	% of Population	West Oxfordshire	Oxfordshire	England
No Qualifications	772	20.0%	17.6%	16.7%	25.5%
Level 1 Qualifications	465	12.1%	13.3%	12.0%	13.3%
Level 2 Qualifications	564	14.6%	15.8%	13.8%	15.2%
Apprenticeship	216	5.6%	3.9%	3.5%	3.6%
Level 3 Qualifications	395	10.3%	12.3%	13.3%	12.4%
Level 4+ Qualifications	1,282	33.3%	32.9%	35.7%	27.4%
Other qualifications	157	4.1%	4.1%	5.0%	5.7%
Total	**3,851**	**100%**	**100%**	**100%**	**100%**

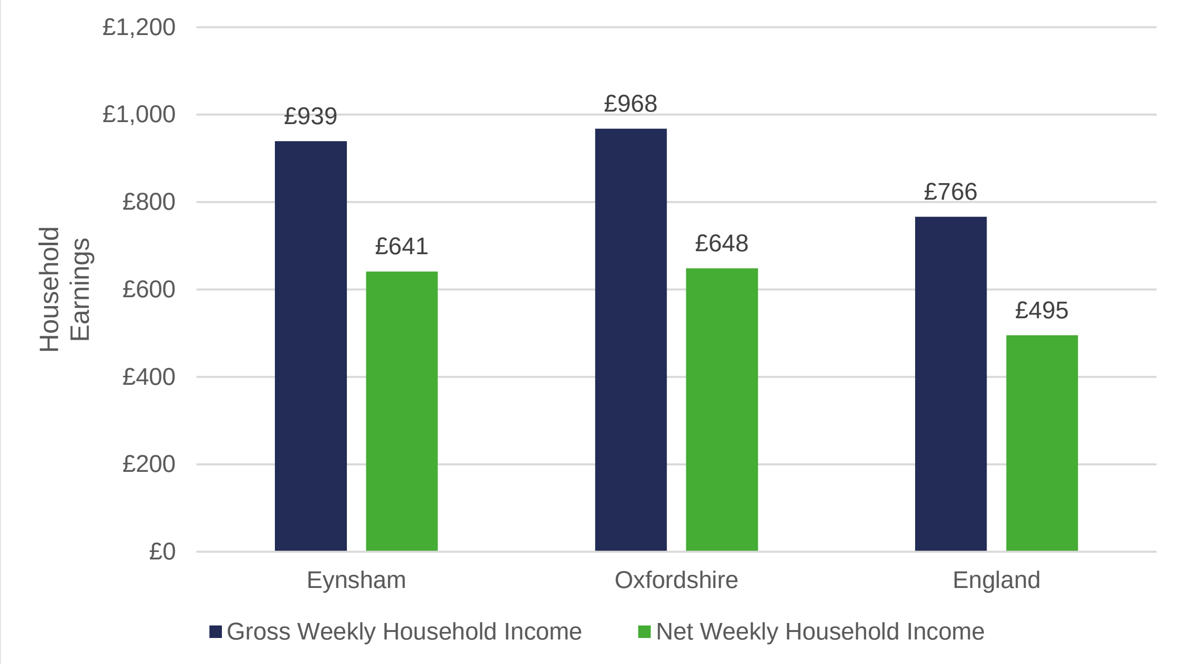
4.8 Of those aged 16-74 in Eynsham, 46% are employed in managerial and professional occupations – broadly consistent with the profile across West Oxfordshire. There are a relatively high proportion of residents with a skilled trade occupation in Eynsham (13.8%) when compared to Oxfordshire (10.7%) and England (11.4%).

Figure 4.2: Occupation of Residents (Census, 2011)



4.9 Influenced by this occupation profile, data provided by the Office for National Statistics shows average weekly household earnings in Eynsham at £939 per week which is 3% below the Oxfordshire-wide average but is £173 per week (22.5%) above the national average. The earnings profile of Eynsham's households is depicted in Figure 4.3 below.

Figure 4.3 Average Household Income (Office for National Statistics, 2013/14)



Household Characteristics

4.10 At the time of the 2011 Census, there were 1,974 households in Eynsham. The Table below profiles the types of households in the Parish.

Table 4.2 Household Composition (Census, 2011)

Composition	Eynsham	% of HH	West Oxford-shire	Oxford-shire	England
One Person (Aged 65 and over)	297	15.0%	12.3%	11.5%	12.4%
One Person (Under 65)	248	12.6%	14.1%	15.8%	17.9%
Couple (Aged 65 and over)	249	12.6%	10.2%	8.9%	8.1%
Couple (No Children)	377	19.1%	21.6%	19.5%	17.6%
Couple (Dependent Children)	399	20.2%	22.4%	21.7%	19.3%
Couple (Non-Dep. Children)	148	7.5%	6.3%	6.0%	6.1%
Lone Parent (Dep. Children)	92	4.7%	4.9%	5.5%	7.1%
Lone Parent (Non-Dep Children)	63	3.2%	2.7%	2.9%	3.5%
Other household types	101	5.1%	5.4%	8.2%	8.0%
Total	**1,974**	**100%**	**100%**	**100%**	**100%**

4.11 There is a relatively high proportion of one person households and couples who are aged 65 and over which is reflective of the overall population profile of Eynsham which has a higher proportion of people aged over 45. There is a strong relative representation of couples without dependent children. Around a quarter (25%) of households are families.

4.12 The analysis also shows there are notably low levels of younger one person households when compared to the county and national averages. This is likely to be influenced by the profile of the housing stock and its relative affordability.

4.13 The profile of household types (and the age structure of the population) is borne out in the area's smaller than average household size, as shown in the Table below. However with an average of three bedrooms per house (broadly consistent with the district more widely and Oxfordshire), under-occupancy is above average. This is what we might expect for a settlement with an older population structure.

Table 4.3 Average Household Size (Census, 2011)

Measure	Eynsham	West Oxfordshire	Oxfordshire	England
Avg. Household Size	2.3	2.4	2.4	2.4
Avg. No. of Bedrooms	3.0	3.0	2.9	2.7

4.14 In taking a closer look at the occupancy of housing, we can review Census data against the 'bedroom standard' which can be used to assess the level of overcrowding and under-occupation. A negative number indicates overcrowding; whereas, a positive number indicates under-occupation i.e. +2 or more is equal to at least two spare bedrooms. The data is shown in Table 4.4 below.

Table 4.4 Occupancy of Housing – Bedroom Standard (Census, 2011)

Occupancy Rating	Eynsham	% of Households	West Oxfordshire	Oxfordshire	England
+2 or more	896	45.4%	43.7%	40.5%	34.3%
+1	657	33.3%	34.9%	33.0%	34.4%
0	394	20.0%	19.4%	23.4%	26.7%
-1 or less	27	1.4%	2.0%	3.2%	4.6%
Total	**1,974**	**100%**	**100%**	**100%**	**100%**

4.15 Levels of overcrowding in Eynsham are very low with only 1.4% of households being overcrowded in Eynsham in 2011 compared with 2.0% in West Oxfordshire, 3.2% across the county and 4.6% nationally. In contrast there are notable numbers of households who have more bedrooms than they might 'notionally' need. In the market sector in particular, households are able to live in whatever size of property they can afford; and in areas with a population profile with higher proportions of older residents who have built up equity in their homes over time, under-occupation is common.

4.16 Finally, we have set out analysis of the tenure profile of households in Table 4.5 below. The analysis identifies a relatively high proportion of owner occupiers at nearly three quarters (74%) of all households, particularly when compared with the county and national averages. The proportion of those living in the private and social rented sector is consequently low; with the proportion of households living in the social rented sector particularly low against all comparators. An above average proportion of those who own homes outright is evident; with evidence of lower numbers of households living in the Private Rented Sector relative to wider benchmarks.

Table 4.5 Tenure Profile – Households (Census, 2011)

Tenure	Eynsham	% of Households	West Oxfordshire	Oxfordshire	England
Owned: Outright	834	42.2%	34.5%	32.3%	30.6%
Owned: Mortgage	626	31.7%	35.2%	33.2%	32.8%
Social Rented	243	12.3%	12.5%	14.2%	17.7%
Private Rented	246	12.5%	14.9%	17.5%	16.8%
Other	25	1.3%	3.0%	2.8%	2.1%
Total	**1,974**	**100%**	**100%**	**100%**	**100%**

4.17 Data based on a national survey by YouGov for Shelter estimates that the size of the Private Rented Sector has increased at a West Oxfordshire level to around 30% of households which would represent significant growth over the 2001-18 period. It is likely that the proportion of households in the Private Rented Sector in Eynsham has also grown over the period since 2011.

Existing Housing Profile

4.18 In order to understand the existing size and type of housing currently in Eynsham, we have again drawn from the 2011 Census data on the 1,974 households surveyed.

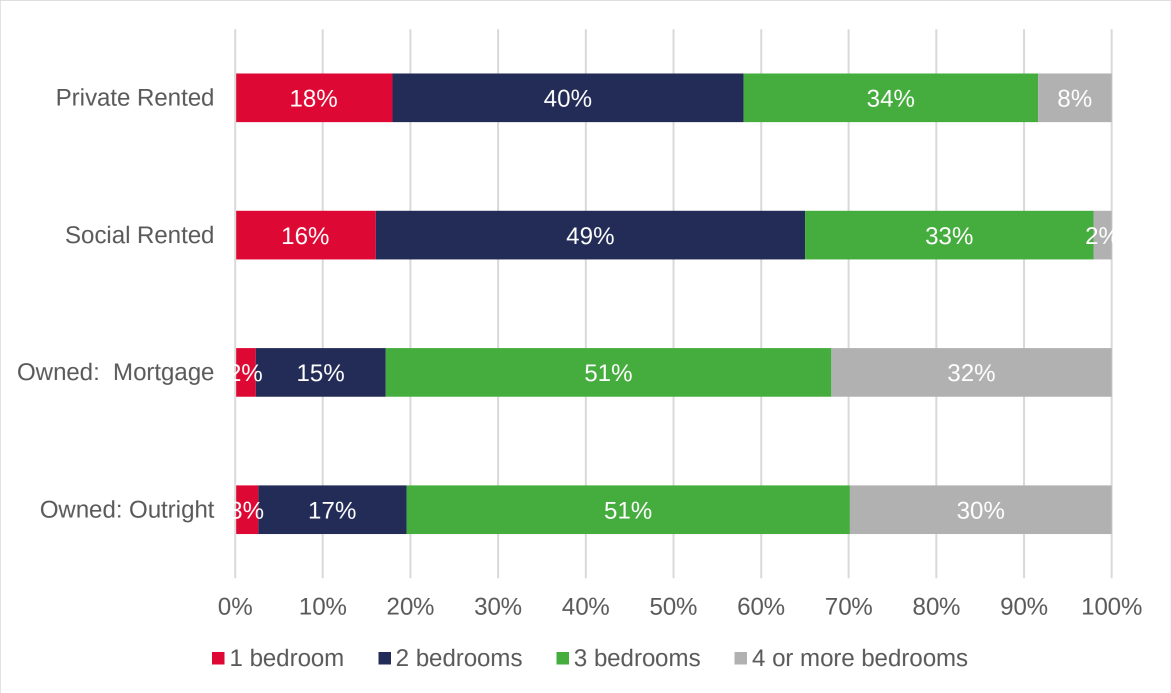
4.19 Table 4.6 considers the sizes of homes. The size profile of homes in Eynsham is one of larger homes with 70.5% of dwellings having 3 or more bedrooms compared with 67.6% at the District-level and 60% nationally. The largest proportion relates to homes with 3 bedrooms at 46.3%; with a marginally lower relative proportion of 4 and 5+ bedroom housing compared to the District as a whole. There is a notably low proportion of one bedroom housing, making up only 6.1% of all dwellings.

Table 4.6 Eynsham's Housing – Number of Bedrooms - Households (Census, 2011)

Bedroom Size	Eynsham	% of Households	West Oxfordshire	Oxfordshire	England
1 Bedroom	120	6.1%	7.3%	9.7%	11.8%
2 Bedrooms	459	23.3%	24.9%	23.9%	27.9%
3 Bedrooms	913	46.3%	40.8%	40.1%	41.2%
4 Bedrooms	377	19.1%	20.0%	19.1%	14.4%
5+ Bedrooms	102	5.2%	6.8%	6.9%	4.6%
Total	**1,974**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

4.20 Drilling into this further, we have cross-tabulated the tenure profile with the numbers of bedrooms in Figure 4.4 below.

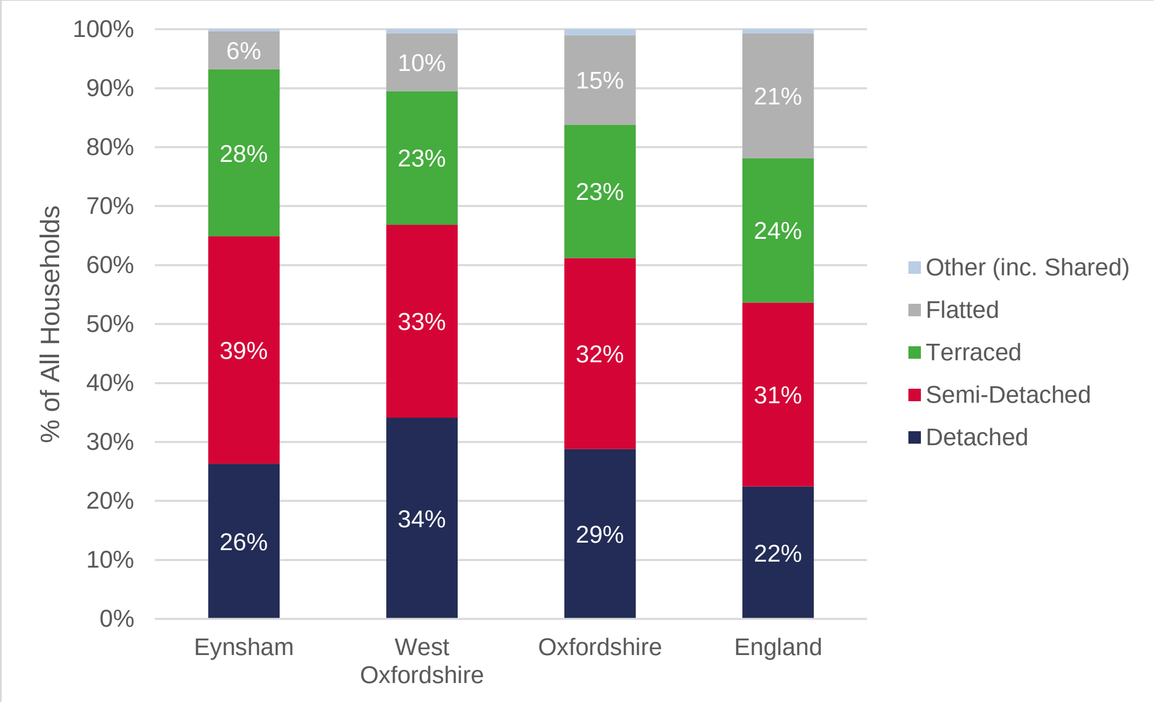
Figure 4.4 Eynsham's Housing – Tenure by Bedroom Size - Households (Census, 2011)



4.21 The analysis shows that homes in the owner occupier sector are significantly larger than both the private and social rented sectors. Some 82% of all owner-occupied homes have at least three bedrooms; whereas, in the social rented and private sectors, only 33% and 34% have three or more bedrooms respectively. Notably, only 3% of owner-occupied homes have one bedroom; and only 16% has two bedrooms. Overall, owner occupied homes are principally three and four-bedroomed; whilst social and private rented homes are focused more towards smaller properties, with two- and three-bedroom homes the most prevalent.

4.22 The Figure below depicts the profile of house types in Eynsham. Semi-detached homes account for the greatest proportion (39%), followed by terraced (28%) and detached homes (26%). The proportion of detached homes is below regional and county benchmarks.

Figure 4.5 Eynsham's Housing – Accommodation Type - Households (Census, 2011)



4.23 The proportion of semi-detached housing at 39% of all households is particularly high in comparison to 33% across West Oxfordshire, 32% across Oxfordshire and 31% in England. In contrast, there is a notably low proportion of flats (6% of all households) which is some way below the national average of 21%. Flats tend to be concentrated more in urban locations, and the low proportion of flats is not uncommon for settlements of Eynsham's size.

Key Points – Baseline Profile

The profile of homes in Eynsham is focused particularly on 3-bed housing and semi-detached properties. There is a limited proportion of flats, and 1-bed properties in particular. Levels of home ownership are high, but the Private Rented Sector is likely to have grown in size over the period since 2011.

The profile of residents in Eynsham is focused on families with school age children and older persons, influenced in part by the affordability characteristics and low proportion of social rented housing (12% in 2011). Increasing availability of affordable housing (and smaller, more affordable market housing) provides the potential to attract and retain younger people in their 20s and 30s, the representation of which is currently relatively low in Eynsham.

5. MARKET HOUSING DEMAND

5.1 This section considers housing market dynamics in Eynsham. It considers housing costs and rents, the profile of transactions, and the findings of Iceni's engagement with local estate and letting agents. It seeks to provide a picture of housing market dynamics, and to consider gaps in the current market housing offer. This is important in considering how new homes as part of the West Eynsham SDA and the Garden Village can help to plug gaps in the existing offer; but also, to understand the profile of 'what will sell' in the broad Eynsham area.

Sales Market

5.2 Iceni has used transactions data on actual sales of homes from HM Land Registry to analyse house prices and sales. Analysis of the latest available median house price data for the year to the end of September 2018 shows that for the Eynsham[4] area, the overall median price paid across all types was £365,000.

5.3 The Table below sets out the median house price by type in the Eynsham area, as well as the profile of sales; set against median prices in Oxford, West Oxfordshire and England.

Table 5.1 House Price Data & Sales – Eynsham (HM Land Registry, 2018)

Dwelling Type	Sales	% of All Sales	House Price	Oxford	West Oxford-shire	England
Detached	24	29%	£532,475	£740,000	£484,500	£339,995
Semi-Detached	30	37%	£349,998	£415,000	£319,995	£212,995
Terraced	22	27%	£321,000	£400,000	£291,500	£187,000
Flat	6	5%	£289,950	£315,000	£190,000	£215,000
Overall Median	82	100%	**£365,000**	**£395,000**	**£335,000**	**£239,000**

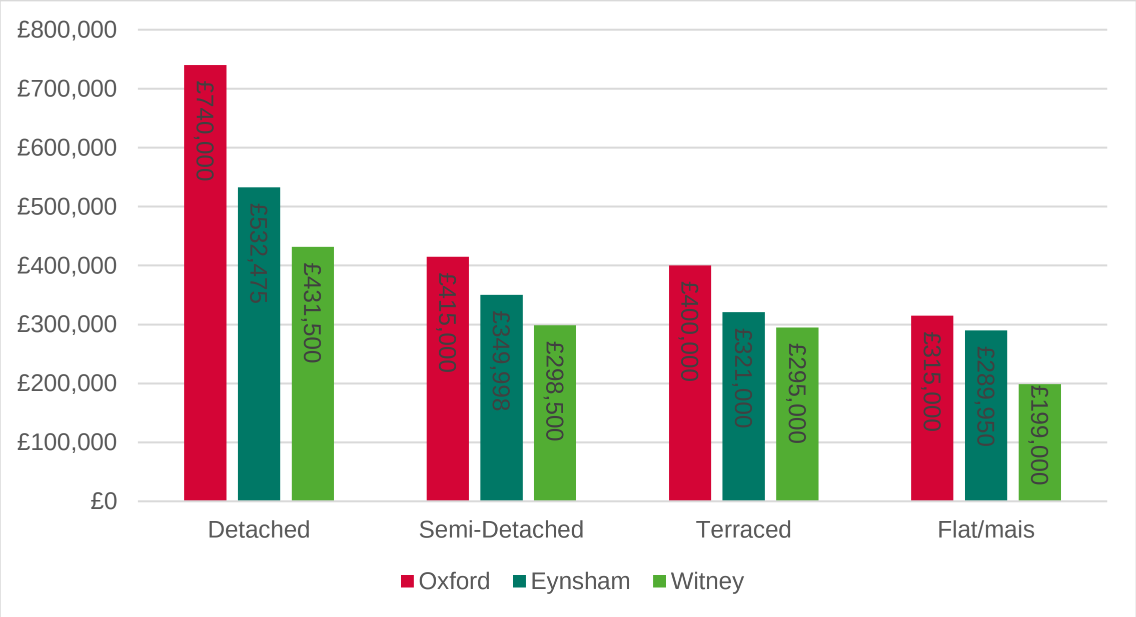
5.4 The median price for flats was £290,000; for terraced properties £321,000; and for semi-detached properties £350,000. Influenced by a number of higher values sales of detached homes, there is a particular premium associated with detached homes with median values of £532,475.

5.5 The median house price in Eynsham was 53% or £126,000 above the national average indicating strong relative housing demand.

[4] Median house price data for Eynsham is presented at ward level – Eynsham and Cassington

5.6 It is helpful to consider how house prices by type vary between Eynsham, Oxford and Witney. Across house types, homes are more affordable in Witney than Oxford, with a price differential of £207,525 for detached properties; £65,000 for semi-detached homes; £79,000 for terraced homes; and £25,050 for flats/ maisonettes. The cost differential for housing in particular (as opposed to flats) is likely to be one of the attractions for households in moving from Oxford to Eynsham – households can get 'more for their money.'

Figure 5.1: Median House Price Differentials, Year to Sept 2018 (Source: HM Land Registry)

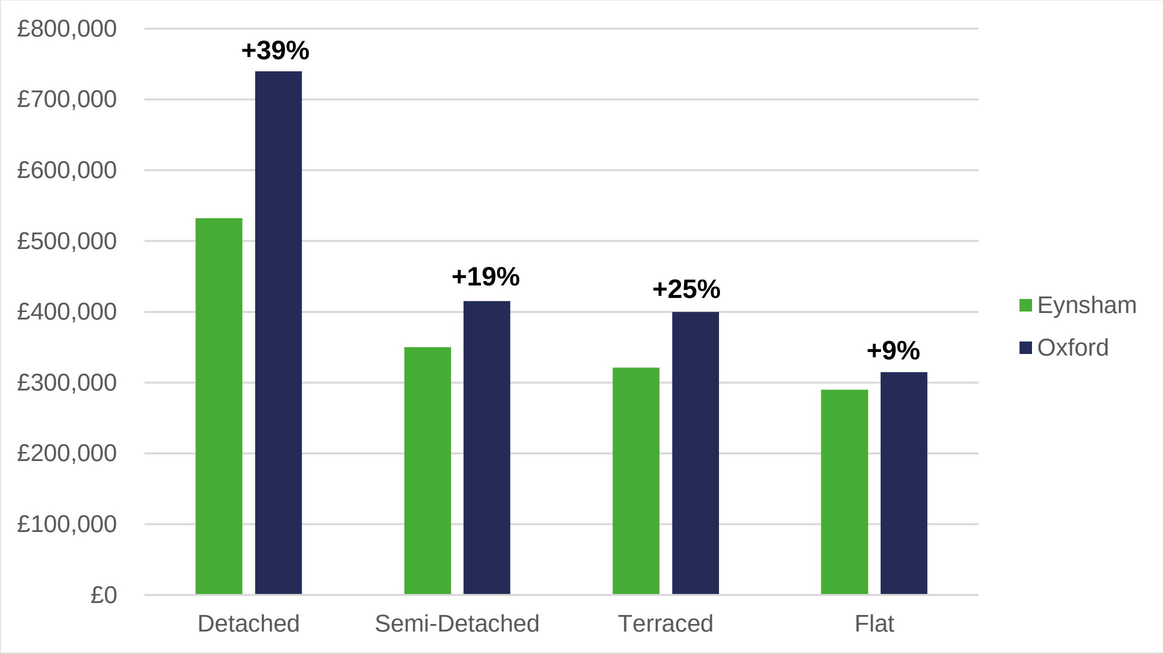


5.7 The Figure above shows larger detached properties at 57% above the national average; with a particular premium paid on semi-detached and terraced properties at a considerable 64% and 72% above the national average respectively. The median house price for flats in 2018 was 35% above the national average although this is based on a small number of transactions for this type in Eynsham.

5.8 Figure 5.2 below shows the price differential relative to Oxford for different sizes of properties in proportional terms.

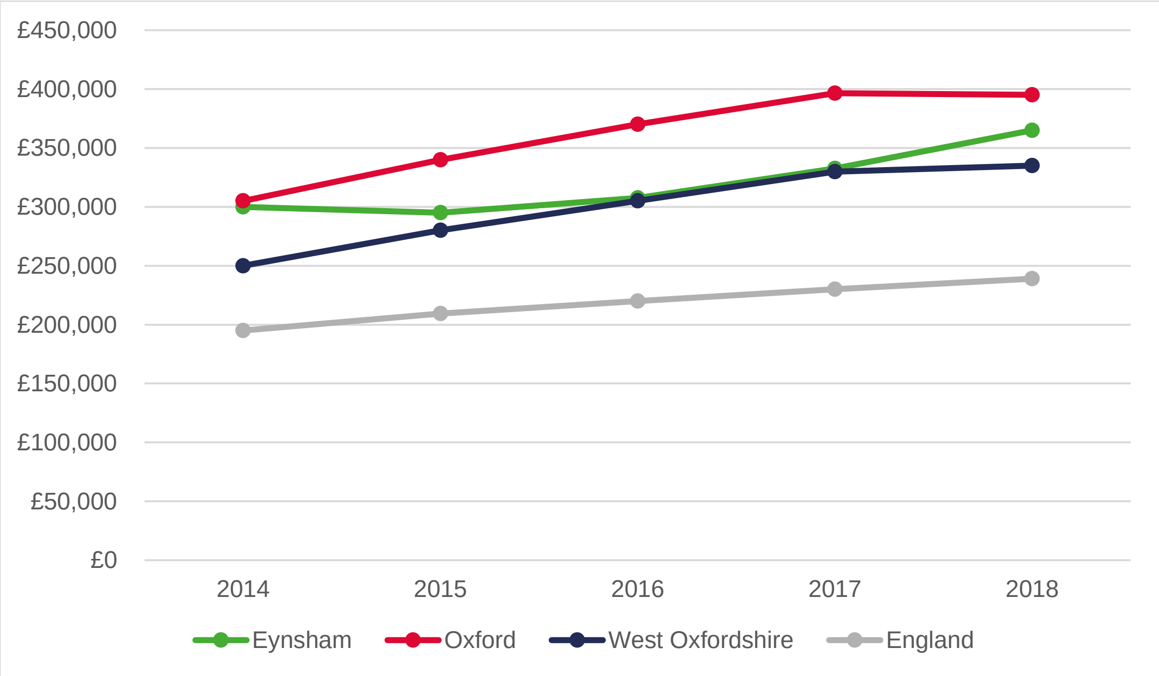
5.9 Relative to Witney, the median house price in Eynsham is £65,000 (22%) higher, with the greatest difference being for detached (£101,000) and flatted properties (91,000). Semi-detached values are on average £51,500 over those in Witney, with terraced properties £26,000 greater.

Figure 5.2: Price Differential for Different Types of Market Homes in Eynsham v Oxford, 2018 (Source: HM Land Registry data)



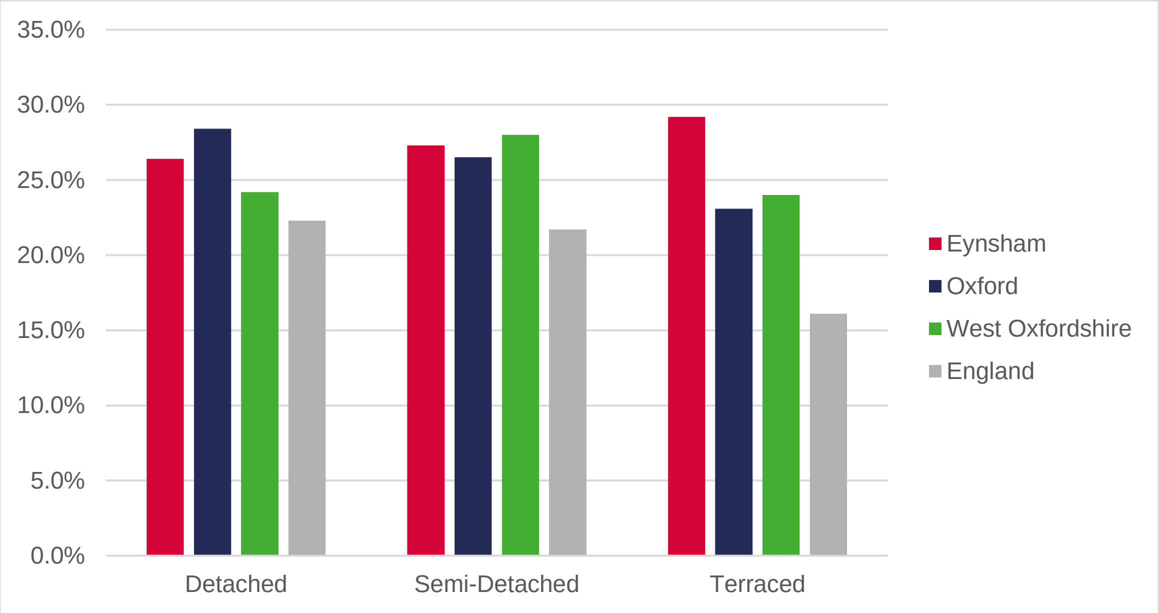
5.10 We have assessed house price growth over the last four years, influenced by the market cycle. Price growth across West Oxfordshire and in Oxford has been stronger than that seen nationally; but we have seen some divergence of prices in Oxford relative to Eynsham (with stronger growth in the former). Over this period median prices grew by 22% in Eynsham compared to 30% in Oxford City, 34% across West Oxfordshire and 23% growth across England. This is shown in the Figure below.

Figure 5.3: Median House Price Trends – 2014-2018 (ONS, 2018)



5.11 House price growth has been strongest for detached properties which have seen growth of £111,225 over the 2014-18 period, which is above average for West Oxfordshire but lower than that seen in Oxford. Semi-detached values have increased by £75,000 and terraced properties by £72,500. Growth in values for flats/maisonettes has also been strong (£89,950) and indeed has been marginally higher than that seen in Oxford (£83,000) narrowing the difference in values for flats between the City and Eynsham. Proportional increases are shown in Figure 5.4 below.

Figure 5.4: Median House Price Trends by Type – 2014-2018 (HM Land Registry, 2018)

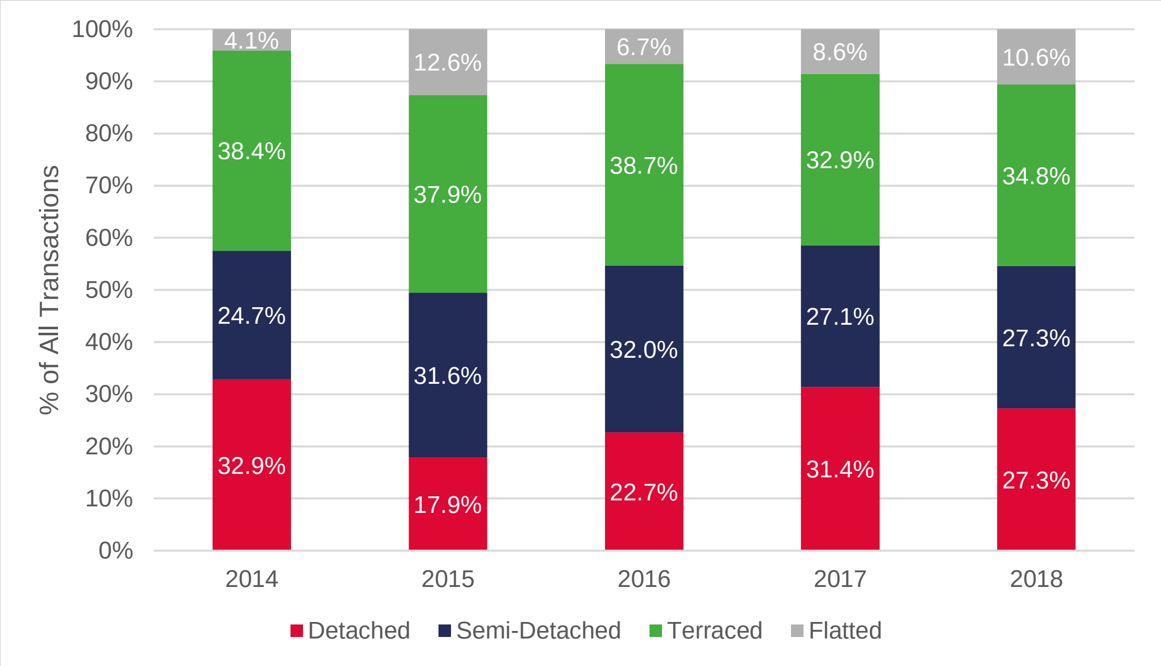


5.12 As is shown in the Figure below detached housing accounted for around 27% of all sales in Eynsham in 2018 with the same proportion of semi-detached sales. 35% of sales were of terraced properties. Levels of flatted sales were relatively low (11%) influenced by the stock profile and character of the settlement. There has been some year-on-year variation in the sales profile, but if we look at the average overall profile over the five year period the following is shown:

- 26% detached;
- 29% semi-detached;
- 37% terraced;
- 9% flat/ maisonettes.

5.13 The sales profile is particularly focused on houses, with proportionally greater sales of terraced properties (and slightly lower levels for semi-detached homes) relative to the stock profile.

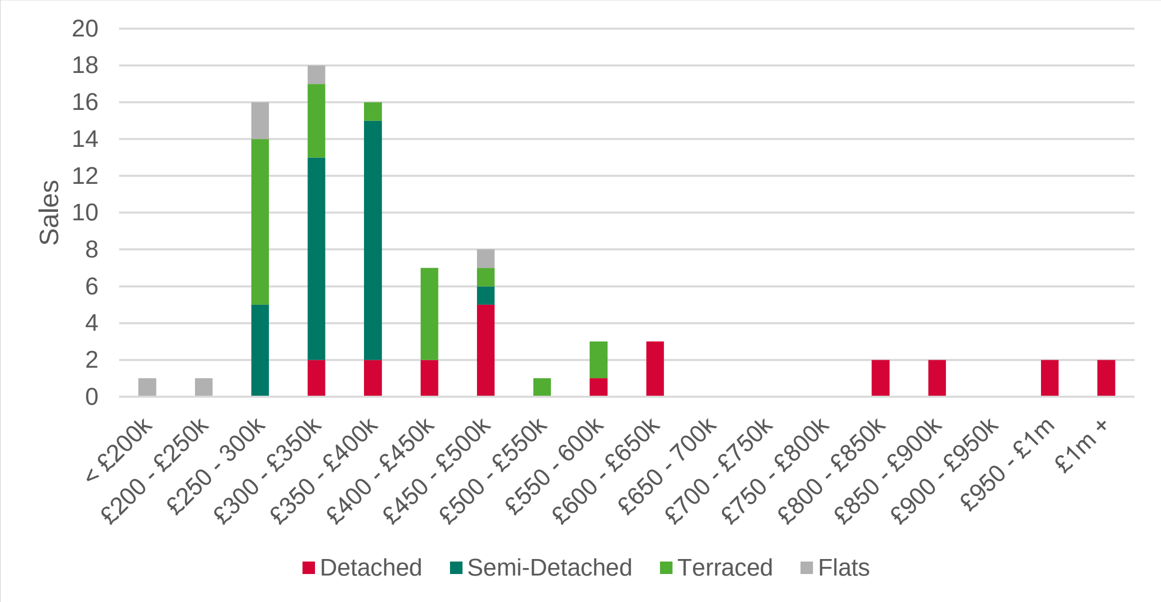
Figure 5.5: Profile of Sales in Eynsham by Type, 2014-2018 (HM Land Registry, 2018)



5.14 We have also sought to use the HM Land Registry data to assess the profile of sales. This is shown in Figure 5.6. It shows that:

- Entry-level prices in Eynsham are around £250,000, with few sales below this. Entry-level terraced and some semi-detached properties with values between £250,000 – £300,000 account for around 20% of sales;
- Mid-market three and four-bed semi-detached and terraced properties sell for between £300,000 - £400,000. These mid-market properties account for between 40-45% of sales;
- Larger properties valued at over £400,000, the majority of which are detached, account for around 35-40% of sales. The values of such properties range significantly from those between £400,000 - £500,000 through to properties valued at over £1 million.

Figure 5.6: Distribution of Property Sales in Eynsham, Year to Sept 2018 (Source: HM Land Registry)



Engagement with Estate Agents

5.15 Iceni has engaged with a range of sales agents[5] who are involved in marketing properties in Eynsham. Agents described the Eynsham market as 'very strong' albeit that some stated that there has been a short-term effect of macro-economic/ Brexit uncertainty on market activity over the last 12-18 months.

5.16 The strength of the market is underpinned by:

- Proximity to Oxford with a good, regular bus service (every 15 mins);
- Good range of facilities in the settlement, and good schools; and
- Employment opportunities available locally.

5.17 Agents describe a profile of buyers which includes those moving locally, as well as people moving from Oxford and elsewhere in Oxfordshire, as well as to the 'Oxford area,' as properties in Eynsham are cheaper than those in the City and you can therefore 'get more for your money.' Agents estimate around 10-25% of demand currently is from those moving from Oxford, but this would increase if more housing is supplied.

[5] Abbey Properties, Chancellors, Martyn R Cox

5.18 The greatest relative demand, agents described, is for 3-bed and 4-bed properties, with agents particularly mentioning strong demand for 3-bed semi-detached homes with values around £350,000 - £375,000 (as at Spring 2019). There is also interest in 1960s 3-bed terraced properties in the settlement. These are attractive for households looking to upsize as well as those downsizing for instance from 5-6 bed houses to a 3-bed terraced home, this accounting for around 60% of demand currently.

5.19 Agents stated that smaller properties, including smaller two- and three-bedroom homes, tend to be purchased by first-time buyers, with values at around £250,000 for a 2-bed home; but noted a lack of supply of 1-bed properties in the settlement. First-time buyers currently account for around 20-30% of transactions. Agents described a lot of young people being 'priced out' of the core Eynsham market due to a lack of properties available for sale for under £200,000. Because of a lack of such properties, including flatted stock, agents said first-time buyers tend to go to Witney or Carterton where smaller properties are more available and affordable.

5.20 Agents described Eynsham as attractive to older households of retirement age, this accounting for around 20% of market demand. Buy-to-let purchases were described as accounting for around 20% of transactions.

5.21 Values in the settlement are currently around £250-300 per sq. ft. Values at the time of writing are described by agents as static or falling slightly, with a drop of around 5% over the last 12 months suggested. Brexit uncertainty underlies this together with reasonable levels of new-build development which with incentives, are reducing demand in the resale market for existing properties.

5.22 One of the agents - Chancellors - described interest in self-build, stating "*there are many people on my books who would be interested in buying a plot of land to build their own home*." The current issue is described as one of land availability.

Key Points

The sales market in Eynsham is generally relatively strong influenced by the settlement's attractiveness as a place to live – including facilities in the settlement and its schools, proximity and access to Oxford, and local employment opportunities. It sees people moving from Oxford as prices are lower and you can therefore 'get more for your money,' with the evidence suggesting prices are £65,000 + cheaper than those in the City.

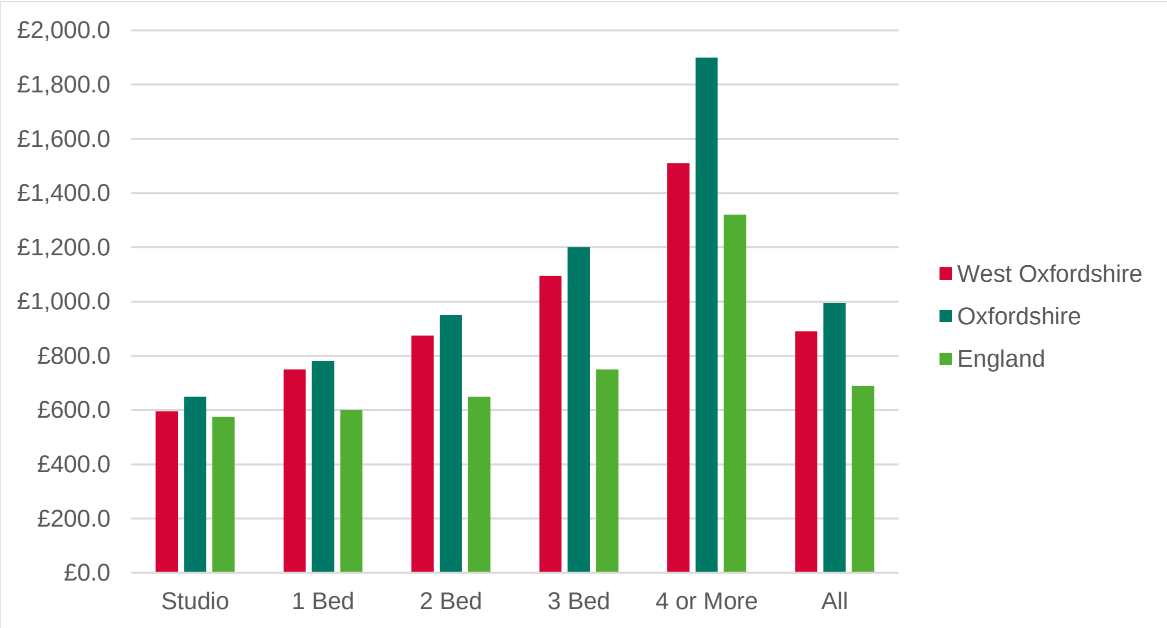
The profile of demand is focused more towards houses than flats (where values are more similar to those in Oxford). Currently agents describe the greatest relative demand for 3- and 4-bed properties, which will include a mix of house-types; but this appears to be in part influenced by the limited supply and availability of smaller properties. There is a particular premium for detached properties, which have seen recent strong price growth. The demand profile in the Eynsham area is influenced by the presence of the secondary school, Bartholomew School.

Rental Market

5.23 Turning to the rental market, Figure 5.7 below sets out our analysis of median rents by size; focussing on West Oxfordshire (and relevant comparators) as local area data for Eynsham is not available from the Valuation Office Agency source. Median rents in West Oxfordshire are relatively high in comparison to the national average across all sizes – particularly in respect of larger properties – but are below the Oxfordshire average.

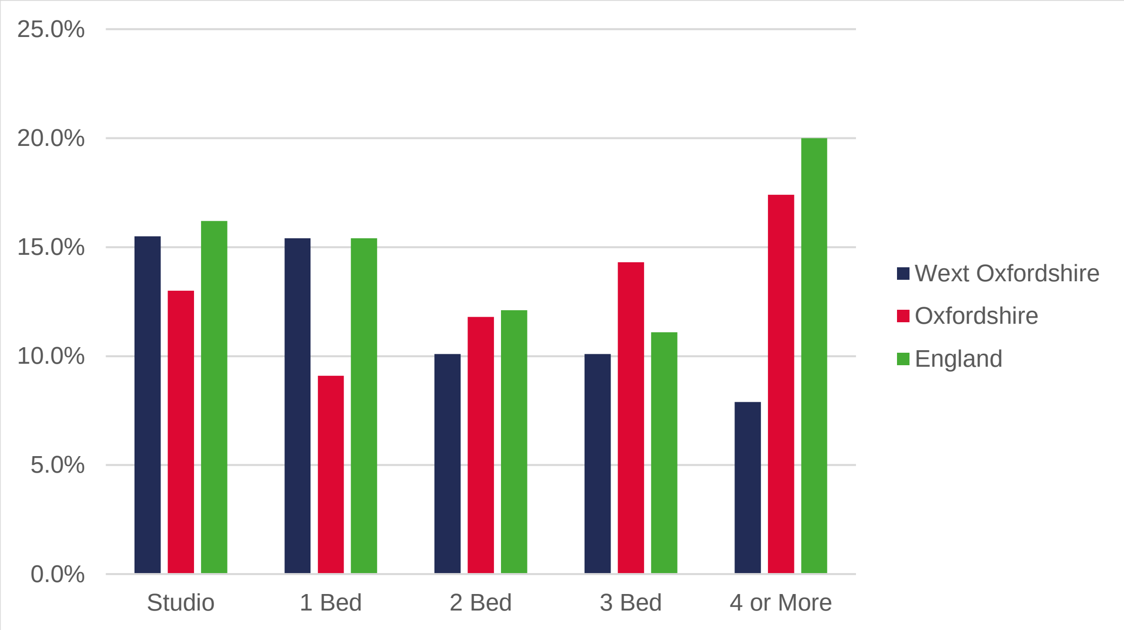
5.24 In 2018, the average rent for a 3-bed property in Oxfordshire was £1,200 per calendar month (PCM) compared with £1,095 PCM in West Oxfordshire; and the median rent for 4 bedrooms or more was £1,900 PCM in Oxfordshire compared to £1,510 PCM in West Oxfordshire. The largest price differential is for larger 4+ bed properties.

Figure 5.7: Existing Median Private Rent Levels by Size (VOA, 2018)



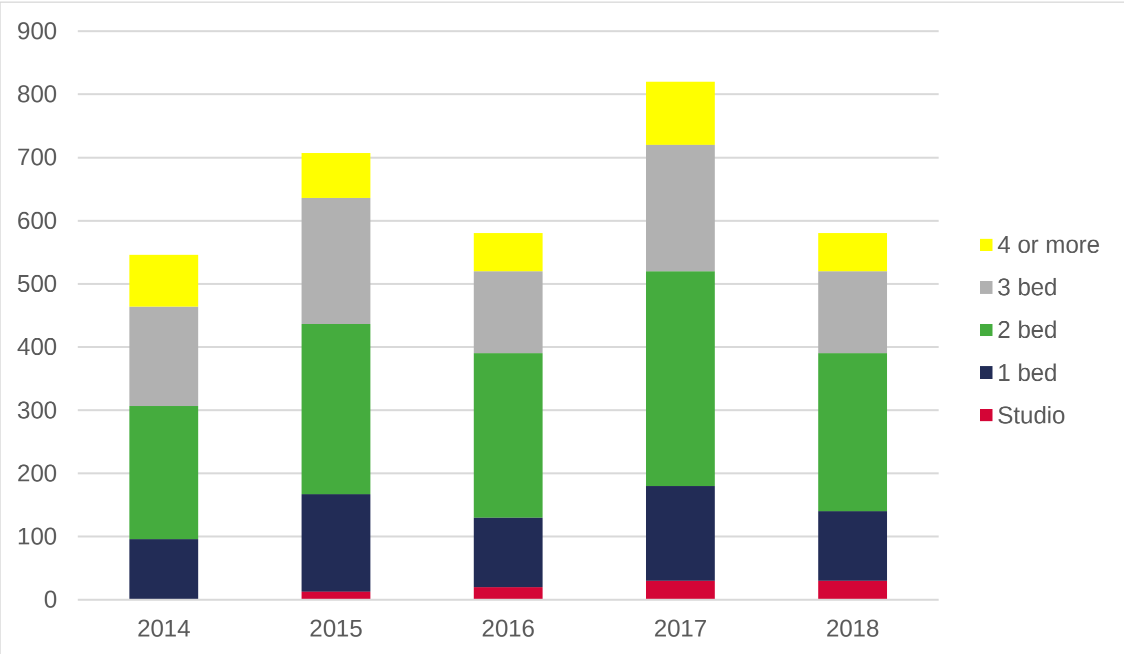
5.25 Figure 5.8 considers trends in median private rents over a five year period from 2014 to 2018. This shows that over the five year period, rents increased in West Oxfordshire for all property sizes but particularly for studio properties and 1 bedroom properties.

Figure 5.8: Trends in Median Private Rents, 2014-2018 (VOA, 2018)



5.26 Transaction data can be used to understand the profile of letting in West Oxfordshire. The analysis is set out in the Figure 5.9 below. 2017 saw the highest level of transactions. The profile by size across the period was 23% 1-bed; 42% 2-bed; 25% 3-bed; and 11% 4+ bed properties. Two-bed properties are the most popular.

Figure 5.9: Rental Transactions in Eynsham, 2014-2018 (VOA, 2018)



Engagement with Letting Agents

5.27 Iceni has engaged with a range of lettings agents[6] who are involved in marketing properties in Eynsham. Agents described Eynsham as 'very popular middle ground between Oxford and Witney' with a market where there's always strong demand. Scott Fraser Estate Agents noted that 'the last four of five properties available to let, have let in within 24 hours'.

5.28 The drivers behind this, according to the agents, include:

- Affordability for those working in Oxford, who can get better value for money and commute; and

- Attractive range of facilities including the secondary school which many families purposely move to Eynsham for; including sometimes temporarily.

5.29 The agents describe the typical profile of renters in Eynsham as mainly young professionals and families looking for more affordable and better value accommodation; with an age profile of between 25 to 45. There is also a small proportion of older people over the age of 60 who are active in the rental market, accounting for around 10%.

5.30 The agents note that the majority are moving within the local area; with those moving in from elsewhere doing so to be nearby family in the village or to position themselves close by to Oxford for work. Chancellors and Scott Fraser both estimated that around 85% of renters work in Oxford.

5.31 The greatest level of relative demand in the village from young professionals looking to rent is 2 bedroom semi-detached properties; whereas for families it will be a 3 and 4 bed semi or detached property. Chancellors stated that 'there is always demand for 3 and 4 bedrooms in the village'.

5.32 The agents also stated there is a level of demand for 1 and 2 bedroom flatted accommodation from those who are older and looking to downsize or rent short-term before buying again; as well as from younger people, as these properties are often the least expensive.

5.33 All agents said that rental values in Eynsham, were static and had been for some time (i.e. around 2 years). At the time of writing (as at spring 2019) a typical 2 bed house would be around £925 PCM; a typical 3 bed semi-detached would be between £1,150 to £1,250 PCM and a 3 bed detached around £1,400 PCM. A 4 bedroom detached property would be between £1,400 to £1,500 PCM and flatted properties somewhere around £750 PCM.

[6] Abbey Rentals, Chancellors and Scott Fraser Estate Agents

5.34 Agents considered that the provision of purpose-built accommodation for undergraduate students in Eynsham would not be appropriate. Chancellors and Scott Fraser both referenced travel time as an issue, with students often wishing to be within walking distance of the university.

5.35 The introduction of a purpose-built product such as Build to Rent was generally supported by the agents; with Chancellors describing it as a 'brilliant idea' whilst Abbey Rentals noted 'the market is definitely there for it'.

Key Points

There is a buoyant rental market in Eynsham driven by young professional and families typically aged 25-45 who are looking for good value accommodation, many of whom work in Oxford. There is demand for a range of types of properties, but with 2-bed homes being the most popular.

Iceni (and indeed local agents) consider that there is scope for development of build-to-rent accommodation given the attractiveness of the location, proximity and transport links to Oxford but slightly better affordability. We consider this further later in the report.

Housing Supply Pipeline

5.36 We have next sought to assess the pipeline supply of housing coming forwards in Eynsham, in West Oxfordshire more widely, and in Oxford City. Our analysis has focused on sites with capacity for 50 or more dwellings with planning consent, as agreed with West Oxfordshire District Council (WODC).

Pipeline Supply in Eynsham

5.37 There are two sites of over 50 dwellings with planning consent in Eynsham at the time of writing. These are Eynsham Nursery and Plant Centre (77 dwellings); and West of Thornbury Road (160 dwellings).

5.38 Of the 237 dwellings to be delivered on these schemes, two- and three-bed homes predominate and are expected to account for 64% of provision. The profile of sizes of market and affordable units is shown overleaf in Table 5.2.

Table 5.2: Eynsham Pipeline Supply – Breakdown by Property Size (Source: WODC)

Site	Eynsham Nursery and Plant Centre	West of Thornbury Road, Eynsham	Total: Housing	Housing Profile (%)
Total Housing	118	119	237	
% Affordable	50%	50%		
Market Housing Mix				
2 Bedroom House	3	5	8	7%
3 Bedroom House	7	22	29	25%
4+ Bedroom House	28	53	81	69%
Total Market	38	80	118	100%
Affordable Housing Mix				
1 Bedroom Flat	8	6	14	12%
2 Bedroom Flat	0	12	12	10%
1 Bedroom House	0	2	2	2%
2 Bedroom House	18	32	50	42%
3 Bedroom House	12	26	38	32%
4 Bedroom House	1	2	3	3%
Total Affordable	39	80	119	100%

Pipeline Supply across West Oxfordshire

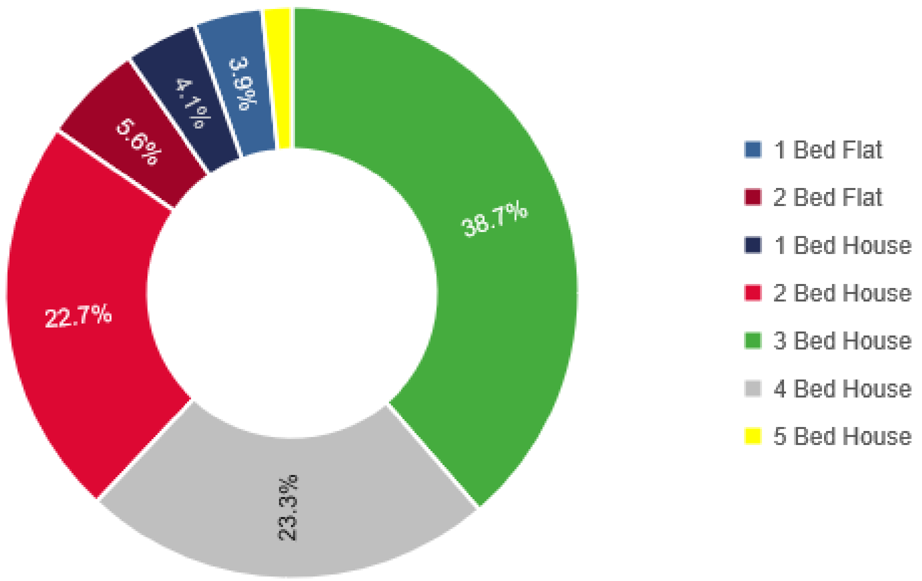
5.39 Across West Oxfordshire, there are 26 sites of over 50 dwellings with planning consent. These sites have development yields ranging from 50 dwellings to 1,000 dwellings. The total number of homes expected to be delivered from these sites is around 4,600 dwellings. Notably, not all of the sites are currently under construction and a number of the sites have only gained outline planning permission; therefore, the overall anticipated housing mix is indicative and subject to change with the submission of reserved matters applications.

5.40 Across these 26 large sites, 90% of dwellings are expected to be houses; and 10% flats. This includes both market and affordable housing. This ratio broadly aligns with West Oxfordshire's existing profile of housing types.

5.41 A breakdown of the District's pipeline housing supply by type and size is set out in the Figure below. The nature of the anticipated land supply from sites delivering over 50 dwellings across the District is primarily focussed on 3 bedroom housing; representing almost two fifths of all supply at around 39% - which is in keeping with the District's existing housing profile comprised of 41% 3 bedroom stock. Just under a half the supply considered will deliver 2 bedroom housing (23%) and 4 bedroom housing (23%).

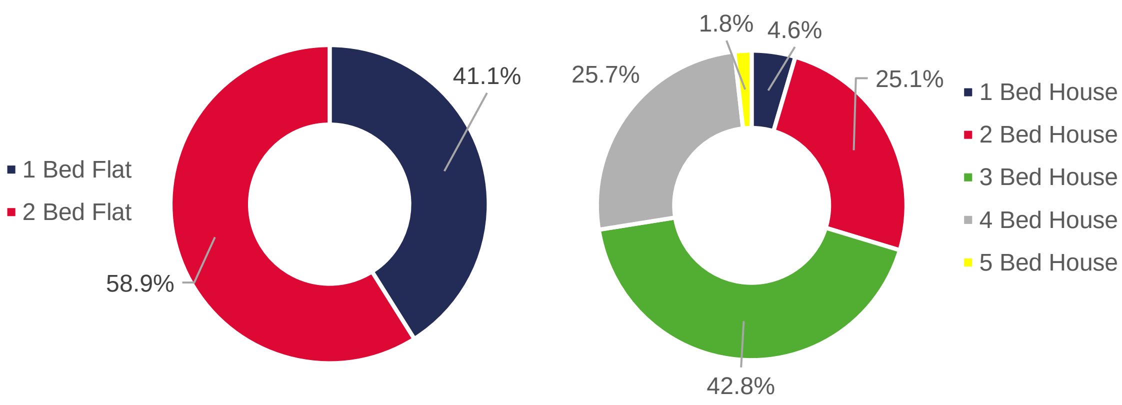
5.42 What we see, as we might expect, is new-build development essentially reinforcing around the existing profile of homes in the District.

Figure 5.10: District-Wide Pipeline Housing Supply – Overall Mix of Flats and Houses



5.43 We have also shown the mix of flats and houses of different sizes being delivered in West Oxfordshire. Flatted development is focused on 1- and 2-bed properties, with 59% 2-bed. There is currently no planned provision for 3 or 4 bedroom flatted housing in the District on schemes of over 50 dwellings.

Figure 5.11: District-Wide Pipeline Housing Supply – Flatted Mix and Housing Mix



5.44 In respect of housing, the bulk of this type of supply will deliver 3 bedroom housing (43% of all housing provision). 2-bed stock accounts for 25% of units, and 4+ bed stock 27.5%.Of this it is expected that around 2% will deliver 5 bedroom housing.

Influence of Oxford City

5.45 Given the spatial proximity of Eynsham to Oxford and the relationship which exists in market terms, it is sensible to also assess the type of homes which are being delivered in Oxford; and the nature of the development pipeline in the City. We have therefore set out below evidence of what types of homes are needed in Oxford, and what is being built.

5.46 An updated assessment of housing need in Oxford was prepared by a consultancy team led by GL Hearn, and published in October 2018. This did not however establish the profile of need for different sizes of market housing in the City. Such evidence was however presented in the 2014 SHMA. This showed the following:

Table 5.3 Mix of Housing Needed – Oxfordshire SHMA 2014

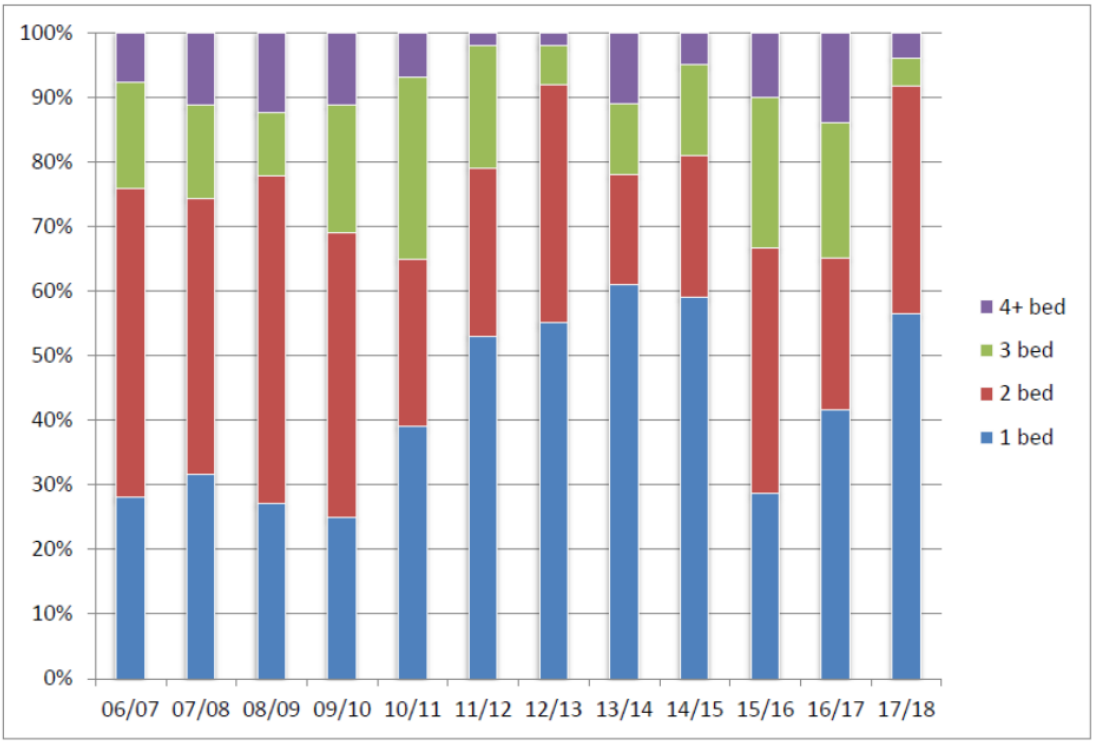
	1-bed	2-bed	3-bed	4+ bed
Oxford – Market	10.7%	24.9%	38.9%	25.5%
Oxford – Affordable	29.0%	32.7%	32.2%	6.1%
Oxford – Total	19.9%	28.8%	35.6%	15.8%
West Oxfordshire - Market	4.8%	27.9%	43.4%	23.9%
West Oxfordshire - Affordable	23.3%	43.7%	30.4%	2.6%
West Oxfordshire - Total	12.2%	34.2%	38.2%	15.4%

5.47 Looking first at past completions, the following is drawn from the Oxford City Council Annual Monitoring Report (AMR), which was published in October 2018:

> *"In previous years there have been concerns that increasing proportions of smaller homes (one or two bedrooms) were being completed in Oxford and that this was limiting the supply of new family-sized homes. The 2015/16 and 2016/17 monitoring years were more successful in meeting the Core Strategy targets with over 30% of homes being 3 or more bed dwellings. Figure 5 however shows that during the 2017/18 year the mix of dwelling sizes completed did not reach the Council's aspirations."*

5.48 What the associated table in the Oxford AMR shows is that **around three quarters of housing delivery in Oxford over the last 12 years has been of 1-bed and 2-bed properties**. In the latest monitoring year, the provision of 1 and 2 bed properties accounted for over 90% of all supply in the City. This is not uncharacteristic of cities, with a land supply which is focused on smaller brownfield development sites. This compares with a need profile whereby just under half of the need/demand (48.7% based on the SHMA) is for 1- and 2-bed homes and 41% for properties for 3 or more bedrooms. By implication, households seeking larger family housing often move to areas around cities to access it.

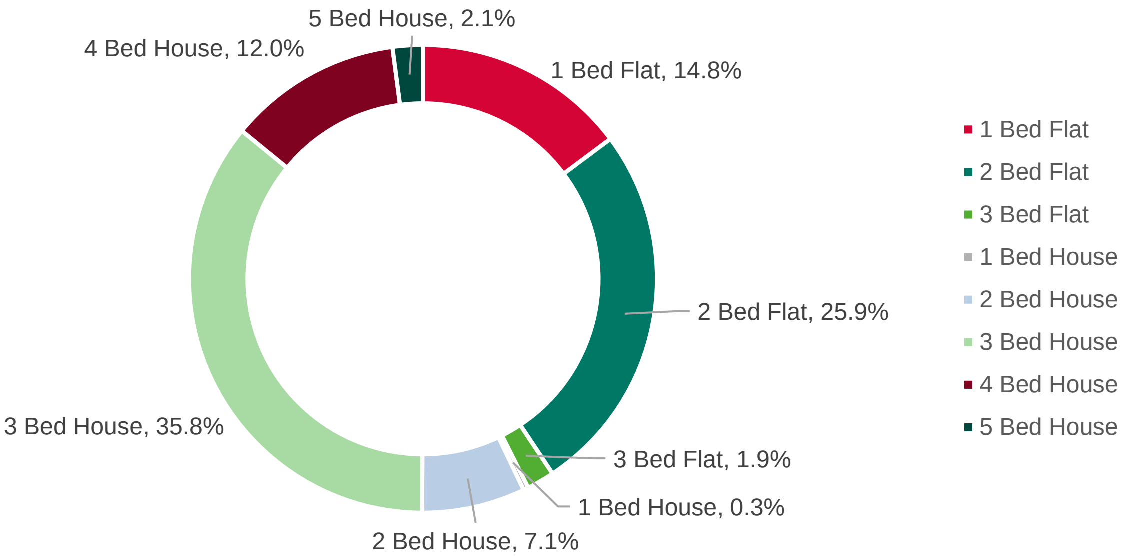
Figure 5.12: Completions of Different Sizes of Homes in Oxford City (Source: Oxford AMR)



5.49 We have also had regard to the development pipeline, and have reviewed sites with planning permission expected to deliver 50 dwellings and above in Oxford City from 2018/19 onwards. The total number of homes expected to be delivered on these sites is equal to 1,725 dwellings – a relatively modest amount. This exercise has been undertaken using the same approach to our assessment of the pipeline supply coming forward in West Oxfordshire District. The results are shown in the Figure below.

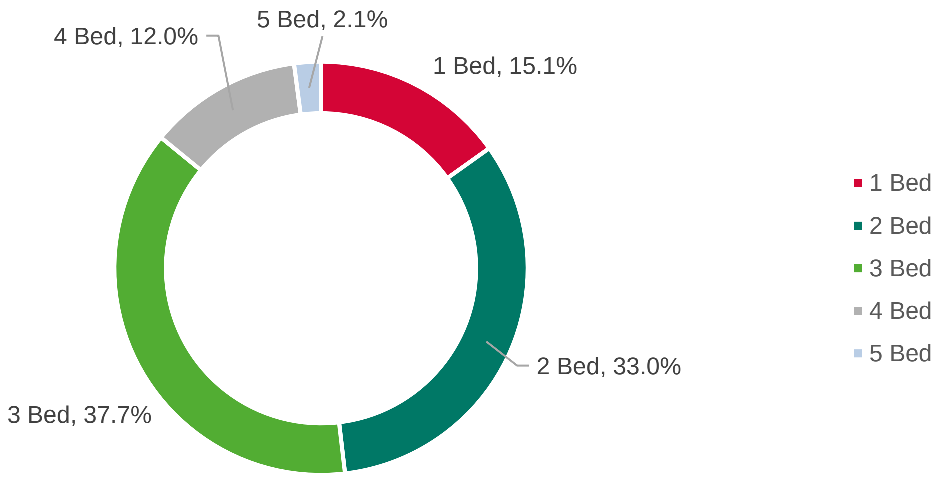
5.50 The analysis shows that in contrast to historic completions trends, a larger proportion of the supply on sites of over 50 dwellings in Oxford City is of larger homes. The flatted supply equates to 42.6% of the pipeline on such sites; with almost half of the supply on such sites expected to deliver family-sized housing with 3 or more bedrooms (49.9%).Whilst some caution should be applied to these figures as they represent only sites with planning consent, and sites of over 50 dwellings; it does suggest that the City Council's policies are having some effect in supporting greater delivery of larger homes (3+ bed houses).

Figure 5.13: Pipeline Supply in Oxford City on sites of 50+ dwellings (Source: OCC)



As a means of comparing more directly with other data sources, Figure 5.14 below presents the same data just for bed sizes.

Figure 5.14: Pipeline Supply in Oxford City – Bed Sizes (Source: OCC)



Key Points

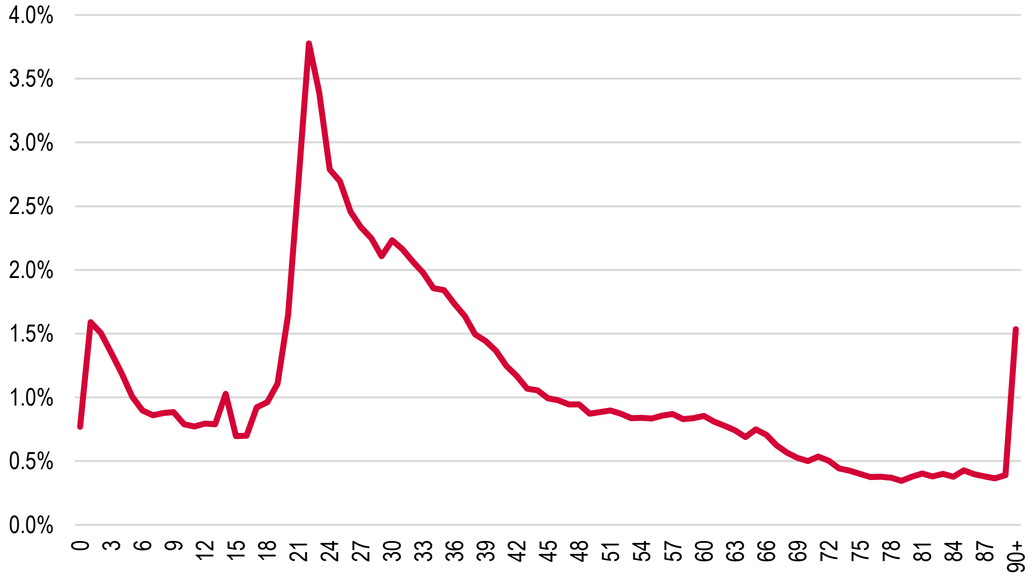
The pipeline supply analysis suggests a limited market in West Oxfordshire for 1-bed properties, with these typically accounting for < 10% of supply. The market profile is focused on two-, three- and four-bed houses, with the greatest proportion of delivery being of 3-bed properties in line with the District's existing housing profile.

There is a correlation between this and the nature of the land supply in Oxford City which is focused towards delivering flats, almost all of which have been 1- and 2-bed properties. Whilst the City Council is aspiring to increase delivery of larger properties, there are likely to continue to be households who move out of Oxford City – as happens with other cities – to access family housing.

Implications of Demographic Changes

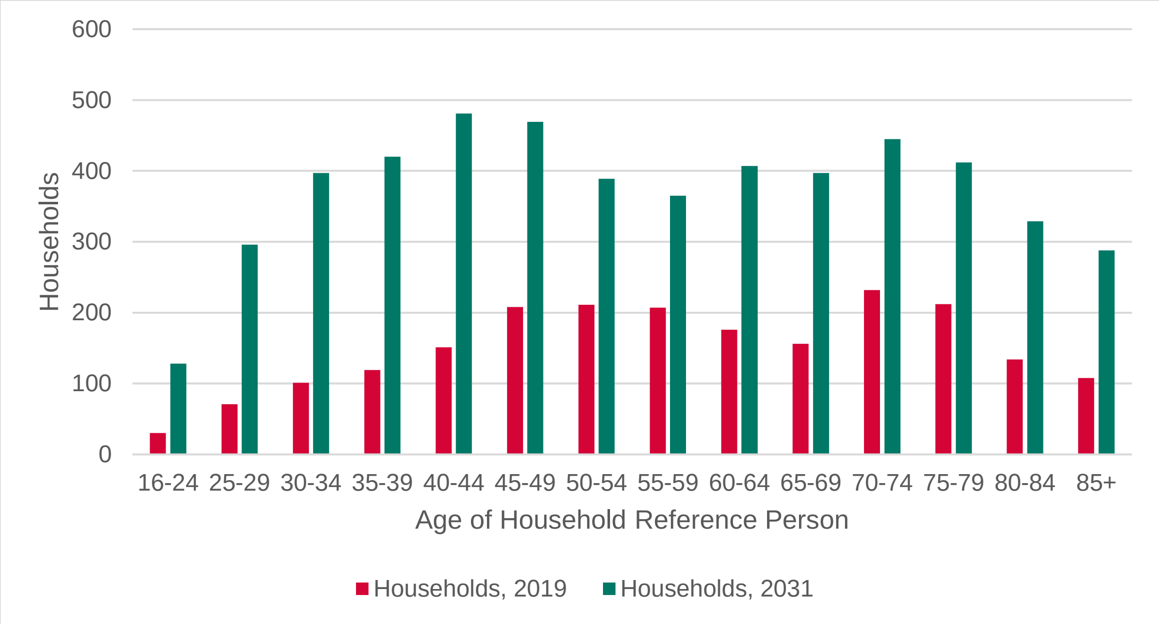
5.51 JGC has sought to model the implications of demographic changes on the profile of housing need. To do so we have modelled what demographic change would be implied by the delivery of the West Eynsham SDA (1000 dwellings), and the Garden Village development (2,200 dwellings) including the potential for additional in-migration. We have assumed a migration profile of those moving to the area consistent with that from ONS 2016-based Sub-National Population Projections. This is shown below. Our modelling assumes household formation rates change in line with Government's 2014-based Household Projections, with a small adjustment to improve formation rates for those 25-44 on the basis that improved affordability over time supports improved ability of younger households to form. We assume 3% vacant homes consistent with the level generally regarded as necessary to facilitate turnover and repairs to properties within a functioning housing market.

Figure 5.15: Age Profile of In-Migration to West Oxfordshire (2019-31).



5.52 The chart below shows how the number of households in the Eynsham area is expected to change as a result of the development of both the West Eynsham SDA and Garden Village. Significant household growth relative to that which exists now is expected across a range of age groups.

Figure 5.16: Projected Change in Households by Age, 2019-31



5.53 Table 5.4 below shows the projection of household types moving forwards. This shows increase across all household types, but with particularly notable changes to households with dependent children (family households) with over 1,100 additional family households expected.

Table 5.4 Changes in Household Types 2019-31 with 3,200 New Homes in Eynsham Area

	2019	2031	Change
One-person household (aged 65 and over)	316	600	283
One-person household (aged under 65)	270	747	477
Couple (aged 65 and over)	400	911	511
Couple (aged under 65)	305	680	375
A couple and one or more other adults: No dependent children	159	323	163
Households with one dependent child	253	792	539
Households with two dependent children	235	712	477
Households with three dependent children	71	194	123
Other households	107	265	158
TOTAL	2,117	5,223	3,107

5.54 The sizes of homes which households occupy however relates more to their age and wealth than the number of people they contain. In the market sector in particular, there is no reason why a single person cannot buy a 4-bed homes as long as they can afford it; and many households have more rooms than they might 'need' in order to allow friends and relatives to come to stay. Some older households may however choose to downsize, but this may be from a 4- or 5-bed home to a 3- or 4-bed home where a level of 'under-occupancy' remains.

5.55 JGC has modelled the implications of demographic changes taking account of how households occupy homes in different tenures. The Housing Market Model used looks at the types and tenures of accommodation occupied by different ages of residents. This is applied to projected changes in the size and structure of the population to assess the need for different sizes of homes. The model used is consistent to that used in the 2014 Oxfordshire SHMA. Figures 5.17 and 5.18 below show how households of different ages occupy homes by sector in Oxford and West Oxfordshire.

Figure 5.17: Average Bedrooms by Age and Tenure – West Oxfordshire (Source: ONS Commissioned Table CT0621)

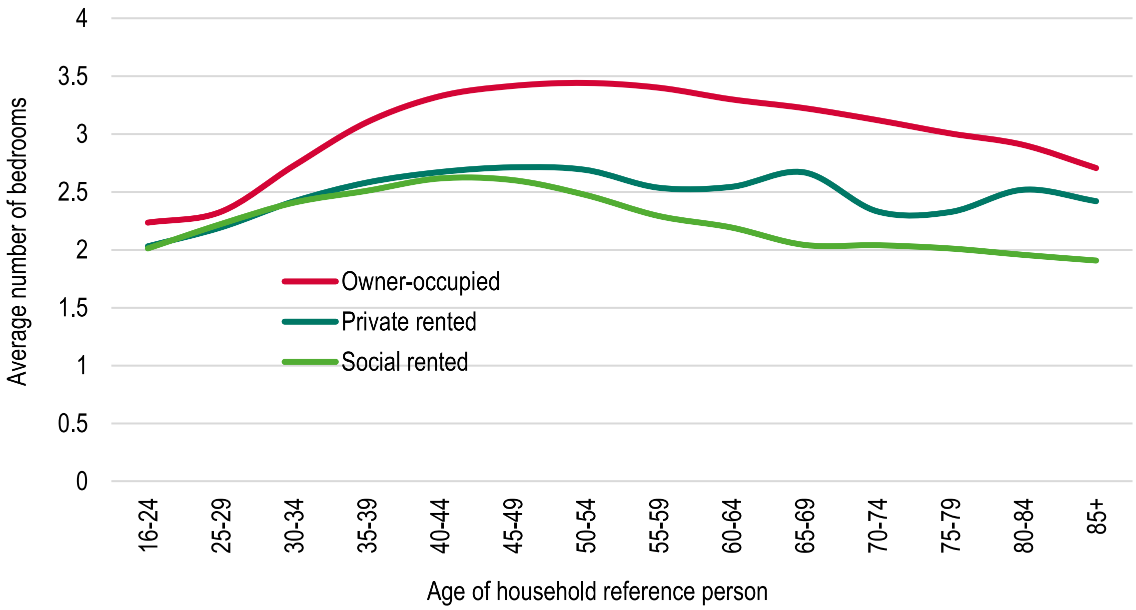
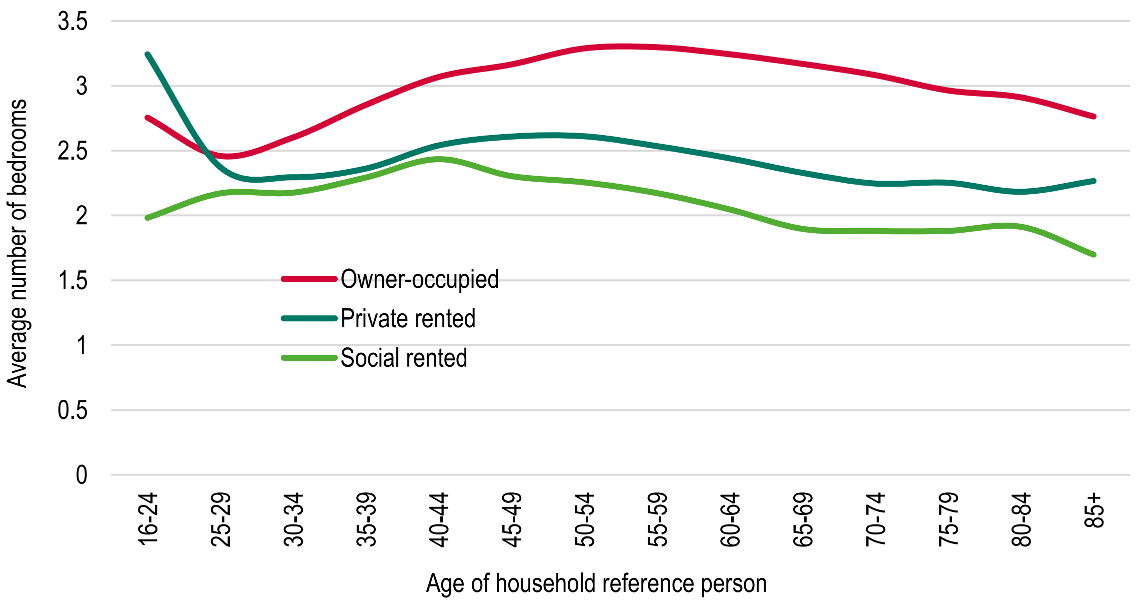


Figure 5.18: Average Bedrooms by Age and Tenure – Oxford (Source: ONS Commissioned Table CT0621)



5.56 In order to model the needs of different sizes of homes, we have assumed that 50% of homes are delivered as market housing; 20% for affordable home ownership; and 30% for rented affordable housing. These are modelling assumptions for the purposes of considering the sizes of homes needed, recognising that occupancy varies by sector.

5.57 Recognising that the mix of housing to be delivered in the West Eynsham SDA is focused more on addressing gaps in the housing mix within the existing settlement, and catering for needs of its residents, we have modelled first provision of 1000 homes associated with the SDA.

5.58 We then move on to consider the needs associated with the Garden Village which is driven essentially by additional in-migration. In doing so we have modelled needs associated with how households occupy homes in West Oxfordshire; and in Oxford. For the Garden Village, we have adjusted in-migration on the basis of additional people moving to the site.

Table 5.5: Implications of Demographic Changes on Market Housing Mix in West Eynsham SDA

	1-bed	2-bed	3-bed	4+-bed
Market	4%	24%	44%	28%

Table 5.6 Implications of Demographic Changes on Market Housing Mix in Oxfordshire Cotswolds Garden Village

	1-bed	2-bed	3-bed	4+-bed
West Oxfordshire Occupancy Profile	4%	21%	43%	32%
Oxford City Occupancy Profile	5%	21%	48%	26%

5.59 In interpreting the figures above, it should be borne in mind that this is based on the occupancy profile for owner-occupied properties. As a proportion of 'market housing' will be for private rent, where the sizes of homes occupied are relatively smaller (as shown in Figures 5.18 and 5.19) there is some basis for adjusting the mix slightly towards smaller properties in drawing conclusions on the future size of new homes needed.

The Profile of Housing Needed to Support the Local Economy

5.60 The West Oxfordshire Economic Snapshot 2015[7] sets out that the Woodstock and Eynsham Sub-Area has a relatively buoyant economy. The economy supports jobs across a range of sectors, but

[7] CAG Consultants & Ramidus Consulting (2015) *West Oxfordshire Economic Snapshot*

with some of the largest sectors being Financial and Business Services; Manufacturing and Government Services. Drawing the evidence in this and the Garden Village Employment Study[8], it is clear that that there is a concentration of technology-focused businesses, including in advanced engineering, in Eynsham; as well as a number of software and insurance firms amongst others. Key employers include Siemens Magnet Technology (which manufactures magnets for MRI scanners); Polar Technology; and Owen Mumford. Oxfordshire more broadly has a particular strength in science, technology and research and development activities, which is influenced by the universities, key research institutions and catalyst companies in the county.

5.61 As part of the Garden Village development, development of a new science park is proposed. The Garden Village Employment Study is clear that there is demand for this, supporting science and R&D-focused activities, with a ladder of premises of different sizes and different price points; including 'move on' space for businesses moving out of incubator space in Oxford.

5.62 Based on the characteristics of the existing economic base and the proposed delivery of the science park, it is clear that **the focus of jobs growth locally in the Eynsham area is likely to be focused towards higher-skilled roles, with above average employment in managerial and professional occupations as well as graduates.**

5.63 We give further consideration to the scope for employer-linked housing in Section 7. But it is equally important to understand and consider how the mix of general needs housing can help to support the economy and the above findings have thus informed our wider consideration of the mix of market and affordable housing which should be sought in the development schemes.

Bringing the Evidence Together – Mix of Market Housing

5.64 Bringing the evidence above together, we have sought to address the future potential mix of homes in the West Eynsham SDA and the Garden Village separately.

West Eynsham SDA

5.65 Eynsham's population is currently somewhat skewed towards people aged over 45. It has above average representation of those in their 40s and 50s with school-age children, and those nearing/ at retirement age; with low representation of those in their 20s and 30s. 3-bed homes and semi-detached properties predominate with 70.5% of homes in 2011 having three or more bedrooms. There are a limited level of 1-bed properties and flats.

[8] Lichfields (2019) *Oxfordshire Garden Village Employment Study*

5.66 Iceni consider that with regard to the mix of housing to be delivered in the West Eynsham SDA there is a degree of trade-off between:

- Delivering a balanced community with a mix of homes across Eynsham including increased access to housing for younger households in their 20s and 30s; and providing opportunity for older households to downsize.

- Recognising market dynamics, which point to the greatest demand being for 3- and 4-bed properties and a price premium for detached properties; and a limited demand for flatted properties where there is a significant supply in Oxford City and less of a price differential than for other property sizes.

5.67 Iceni is also aware that two initial phases of the SDA already have planning consent and these have a dwelling profile for the market housing which is quite heavily focused on larger 4-bed housing.

5.68 We have therefore drawn two sets of conclusions: a first which considers the proposed overall mix of market housing at Eynsham, and a second which considers what the implications for further schemes would be of achieving this, taking account of the mix of homes expected to be delivered on the two consented schemes.

5.69 The evidence points towards a strong sales market influenced by the facilities in Eynsham including its schools (including the presence of a secondary school and the proximity of the site to it); local employment opportunities; and movement of some households from Oxford to access family housing and as you can get 'more for your money.'

5.70 There is a limited market for 1-bed properties, with these typically accounting for less than 10% of supply. The profile of market demand is focused on houses, with the greatest relative demand for 3- and 4-bed properties.

5.71 On the basis of the understanding of the existing stock, market evidence, combined with consideration of the influence of demographic change and economic drivers, we consider that:

- The focus of market housing provision within the SDA should be on two- and three-bed properties, with around 35% of market housing provision being two-bed properties; and 40% 3-bed properties. This recognises the demand profile from households to both buy and rent; provides opportunities for older households to downsize; as well as opportunities for younger households moving into the area to buy a home that they can afford.

- A relatively modest 5% of market housing can be expected to be delivered as 1-bed properties, reflecting the limited market for flatted development in Eynsham. This level of provision is consistent with that amongst the existing housing stock.

- Around 20% of market housing within the SDA should be made up of larger 4+ bedroom properties. This is slightly below the existing housing mix profile in the settlement but reflects a strategic focus on seeking to support opportunities for younger households, including those working locally, to get on the housing ladder.

5.72 The two consented development schemes are expected to deliver 118 market homes (of the total of 500 market housing dwellings within the SDA). As Table 5.7 below shows, the market housing mix within these is quite strongly skewed towards larger 4+ bedroom properties.

Table 5.7 Recommendations on Market Housing Mix for the West Eynsham SDA

	1-bed	2-bed	3-bed	4+-bed
Existing Mix of Market Dwellings in Eynsham, 2011	5%	20%	48%	27%
Recommended Mix for New Market Homes in SDA: 500 Dwellings	5%	35%	40%	20%
Mix of Market Homes within Consented Schemes: 118 Dwellings	0%	7%	25%	69%
Mix within Residual Land to Deliver Recommended Mix: 382 Dwellings	7%	44%	45%	5%

5.73 The Council will need to consider the degree to which it is therefore more specific in the mix of homes sought through the remaining land within the SDA. Iceni considers that in the context of seeking to deliver balanced housing provision within the SDA and Eynsham more broadly, the focus of development within the remaining land should be on 2- and 3-bed properties but some flexibility should be applied in negotiating the housing mix on remaining sites within the SDA.

Garden Village

5.74 The Oxfordshire Cotswolds Garden Village is being conceived as a standalone new community located near Eynsham to the north of the A40. The scale of growth envisaged will meet much more than a localised housing need arising from Eynsham's existing population (which can essentially be fully met within the West Eynsham SDA). It will support in-migration to the Eynsham area from other parts of West Oxfordshire, Oxford and some from further afield attracted by the settlement's proximity and transport links to Oxford; quality of place; as well as local employment opportunities.

5.75 Iceni consider that whilst there is scope for greater flexibility to be offered by the Council in the mix of market housing reflected to allow phases of the development to respond to up-to-date market evidence and prevailing market conditions as individual phases are brought forwards; it is sensible for the Council to set out an overall guide mix for the development scheme as a whole to inform masterplanning; and to ensure that a balanced, mixed community is supported which provides housing for a range of households. Our recommended guide mix is set out in Table 5.8 below.

5.76 Our conclusions on the market housing mix for the Garden Village take account of:

- An expectation that a substantial proportion of the market demand will be from family households taking account of existing market dynamics and evidence, the cost differential to Oxford, as well as the nature of the land supply in Oxford where delivery of family housing is expected to be restricted;
- Alongside this providing a level of smaller 'more affordable' market homes for single persons and couples which contribute to an overall balanced mix, and provide housing opportunities for a range of households;
- Consideration of the potential for build-to-rent development[9] and older persons accommodation in the settlement, the housing profile of which can be expected to be more focused towards smaller properties.

Table 5.8 Recommendations on Market Housing Mix for Garden Village

	1-bed	2-bed	3-bed	4+-bed
Recommended Mix for New Market Homes in Garden Village	5-10%	20-25%	40-45%	25-30%

Market Housing Mix: Key Findings

Our recommendations on housing mix draw together analysis on the existing housing offer, market dynamics, demographic changes, the nature of employment growth and the inter-relationship between housing demand in Eynsham and what is being built in Oxford City.

We recommend that the focus of market housing on the remaining land at West Eynsham (which does not have planning consent) should be on two- and three-bed houses. This recognises the demand profile from households to both buy and rent; provides opportunities for older households to downsize; as well as opportunities for younger households moving into the area to buy a home that they can afford. It will help to balance the overall profile of homes across Eynsham.

[9] See analysis later in this section.

Within the Oxfordshire Cotswolds Garden Village, Iceni have recommended an overall guide mix for the development scheme as a whole, which is focused in particular towards three-bed houses; takes account of the limited supply of larger family homes expected to be delivered in Oxford; but is reasonably similar to the profile of homes needed across the District.

Clearly, the recommendations on housing mix should not apply precisely to every phase; given it will be appropriate for the housing mix in individual phases to respond to location (i.e. higher densities will be more appropriate around centres and transport hubs which will invariably result in a mix focussed more on smaller, flatted properties) and demand evidence at the time of development.

Build-to-Rent Development

5.77 The Private Rented Sector has been the key growth sector in the housing market for the last 15 years and now makes up just over 20% of all UK households. Since 2011, the private rented sector has been the second largest housing tenure in England behind owner-occupation, overtaking social housing.

5.78 In the context of the sector's growth over the last 20 years and a national housing shortage, successive Governments have looked to the Private Rented Sector to play a greater role in providing more new build housing and have sought to encourage "Build-to-Rent" development.

5.79 Build-to-Rent development is defined in the NPPF Glossary as "*purpose-build housing that is typically 100% rented out. It can form part of a wider multi-tenure development comprising either flats or houses, but should be on the same site and/or contiguous with the main development. Schemes will usually offer longer tenancy agreements of three years or more, and will typically be professionally managed stock in single ownership or management control."* It represents development which is constructed with the intention that it will be let (rather than sold).

5.80 The benefits of Build to Rent are strong and are best summarised in the Government's *A Build to Rent Guide for Local Authorities*[10] which was published in March 2015. The Guide notes the benefits are which ranging but can include:

- Helping local authorities to meet demand for private rented housing whilst increasing tenants choice "as generally speaking tenants only have the option to rent from a small-scale landlord".

[10] Accelerating housing supply and increasing tenant choice in the private rented sector: A Build to Rent Guide for Local Authorities (DCLG, March 2015)

- Retaining tenants for longer and maximising occupancy levels as Build to Rent investment is an income focused business model;

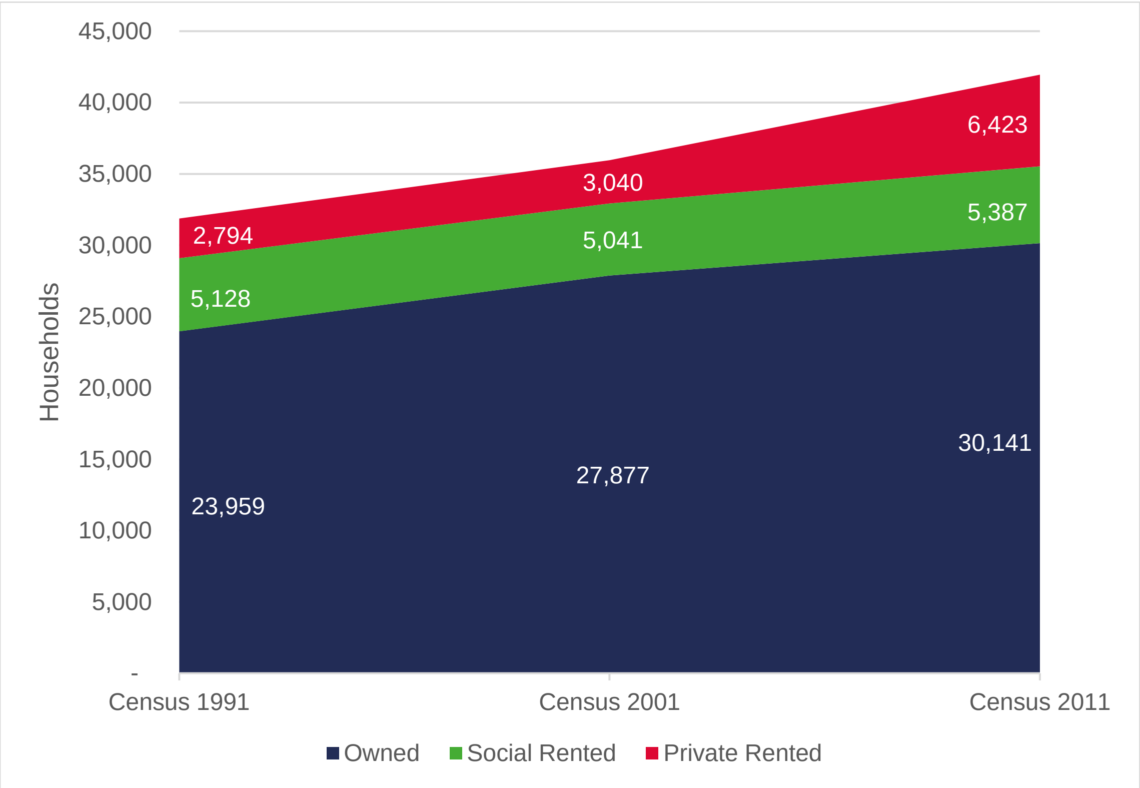
- Helping to increase housing supply, particularly on large, multiple phased sites as it can be built alongside build for sale and affordable housing; and

- Utilising good design and high-quality construction methods which are often key components of the Build to Rent model.

5.81 The 2019 NPPF now recognises the emergence of the strength of the Private Rented Sector. The Framework (paragraph 61) says the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies including **those people who rent their homes** (as separate from those in affordable housing need). The Framework's glossary also introduces a definition for Build to Rent development (as defined above), thus recognising it as a sector.

5.82 In West Oxfordshire, there has been strong growth in the Private Rented Sector. The Figure below shows the growth of the sector over the last three Census points. Rents at the district-level have been growing, albeit agents report current rents in Eynsham as stable.

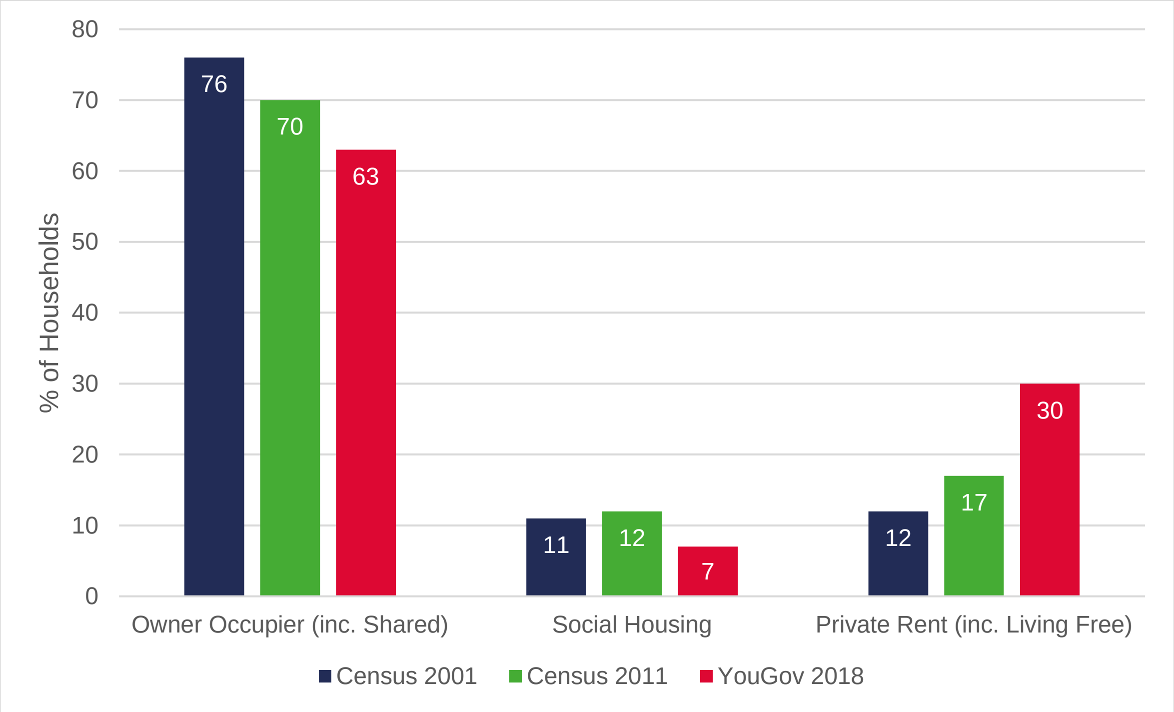
Figure 5.19: Growth of the Private Rented Sector in West Oxfordshire



5.83 Although the number of households overall has grown in West Oxfordshire over the two decades and all sectors have seen an increase in the number of households; the proportionate growth of the private rented sector is equal to 130% compared with 26% for owner-occupiers and just 5% for social renters.

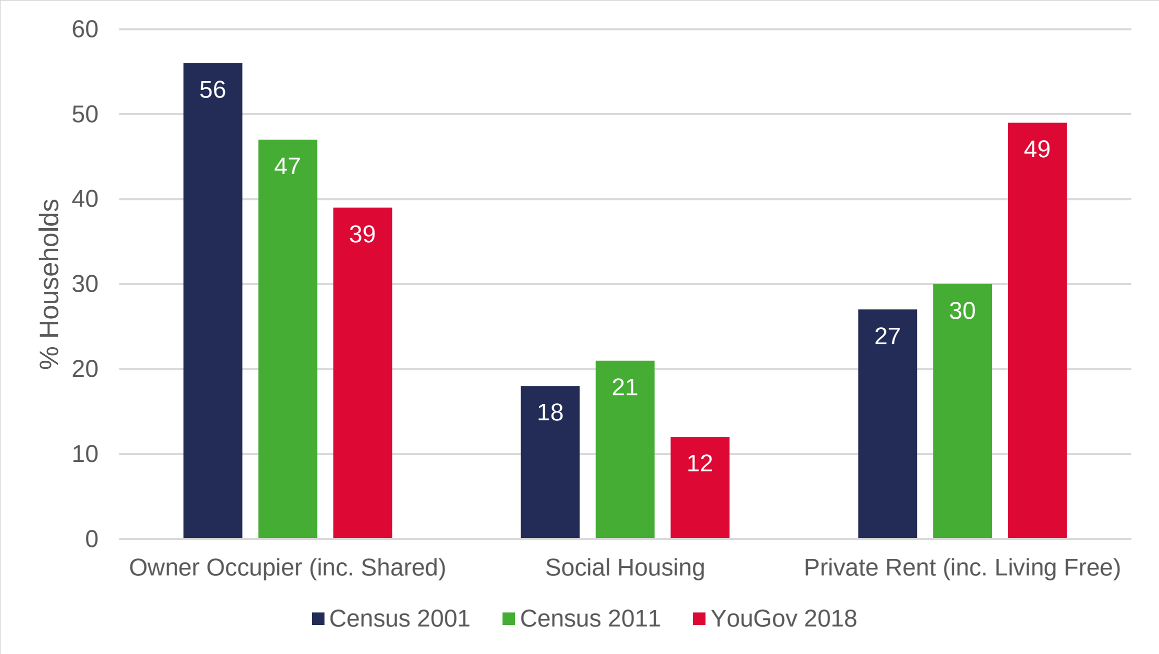
5.84 Recent data published by Shelter (July 2018) looks at growth in the private rented sector by local authority between the point of the 2011 Census to data collected by YouGov in 2018. The evidence clearly points to further significant growth in the private rented sector in West Oxfordshire since 2011. Because of the survey nature of the dataset, undue reliance should not be placed on the specific figures in Figure 5.20; however, it is clear that the sector has continued to grow over the period since the last Census in 2011.

Figure 5.20: Tenure Changes in West Oxfordshire, 2001-18 (Source: Shelter/ YouGov)



5.85 It's also worth highlighting that Oxford City has also experienced substantial growth in the Private Rented Sector. This is shown in the Figure below. Again undue reliance should not be placed on the individual figures from the survey; but it is clear that there is a sizeable, well-established private rental market in Oxford.

Figure 5.21: Tenure Changes in Oxford, 2001-18 (Source: Shelter/YouGov)



5.86 We note that our consultation with local lettings agents has highlighted the strength of the rental market particularly in and around Eynsham; and has also highlighted the strong relationship that Eynsham has with Oxford, both for young professionals and families who are residing in Eynsham and commuting to Oxford for work, it being a more affordable location within reasonable commuting distance.

5.87 The Build-to-Rent sector is one which we would describe as relatively 'embryonic' outside London and the Core Cities. It has developed over the last few years to a position where there are now a range of schemes in London, and schemes coming forwards in other Core Cities, but in many other areas there has been limited provision to date. Our research suggests that, surprisingly, there is no current provision in either Oxford or Cambridge – both of which have very sizeable Private Rented Sectors. We would however expect this to change over the coming years as the sector grows and matures.

5.88 Whilst Iceni would really see greater potential for purpose-build Built-to-Rent development in Oxford City itself, we do see potential for the delivery of Build-to-Rent development as part of the strategic development schemes being brought forward in the Eynsham area (the SDA and Garden Village). Underpinning this potential is:

- A large and established private rental market in the local area and Oxford;
- Attractiveness of good quality, purpose-build accommodation and longer tenancies; and
- The combination of high quality of life/place together with access to services/ jobs in Oxford.

5.89 Build-to-Rent development will cater for a different market segment from 'for sale' housing and has the potential to assist in boosting housing delivery rates.

5.90 In respect of the dwelling mix within a Build-to-Rent Scheme, we would expect the focus to be on 1, 2 and some 3-bed properties given the occupancy profile associated with private rented accommodation (see Figures 5.17 and 5.18). It can be expected to accommodate households typically aged in the 25-40 bracket who are unable to afford to buy a home; but may also include some older households looking for flexibility or whose circumstances have changed (e.g. divorcees). Given that this is a relatively embryonic sector, we would recommend that the Council is not overly prescriptive on the mix of dwelling sizes within new Build-to-Rent development.

5.91 The NPPF definition of Build-to-Rent development sets out that schemes will usually offer tenancy agreements of three or more years and will typically be professionally managed stock in single ownership and management control. It would be appropriate for the Council to adopt a consistent definition.

5.92 The Council will need to consider affordable housing policies specifically for the Build-to-Rent sector within the Garden Village through the AAP and clarify how affordable housing within any build-to-rent development at Eynsham might be treated within the SPD. The viability of Build-to-Rent development will however differ from that of a typical mixed tenure development: returns from the BTR development are phased over time whereas for a typical mixed tenure scheme, capital receipts are generated are the units are completed. There is potential for a proportion of build-to-rent units to be delivered as 'affordable private rent' housing. Planning Practice Guidance[11] states that:

> *"The National Planning Policy Framework states that affordable housing on build to rent schemes should be provided by default in the form of affordable private rent, a class of affordable housing specifically designed for build to rent. Affordable private rent and private market rent units within a development should be managed collectively by a single build to rent landlord.*
>
> *20% is generally a suitable benchmark for the level of affordable private rent homes to be provided (and maintained in perpetuity) in any build to rent scheme. If local authorities wish to set a different proportion they should justify this using the evidence emerging from their local housing need assessment, and set the policy out in their local plan. Similarly, the guidance on viability permits developers, in exception, the opportunity to make a case seeking to differ from this benchmark.*

[11] ID: 60-002-20180913

National affordable housing policy also requires a minimum rent discount of 20% for affordable private rent homes relative to local market rents. The discount should be calculated when a discounted home is rented out, or when the tenancy is renewed. The rent on the discounted homes should increase on the same basis as rent increases for longer-term (market) tenancies within the development"

5.93 The Council should have regard to the specific Planning Practice Guidance on Build-to-Rent development.

5.94 The starting point should therefore be that 20% affordable private rented homes at a discount of 20% to local market rents should be included within a development scheme. The Council should test the feasibility of this through viability analysis, but in order to help stimulate the market; Iceni does not consider that a higher proportion of affordable housing or higher discount should necessarily be applied. Our analysis of 'living rents' considered in Section 6 may help inform judgements regarding what rent levels are 'affordable.'

5.95 As part of both schemes, masterplans might reasonably consider where build-to-rent development would be best situated. It will be appropriate for a policy to be included within the Garden Village AAP to address build-to-rent development setting out what the Council defines as Build-to-Rent, that it seeks to support it, and the level of affordable housing applicable.

5.96 Iceni would consider that the Garden Village potentially offers a more suitable location for build-to-rent development given firstly the potential for a higher frequency public transport link to Oxford with a potentially shorter journey time; and the potential for higher density development as part of a district centre on the site. This will need to be further reviewed as framework plans for the schemes are developed.

5.97 We would advise that the Council also works proactively, potentially with the lead developers for the two schemes, to engage with specialist Build-to-Rent developers such as Grainger, Moda, Essential Living etc.

Build-to-Rent Development: Implications

There is a lack of schemes which have tested the market for build-to-rent development in Oxfordshire, including in Oxford City, but the evidence points to potential for build-to-rent development to come forward as part of strategic development at Eynsham.

Iceni recommend that the Council encourages build-to-rent development as part of strategic development at Eynsham, and works proactively with the site promoters to encourage interest from specialist developers in this sector. It is considered that a Build-to-Rent scheme should be located at an accessible location within the development with strong public transport accessibility.

Initially we consider that small scheme of 50 units – or more, should it be supported by the market - would be appropriate to test the market and demonstrate that the demand exists. The success of this could then support further PRS development within subsequent phases. The policy framework, particularly within the AAP as this will be part of the statutory development framework, should set out how the Council defines Build-to-Rent development and the level of affordable housing applicable; which we would recommend is aligned to national guidance, subject to viability testing.

Space Standards

5.98 The Government has set out a Nationally Described Space Standard which deals with internal space and addresses the minimum gross internal floor area and storage requirements for different sizes of dwellings.[12] Councils will need to justify policies for space standards within their Local Plan, with Planning Practice Guidance[13] indicating that to do so, Councils should take account of:

- Need – providing evidence on the size and type of dwellings currently being built in the area, to ensure the impacts of adopting space standards can be properly assessed;
- Viability – the impact of adopting the space standard should be considered as part of the plan's viability assessment.
- Timing – there may be a need for a reasonable transition period following the adoption of a policy to enable developers to factor in the costs into future land acquisitions.

5.99 Detailed data on the square footage of homes being built in West Oxfordshire is not available. Iceni has however reviewed the sizes of properties proposed at Taylor Wimpey's Thornbury Green Scheme. 90% of properties at this scheme appear to sit within or above the space standards for the number of bedrooms indicated.

5.100 The evidence in this report does not point to particular issues of overcrowding in West Oxfordshire. There are clear affordability issues in West Oxfordshire which suggest that policies which encourage delivery of larger homes could impact negatively on householders' ability to afford new homes. We

[12] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/524531/160519_Nationally_Described_Space_Standard____Final_Web_version.pdf

[13] ID: 56-020-20150327

do not consider that policies requiring homes to be constructed to the national space standard can therefore be justified.

Key Points – Market Housing Demand

Overall in respect of market housing mix, we recommend that the focus of market housing on the remaining land at West Eynsham (which does not have planning consent) should be on two- and three-bed houses. This recognises the demand profile from households to both buy and rent; provides opportunities for older households to downsize; as well as opportunities for younger households moving into the area to buy a home that they can afford. It will help to balance the overall profile of homes across Eynsham.

Within the Oxfordshire Cotswolds Garden Village, Iceni have recommended an overall guide mix for the development scheme as a whole, which is focused in particular towards three-bed houses; takes account of the limited supply of larger family homes expected to be delivered in Oxford; but is reasonably similar to the profile of homes needed across the District.

Clearly, the recommendations on housing mix should not apply precisely to every phase; given it will be appropriate for individual phases of development to respond to location (i.e. higher densities will be more appropriate around centres and transport hubs which will invariably result in a mix focussed more on smaller, flatted properties) and to take account of up-to-date market evidence.

Iceni recommend that the Council encourages build-to-rent development as part of strategic development at Eynsham and works proactively with the site promoters to encourage interest from specialist developers in this sector. A Build-to-Rent scheme should be located at an accessible location within the development with strong public transport accessibility.

Initially we consider that small scheme of 50 units – or more, should it be supported by the market - would be appropriate to test the market and demonstrate that the demand exists. The success of this could then support further PRS development within subsequent phases. The policy framework, particularly within the AAP as this will be part of the statutory development framework, should set out how the Council defines Build-to-Rent development and the level of affordable housing applicable; which we would recommend is aligned to national guidance, subject to viability testing.

In respect of space standards, the evidence in this report does not point to particular issues of overcrowding in West Oxfordshire. There are clear affordability issues in West Oxfordshire which suggest that policies which encourage delivery of larger homes could impact negatively on householders' ability to afford new homes. As a result, we do not consider that policies requiring homes to be constructed to the national space standard can therefore be justified.

6. AFFORDABLE HOUSING NEED

6.1 This section provides an analysis of the need for affordable housing. It responds to the particular context of the strategic developments at Eynsham whereby the allocation of these sites was to meet an unmet housing need from Oxford. It includes a review of existing housing needs evidence; as well as recognising that the definition of affordable housing has been widened, as set out in Annex 2 of the 2019 National Planning Policy Framework (NPPF).

What is affordable housing?

6.2 Affordable housing is defined by Government in the NPPF as "*housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route into home ownership and/or is for essential local workers)*." The NPPF then defines various forms of affordable housing including affordable housing to rent, starter homes, discounted market sale housing and other affordable routes into home ownership, including shared ownership housing.

6.3 Through the preparation of the NPPF and publication of associated Planning Practice Guidance, the Government has widened the definition of those considered to be in affordable housing need. It has traditionally encompassed households who require support or assistance to meet their basic housing needs. The expanded definition however now includes *'households which can afford to rent in the private rental market, but cannot afford to buy despite a preference for owning their own home'* and for whom affordable housing products are an important stepping stone into home ownership.

Entry-Level Market Housing Costs

6.4 Affordable housing needs are sensitive to housing costs. The affordable housing needs assessment compares prices and rents with the incomes of households to establish what proportion of households can meet their needs in the market, and what proportion require support and are thus defined as having an 'affordable housing need'.

6.5 Iceni have considered what entry-level housing costs are at the time of preparing this report. The approach has been to analyse Land Registry and Valuation Office Agency (VOA) data to establish lower quartile prices and rents.[14]

6.6 Data from the Land Registry for the year to September 2018 (i.e. Q4 2017 – Q3 2018) shows estimated lower quartile property prices in the area by dwelling type. Entry-level housing costs to buy are estimated to start from about £160,000 for a flat in West Oxfordshire and rising to over £500,000 for a detached home in Oxford. Prices in Eynsham sit above those for West Oxfordshire but below those in Oxford. Looking at the lower quartile price across all dwelling types the analysis shows a lower quartile 'average' price of £300,000 in Eynsham.

Table 6.1 Lower Quartile Cost of Homes to Buy – Year to September 2018

	Eynsham	West Oxfordshire	Oxford
Flat/maisonette	£220,000	£161,700	£242,800
Terraced	£272,500	£253,700	£322,500
Semi-detached	£312,000	£270,000	£346,300
Detached	£438,800	£386,800	£524,300
All dwellings	£300,000	£264,200	£312,800

Source: Land Registry

6.7 A similar analysis has been carried out for private rents using Valuation Office Agency (VOA) data. This covers a 12-month period to September 2018. For the rental data, information about dwelling sizes is provided (rather than types). The analysis shows an average lower quartile cost (across all dwelling sizes) of £775 per month in West Oxfordshire, rising to £1,000 in Oxford. For Eynsham an additional analysis has been undertaken to look at rental costs (using online information) and overall (as with prices) it is estimated that private rents sit somewhere between the District and City figures.

Table 6.2 Lower Quartile Market Rents, Year to September 2018

	Eynsham	West Oxfordshire	Oxford
Room only	-	£430	£475
Studio	-	£550	£780
1-bedroom	£785	£695	£880
2-bedrooms	£925	£818	£1,050
3-bedrooms	£1,125	£995	£1,275
4-bedrooms	£1,525	£1,350	£1,800
All properties	£875	£775	£1,000

Source: Valuation Office Agency and internet price search

6.8 Households which are not able to afford to meet these entry-level housing costs, to buy or to rent, are considered to have an affordable housing need.

Income Levels and Affordability

6.9 Household income has been modelled on the basis of a number of different sources of information to provide both an overall average income and the likely distribution of income. The key sources of data include:

- ONS modelled income estimates (published in April 2018 with a 2015/16 base) – this information is provided for middle layer super output areas (MSOA) and is therefore used to build up a profile for Eynsham and for West Oxfordshire;

- English Housing Survey (EHS) – to provide information about the distribution of incomes; and

- Annual Survey of Hours and Earnings (ASHE) – to assist in looking at how incomes have changed since the ONS base date.

- Data from the 'Local-Insight-Profile-for-Eynsham-Area' to provide an estimate for Eynsham (again updated based on recent changes).

6.10 The table below shows an estimated mean, median and lower quartile income (for all households) in each of the three areas studied. The analysis suggests that overall incomes do not vary substantially between the Eynsham area and the wider District.

Table 6.3: Estimated Household Income Levels, 2018

	Mean	Median	Lower quartile
Eynsham	£53,600	£40,800	£23,600
West Oxfordshire	£55,300	£42,000	£24,300
Oxford	£55,500	£42,200	£24,400

Source: Derived from a range of data as discussed

6.11 A household is considered able to afford market rented housing in cases where the rent payable falls below 35% of gross income. This is consistent with the agreed position in the Oxfordshire SHMA and has been accepted as part of the West Oxfordshire Local Plan Examination. Analysis of current letting practice suggests that letting agents typically work on a 40% figure. We have assumed a 10% deposit and 4 times mortgage multiple in considering households' ability to buy a home.

6.12 The distribution of household incomes is then used to estimate the likely proportion of households who are unable to afford to meet their needs in the private sector without support, on the basis of existing incomes. This analysis brings together the data on household incomes with the estimated incomes required to access private sector housing.

6.13 Different affordability tests are applied to different parts of the analysis depending on the group being studied (e.g. recognising that newly forming households are likely on average to have lower incomes than existing households). Assumptions about income levels for specific elements of the modelling are the same as in the 2014 Oxfordshire SHMA.

Oxford's Affordable Housing Need

6.14 The Local Plan states that of the 1,000 homes at the West Eynsham SDA, 450 homes will contribute to meeting West Oxfordshire's own housing needs; and 550 homes to Oxford's unmet housing need.

Para 5.16 states that the working assumption is that the Garden Village site north of the A40 will provide around 2,200 new homes, all of which will contribute to Oxford's unmet needs[15].

6.15 The latest evidence on affordable housing need in Oxford is set out in the OAN Update, Oct 2018, prepared by GL Hearn and JGC[16]. It uses an essentially consistent methodological approach to that herein. It shows a net need for 678 affordable homes per annum in Oxford City, based on the narrow definition of affordable housing in the previous 2012 NPPF (now superseded). This therefore represents an assessment of the need for rented affordable housing.

Table 6.4 Rented Affordable Housing Need in Oxford

Oxford City	Per Annum	2017-36
Current need	140	2,666
Newly forming households	669	12,709
Existing households falling into need	331	6,281
Total Gross Need	1,140	21,657
Re-let Supply	462	8,788
Net Need	678	12,879

How Much Should Rented Affordable Housing Cost?

6.16 The analysis above has studied the overall need for affordable housing using a well-established model. This model focusses on households who cannot afford to rent in the market without financial support. Next we move on to consider at what level rents could be set to ensure that housing was affordable to local people.

6.17 The analysis essentially considers what might be a 'Living Rent'. These calculations are based on research by JRF/Savills[17] and use the following methodology:

- Annual Survey of Hours and Earnings (ASHE) lower quartile earnings;
- Adjustment for property size by recognised equivalence model;
- Starting rent set at 28% of net earnings; and
- Rent set at Local Housing Allowance (LHA) limits where calculations show a higher figure.

[15] As set out in Para 5.27

[16] Oxford City – Objectively Assessed Need Update (GL Hearn and JGC, October 2018)

[17] http://pdf.savills.com/documents/Living%20Rents%20Final%20Report%20June%202015%20-%20with%20links%20-%2019%2006%202015.pdf

6.18 This analysis is used to consider at what level rents should be set to be considered genuinely affordable at a local level based on the current evidence/ position. The analysis suggests, taking account of incomes in both West Oxfordshire and Oxford, rents in the range of £326-£400 for a 1-bedroom home in and rising to £521-£639 for homes with 3-bedrooms would be appropriate for Eynsham. Generally, the suggested 'living rents' are lower than the relevant LHA.

Table 6.5 Living Rents in 2018

£ PCM	1-bedroom	2-bedroom	3-bedrooms
Living rent	£326-£400	£424-519	£521-£639
LHA limit (Oxford BRMA)	689	834	£997

Source: ASHE

6.19 As a general principle it is not considered sensible to charge a rent in excess of LHA limits, as this would mean households having to top up their rent from other income sources. **The issue of LHA limits should be a key consideration when setting rent levels as part of S106 negotiations for new development schemes**.

Implications of the Expanded Definition of Affordable Housing

6.20 The analysis above has considered the needs arising from households who cannot afford to either rent or buy without financial support. It has essentially considered the need for subsidised housing at a cost below that to access the private rented sector (i.e. for households unable to access any form of market housing without some form of subsidy). It would be expected that this housing would be delivered primarily as social/affordable rented housing.

6.21 The new NPPF widens the definition of affordable housing need to include households who might be able to rent privately without financial support, but who aspire to buy a home and need financial support to be able to do so. Such households might seek discounted market sales homes, starter homes, shared ownership properties and other affordable housing products which support people in accessing home ownership.

6.22 The NPPF promotes housing targeting such households, identifying that *"where major development involving the provision of housing is proposed, planning policies and decisions should expect at least 10% of the homes to be available for affordable home ownership, unless this would exceed the level of affordable housing required in the area, or significantly prejudice the ability to meet the identified affordable housing needs of specific groups."* (NPPF, para 64).

Quantifying the Need for Affordable Home Ownership

6.23 Planning Policy Guidance (July 2018) confirms a widening definition of those to be considered as in affordable need; now including *'households which can afford to rent in the private rental market, but cannot afford to buy despite a preference for owning their own home'*. However, at the time of writing, there is no specific guidance about how the number of such households should be measured. The methodology used in this report therefore draws on the method set out in the PPG to estimate households who can afford to rent, but cannot afford to buy, without financial support.

6.24 The first part of our analysis seeks to understand what the gap between renting and buying actually means in Eynsham (and across the wider area) – in particular establishing the typical incomes that might be required. In the year to September 2018, the 'average' lower quartile private rent in Eynsham is estimated to be £875 a month, assuming a household spends no more than 35% of income on housing, this would equate to an income requirement of about £30,000. For the same period, Land Registry data records a lower quartile price of about £300,000, which (assuming a 10% deposit and 4 times mortgage multiple) would equate to an income requirement of around £67,500.

6.25 On this basis, it is reasonable to suggest **that affordable home ownership products would be pitched at households with an income between £30,000 (i.e. able to afford to privately rent) and £67,500 (the figure above which a household might reasonably be able to buy)**.

6.26 We have sought to model the need for affordable home ownership housing for Eynsham and West Oxfordshire (as above) as well as for Oxford, to ensure that a consistent assessment is available.

6.27 Household income has been modelled on the basis of a number of different sources of information to provide both an overall average income and the likely distribution of income. The key sources of data include:

- ONS modelled income estimates (published in April 2018 with a 2015/16 base) – this information is provided for middle layer super output areas (MSOA) and is therefore used to build up a profile for Eynsham and for West Oxfordshire;

- English Housing Survey (EHS) – to provide information about the distribution of incomes; and

- Annual Survey of Hours and Earnings (ASHE) – to assist in looking at how incomes have changed since the ONS base date.

- Data from the 'Local-Insight-Profile-for-Eynsham-Area' to provide an estimate for Eynsham (again updated based on recent changes).

6.28 A household is considered able to afford market rented housing in cases where the rent payable falls below 35% of gross income. This is consistent with the agreed position in the Oxfordshire SHMA and has been accepted as part of the West Oxfordshire Local Plan Examination. Analysis of current letting practice suggests that letting agents typically work on a 40% figure. We have assumed a 10% deposit and 4 times mortgage multiple in considering households' ability to buy a home.

6.29 Based on the modelled distribution of incomes, it has been estimated that of all households living in the private rented sector, around 20% already have sufficient income to buy a lower quartile home, with 38% falling in the "rent/buy gap." The final 41% of private renters are estimated to have an income below which they cannot afford to rent privately.

6.30 These figures have been based on an assumption that incomes in the Private Rented Sector are around 88% of the equivalent figure for all households, as derived from the English Housing Survey, and are used as it is clear that affordable home ownership products are likely to be targeted at households living in or who might be expected to access this sector (e.g. newly forming households).

6.31 The finding that 20% of households in the Private Rented Sector are likely to have an income that would allow them to buy a home is also noteworthy and suggests that for many households, barriers to accessing owner-occupation are less about income/the cost of housing and more about other factors, which could for example include the lack of a deposit or difficulties obtaining a mortgage (for example due to a poor credit rating or insecure employment).

6.32 To study current need, an estimate of the number of household living in the Private Rented Sector (PRS) has been established, along with the same (rent/buy gap) affordability test described above. the start point is the number of households living in private rented accommodation; as of the 2011 Census there were some 246 households living in the sector. Data from the Survey of English Housing (EHS) suggests that since 2011, the number of households in the PRS has risen by about 26% - if the same proportion is relevant to Eynsham then the number of households in the sector would now be around 310.

6.33 Additional data from the EHS suggests that 60% of all PRS households expect to become an owner at some point (186 households if applied to Eynsham) and of these some 25% (47 households) would expect this to happen in the next two years. The figure of 47 households is therefore taken as the number of households potentially with a current need for affordable home ownership before any affordability testing.

6.34 As noted above, on the basis of income it is estimated that around 38% of the Private Rented Sector sit in the gap between renting and buying. Applying this proportion to the 47 households figure would suggest a current need for around 18 affordable home ownership products (equivalent to 1-2 per annum if annualised over a 12-year period).

6.35 In projecting forward, the analysis can consider newly forming households and also the remaining existing households who expect to become owners further into the future. Applying the same affordability test (albeit on a very slightly different income assumption for newly forming households) suggests an annual need from these two groups of around 17 dwellings (12 from newly forming households and 4 from existing households in the private rented sector) in Eynsham.

6.36 Bringing together all of this analysis suggests that there is a need for around 18 affordable home ownership homes (priced for households able to afford to rent but not buy) per annum in the 2019-31 period in Eynsham. This is shown in the table below along with equivalent calculations for West Oxfordshire and Oxford. An analysis is included for Oxford as development at the West Eynsham SDA and the Garden Village is expected contribute to addressing Oxford's unmet housing needs. A gross need from 390 affordable home ownership homes is identified in Oxford.

Table 6.6 Estimated Gross Need for Affordable Home Ownership Properties (per annum 2019 – 2031)

	Eynsham	West Oxon	Oxford
Current need	1	39	74
Newly forming households	12	236	417
Existing households falling into need	4	116	223
Total Gross Need	18	390	714

Source: Census (2011)/Projection Modelling and affordability analysis

Potential Supply of Housing to Meet the Affordable Home Ownership Need

6.37 The lower quartile cost of a home to buy in Eynsham is around £300,000. By definition, a quarter of all homes sold (noting that the data is for the year to September 2018) will be priced at or below this level. There were a total of 72 sales in this period and therefore around 18 would be priced below the lower quartile. This is 18 homes that would potentially be affordable to the target group for affordable home ownership products and is a potential supply that is the same as the level of need calculated.

6.38 However, in reality not all of these homes will be available to households who can only afford a product in the "rent/buy gap." Market homes are not allocated and so there is no control over who buys them. In addition, at the very bottom end of the market there could be some homes that require significant investment due to condition or are bought by landlords seeking to rent them out. For these reasons, and for the purposes of providing outputs, it has been assumed that half of the lower quartile stock would be available to meet the needs of households in the "rent/buy gap."

6.39 The table below therefore shows the potential need for affordable home ownership products. It shows a clear potential needs group who would benefit from delivery of affordable home ownership homes.

Table 6.7 Estimated Need for Affordable Home Ownership Homes – per annum

	Eynsham	West Oxon	Oxford
Current need	1	39	74
Newly forming households	12	236	417
Existing falling into need	4	116	223
Gross need	18	390	714
Supply from relets	9	228	177

Net need	9	163	537

Source: Census (2011)/Projection Modelling/affordability analysis/Land Registry

6.40 Iceni conclude that it would be appropriate to continue to seek affordable housing provision in line with West Oxfordshire's Local Plan affordable housing policy which seeks a tenure split of affordable housing of 66% social/ affordable rented and 33% intermediate housing (as a proportion of the total affordable provision) subject to viability.

What Tenure Profile of Affordable Housing should be sought?

6.41 In respect of the tenure of rented affordable housing, our analysis indicates that looking at this purely on affordability grounds suggests a need for between 17% and 23% of rented homes to be at affordable rents and the rest (77%-83%) at social rent levels. However, arguably the proportion of affordable rents could be higher due to:

- The fact that most rented homes are at social rents (i.e. there are currently relatively few affordable rented homes);
- The fact that as long as the rent is below LHA limits it is likely to be affordable even to a household with little or no earned income, as earnings can be 'topped up' by benefits;
- These figures are based on affordable rent being 80% of the market – a lower proportion would make it affordable to more households; and
- If viability is a consideration, then a greater proportion of affordable rents might be prudent if it allows for more affordable homes to be completed.

6.42 However, provision of social rented housing would be the most affordable option and it may well have additional social benefits such as enabling households to return to work. Social rented housing is likely to be the best option for those with the most acute needs although as noted above, if they are fully benefit dependent then an affordable rent (at or below LHA) would arguably be as affordable, even though the rent is higher.

6.43 The Local Plan Viability Study[18] modelled affordable housing based on affordable rents at 80% local market rents. Providing rented affordable housing at 'social rents' (as the emerging policy in Oxford promotes) or increasing the discount applied to local market rents will reduce the 'transfer values' for

[18] Aspinall Verdi (2016) Local Plan and CIL Viability Assessment

affordable housing impacting on development viability. Alternative splits might therefore be sensible to test through viability analysis in informing the Council's policies.

6.44 It should be noted that West Oxfordshire's Local Plan seeks a profile of affordable housing whereby two thirds (66%) of provision is at an affordable rent, and one third (33%) comprises intermediate housing. There are a number of issues for the Council to consider in assessing whether it should amend the provision of affordable housing which is targeted:

- The trade-off between meeting the needs of those with more acute housing needs, whose needs are focused more towards social rented provision; as against
- Provision of higher proportions of affordable home ownership (intermediate) products, which should support viability, and thus contribute to higher affordable housing provision more widely.

6.45 Considered purely on the needs evidence, provision of 20% of homes for affordable home ownership and 30% of homes for rented affordable housing would be justified, with a split of rented provision, such as 50% social rent and 50% affordable rent (at 80% of market rents) within the rented proportion of affordable housing. However the social rented provision within this is likely to impact on viability (as would requiring discounts of above 20% on OMV within the affordable home ownership homes), and there is thus a trade-off between what effectively delivering homes which are more affordable and thus better meet local housing needs, as against the level of affordable housing provision which can viably be delivered.

How Much Should Affordable Home Ownership Homes Cost?

6.46 The analysis and discussion above suggest that there are a number of households likely to fall under the new PPG definition of affordable housing need (i.e. in the gap between renting and buying) but that the potential supply of housing to buy makes it difficult to fully quantify this need. Our analysis above suggests that 20% affordable home ownership homes would be justified (noting that national policy requires at least 10%).

6.47 Iceni recommends shared ownership as the most appropriate form of affordable home ownership and also encourages consideration of other packages such as providing support for deposits. However, it is possible that some housing would come forward as other forms of housing such as Starter Homes or discounted market sale. If this is the case, it will be important for the Council to ensure that such homes are sold at a price that is genuinely affordable for the intended target group.

6.48 To ensure that affordable home ownership properties are genuinely affordable for local people, it is appropriate to consider what such properties should be sold for. NPPF Annex 2 indicates that such housing should be made available at a discount of at least 20% from Open Market Value (OMV).

The problem with having a percentage discount is that it is possible in some locations or types of property that such a discount still means that housing is more expensive than that typically available in the open market.

6.49 The preferred approach in this report is to set out a series of affordable purchase costs for different sizes of accommodation. These are based on establishing the income range represented by the 'rent-to-buy gap' and then calculating what this represents in respect of housing costs.

6.50 The table below shows the suggested range (by size) for which affordable home ownership properties could potentially be made available so as to be affordable to households in the rent/buy gap. The range is quite large and reflects the sizeable gap in incomes required to just about be able to rent up to nearly being able to afford to buy.

6.51 In deciding where to set a cost for this type of housing there are a number of factors to consider:

- Housing priced at the top end of the range is likely to be affordable to only a small proportion of those in the rent/buy gap;
- Housing at the bottom end of the range will potentially be affordable to a much greater proportion of households, but may be less viable to provide which could have a knock-on impact to the ability to provide rented tenures;
- Therefore, there will to some degree be a choice to be made in terms of the balance between the affordability of affordable home ownership and provision of rented housing that will be meeting more acute needs.

Table 6.8 Affordable Home Ownership Prices – Year to Sept 2018

	Affordable Purchase Price
1-bedroom	£120,000-£175,000
2-bedroom	£145,000-£250,000
3-bedroom	£175,000-£350,000
4-bedroom	£240,000-£450,000

Source: derived from VOA data

6.52 It is also possible to look at shared ownership homes in terms of what level of equity share would be needed to be affordable. The table below shows the Open Market Value (OMV) that would need to be achieved for homes to be affordable. The analysis looks at a 25% and 50% equity share and makes an assumption that 2.75% of the retained equity is paid in rent each year.

6.53 Figures are again set out as a range to reflect different pricing in West Oxfordshire and Oxford. The analysis shows that higher OMVs can be achieve if the initial equity purchase is lower. The OMV figures are also substantially higher than the estimated purchase prices for discounted market sale.

Table 6.9 Estimated Maximum OMV for Shared Ownership/ Equity Properties to be Affordable

	25% equity	50% equity
1-bedroom	£201,000-£255,000	£154,000-£196,000
2-bedroom	£237,000-£304,000	£182,000-£234,000
3-bedroom	£288,000-£370,000	£221,000-£284,000
4-bedroom	£391,000-£522,000	£301,000-£401,000

Drawing the Analysis Together – Affordable Housing Mix

Provision of affordable housing within the strategic developments at Eynsham is intended to help contribute to meeting Oxford's housing needs. Our approach has been to consider the existing needs evidence, and to take account of the expanded definition of affordable housing which brings in households who might be able to afford to rent privately but aspire to own a home, and require support to do so. The analysis brings together evidence of need. But in doing so it is important to recognise that there is some overlap between the 'target market' for affordable home ownership products and support provided by Help-to-Buy in helping households to access market housing.

Iceni conclude that purely on the needs evidence, provision of 20% of homes for affordable home ownership and 30% of homes for rented affordable housing would be justified, with a split of rented provision, such as 50% social rent and 50% affordable rent (at 80% of market rents) within the rented proportion of affordable housing; however, due consideration should be given to social rented provision's impact on viability.

Iceni would recommend that rental costs do not exceed Local Housing Allowance levels (which in particular may require costs to be set below 80% market rents, particularly for larger properties); and that for affordable home ownership homes, these take account of the price brackets shown in Tables 6.8 – 6.9 above.

Need for Different Sizes of Affordable Housing

6.54 Using the same Housing Market Model as described in Section 5, Iceni and JGC has sought to model the profile of need for different sizes of affordable homes. Our modelling uses Census data to consider how households of different ages typically occupy homes by sector. We have used occupancy patterns for the Private Rented Sector to consider the occupancy profile for affordable home ownership products (which is reasonable given that the Government's drive for home ownership is related to a wish to increase access to housing for those who are principally private renters currently). For rented affordable housing we have drawn on Census data relating to the Social Rented Sector.

6.55 In order to model the needs of different sizes of homes, we have assumed that 20% of homes are delivered for affordable home ownership; and 30% for rented affordable housing. These are modelling assumptions for the purposes of considering the sizes of homes needed, recognising that occupancy varies by sector.

6.56 Recognising that the mix of housing to be delivered in the West Eynsham SDA is focused more on meeting local needs and catering for needs of its residents, we have modelled first provision of 1000 homes associated with the SDA. We have assumed an occupancy profile of this consistent with that for West Oxfordshire.

6.57 We then move on to consider the needs associated with the Garden Village which is driven essentially by additional in-migration. In doing so we have modelled needs associated with how households occupy homes in West Oxfordshire; and in Oxford.

Table 6.10 Implications of Demographic Changes on Affordable Housing Mix in West Eynsham SDA

	1-bed	2-bed	3-bed	4+-bed
Social/Affordable Rented	21%	44%	32%	3%
Affordable Home Ownership Homes	16%	39%	34%	12%

6.58 In doing so, we have taken into account that some households might come from West Oxfordshire's Housing Register (with relets of existing properties used to make provision for a proportion of Oxford's unmet needs).

6.59 For the Garden Village, we have adjusted in-migration on the basis of additional people moving to the site. We have shown figures based on both the West Oxfordshire and Oxford City occupancy profile.

Table 6.11 Implications of Demographic Changes on Market Housing Mix in Oxfordshire Cotswolds Garden Village

	1-bed	2-bed	3-bed	4+-bed
Social/Affordable Rented	19-32%	31-42%	31-35%	4-6%
Affordable Home Ownership Homes	16-24%	33-39%	24-34%	12-19%

6.60 Since the Census, the Government has however reformed social rented sector size criteria limiting the rent which can be covered by Housing Benefit or Universal Credit for households of working age to that which the household needs. The effect of this has been to shift needs somewhat towards smaller sized properties.

6.61 We have additionally considered the profile of residents on the Council's Housing Register. This is shown in Table 6.22 below. This shows a greater need for 1-bed properties (50%+ of the need); but does not show the relative need of those in different bands – which tends to be higher for those seeking larger properties. Moreover providing larger properties can help to accommodate transfer requests, which in turn release smaller properties for other households.

Table 6.12 Profile of Need on West Oxfordshire Housing Register (April 2019)

	1 bed single	1 bed couple	2 bed	3 bed	4 bed	5 bed	6 bed
Eynsham - Woodstock Sub-Area	579	264	497	164	53	6	2
	37.0%	16.9%	31.8%	10.5%	3.4%	0.4%	0.1%
West Oxfordshire District	1013	374	859	280	93	19	3
	38.4%	14.2%	32.5%	10.6%	3.5%	0.7%	0.1%

6.62 Taking the above into account, Iceni consider that the following mix of homes should be sought through new development schemes at Eynsham (as shown in Table 6.23 below). The mix proposed is relatively similar to that proposed in the SDA and Garden Village Issues Papers, and our analysis essentially endorses the mix proposed therein. It is also not that dissimilar to that proposed in the 2014 Oxfordshire SHMA as shown in the table for comparative purposes.

Table 6.13 Recommended Affordable Housing Size Mix

	1-bed	2-bed	3-bed	4+-bed
Social/Affordable Rented	30-35%	30-40%	30-35%	5%
Affordable Home Ownership	20-25%	40%	25-30%	5-10%
2014 SHMA Conclusions on Affordable Housing Mix (for comparison	25-30%	30-35%	30-35%	5-10%
Proposed Affordable Housing Mix in SDA and Garden Village Issues Paper	20-30%	30-40%	30-35%	5-10%

Sizes of Affordable Homes – Key Points

Our analysis concludes that the mix of affordable housing proposed in the Issues Papers for the Garden Village and West Eynsham are broadly appropriate, with a balance of provision of different sizes of homes but with the greatest provision being of 2- and 3-bed properties. Table 6.23 above shows how this splits into the mix appropriate for social / affordable rented properties and affordable home ownership properties.

7. SPECIALIST HOUSING NEEDS

7.1 This section considers the housing needs for specific groups within the local population including older persons; persons with disabilities; families; and younger people. It also considers cohousing and the design of flexible housing which can be adapted to the needs of different households.

7.2 Upfront it is worth noting that the scale of growth proposed in/ around Eynsham through the delivery of the SDA and Garden Village will result in additional in-migration to the area; and therefore the development schemes can be expected to meet a localised housing need and more. In drawing additional migrants into the area, there is a degree to which the profile of migrants will be influenced by the types of homes built. We have therefore sought to consider demographics but also market and commercial considerations.

A Growing Older Population

7.3 Oxfordshire County Council's population projections expect a 44% increase in the population aged over 65 between 2016-31 across the County. 55% growth is expected in those aged over 85 (+9,400 persons) across the County, with an increase of 1,900 persons aged over 85 in West Oxfordshire taking account of levels of planned housing growth influenced in particular by increases in life expectancy.[19]

7.4 As the NPPF Glossary definition of "older people" states, the housing needs of older people vary and range from accessible, adaptable general needs housing through to the full range of retirement and specialist housing for those with support or care needs.

7.5 Many older persons will continue to live in mainstream housing. Indeed many will live in homes that they have for many years. However, it is important that a choice of suitable accommodation for households changing needs is available, and a proportion of older persons may wish or need to move to specialist older persons accommodation or housing with care. The need for specialist housing is considered further below.

7.6 In developing its Local Plan, the Council prepared a Topic Paper on *Accessible and adaptable housing and wheelchair adaptable dwellings.*[20] This set out that the population of older persons in Oxfordshire is expected to grow faster than regional or national averages, driven by increasing life

---

[19] Oxfordshire Joint Strategic Needs Assessment, 2018

[20] https://www.westoxon.gov.uk/media/1610949/HOU22-Topic-Paper-Accessible-and-Adaptable-Housing-and-Wheelchair-Adaptable-Housing-May-2017.pdf

expectancy, for many, their latter years would be spent living with disabilities which will impact on their housing requirements. The evidence within the Paper showed that the numbers of people aged over 65 with limiting long-term illness was expected to grow; and that this justified building 25% of homes to accessible and adaptable standards, as defined in Part M4(2) of the Building Regulations.

People with Disabilities

7.7 Census data shows a greater prevalence of both people, and households which include people, in Eynsham with a long-term health problem or disability than is the case at the District or County level (Table 7.1).

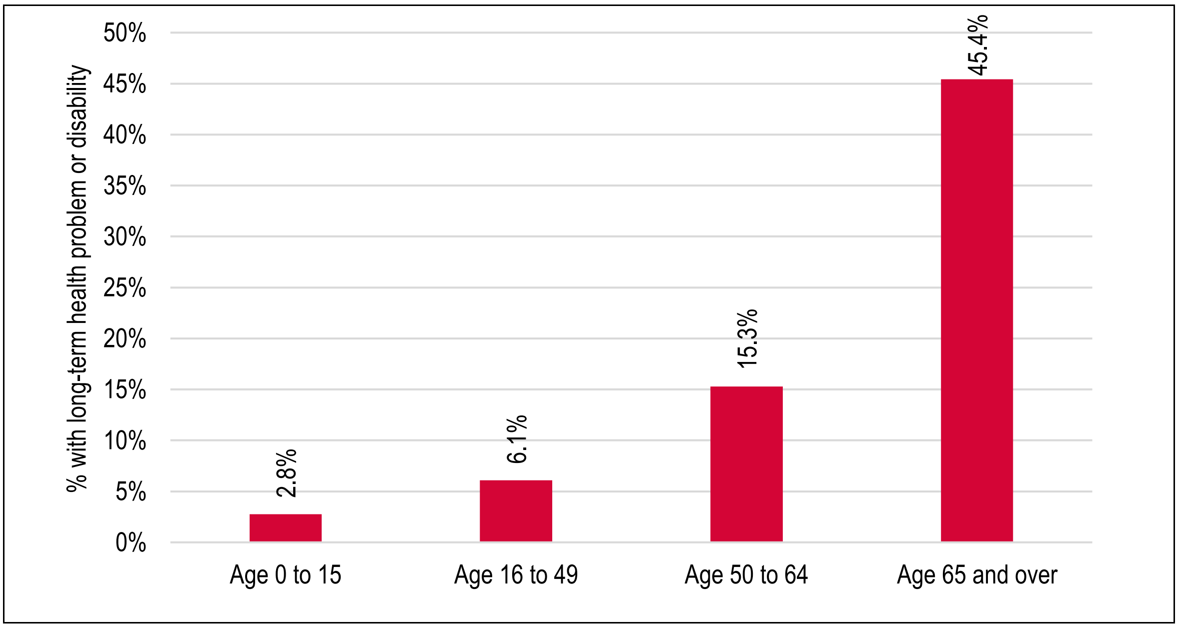
Table 7.1: Households or People with a Long-term Heath Problem or Disability, 2011

	Households containing someone with a health problem		Population with a health problem	
	Number	%	Number	%
Eynsham	605	30.6%	757	16.3%
West Oxfordshire	11,733	27.1%	15,149	14.5%
Oxford	14,504	26.2%	18,851	12.4%
Oxfordshire	69,824	27.0%	89,756	13.7%
South East	1,048,887	29.5%	1,356,204	15.7%
England	7,217,905	32.7%	9,352,586	17.6%

Source: 2011 Census

7.8 It is also clear that the prevalence of long-term health problems or disability (LTHPD) is focused in particular towards older households aged 65 and over (see Figure 7.1 overleaf). The age specific prevalence rates shown above can be applied to the demographic data to estimate the likely increase over time of the number of people with a LTHPD.

Figure 7.1: Population with Long-Term Health Problem or Disability – Eynsham



Source: 2011 Census

7.9 We can apply prevalence rates for those with a long-term health problem/ disability to the projected population growth in the Eynsham area which is expected to arise from delivery of the Garden Village and SDA. This shows an increase of 1,169 persons with an LTHPD. Most of this increase is expected to be in age groups aged 65 and over.

Table 7.2: Estimated Change in Population with LTHPD – Eynsham

	Population with LTHPD		**Change (2019-31)**	**% change from 2019**
	2019	2031		
Linked to 3,200 additional homes	875	2,044	1,169	133.5%

Source: Derived from demographic modelling and Census (2011)

7.10 We can also assess what growth in specific health issues may be seen. For this, data from the Projecting Older People Information System (POPPI) website[21] has been used. The website provides prevalence rates for different disabilities by age and sex. For the purposes of this study, analysis has focussed on estimates of the number of people aged over 65 with dementia and mobility problems.

[21] The figures from POPPI are based on prevalence rates from a range of different sources and whilst these might change in the future (e.g. as general health of the older person population improves) the estimates are likely to be of the right order.

7.11 The Table below shows that both of the illnesses/disabilities are expected to increase significantly in the future. In particular, there is projected to be a large rise in the number of people with dementia (up 146%) along with a 133% increase in the number with mobility problems.

Table 7.3: Estimated Growth in Persons with Key Heath Issues in Eynsham Area – 2019-31

Type of illness/ disability	2019	2031	Change	% increase
Dementia	87	214	127	**146.3%**
Mobility problems	**231**	**536**	**306**	**132.6%**

Source: Data from POPPI and demographic projections

7.12 To address the growth in those with a disability, including mobility problems, Iceni consider at least 25% of new homes should be delivered to Part M4(2) accessible and adaptable homes standards, as per the Local Plan policy.

Wheelchair User Housing

7.13 Some households may also require housing which can accommodate wheelchairs. Part M of the Building Regulations sets a distinction between wheelchair accessible (a home readily useable by a wheelchair user at the point of completion) and wheelchair adaptable (a home that can be easily adapted to meet the needs of a household including wheelchair users) dwellings. Local Plan policies for wheelchair accessible homes should be applied only to those dwellings where the local authority is responsible for allocating or nominating a person to live in that dwelling.

7.14 Information about the need for housing for wheelchair users is difficult to obtain (particularly at a local level). The approach used in this report has been to consider national data within a research report by Habinteg Housing Association and London South Bank University (Supported by the Homes and Communities Agency) entitled *Mind the Step: An estimation of housing need among wheelchair users in England*.

7.15 The report identifies that around 84% of homes in England do not allow someone using a wheelchair to get to and through the front door without difficulty and that once inside, it gets even more restrictive. Furthermore, it is estimated (based on English House Condition Survey data) that just 0.5% of homes meet criteria for 'accessible and adaptable', while 3.4% are 'visitable' by someone with mobility problems and the proportion of 'visitable' properties at a slightly higher 5.3%.

7.16 Overall, the report estimates that there is an unmet need for wheelchair user dwellings equivalent to 3.5 per 1,000 households. In Eynsham, as of 2019, this would represent a current need for about 7 wheelchair user dwellings. Moving forward, the report estimates a wheelchair user need from around 3% of households. If 3% is applied to the household growth in the demographic projections (2019-31) then there would be an additional need for around 90 adapted homes. If these figures are brought together with the estimated current need then the total wheelchair user need would be for around 100 homes.

Table 7.4 Estimated need for wheelchair user homes (2019-2031) – Eynsham

	Current need	Projected need (2019-31)	Total
Linked to 3,200 dwellings	7	93	101

Source: Derived from demographic projections and Habinteg prevalence rates

7.17 Information in the CLG Guide to available disability data also provides some historical national data about wheelchair users by tenure (data from the 2007/8 English Housing Survey). This showed around 7.1% of social tenants to be wheelchair uses, compared with 2.3% of owner-occupiers (there was insufficient data for private renting, suggesting that the number is low).

7.18 Local Plan Policy H4 requires at least 5% of homes to be 'wheelchair adaptable' designed to meet Building Regulation Requirement M4(3). On the basis of the above evidence, this would remain an appropriate standard to apply as part of the two strategic development schemes at Eynsham.

Implications – Persons with Disabilities

With a growth in the population in the Eynsham area expected to 2031 and in particular as a result of increasing life expectancy, an increase of over 1,100 persons with a long-term health problem or disability is projected. A growing number of households will include people with mobility problems, or who need adaptions to properties. A need for around 100 homes which are suitable for wheelchair-users is also identified. The analysis identifies a notable proportion of the population/households as having some form of disability and that numbers are likely to increase substantially in the future. This would suggest that there is a clear need to increase the supply of accessible and adaptable dwellings and wheelchair user dwellings as well as providing specific provision of older persons housing.

The Local Plan policy requirement that at least 25% of new homes should be delivered to Part M4(2) accessible and adaptable homes standards; and that at least 5% are designed to be 'wheelchair adaptable' as per Part M4(3) is therefore justified and should be met through the new developments.

Given the evidence, the Council could consider requiring all dwellings to meet the M4(2) standards (which are similar to the Lifetime Homes Standards). Data in the DCLG Housing Standards Review (Cost Impacts) of September 2014 identified a cost range to meet this standard in new homes of

£520 to £940 depending on dwelling size and built-form. Whilst this is clearly an additional cost it is unlikely to fundamentally alter scheme viability.

In seeking M4(2) compliant homes, the Council should also note that there will be circumstances where achieving the standard is not practical (e.g. where level access cannot be achieved) – in such cases the standard would not apply (i.e. it would not be expected that a dwelling should meet a 'partial' standard). The Council should also be mindful that such homes could be considered as 'homes for life' and would be suitable for any occupant, regardless of whether or not they have a disability at the time of initial occupation; this point would support seeking a high proportion of new homes as meeting the standard.

If the Council does not pursue a policy seeking 100% of homes as meeting the M4(2) standards (through the Garden Village AAP) it should consider if a different approach is prudent for market housing and affordable homes, recognising that Registered Providers may already build to higher standards, and that households in the affordable sector are more likely to have some form of disability.

Need for Specialist Housing for Older Persons

7.19 There is a spectrum of different types of specialist housing for older persons. These are shown in Figure 7.1 overleaf. Drawing on what is set out in the 2012 Housing our Ageing Population (HAPPI) Report,[22] housing for older persons can be divided into three categories:

- **Mainstream housing** – which is not designated for a specialist group. This includes general needs housing, including accessible and adaptable dwellings (as defined in Requirement M4(2) in the Building Regulations) and wheelchair-user dwellings (as defined in Requirement M4(3) therein).

- **Specialist retirement housing** – which is housing specifically designed for older people with access to care and support. This includes sheltered/ retirement housing, assisted living, extra care housing and retirement villages.

- **Residential care or care home accommodation** – which is institutional accommodation (a suite of bedrooms) with care services and facilities. It includes residential homes and nursing homes.

[22] HCA, CLG & Department of Health (2012) *Housing our Ageing Population – Panel for Innovation*

7.20 There are a range of different forms of specialist retirement housing which can reflect both the varying needs of older persons and commercial considerations.

7.21 **Sheltered housing schemes and over 55 developments** are similar to general housing, but are age-restricted, typically for those aged 55 or over. They offer independent self-contained homes, with households having their own front door, which can include properties to buy or rent. Properties can include specific design features, such as raised electric sockets, lowered worktops, and walk-in showers. Some may be designed to accommodate wheelchair users or mobility scooters. There is usually also an emergency alarm service or other telecare infrastructure.[23]

7.22 Some schemes have a 'manager' or 'warden', either living on-site or nearby, whose job is to manage the scheme and help arrange any services residents need. Managed schemes may also have some shared or communal facilities such as a lounge for residents to meet, a laundry, a guest flat and a garden. On other schemes, staffing can be limited, typically focused on the maintenance of communal areas or grounds.

7.23 **Extra care housing** is housing with care primarily for older people where occupants have specific tenure rights to occupy self-contained dwellings and where they have agreements that cover the provision of care and support, and domestic, social, community and/or other services. Residents may not be obliged to obtain their care services from a specific provider, though other services (such as domestic services, costs for communal areas and in some cases meals) might be built in to charges the residents pay. Extra care units can be available on either a leasehold or rented basis.

7.24 The Housing Learning and Improvement Network (Housing LIN), a knowledge hub on specialist housing issues which is recognised by Government and the housing with care sector, has identified a core set of ingredients that are part of extra care housing. Schemes are typically purpose-built, accessible buildings that promote independent living and support people in place as they age; contain self-contained properties where occupants have their own front doors; some communal spaces and facilities; office/staff space; access to domiciliary care[24] and support services 24 hours

[23] Telecare is technological infrastructure that helps a person live safely and independently, such as a personal trigger, fall detector or smoke alarm.

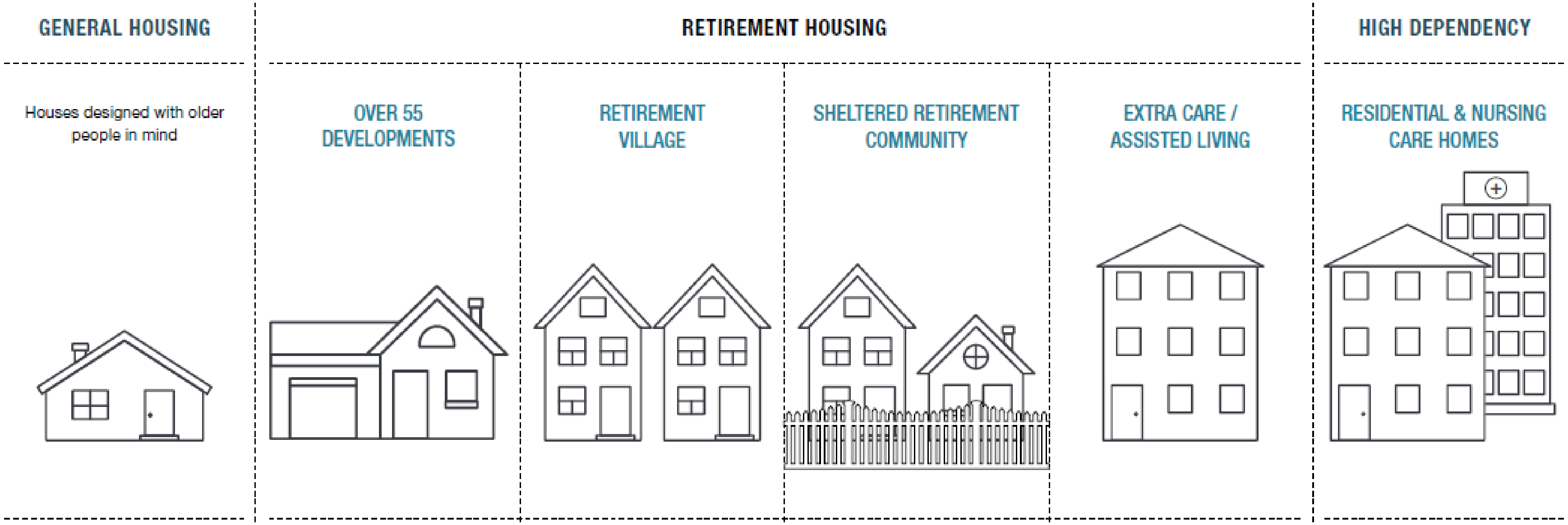
[24] Domiciliary Care is care provided in an individual's home, normally of a personal nature such help with dressing, washing or toileting. It can be arranged by Social Services following an assessment of need, or can be arranged privately by the individual themselves, or someone acting for them.

a day; community alarms and other assisted technology; with safety and security often built into the design of the scheme.[25]

7.25 **Retirement villages and communities** are typically larger schemes, with 100 or more units, which can offer a variety of housing types, and an extended range of facilities for older people in an attractive setting. They typically accommodate residents with varying support and care needs, and are designed so that the level of care/support provided can change over time, as people's needs change. Social, sport/leisure and retail facilities may also be provided on site, as these can be supported by the greater scale of the scheme. Schemes offer a range of housing options and opportunities for social interaction and activities.

[25] Housing LIN Factsheet 1: Extra care housing – What is it in 2015?

Figure 7.2: Types of Housing for Older People



Source: Knight Frank, UK Healthcare Property Market 2018

7.26 Given the projected changes in the number of older people living in Eynsham, there is likely to be a requirement for specialist housing options moving forward. To provide an indicative modelling of housing needs, we have considered the projected population growth which might result from the delivery of 3,200 homes in the Eynsham area through the delivery of the SDA and Garden Village developments. To this we have applied typical prevalence rates to estimate the need for specialist housing for older persons.

7.27 The analysis is split between the need for dwellings (typically sheltered and extra-care housing) and the need for care home bedspaces. Suggestions about the tenure split of housing is also provided. It should however be noted upfront that the modelling assumes a consistent profile of migration to West Oxfordshire as past trends, and there is potential for the nature of the developments (and mix of homes within them) to influence this.

7.28 The table below shows how the population of the Eynsham area is projected to change in the 2019 to 2031 period with the growth envisaged. The analysis shows that the number of people aged 65 and over is projected to more than double over the 12-year period (increasing by 121%) whilst the proportion aged 75 and over is projected to increase by 134%. This latter figure is important as modelling of needs for specialist accommodation uses the population aged 75 and over as the baseline against which prevalence rate calculations are undertaken.

Table 7.4 Projected Change in Older Person Population – Eynsham Area

	Population 2019	Population 2031	Change	% change
Under 65	3,815	11,026	7,211	189%
65-74	654	1,362	708	108%
75-84	472	1,042	569	121%
85+	145	404	259	179%
Total	5,086	13,834	8,748	172%
65+	1,271	2,807	1,537	121%
75+	617	1,446	828	134%

Source: Demographic projections

Older Persons' Housing Needs – Sheltered & Extra-Care Housing

7.29 The analysis in this section draws on data from the Housing Learning and Information Network (Housing LIN) Shop@ online toolkit. This data is considered alongside demographic projections to provide an indication of the potential level of additional specialist housing that might be required for older people in the future.

7.30 The data for need is calculated by applying prevalence rates to the population aged 75+ currently and as projected to change moving forward. The prevalence rates have been taken from a toolkit developed by Housing LIN in association with the Elderly Accommodation Council and endorsed by the Department of Health. This includes the following categories (discussed in more detail below): retirement/sheltered housing, enhanced sheltered housing and extra care.

7.31 When looking at supply for Eynsham, a pro-rata approach has been taken from District level data; whilst this approach may not replicate the actual supply in the area, it will provide an indication of the amount of supply that might be available to households living in the area. As a general point it should be noted that the supply of specialist housing in West Oxfordshire currently is very low, particularly in the affordable sector.

7.32 As well as setting out overall prevalence rates for different types of housing, the Housing LIN provides some suggestions for the tenure split between rented and leasehold accommodation. This varies depending on an area’s level of depravation. In West Oxfordshire, data from the 2015 Index of Multiple Depravation suggests that the District is the 316th most deprived of 326 local authorities (i.e. a low level of deprivation). This points to a higher proportion of specialist accommodation as needing to be leasehold (market) accommodation rather than rented (affordable) provision. Iceni has however also given consideration to the existing tenure profile amongst older residents.

7.33 Consideration has also been given to overall levels of disability in the older person population; given that these are slightly lower than the national average a small downwards adjustment to national prevalence rates has been made.

7.34 Quantifying the need for specialist older persons accommodation is sensitive to the ‘prevalence rate’ assumptions used, which describe the proportion of people of different age groups who might be expected to need such accommodation. Different sources have suggested different prevalence rates, and it is also worth noting that the ‘market penetration’ of specialist accommodation with care in the UK is much lower than in a number of other countries with demographic and socio-economic similarities such as New Zealand or the USA.

7.35 The main source of prevalence rate data is the Housing LIN. However, the rates used in the online toolkit are still the same as originally developed in 2008. A review of the rates was undertaken in 2016, and whilst these have not yet been adopted on the Housing LIN website, they are also worthwhile reflecting in the conclusions. A Housing LIN Report, Housing in Later Life, was published in 2012 and contained a further set of suggested prevalence rates; however, these figures were rejected as not being ‘substantiated’ and have not therefore been considered in the analysis below.

7.36 Taking account of the different data sources, we have modelled the implications of two different sets of prevalence ratios for specialist housing accommodation. These are:

- Shop@ (adjusted) – this takes the Housing LIN online figures and makes adjustments based on recognising slightly better health amongst the older person population in the area. Adjustments are also made to the tenure split based on local deprivation levels; and

- Shop@ Review – this uses information from the 2016 review into the Housing LIN prevalence rates and whilst not yet adopted by Housing LIN does provide some more up-to-date thinking on the topic. The base rates have again been adjusted to take account of health and deprivation.

7.37 The table below shows the prevalence rates used in the analysis from each of the above sources. Accommodation types are split into retirement/sheltered, enhanced sheltered and Extra-care. For the purposes of analysis below the last two categories (enhanced sheltered/Extra-care) have been merged into one. This is partly because this allows for alignment with the supply data available from the EAC; and also to be consistent with the Shop@ Review (discussed above) which notes that 'most leasehold extra-care is enhanced sheltered according to EAC specifications'. Therefore, two categories of accommodation are used:

- Housing with Support (which covers retirement/sheltered housing); and

- Housing with Care (which includes the enhanced sheltered and extra-care housing)

Table 7.5 Prevalence rates from different sources as applicable to West Oxfordshire

	Housing with support (sheltered/retirement)		**Housing with care (enhanced sheltered/extra-care)**	
	Rent	Market	Rent	Market
Shop@ (adjusted)	36	72	16	23
Shop@ Review	37	71	5	13

Source: Derived from Housing LIN

7.38 For housing with support, we have taken the average of the two sources to quantify needs. Given the difference in the prevalence ratios, for housing with care provision we have shown a range.

7.39 The table below shows estimated needs for different types of housing across the whole of Eynsham by applying the above prevalence rates. Overall, the analysis identifies a total need for around 175 units of specialist accommodation, mainly within the affordable sector.

Table 7.6 Older Persons' Dwelling Requirements 2019 to 2031 linked to 3,200 dwellings – Eynsham

		Housing demand per 1,000 75+	Current supply	2019 Demand	Current shortfall/ (surplus)	Additional demand to 2031	Shortfall/ (surplus) by 2031
Housing with support	Rented	36.5	0	23	23	30	53
	Leasehold	71.5	9	44	35	59	94
Housing with care	Rented	5 to 16	0	3	3 to 10	4 to 13	7 to 23
	Leasehold	13 to 23	31	8	0	11 to 19	11 to 19

Source: Derived from demographic projections and Housing LIN/EAC

7.40 The analysis points to a need for 'housing with support' development of c. 147 units to 2031, of which 64% is for leasehold accommodation. A need is shown for up to 42 housing with care units.

7.41 However Iceni would advise an element of caution is exercised regarding the tenure split. Table 7.4 below shows the tenure profile of existing older households (based on the age of the head of household). Owner occupancy amongst older age groups in West Oxfordshire in 2011 was around 80%, with over 65% in Oxford.

Table 7.7 Tenure Profile of Older Households, 2011

	50-64		65+	
	West Oxfordshire	Oxford	West Oxfordshire	Oxford
Owner Occupied	80%	65%	79%	68%
Social Rented	10%	23%	15%	26%
Private Rented	11%	12%	6%	7%

Source: 2011 Census

7.42 The scale of need would be sufficient to support a housing with support scheme but would not necessarily be sufficient to support a housing with care/ extra care housing development. However it should be remembered that firstly there is no nationally agreed set of prevalence rates, that the rates used have been influenced by existing provision, and there is some potential for prevalence rates to grow. Secondly, the provision of specialist housing could also stimulate demand, particularly in an area such as West Oxfordshire where there is a very limited current supply of such homes; and there is potential for migration from Oxford and other areas to suitable provision. On that basis, it is concluded that the analysis would support a retirement and/or extra-care facility in the area.

7.43 Iceni's experience indicates that a viable extra care scheme might have between 60-150 units. It should be located to be well integrated within a development scheme, close to local facilities, amenities and public transport. To support the delivery of specialist housing for older persons, the

Council should consider whether it is appropriate to identify and allocate specific land through the Garden Village AAP or the West Eynsham SPD for provision of older persons accommodation.

7.44 The Council's position on affordable housing contributions as part of older persons housing schemes is reflected in Policy H3 of the Local Plan. The viability evidence[26] prepared in support of the Local Plan and Policy H3 suggested that on-site provision of affordable housing as part of sheltered housing and extra-care housing schemes is achievable (at varying percentages); however, further viability testing for the Garden Village and the SDA may warrant further consideration once more information on development costs are known. The Council should also consider practical challenges of integrating affordable housing into a scheme which provides a range of facilities/services for residents in respect of the affordability of associated service charges.

Older Persons' Needs for Care Bedspaces

7.45 A consistent approach, using the same data sources as above, has been used to quantify the need for care home bedspaces.

7.46 The analysis below provides the same style of outputs (drawing on the same sources) for the estimated need for care home bedspaces. The analysis draws on that above, including adjusting for the relative health of the population of West Oxfordshire. It should be noted that the rows in tables are for bedspaces and do not have an associated tenure. The box below shows the definition of care beds assumed for this assessment.

Definitions of Different Types of Older Persons' Accommodation (C2 use class)

Care beds:

Care homes: Residential settings where a number of older people live, usually in single rooms, and have access personal care services (such as help with washing and eating).

Care homes with nursing: These homes are similar to those without nursing care but they also have registered provide care for more complex health needs.

Source: HOPSR

[26] Aspinall Verdi (2016) Local Plan and CIL Viability Assessment

7.47 The table below shows the prevalence rates used in analysis for the number of bedspaces required. Again, the analysis shows some variation in assumptions with the overall average showing a need for 84 bedspaces per 1,000 population aged 75 and over.

Table 7.8 Prevalence rate assumptions used to estimate the Need for Care Home Bedspaces

	Housing demand per 1,000 75+
Shop@ (adjusted)	95
Shop@ Review	73

Source: Derived from Housing LIN and HOPSR data

7.48 The table below shows the need associated with these prevalence rates when applied to the population projections in Eynsham. The analysis includes an estimate of the current supply which includes schemes in Cumnor and Farmoor. It shows an adequate level of existing provision. There is however projected to be a notable future need, with a total of 70 bedspaces estimated as being needed in the period to 2031.

Table 7.9 Older Persons' Care Bedspace Needs, 2019 to 2031 – Eynsham

	Housing demand per 1,000 75+	Current supply	2019 demand	Current shortfall/ (surplus)	Additional demand to 2031	Shortfall/ (surplus) by 2031
Linked to 3,200 dwellings	84	125	52	-73	70	70

Source: Derived from demographic projections and Housing LIN/HOPSR/EAC

7.49 As with the modelling of sheltered/extra-care needs the findings are subject to a degree of assumption and could vary depending on the rates used. It should also be noted that some of the need shown for home bedspaces might alternatively be provided in the form of self-contained (extra-care) housing and this would confirm the earlier conclusion that there is likely to be scope for a retirement and/or extra-care facility in the area.

7.50 Developments of care home bedpsaces typically in our experience fall within the 60-100 bedspace range. The identified need falls within this range. We consider that it would be appropriate to seek to deliver additional care home provision within the strategic developments in the Eynsham area.

7.51 Iceni notes that the 2019 Oxfordshire Joint Strategic Needs Assessment indicates that almost two thirds of older people are estimated to be self-funding long term care in Oxfordshire. This suggests a balance of need towards private sector provision.

Specialist Older Persons Housing – Key Points

There is a growing population of older persons across Oxfordshire. The housing needs of older persons are however diverse and whilst many will continue to live in general needs housing, there is a strong case for delivery of new specialist housing. The analysis points to a need for 'housing with support' development of c. 147 units to 2031, of which 64% is for leasehold accommodation. A need is shown for up to 42 housing with care units; and 70 care home bedspaces.

Iceni's experience indicates that a viable extra care scheme might have between 60-150 units. It should be located to be well integrated within a development scheme, close to local facilities, amenities and public transport. To support the delivery of specialist housing for older persons, the Council should consider whether it is appropriate to identify and allocate specific land through the Garden Village AAP for provision of older persons accommodation. It should also consider provision as part of the West Eynsham SDA.

Need and Demand for Bungalows

7.52 The sources used for analysis in this report make it difficult to specifically quantify a need/demand for bungalows in the District as Census data (which is used to look at occupancy profiles) does not separately identify this type of accommodation. However, it is typical to find that there is a demand for this type of accommodation particularly from older households.

7.53 Bungalows are often the first choice for older people seeking suitable accommodation in later life and there is generally a high demand for such accommodation when it becomes available. As a new build option, it is, however, the case that bungalow accommodation is often not supported by either house builders or planners (due to potential plot sizes and their generally low densities). There may, however, be instances where bungalows are the most suitable house type for a particular site; for example, to overcome objections about dwellings overlooking existing dwellings or preserving sight lines.

7.54 There is also the possibility of a wider need/demand for retirement accommodation. Retirement apartments can prove very popular if they are well located in terms of access to facilities and services, and environmentally attractive (e.g. have a good view). However, some potential purchasers may find high service charges unacceptable or unaffordable and new build units may not retain their value on re-sale.

7.55 Iceni consider that the Council might consider the potential role of bungalows as part of the future mix of housing at Eynsham. Such housing may be particularly attractive to older owner-occupiers (many of whom are equity-rich) which may assist in encouraging households to downsize. However, the downside to providing bungalows is that they are relatively land intensive for the amount of floorspace created.

Communal Housing

7.56 The concept of communal living can be defined as like-minded individuals working together to build and reside in their own housing development. Residents then effectively pool space, time and resources for shared benefit. In housing terms, it offers a new and innovative way to deliver homes and create communities; and they are typically environmentally sustainable.

7.57 Although communal housing has been popular across Europe, there are only 21 completed schemes in the United Kingdom, 10 of which are located in London. Nevertheless, applications for communal housing are increasing in London, principally as they offer a partial solution to increasing housing delivery. Communal living can also offer a number of other benefits including easing pressures elsewhere in the housing market and increasing home ownership rates, particularly amount younger age groups.

Case Study: Marmalade Lane, Cambridge

Outside of London, one notable communal housing case study is Marmalade Lane, Cambridge. This scheme's delivery involved a mix of stakeholders including Mole Architects, TOWN developers Cambridge City Council and the community group driving the scheme, K1 Housing. The community group formed in 2005; with an outline planning permission submitted in 2014 demonstrating the potential for delays in the process.

Completed in 2018, the scheme comprises 42 new homes, pre-fabricated off-site. The scheme is deliberately multi-generational to support a greater mix of housing including five bedroom terraced housing to one bedroom apartments which sit within a low rise block of 10. The developer effectively delivered the scheme, with residents paying market rate for the properties; however, all residents were fully involved in the design of the scheme.

7.58 In policy terms, communal living as a housing product is ultimately very embryonic with no evidence to support the demand for such a housing product. However, there are clear benefits around communal living in housing delivery terms amongst other areas. As such, it is considered that should a community group come forward with a particular aspiration to deliver a communal living scheme in the Eynsham area, the Council should look to work with and encourage that group and any associated developer to identify and bring forward a site to address any identified demand.

Student/ Graduate or Employment-linked Housing

7.59 The Garden Village and West Eynsham SDA present an opportunity to meet the housing needs of essential local workers and junior skilled staff required by high-tech businesses, health and education institutions located in Eynsham, as well as Witney and Oxford. As a result of the proximity to Oxford and its universities, there is also an opportunity to meet the needs of post-graduate students and academic staff.

7.60 Oxford's emerging Local Plan[27] identifies that employers in Oxford experience significant challenges in the recruitment and retention of staff, due to the lack of availability and unaffordability of housing. Oxfordshire's emerging Local Industrial Strategy[28] identifies housing affordability as an issue across Oxfordshire and one which can restrain staff recruitment and economic performance.

7.61 The emerging Local Plan in Oxford includes a policy which supports provision of housing by employers on sites which they own, for their own employees. It requires that 100% of the housing should be available to be occupied by those employees who meet the requirements of the affordable housing approach agreed between the council and the employer and be available in perpetuity. The policy is applicable to specific sites identified in the Plan.

7.62 On the basis of our consultation with a range of stakeholders including site promoters and local estate agents, it is unlikely that Eynsham would be an appropriate location for purpose-built undergraduate student accommodation due to its connectivity. Undergraduate students are principally looking for locations which are close (ideally walking distance) to their place of Study. The journey time from Eynsham to the place of Study of Oxford would be likely to inhibit demand.

7.63 However, with regards to other employment and education linked housing, there is clear support from both site promoters and local estate agents to the concept, subject clearly to firm interest from companies/ institutions. Major employers in the Eynsham area include Siemens and Polar Technology Management and Iceni understands anecdotally that there is interest in exploring employment-linked housing provision.

7.64 At present, proposals being considered by the Garden Village site promoters, Grosvenor, include a new University NHS Trust and Oxford Brookes University-linked training cluster with accommodation, which would provide an anchor for essential local workers and support medical training as well as nearby tech-companies in Eynsham. This is at a concept-based stage at the current time.

[27] Oxford Local Plan 2036: Proposed Submission Draft (December 2018)

[28] The Oxfordshire Industrial Strategy: Working Draft for Discussion with Government (December 2018)

7.65 We have also engaged with Oxford University who have indicated that in supporting provision of housing for postgraduates and staff, the University is actively looking at development on a number of sites in the greater Oxford area.

7.66 There is also support from some of the site promoters at the West Eynsham SDA who see the provision of essential worker housing university staff as a potential component of the scheme; and are open to exploring the provision of housing for postgraduates and academics.

7.67 Eynsham is clearly a suitable location for education and employment-linked housing. In policy terms however, given that there is little specific quantitative evidence on the needs of these groups and that the proposals being considered (based on our understanding) are at a reasonably formative stage, we consider that the Council might encourage provision of graduate or employer-linked housing a part of the Garden Village AAP and West Eynsham SDA, but it should not necessarily be a policy requirement.

8. SELF-BUILD AND CUSTOM-BUILD DEVELOPMENT

8.1 The Self-Build and Custom Housebuilding Act 2015 (as amended by the Housing and Planning Act 2016) (“the Act”) provides a legal definition of ‘self-build and custom housebuilding’ which are where individuals or associations of individuals (or persons working with or for individuals or associations of individuals) build houses to be occupied as homes for those individuals.

8.2 The Government has long had a clear agenda for supporting and promoting the self-build and custom building sector. In *Laying the Foundations: a Housing Strategy for England* (November 2011), the Coalition Government set out plans to enable more people to build or commission their own home. The Housing and Planning Act 2016 introduced the ‘Right to Build’ with effect from 31st October 2016. In the Government’s 2017 Housing White Paper[29] (paragraph 3.14), the commitment to support the self-build and custom housebuilding sector was reasserted.

8.3 The Government stating that “*alongside smaller firms, the Government wants to support the growth of custom built homes*” in recognition of the fact that custom build homes are generally built more quickly, built to a higher quality and tend to use more productive and modern methods of construction. The Housing White Paper however recognised common barriers to doing so, including access to mortgage finance; the planning process and variations in local authority approaches; and crucially, land supply and procurement.

West Oxfordshire Self-Build and Custom Housebuilding Register

8.4 As of 1st April 2016 and in line with the Act and the Right to Build, relevant authorities in England are required to have established and publicised a self-build and custom housebuilding register which records those seeking to acquire serviced plots of land in the authority’s area in order to build their own self-build and custom houses.

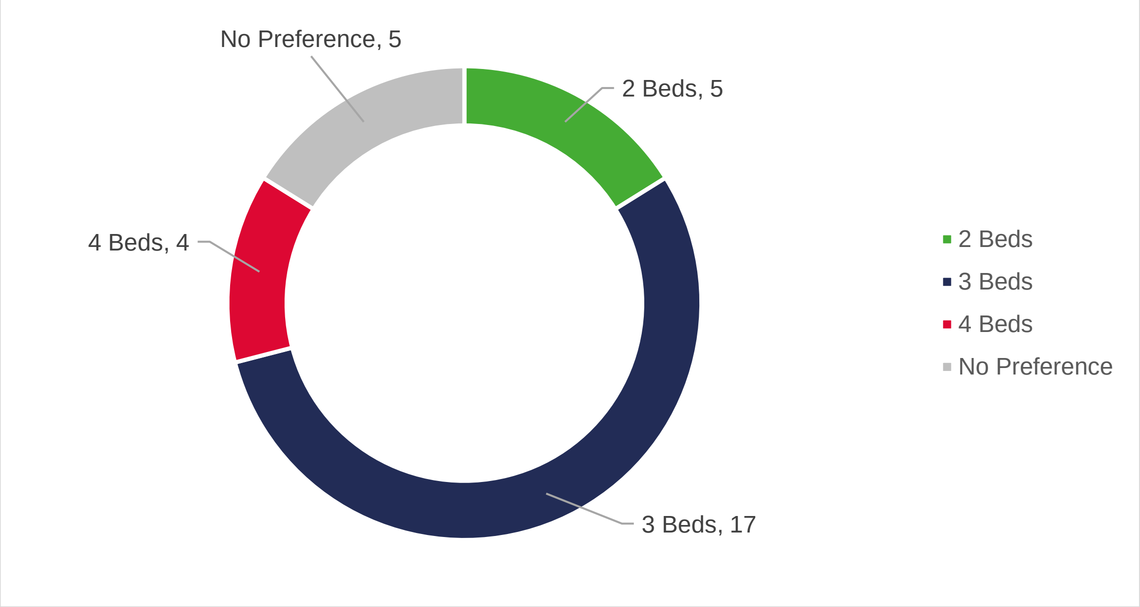
8.5 The West Oxfordshire Self-build and Custom Housebuilding Register, assessed over the 3.5 year period from 1st October 2015 to 31st March 2019, shows there has been 98 registered expressions of interest in a serviced plot of land for self-build and custom housebuilding across West Oxfordshire District.

8.6 The Figure below focusses on those who have expressed a preference for serviced plots of land in Eynsham specifically (although it is noted this does not necessary reflect demand for that area; given many respondents have expressed an interest for a number of areas). There are 31 persons who

[29] Fixing our Broken Housing Market (DCLG, February 2017)

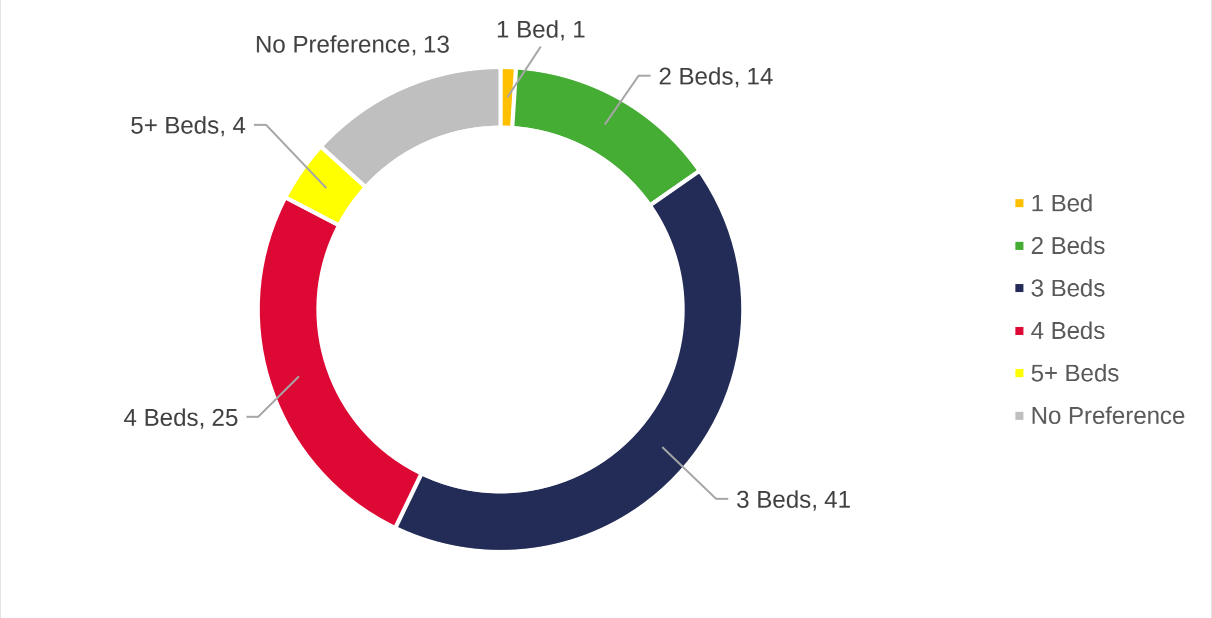
have expressed an interest in self- or custom-build development of which the greatest proportion (68%) seek 3-bed homes.

Figure 8.1: Serviced Plot Demand by Size, Eynsham (1st October 2015 to 31st March 2019) (Source: WODC Register)



We have also reviewed the size preferences of the 98 people who have expressed a requirement for a serviced plot across West Oxfordshire District. The results are shown in the Figure below.

Figure 8.2: Serviced Plot Demand by Size, West Oxfordshire (1st October 2015 to 31st March 2019) (Source: WODC Register)



8.7 Across the District, demand for serviced plots of land are again more focussed towards larger plots for larger homes of around 3+ bedrooms. The most sought after size is again 3 bedrooms at 42% of all responses; with 3+ bedrooms accounting for 71% of responses.

8.8 The above figures represent demand at the current point in time, and are likely to be supplemented by further persons/ households joining the register year-on-year. This is important to recognise, given that the SDA and Garden Village will be built-out in phases over a number of years.

8.9 The level of revealed demand on the Register is also likely to be influenced by people's awareness that councils now maintain such registers.

Broader Demand Evidence

8.10 To supplement the data from the Council's own register, we have looked to a number of secondary sources identified in the PPG including Buildstore, the Self Build Portal and other sources such as Plotfinder. These sources suggest there is one single plot currently for sale in West Oxfordshire District. The plot is on sale for £150,000 and has outline planning permission; situated to the north of Woodstock, West Oxfordshire.

8.11 In respect of demand, Buildstore, who own and manage the largest national database relating to the demand and supply for self and custom build properties in the UK have informed us that 506 people are registered as looking to build in West Oxfordshire on their Custom Build Register with a further 879 subscribers to their Plotsearch service which tracks self-build land opportunities. This suggests a sizeable potential level of demand for self- and custom-build development in the District.

8.12 The National Custom and Self-Build Association (NaCSBA) has undertaken primary research with Ipsos Mori at a national level which indicate that 1 in 50 of the adult population across the country want to purchase a Custom or Self-Build Home over the next 12 months. When applied to the working population of West Oxfordshire, this would point to a potential need in the order of 1,340 plots.

8.13 In line with the recommendations of the PPG, we have also sought to supplement quantitative data with qualitative data through consultation with local estate agents in the District; in order to understand the level of enquiries for suitable serviced plots of land. We have spoken with three estate agents[30] in and around Eynsham who also cover Witney and areas up to Oxford. All three estate agents consulted agreed that there was demand for serviced plots of land in and around Eynsham. One agent stated that "*there are many people on my books who would be interested in buying a plot of land to build their own home*".

[30] Martyn R Cox Estate Agents, Chancellors and Abbey Properties

8.14 The agents noted that the availability of land in the area had resulted in limited opportunities for serviced plots for individuals looking to build their own home. One agent noted that over the last 20 years as land values have increased in the area, self-builders looking for individual plots have been priced out.

Delivering Self and Custom Build Housing

8.15 There are different potential models for the delivery of self-build housing. In some cases developers or site promoters are coming forward with outline applications for schemes for self- or custom-build development, typically with the parameters for the development and a design code established at the outline stage; with individual self-builders then needing to bring forward applications for reserved matters approval.

8.16 At Graven Hill on the edge of Bicester, an example of where substantial self- or custom-build development is envisaged on a strategic site, Cherwell District Council has worked to designate part of the site for this form of development and has then put in place a Local Development Order ("LDO"), alongside an approved masterplan and design code. Each plot within the development has a plot passport, which sets out details such as the building footprint, position of the main façade, maximum height and floorspace.

8.17 This supports fast track determination of applications for planning permission within 28 days. This might provide a suitable model for the Garden Village where a reasonably substantial volume of self- or custom-build development is envisaged, where a proportion of the site can be masterplanned to provide clear parameters for development and an accelerated planning regime could be supported through development of a Local Development Order.

8.18 The Council has commissioned the Right to Build Task Force to undertake a potential piece of work to further consider potential development models and delivery mechanisms. They have indicated to Iceni that Custom and Self Build (CSB) housing can be delivered through a range of development models and delivery mechanisms and the selection of those most appropriate is dependent on the consideration of a wide number of factors. These factors will include who is initiating/promoting the provision of CSB housing, who is the end customer – an individual or a group, how the plots will come forward, the form of tenure, site attributes and constraints, local considerations – including demand & values, motivations, objectives and drivers of the parties involved, landowner/developer skills and experience and tax implications.

8.19 These models and mechanisms can be applied to deliver both market and affordable housing. Although it should be noted that any affordable housing will need to meet the requirements and definitions as set out by the Local Authority and within the NPPF, requiring some element of discount and affordability secured in perpetuity.

8.20 In terms of development models, the following five generic models have been identified by the Right to Build Task Force:

- **Land with Outline Planning Permission or Permission in Principle**, transferred to another party in whole or part, to build out for sale or rent, (land with relevant, deliverable, residential planning permission for CSB, setting out scale of development, means of access etc.).

- **Serviced Site/Parcel**, transferred to another party to prepare serviced plots for sale and/or build out for sale or rent, (serviced site or parcel with no serviced plots).

- **Serviced or 'Golden Brick' Plots**, sold individually or in groups, either directly to the customer, or to another party to build out for sale or rent, allowing customers to design and procure their own homes within the constraints of the planning permission and associated design code (individual plots with roads and infrastructure in place including all drainage and services brought to the edge of the plot, plus ground floor slab/foundation, and possibly services brought to slab/foundation, where the 'Golden Brick' option is selected). Whether serviced or 'Golden Brick' plots are provided will be dependent on VAT implications, the principles of which will be considered in the Right to Build Task Force's more detailed report on delivery models. 'Golden Brick' refers to the construction of a residential property to the stage one brick above the ground floor damp proof course. The transfer of land is not VAT-able, and so any VAT on costs incurred in bringing the land forward cannot be recovered. If the property/properties on the land are built to 'Golden Brick' stage before the land is transferred this is considered, for VAT purposes as the transfer of a property and is VAT-able. New build properties are zero VAT rated so no VAT is payable but VAT incurred can be reclaimed. If the 'Golden Brick' model is not adopted landowners/developers may look to recover the lost VAT from the purchaser.

- **Custom Build Shell Homes**, sold directly to the customer for self-finish (individual plots with superstructure constructed providing a weathertight shell for finishing by the customer).

- **Custom Build 'Turnkey' Homes**, sold directly to the customer, allowing some element of customisation around layout and finishes (individual serviced plots with fully completed homes built to the customer's preferences).

8.21 In terms of delivery mechanisms, this will, in large part, be determined by who is taking direct responsibility for delivery, and the role each party is looking to fulfil, this may be:

- **Current Landowner/Developer** – looking to directly bring forward the CSB housing, either with or without an 'enabling' custom home developer/builder partner, or looking to offload parcels to others after putting in required infrastructure and services;

- **Local Authority** – acting purely as housing & planning authority, or taking a greater role in the delivery of custom and self-build housing;

- **Registered Provider** – taking transfer of land with planning permission, serviced site/parcel or serviced/'Golden Brick' plots, custom build shell or custom build 'turnkey' homes for sale and/or rent as affordable housing;

- **Non-RP Community Group** - such as community land trusts, co-housing or co-operative housing groups or associations of individuals who are a community benefit society, taking transfer of serviced site/parcel or serviced/'Golden Brick' plots, custom build shell or custom build 'turnkey' homes for sale and/or rent, such schemes may provide affordable housing;

- **Custom Home Developer/Builder** – brought on board for their expertise by any of the other parties listed here, whether to build out a serviced site or parcel or a serviced/'Golden Brick' plot, to provide a customer with a shell for self-finish or a 'turnkey' home; and/or

- **Individual Custom Home Purchaser or Self-builder** – looking to secure a serviced or 'Golden Brick' plot, custom build shell or custom build 'turnkey' home, dependent on their desire for direct involvement in the design and/or construction of their home.

8.22 It is anticipated that a range of development models and delivery mechanisms may be adopted across the strategic development sites at Eynsham with delivery being phased throughout the period of the development and located within clusters of potentially 10-15 or more plots/homes, depending on demand, local policies and landowner appetite for risk and opportunity.

8.23 The Local Plan, Policy H5 requires 5% of residential plots on schemes of 100+ dwellings to made available as serviced plots for self- and custom-build development. This can include the partial completion of units to be made available for self-finish. Any plots remaining unsold after 12 months marketing are then permitted to be built-out by the developer. The evidence herein supports the application of this policy to both the SDA and the Garden Village.

Key Points – Self- and Custom-Build Housing

It is clear that there is a level of demand for self-build and custom housebuilding serviced plots of land in the District. There has been 98 expressions of interest in serviced plots of land over the 3.5 year period considered; as drawn from the Council's register. There are also 506 people registered on the Buildstore's Custom Build Register and 879 subscribers' to Plotsearch and wider data sources indicate that even these may under-estimate potential demand. Local estate agents have also highlighted that there are people searching for plots; but ultimately there are land availability issues – particularly in and around Eynsham.

There is clear evidence of need/demand which justifies the Council's policies requiring 5% of plots to be made available for self- and custom-build development. This is applicable both to the West Eynsham SDA and to the Garden Village.

The Council has commissioned specific research to appraise and advise on potential delivery models for self- and custom-build development, which will need to be taken into account through the planning process.

9. ACCELERATING HOUSING DELIVERY

9.1 The housing trajectory in the Local Plan envisages delivery of the Garden Village over the period from 2021-31, with delivery of 220 homes a year on the site each year over this decade. The Council's aspirations, as clearly stated in the Local Plan, are that a diverse range of delivery partners contributes to the development of the scheme, including delivery of self-build development; a range of housebuilders from SMEs to housing associations and major housebuilders; as well as potential development of employer-related housing; and by Community Land Trusts.

9.2 For the West Eynsham SDA, the Council's trajectory envisages delivery of up to 150 homes per year with the development being completed in 2028/29.

General Points

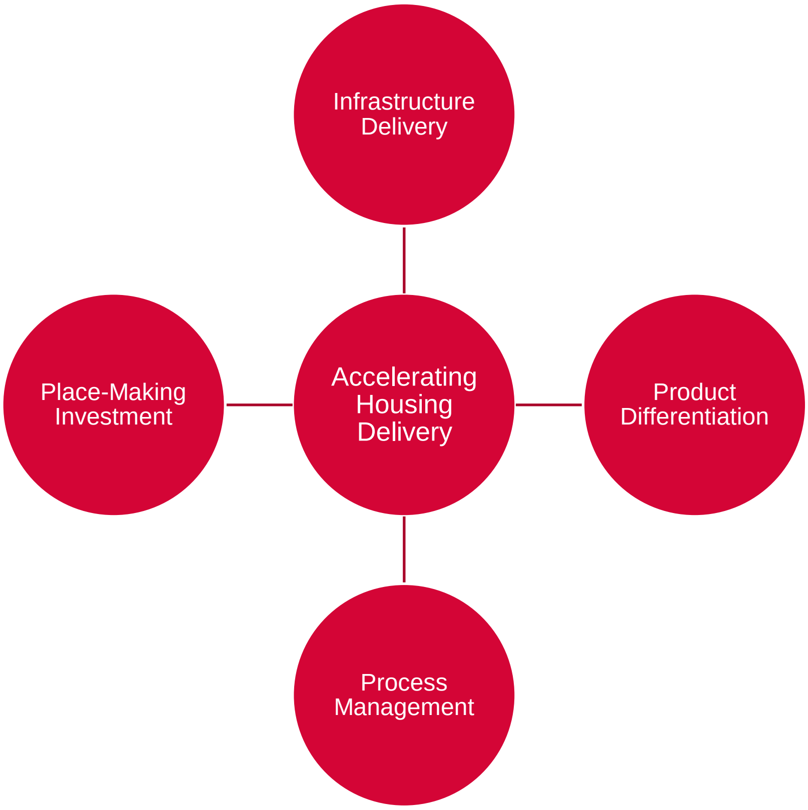
9.3 The timely delivery of the two strategic sites will be important in ensuring that West Oxfordshire District Council can maintain a five year housing land supply. In the absence of this, it risks seeing unplanned development brought forward through speculative planning applications on non-allocated sites.

9.4 It is positive that work being undertaken by Grosvenor on a planning application is being 'twin tracked' with the development of the Garden Village AAP such that an outline application is expected to be submitted in late 2019/ early 2020. The AAP is due to be submitted for examination in February 2020 and adopted in July 2020; and we envisage that the outline planning application would be determined thereafter.

9.5 At West Eynsham, initial masterplanning work is underway to help inform the proposed SPD for the site which should be adopted in autumn 2019 and application/s likely to be submitted thereafter building on the two currently consented first phases.

9.6 We consider that the are a number of factors which warrant consideration in assessing the role which the Council can play in accelerating housing delivery:

Figure 9.1: Considerations in Accelerating Housing Delivery



9.7 These factors can affect either the lead-in time to first completions; or the pace at which the sites are delivered – the build-out rate.

Process Management

9.8 As identified above, it is positive that the Council is bringing together a range of stakeholders to put in place a clear policy framework through the Garden Village AAP and West Eynsham SDA against which planning applications can be assessed. It is clear that there is extensive collaborative working taking place between both the developers, the district and county councils, infrastructure providers and other statutory consultees. This upfront work will provide a strong basis for the timely determination of planning applications.

9.9 The Council has already signed a Planning Performance Agreement with Grosvenor on the Garden Village site and the intention is to twin-track the AAP with the submission of the outline planning application to ensure it is submitted as quickly as possible. There are also member workshops ongoing in respect of both sites, to ensure that decision-takers are fully informed.

9.10 It will be appropriate for the Council to continue to support and encourage early pre-application engagement with developers on the SDA and Garden Village to seek to control (and minimise) the lead-in time to first completions on-site, whilst clearly not compromising on its own quality ambitions.

9.11 It will be sensible for the Council to carefully consider what pre-commencement conditions will be necessary to attach to outline planning permissions, limiting it to those which are required; and to ensure that on its side the process of discharging conditions is adequately resourced to support the timely delivery of these major sites.

Place-Making Investment and Infrastructure Delivery

9.12 Successful large-scale residential developments need a mix of local amenities, shops, workplaces, schools, public spaces, recreational space and different types of housing. This helps to build the community and supports vibrant, economically successful places.

9.13 A report by Savills on *the Value of Placemaking*[31] has shown that upfront "placemaking investment" – including through bringing forward the delivery of social and community infrastructure – makes the development more appealing and has a positive effect on both the pace of sales/ delivery and residential values (and thus ultimately the residual land value). In the theoretical example given, an increased infrastructure investment upfront of £15,000 per unit supports a 50% increase in sales rates and 20% increase in sales values. This relationship is particularly applicable to high demand areas where buyers can be drawn from strong markets nearby, and we would consider that there is particular potential for this at Eynsham.

9.14 The report however demonstrates that to support this upfront investment requires 'patient capital' whereby essentially land is paid for over time rather than upfront creating more financial capital to invest in place.

9.15 The delivery of infrastructure within early phases of development can also help to create place and underpin demand. Savills research shows that investment is schools is particularly important as they can provide an immediate draw to the development attracting potential buyers, but also help to create footfall. Retail shops, services and local community facilities also need to be delivered hand-in-hand with the development of the strategic sites. The existing presence of a secondary school at Eynsham is a clear benefit.

9.16 For the Garden Village, the phasing of the development of the Science Park will also be important – as this can help to support housing need directly, as people look to move to the area to work; but will also help to support the growth of local services, which then in turn supports the vibrancy of the place and its attractiveness as a place to live.

[31] https://pdf.euro.savills.co.uk/uk/residential---other/spotlight-the-value-of-placemaking-2016.pdf

9.17 The Council (and indeed the County Council) might wish to consider how it leverages its own resources to contribute to early infrastructure delivery to support the creation success of the development schemes, and particularly the Garden Village because of its size.

Product Differentiation and Build-Out Rates

9.18 A key issue is one of build-out rates.

9.19 Sir Oliver Letwin's *Independent Review of Build Out* has explained and reported on ways in which the build-out rate on large sites can be improved. The report found that:

> *"if either the major house builders themselves, or others, were to offer much more housing of varying types, designs and tenures including a high proportion of affordable housing, and if more distinctive settings, landscapes and streetscapes were provided on the large sites, and if the resulting variety matched appropriately the differing desires and financial capacities of the people wanting to live in each particular area of high housing demand, then the overall absorption rates – and hence the overall build out rates – could be substantially accelerated."*

9.20 A key conclusion drawn from the *Review* is a need to increase diversity in the products delivered on large sites, and diversity in those who are building homes. Housing diversity is described as housing of differing type, size, style, design, and tenure mix; and includes housing sold/let to specific groups such as older persons housing, students, and self/ custom-built homes. Letwin recommended that each phase of the development should be subject to housing diversity requirements – including different housing products, types, tenures and styles. This is something which the AAP and the SPD could specify.

9.21 Eynsham is an area of relatively strong housing demand which will support the build-out rate. The Local Plan policy seeks a relatively high proportion of affordable housing at 50%. These factors will support faster build-out than might be expected 'on average' across the country. Iceni's view is that the principle set out in the Letwin Review of diversity in the overall scheme, and where appropriate by phase, is right and will help to support build-out rates.

9.22 As part of the masterplanning process for both the Garden Village and West Eynsham SDA , the following issues should be considered:

- Sales outlets – the potential to support multiple sales outlets at different locations within the development scheme, as part of each phase. The Council should look to have at least 2 access points to the site, and multiple sales points from an early point in the delivery of both sites.

- Product differentiation – ensuring that these sales outlets are able to offer a level of differentiation between the market housing ‘product’ being offered in order to limit competition and boost sales rates.

- Integrated affordable housing – integrating affordable housing within development phases, as this is catering for a different market/ target group from the ‘for sale’ housing. The relatively high proportion of affordable housing in the scheme should help in these terms to support the build-out rate.

- Catering for Different Market Segments – with elements of the scheme catering for different specialist market segments, such as build-to-rent; elderly persons accommodation; student/ graduate housing; and self-custom-build development. There would be a benefit from designing the scheme such that the potential of these markets can be tested within earlier phases, providing market evidence which then supports further investment in later phases of the scheme.

9.23 Iceni consider that these issues need to inform and be embedded within the masterplan for the developments; and there need to be clear planning policies/key principles addressing product diversity within the AAP/SPD which are applicable not just to any planning application; but which inform and guide delivery thereafter.

9.24 Infrastructure delivery will also support the build-out rate. Fundamentally people want to live in a place, rather than a building site and thus early delivery of supporting services and facilities including any local centre, schools and other social infrastructure can help to improve sales rates.

9.25 Similarly the accessibility of the site and quality of public transport links including to Oxford and Hanborough Station can help to increase its attractiveness as a place to live. Investments in key infrastructure such as this, and placemaking more generally, which helps to make the sites more attractive places to live; and to give people a clearer impression of the place, will help to increase market sales rates and thus the build-out of the scheme. There is a potential role for public funding in helping to support early delivery of infrastructure which can have benefits both in terms of increasing sales volumes, and supporting market values (and thus the viability of the schemes).

Modern Methods of Construction

9.26 Modern methods of construction relates to homes built using a high proportion of components which are produced using modern and technologically driven methods of manufacture, with this production often taking place offsite and the components then assembled onsite.

9.27 The Government's 2017 Housing White Paper[32] found that homes constructed offsite through 'modern methods of construction' can be built up to 30% quicker than by traditional methods of construction, and with potentially a 25% reduction in costs; and Government has sought to encourage growth in their use. Through using a high proportion of precision-manufactured components, materials and manufacturing systems, housing delivered in this way can be of a superior quality to that delivered through traditional construction, and can achieve better energy performance; can reduce the effects of site deliveries, noise and pollution by shortening the construction period and thus reducing disruption to local communities; and can require lower levels of workers, helping to mitigate and manage the potential effects of construction skills shortages.

9.28 The infographic below summarises some of the key benefits.

Figure 9.2: Potential Benefits of Modern Methods of Construction

9.29 To a degree there has historically been a level of stigma associated with 'prefab' homes with the perception being influenced by the perceptions of the 150,000 homes delivered as part of post-war reconstruction through the Emergency Factory Made Homes Programme. However in many other countries, the situation is quite different – in Sweden for instance it is estimated that up to 90% of homes are factory-built, and factory-built homes have a reputation for higher quality, efficiency and sustainability. BoKlok – a joint venture between Skanska and InterIkea has deliver 10,000 high quality but affordable homes.

[32] DCLG (Feb 2017) *Fixing our broken housing market*

9.30 In the UK, there are a range of bodies which have recently set up factories to deliver modular construction. This includes Berkeley Homes, which has built a 160,000 sq.ft factory in Kent which is expected to become operational in 2020 and has the capability to deliver 1,000 homes a year.[33] Legal and General, which owns housebuilders such as CALA, has a modular division[34] and has opened a factory near Leeds which is capable of producing 3,000 homes a year. A key issue for these companies is maintaining a pipeline of work as volume of delivery is an important component of the efficiencies which can be achieved by the model.

9.31 Iceni do consider that there is potential for modern methods of construction to contribute to the delivery of the strategic sites at Eynsham; and there are potential benefits from this as shown in Figure 9.2 above. If the Council wants to see this happen, it needs to work with the site promoters to actively engage potential delivery partners; but also consider how the planning process can effectively support the delivery of factory-built homes. To maximise the role which modern methods of construction can have in accelerating delivery, it is critical that this type of construction requires a highly detailed design to be agreed at an earlier stage, with the ability to make changes to the design and space planning subsequent to this being quite limited.

[33] https://www.berkeleygroup.co.uk/about-us/our-brands/berkeley-modular

[34] https://www.legalandgeneral.com/modular/

10. LONG-TERM MAINTENANCE & MANAGEMENT OF THE HOUSING STOCK

10.1 This section provides advice on the potential options for the long-term maintenance and management of the housing stock of the Garden Village. In order to deliver a successful community, it is important to have a strong understanding of how that community and the assets which are delivered will be managed in perpetuity.

The Principles for Success

10.2 The long-term supervision, maintenance and management of an asset simply translates as ensuring that the development and community is properly managed in perpetuity. The Garden City Principles as set out in the introduction to this report acknowledge that maintenance and management should be undertaken for the benefit of the community; but it can also benefit councils and indeed developers and site promoters.

10.3 There are a range of bodies and individuals involved in the process, from those formed to take on responsibility for green space and public space management; to private sector management companies that operate over the lifetime of the development; to companies set up under the 'Letchworth Model' where an organisation commits to proactively share and reinvest funds created through the Garden Village's development and management in order to maintain a range of services.

10.4 In any event and whatever model is taken forward; the Town and Country Planning Association[35] highlight that experience has demonstrated there are a number of principles which underpin success. They are as follows:

Planning for maintenance and management:

- Long-term management should be considered from the outset;
- Long-term management is about linking public engagement and delivery;
- Planning for long-term management involves thinking beyond the site boundary;
- Maintenance and management bodies can manage a wide range of community assets; and
- Progress should be made one step at a time.

[35] TCPA Practical Guides for Creating Successful New Communities: Long Term Stewardship (December 2017)

Paying for maintenance and management:

- Revenue funding is essential for successful maintenance and management;
- Proactive management of land and property endowments can be profitable;
- Management bodies should be entrepreneurial;
- Money can be saved through good design; and
- Management services should develop as the community grows.

Running a management body/trust:

- Good management and maintenance requires good governance;
- Investment in the right skills and capacity is crucial; and
- Dialogue with residents must be maintained.

10.5 In line with the principles set out above, it is clear that new communities, facilities and other assets will not be sustainable without well organised management structures, strong ideas and a reliable and continuous revenue stream.

10.6 The Council will be able to facilitate this through a framework to maintain and manage those assets (secured through legal agreement); as well as providing reassurance to new residents of the community and providing them with genuine involvement in the development of their community. Parish Councils, once established or developed, could be potential partners or even beneficiaries of any management body; so the framework should deal with this from the outset.

The Potential Options and Ideas

10.7 There are several options which could be taken forward by the Council. In light of this (and as there is currently no masterplan approved for the Garden Village); we have sought to set out below a number of these options with reference to supporting case studies which the Council can then review, develop and adopt as appropriate.

Management Companies and Community Trusts

10.8 There are a variety of organisations and bodies that can maintain and manage community assets. The majority of a community's assets, services and public realm can be managed by these bodies; whilst certain services will already be provided by the Council. Arguably the most common of these bodies is a management company or community trust; which are set up to manage land, property and facilities as part of a development. As noted, there is clear support from Government for this approach. Membership of these bodies can be extended to residents, who can become shareholders.

10.9 The extent of participation in the management and executive functions of the company depends on the terms under which the company is established – usually, the ultimate control of assets and expenditure is not passed across to residents until the development is complete, with the developer holding weighted voting rights until that time.

Case Study: Caterham Barracks, Caterham-on-the-Hill

Caterham Barracks is an award-winning housing development in Surrey which delivered 361 homes with a range of housing tenures on the site of the former army barracks.

The development was completed in 2006 but continues to be managed and maintained by a Community Trust, the Caterham Barracks Community Trust, which was set up by a collaboration between the developer of the Barracks Site, Linden Homes, and Tandridge District Council to provide the community of Caterham and particularly those in need with the facilities and capacity for development.

The aims of the Trust include preserving and enhancing such parts of the natural or built environment in the area of benefit; and to provide and assist with the provision of facilities for recreational and other leisure activities in the interests of social welfare.

With the assistance of Tandridge District Council, a Caterham Barracks Local Group was set up and more than 100 volunteers worked in a series of Working Groups to produce a 'local view' of the way in which the site should be developed; removing unreasonable aspirations. In order to meet the needs of the community, Linden Homes contributed in excess of £2 million in buildings and money to this project. The Caterham Barracks Community Trust was setup to manage this opportunity and continues to successfully manage and maintain the barracks today.

Community Interest Company or Limited Company

10.10 A community interest company is a type of limited company introduced in 2005 under the Companies Act 2004, which exists primarily to benefit the community or with a view to pursuing a social purpose, rather than to make profit for shareholders. These models are set up to use their assets, income and profits for the benefit of the community they are formed to serve and must embrace special features such as an 'asset lock', which ensures that assets are retained within the company to support its activities or otherwise used to benefit the community.

Case Study: Beaulieu Park, Chelmsford

Beaulieu is a new development in Chelmsford which will create up to 3,600 new homes served by a range of facilities, amenities and transport links; as well as 176 acres of green open space, allotments, sports ground and parkland, and public art installed throughout.

The cost of managing the green open spaces around Beaulieu will be paid for by all homeowners through an annual service charge. Developers of the scheme, L&Q and Countryside, realised that it is vital such spaces are maintained after a new place is developed out. They chose the Land Trust to take on the long-term ownership and management of the green infrastructure on site.

As the development progresses, the management and maintenance of the site is being handed over to Beaulieu Estate Management Ltd, which is a wholly owned subsidiary of the Land Trust. Beaulieu Estate Management Ltd will take ownership of the green spaces as they are developed on a phase-by-phase basis and will subsequently safeguard and maintain them on behalf of and in partnership with the local community, helping to make Beaulieu a great place to live for future generations.

The Land Trust is encouraging residents to engage with the process, provide feedback, set up and run events on site and help to demonstrate that the open spaces and facilities are being maintained. The developers have importantly incorporated the set-up costs and sustainable funding structure at inception, with the intention being that the services, facilities and open spaces will be maintained throughout the build-out phase and well into the future.

Housing Associations or Registered Social Landlords

10.11 There are a number of housing associations and registered social landlords (RSLs) that provide services beyond the scope of their role as a social landlord. There is potential for the housing associations or RSLs to be contracted by the Council to maintain the public realm or manage facilities; or indeed, if they are involved from the outset in a large scale strategic site, they may own such assets themselves and therefore have a more direct role in the maintenance and management of the site. Under this banner, there is also the option for the establishment of a Council-led Local Housing Company.

Case Study: Bournville, Birmingham

Bournville is a model village located to the south of Birmingham which was first established in the late 19th to early 20th century; with the delivery of 313 homes.

In 1900, one of the longest-established housing associations was founded - the Bournville Village Trust. The Trust was founded by the chocolate maker and philanthropist George Cadbury, with an aim of controlling the development of the estate, providing schools, hospitals museums and other public facilities.

As well as being a not-for-profit housing association providing rented housing, the Trust managed supported housing community facilities and landscape areas on the Bournville estate governed by a number of objectives including managing communal areas and open space to a high standard; to protecting the visual amenity of the estates; to operating a development control function.

The Trust's estate management services are funded through an annual management charge applied to each household where freehold titles include a convenient to pay the charge. The annual management charges are set at approximately £250 to £300 per household per annum.

The maintenance charge allows for the development of a sinking fund for future capital repairs and replacements; whilst the Trust also helps to maintain a high-quality public realm through design covenants.

Moving Forwards

10.12 As noted, there are a number of options which could be taken forward by the Council and we have sought to set out a series of examples above; however, this list is not exhaustive and ultimately the agreed masterplan and the views of the Council, developer and the local community should influence the most appropriate model to move forward with.

10.13 There will be a number of additional issues which will influence the appropriate management body and model; and the Council will have to consider these. These include issues around the willingness of the community or prospective members to participate and potentially be liable for such maintenance and management; the extent of ownership of land and other assets; the desired governance and legal structure, tax considerations and most notably, the availability of funding in the short and long term for the model – including the level of capital investment and potential revenue streams.

10.14 It is important to consider these issues at the earliest possible stage and the Council should consider establishing a framework (e.g. through the AAP) which encourages the site promoter and future developers to engage with the community early-on; recognising the benefits of doing so and alluding to the principles of success. The local authority should then seek to work with the site promoter, and in time the community, to scope of what type of management body and model is most appropriate to maintain and preserve the assets in perpetuity.

11. CONCLUSIONS AND RECOMMENDATIONS

11.1 In this section we have sought to draw together the research undertaken to set out conclusions and recommendations on how the Council should seek to address issues relating to housing mix in policy terms when preparing the Garden Village AAP and West Eynsham SPD. We have also set out our conclusions and recommendations around the needs for specific groups, emerging market segments, accelerating housing delivery and maintaining and managing the stock moving forward.

11.2 An important starting point is to recognise that there are policies regarding housing mix set out within the adopted Local Plan. In drawing conclusions, we have taken into account that the West Eynsham SPD can provide supplementary guidance acting as a 'material consideration' whereas the Garden Village AAP will form part of the statutory development plan.

Housing Mix within the West Eynsham SDA

11.3 The West Eynsham SDA is envisaged as an urban extension to the existing settlement. It provides an opportunity to address gaps in the settlement's existing housing offer and socio-economic profile in order to contribute to delivering a more balanced, sustainable community. The starting point for considering future housing needs is therefore an understanding of the existing housing mix and socio-economic characteristics of Eynsham today.

11.4 The profile of homes in Eynsham is focused particularly towards 3-bed housing and semi-detached properties. There is a limited proportion of flats and 1-bed properties albeit that this is characteristic of villages and their role within a wider hierarchy of settlements. Levels of home ownership are high, albeit that the Private Rented Sector is likely to have grown in size since 2011.

11.5 The profile of residents in Eynsham is focused on families with school age children and older persons, influenced in part by affordability characteristics, the low proportion of social housing (12% in 2011) as well as the presence of both primary and secondary schools in the village.

11.6 Through the delivery of the West Eynsham SDA there is an opportunity to attract and retain younger people in their 20s and 30s, the representation of which is currently relatively low in Eynsham. This can be achieved by increasing the availability of affordable housing and smaller, more affordable market housing. This is not to suggest that housing should not be provided for residents of other ages, just that there is an opportunity to move towards a more balanced socio-economic profile through the careful consideration of the mix of homes delivered. There is a clear local aspiration for this, as revealed from the SPD Issues Paper Consultation and the draft Neighbourhood Plan.

11.7 The West Oxfordshire Local Plan sets out that 50% of homes should be affordable, comprising both housing and various ‘affordable home ownership’ products; with 50% market housing (which is likely to comprise a mix of owner occupied properties, and those owned by landlords and available for private rent). The evidence in this report supports this.

Affordable Housing Mix

11.8 In considering policy guidance regarding the mix of affordable housing, both the need profile and viability evidence is relevant. This report has considered development needs but it will be important that the recommended housing mix is considered through viability testing in the preparation of the SPD.

11.9 Addressing the tenure mix of affordable housing first of all, Iceni considers that the evidence supports the policy split of affordable housing provision in the Local Plan with 66% (two-thirds) being for rented housing and 33% (one third) for intermediate and low cost home ownership products.

11.10 **R1: Iceni consider that the tenure split of affordable housing in the Local Plan remains appropriate and should be applied as a starting point in negotiating affordable housing within the two strategic development schemes at Eynsham.**

11.11 It is important that both rental levels for affordable homes and the discounts applied to homes for sale are sufficient that it makes housing genuinely affordable for local people.

11.12 In setting rent levels, Iceni would recommend that rental levels should not be allowed to exceed Local Housing Allowance levels. We would recommend that rental levels are set having regard to what represent ‘living rents’ within West Oxfordshire.

R2: The Council should work to consider what level rents should be set for affordable housing to ensure that they are genuinely affordable having regard to the evidence in this report, alongside as appropriate viability evidence. Rents should typically not exceed Local Housing Allowance rates for different property sizes.

11.13 It would be appropriate to seek to deliver a mix of low cost home ownership options within the SDA including both shared ownership and discounted market sale homes. Consideration should be given to the pricing of these so that they are affordable to households locally within the ‘rent-to-buy gap.’ Based on the current position, this is households with an income of between £30,000 - £67,500. Discounts on OMV or the householders’ share for shared ownership properties should be assessed to ensure housing is affordable to those in this income bracket.

R3: Consideration should be given to the pricing of affordable home ownership products to ensure that they to be affordable to households within the “rent-to-buy gap” in West

Oxfordshire. The mix of affordable home ownership products offered within individual development schemes should ensure that it delivers housing accessible for those with a range of incomes in this bracket, including at the lower end of the range.

11.14 Turning to the sizes of affordable housing to be delivered, Iceni's analysis points to a need for a mix of different property sizes. Our recommended mix of different sizes of affordable homes is set out in the Table below. Iceni consider that regard however should also be had to the profile of need revealed by the Council's Housing Register, taking account of not just the overall needs profile but relative priority needs.

R4: The mix of different sizes of affordable homes in new development schemes within the SDA should be informed by the mix of different sizes of homes identified in this Study or updated evidence where applicable and the mix of households on the relevant Housing Register.

Table 11.1 Recommended Affordable Housing Size Mix

	1-bed	2-bed	3-bed	4+-bed
Social/Affordable Rented	30-35%	30-40%	30-35%	5%
Affordable Home Ownership	20-25%	40%	25-30%	5-10%

11.15 Delivery of the mix of housing set out, taking account of the policy position seeking 50% affordable housing through new developments, will assist in rebalancing the overall profile of homes in Eynsham; and increasing access to housing amongst younger age groups.

Market Housing Mix

11.16 Iceni's analysis points to a strong sales market in Eynsham which is influenced by the settlement's attractiveness as a place to live – including facilities in the settlement and its schools, proximity and access to Oxford, and local employment opportunities. It sees people moving from Oxford as prices are lower and you can therefore 'get more for your money,' with the evidence suggesting prices for houses are £65,000 + cheaper than those in the City. The profile of demand is focused more towards houses than flats (where values are more similar to those in Oxford).

11.17 There is a limited market in West Oxfordshire for 1-bed properties, with these typically accounting for < 10% of supply. The market profile is focused on two-, three- and four-bed houses, with the greatest relative demand for 3- and 4-bed properties. The split of housing within the two consented phases of the SDA is however relatively strongly focused towards larger 4+ bed properties, which account for 69% of supply.

R5: The Masterplan for the West Eynsham SDA should seek to achieve the balance of market housing indicated in the table below across the development scheme. The Council should monitor delivery against this whilst exercising some flexibility in the mix allowed within

individual phases of development/ planning applications to respond to changing market circumstances. Any substantive deviation from the recommended mix should be supported by clear evidence as part of planning applications to justify this.

Table 11.2 Recommendations on Market Housing Mix for the West Eynsham SDA

	1-bed	2-bed	3-bed	4+-bed
Recommended Mix for New Market Homes in SDA: 500 Dwellings	5%	35%	40%	20%

Meeting Specific Housing Needs

11.18 Iceni consider that there is some potential for the West Eynsham SDA to contribute to providing specialist older persons housing, should there be interest from a specialist developer to deliver this. We consider that there is probably greater potential for the delivery of Build-to-Rent development within the larger Garden Village scheme, but policy should not preclude provision within the SDA should there be market interest.

11.19 Iceni find the Local Plan position of requiring at least 5% of plots to be made available for self- or custom-build development to be justified. The Council are undertaking further work with the Right to Build Taskforce to consider delivery models. Our analysis has similarly found that the requirements for accessible and adaptable homes are justified; and that it would be reasonable to provide at least 5% of homes as wheelchair adaptable homes.

Housing Mix within the Garden Village

11.20 The Oxfordshire Cotswolds Garden Village is intended to function more as a standalone settlement, albeit one which is in close proximity to Eynsham and with links to it. Starting with a relatively blank canvas in these terms, there are opportunities for the scheme to deliver a range of housing. The Council is keen that the scheme includes a range of different types, sizes and tenures of homes and is an exemplar of new models of housing delivery. Iceni have considered its potential within this in mind.

11.21 The West Oxfordshire Local Plan sets out that 50% of homes should be affordable, comprising both social and affordable rented properties and various ‘affordable home ownership’ products; with 50% market housing (which is likely to comprise a mix of owner occupied properties, and those owned by landlords and available for private rent). The evidence in this report supports this.

Affordable Housing Mix

11.22 As with the SDA both ‘need’ and ‘viability’ are relevant considerations in setting policies for the mix of housing, and in particular the level and mix of affordable housing.

11.23 Iceni considers that the evidence supports a split whereby 20% of homes are provided for affordable home ownership (using the 2019 NPPF definition) and 30% for social or affordable rented homes. Of the total affordable housing, this equates to a mix of 40/60 split between affordable home ownership and rented affordable products.

11.24 **R6: Iceni recommend that the Garden Village AAP specify that 30% of new homes should be delivered as affordable housing for rent, and 20% as affordable home ownership subject to viability. Affordable home ownership should be defined in a consistent way to the NPPF, including shared ownership and shared equity housing; starter homes and other discounted market sale housing.**

11.25 It is important that both rental levels for affordable homes and the discounts applied to homes for sale are sufficient that it makes housing genuinely affordable for local people. In setting rent levels, Iceni would recommend that rental levels should not be allowed to exceed Local Housing Allowance levels.

11.26 We would recommend that rental levels are set having regard to what represent living rents within West Oxfordshire. Our needs analysis suggests that if the profile of rented housing was to be targeted at meeting needs without recourse to housing-related benefits, c. 80% of rented housing should be provided at social rents and 20% at affordable rent levels. However, there are wider considerations to take into account including viability – particularly in early phases of the scheme where significant infrastructure costs arise.

R7: Rents for rented affordable housing should be set having regard to what represents a "living rent" in West Oxfordshire/ Oxford based on the methodology set out in this report and should not exceed Local Housing Allowance rates for different property sizes. A sizeable proportion of rented affordable housing (50%+) should be delivered at social rent levels to ensure that it is genuinely affordable and limits benefit dependency.

11.27 It would be appropriate to seek to deliver a mix of low cost home ownership options within the Garden Village development including both shared ownership and discounted market sale homes. Consideration should be given to the pricing of these seeking to promote delivery of homes which are affordable to households locally within the 'rent-to-buy gap.' Based on the current position, this is households with an income of between £30,000 - £67,500. Discounts on OMV or the householders' share for shared ownership properties should be assessed to ensure housing is affordable to those in this income bracket.

R8: Affordable home ownership products should be priced to be affordable to households within the "rent-to-buy gap" in West Oxfordshire. The mix of affordable home ownership products offered within individual development schemes should ensure that it delivers

housing accessible for those with a range of incomes in this bracket, including at the lower end of the range.

11.28 Turning to the sizes of affordable housing to be delivered, Iceni's analysis points to a need for a mix of different property sizes. Our recommended mix of different sizes of affordable homes is set out in the Table below. Iceni consider that regard however should also be had to the profile of need revealed by the Council's Housing Register, taking account of not just the overall needs profile but relative priority needs.

R9: The mix of different sizes of affordable homes in new development schemes within the Garden Village should be informed by the mix of different sizes of homes identified in this Study or updated evidence where applicable and the mix of households on the relevant Housing Register.

Table 11.3 Recommended Affordable Housing Size Mix

	1-bed	2-bed	3-bed	4+-bed
Social/Affordable Rented	30-35%	30-40%	30-35%	5%
Affordable Home Ownership	20-25%	40%	25-30%	5-10%

11.29 Delivery of the mix of housing set out, taking account of the policy position seeking 50% affordable housing through new developments, will assist in rebalancing the overall profile of homes in Eynsham; and increasing access to housing amongst younger age groups.

Market Housing Mix

11.30 The delivery of the Garden Village will support in-migration to the Eynsham area, including from Oxford; other parts of West Oxfordshire and potentially further afield. Iceni consider that it is appropriate that there is some flexibility in the mix of housing expected, to allow phases of the development to respond to up-to-date market information and prevailing market conditions at the time at which reserved matters applications for individual phases are brought forward. However, it is helpful to provide an overall guide mix for the development scheme as a whole to inform masterplanning; and to ensure that a balanced, mixed community is supported which provides housing for a range of households.

11.31 We recommend for the Garden Village a housing mix profile for market housing which is relatively similar to the existing profile of homes in Eynsham and across West Oxfordshire (across all tenures). But it should be borne in mind that the high proportion of affordable housing envisaged as part of the development scheme will shift the overall profile of homes more towards smaller properties.

R10: The Council should include a policy within the Garden Village AAP seeking a mix of homes as part of the development which broadly aligns to that set out in the table below; but

with scope for deviation from this where it is supported by relevant evidence to justify this as part of a planning application.

Table 11.4 Recommended Market Housing Size Mix

	1-bed	2-bed	3-bed	4+-bed
Market Housing	5-10%	20-25%	40-45%	25-30%

11.32 There is a lack of schemes which have tested the market for build-to-rent development in Oxfordshire, including in Oxford City. Iceni consider that it would be sensible for a small scheme of 50 units – or more, should it be supported by the market - to be incorporated in early phases of the Garden Village development in order to test the market, and demonstrate that demand exists for Build-to-Rent development at this location. The success of this could then support further PRS development within subsequent phases. A Build-to-Rent scheme should be located at an accessible location with the development with strong public transport accessibility.

R11: The AAP should seek to support delivery of a modest Build-to-Rent development within early phases of the delivery of the Garden Village in order to test the market for this form of provision. This should be at an accessible location within the development with access to local amenities and public transport provision.

Older Persons Housing within the Garden Village

11.33 Taking account of demographic and market dynamics, Iceni considers that there is good potential for the Garden Village scheme to include specialist housing for older people, including both supported housing and housing with care. This caters for a different market segment and can therefore help to drive overall housing delivery rates.

11.34 We consider that it would be appropriate for the Council to exercise a level of flexibility in respect of the nature and scale of development for older persons housing. A need exists for both sheltered/ retirement housing and for more specialist 'housing with care' provision. However, the scale of provision is likely to influence the level of in-migration to the Eynsham area, and therefore the assessed need should not necessarily be considered as a cap on provision.

11.35 Housing with care provision, depending on the specific nature of provision, might fall within a C2 Use Class. The viability evidence prepared in support of the Local Plan suggested that on-site provision of affordable housing in sheltered housing and extra-care housing schemes is achievable (at varying percentages); however further viability testing for the Garden Village and the SDA may warrant further consideration once more information on development costs are known. There are also practical considerations to take into account, including whether affordable housing can be effectively integrated into the development on-site and whether affordable residents will have access to on-site facilities and the affordability of service charges.

11.36 We would envisage that to deliver a viable scheme with sufficient critical mass to support a range of facilities and services on-site, an extra care scheme would typically have between 60-150 units; and a care home scheme between 60-100 units. In addition, there is potential for retirement housing / over 55 development.

R12: Iceni consider that the AAP should support provision of both sheltered/ retirement housing and housing with care within the AAP. These should be located in areas with strong access to local amenities and public transport services. The Council should consider carefully how Policy H3 is applied to these forms of provision on-site.

11.37 It will remain equally important to ensure that general housing is adaptable to households changing needs, and the standards that the Council has set out in the Local Plan regarding accessible and adaptable homes are justified. Iceni also find that it would be reasonable to provide at least 5% of homes as wheelchair adaptable homes.

11.38 The Council might consider the potential role of bungalows as part of the future mix of housing in the Garden Village. Such housing may be particularly attractive to older owner-occupiers (many of whom are equity-rich) which may assist in encouraging households to downsize. However, the downside to providing bungalows is that they are relatively land intensive for the amount of floorspace created.

11.39 Given the evidence set out in this report, the Council may also want to consider requiring all dwellings to meet the M4(2) standards (which are similar to the Lifetime Homes Standards). Data in the DCLG Housing Standards Review (Cost Impacts) of September 2014 identified a cost range to meet this standard in new homes of £520 to £940 depending on dwelling size and built-form. Whilst this is clearly an additional cost it is unlikely to fundamentally alter scheme viability.

11.40 If the Council does not pursue a policy seeking 100% of homes as meeting the M4(2) standards (through the Garden Village AAP) it should consider if a different approach is prudent for market housing and affordable homes, recognising that Registered Providers may already build to higher standards, and that households in the affordable sector are more likely to have some form of disability.

R13: The Council should consider a policy in the AAP which seeks the application of M4(2) standards on 100% of homes.

Self- and Custom-Build Development

11.41 It is clear that there is a level of demand for self-build and custom housebuilding serviced plots of land in the District. There has been 98 expressions of interest in serviced plots of land over the 3.5 year period considered; as drawn from the register. There are also 506 people registered on the Buildstore's Custom Build Register and 879 subscribers' to Plotsearch and this may under-estimate provision. Local estate agents have also highlighted that there are people searching for plots; but ultimately there are land availability issues – particularly in and around Eynsham.

11.42 There is clear evidence of need/ demand which justifies the Council's policies requiring 5% of plots to be made available for self- and custom-build development as part of the Garden Village scheme.

R14: The AAP should retain the policy requirement in the Local Plan requiring 5% of plots within the Garden Village to be made available for self- and custom-build development. The Council should take account of the separate work it has commissioned on delivery models in assessing the form of provision.

Graduate and Employer-Linked Housing

11.43 The Garden Village and the SDA present an opportunity to meet the housing needs of essential local workers and junior skilled staff required by high-tech businesses, health and education institutions located in Eynsham, as well as Witney and Oxford. As a result of the proximity to Oxford and its universities, there is also an opportunity to meet the needs of post-graduate students and academic staff.

11.44 At present, proposals being considered include a new University NHS Trust and Oxford Brookes University linked training cluster with accommodation which would provide an anchor for essential local workers and support medical training as well as nearby tech-companies in Eynsham.

11.45 There is also support from some of the site promoters at West Eynsham SDA who see the provision of key worker housing for the universities as important to the scheme; and are open to explore the provision of housing for postgraduates and academics. It is considered that proposals for such housing should be strongly supported. However, key worker housing would be justified regardless of whether this specific concept comes forward.

R15: The AAP and SPD should include policies/requirements which support graduate and employer-linked housing if brought forward by the university or any enabling organisation.

Space Standards

11.46 The Government has set out a Nationally Described Space Standard which deals with internal space and addresses the minimum gross internal floor area and storage requirements for different sizes of dwellings.[36] Detailed data on the square footage of homes being built in West Oxfordshire is not available. Iceni has however reviewed the sizes of properties proposed at Taylor Wimpey's Thornbury Green Scheme. 90% of properties at this scheme appear to sit within or above the space standards for the number of bedrooms indicated.

11.47 The evidence in this report does not point to particular issues of overcrowding in West Oxfordshire. There are clear affordability issues in West Oxfordshire which suggest that policies which encourage delivery of larger homes could impact negatively on householders' ability to afford new homes. We do not consider that policies requiring homes to be constructed to national space standard can therefore be justified.

Acceleration of Housing Delivery

11.48 The timely delivery of the two strategic sites will be important in ensuring that West Oxfordshire District Council can maintain a five year housing land supply. In the absence of this, it risks seeing unplanned development brought forward through speculative planning applications on non-allocated sites.

11.49 We have considered four key factors in this report which relate to the Council's role in accelerating housing delivery. The key conclusions for each are set out below.

Process Management

11.50 The Council is bringing together a range of stakeholders to put in place a clear policy framework through the Garden Village AAP and West Eynsham SDA against which planning applications can be assessed; which is a positive approach. It is clear that there is extensive collaborative working taking place between both the developers, the district and County Councils, infrastructure providers and other statutory consultees. This upfront work will provide a strong basis for the timely determination of planning applications.

11.51 The Council has already signed a Planning Performance Agreement with Grosvenor on the Garden Village site and the intention is to twin-track the AAP with the submission of the outline planning application to ensure it is submitted as quickly as possible. There are also member workshops ongoing in respect of both sites, to ensure that decision-takers are fully informed. This should support the efficient determination of planning applications. Moving forward, the Council should carefully

[36]https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/524531/160519_Nationally_Described_Space_Standard____Final_Web_version.pdf

consider and limit, where possible, pre-commencement conditions to ensure the timely delivery of phases of development.

Placemaking Investment and Infrastructure Delivery

11.52 The success of large-scale residential developments is very much dependent on the provision of local amenities, shops, workplaces, schools, public spaces and recreational space. These all help to build a strong community and supports vibrant, economically successful places. We have reviewed research in this report which has shown that upfront placemaking investment makes the development more appealing and has a positive influence on the pace of delivery and sales, as well as residential values.

11.53 The delivery of infrastructure within early phases of development can also help to create place and underpin levels of demand. It has been noted in this report that research shows that investment in schools is particularly important, as they can provide an immediate draw to the development attracting potential buyers, but also help to create footfall.

R16: The Council should consider how it leverages its own resources and work with the County Council to contribute to early infrastructure delivery, where possible, to support housing delivery rates.

Product Differentiation and Build out Rates

11.54 A key issue across both strategic sites is build out rates. The most notable conclusion from Sir Oliver Letwin's *Independent Review of Build Out* is a need to increase diversity in the products delivered on large sites and the diversity in those who are building homes. In his report, Letwin recommended that each phase of development should be subject to housing diversity requirements – and including different housing products, types, tenures and styles. The Council should encourage this in the AAP and SPD whilst recognising that different locations within a strategic development may have a different product mix.

R17: The AAP and SPD should adopt the principle set out in the Letwin Review of diversity in the overall scheme, and where appropriate by phase, to help support build-out rates.

11.55 Furthermore, we recommend the following issues are considered as part of the masterplanning process for both the Garden Village and the SDA:

- Sales Outlets – the potential to support multiple sales outlets at different locations within the development scheme; as part of each phase. The Council should look to have at least 2 access points to the sites and multiple sales points from an early point in the delivery of both sites.

- Product differentiation – ensuring that these sales outlets are able to offer a level of differentiation between the market housing 'product' being offered in order to limit competition and boost sales rates.

- Integrated affordable housing – integrating affordable housing within development phases, as this is catering for a different market/ target group from the 'for sale' housing.

- Catering for Different Market Segments – delivering the elements of the scheme which cater for different specialist market segments, such as build-to-rent; elderly persons accommodation; student/ graduate housing; and self-custom-build development.

11.56 We consider these issues should inform and be embedded within the masterplans for both sites; and this should be supported by clear policy or principles addressing product diversity within the AAP and SPD.

Modern Methods of Construction

11.57 The Government has recognised that homes constructed off-site through 'modern methods of construction' can be built up to 30% quicker than by traditional methods of construction, and with potentially a 25% reduction in costs; and Government has sought to encourage growth in their use.

11.58 Through using a high proportion of precision-manufactured components, materials and manufacturing systems, housing delivered in this way can also be of a superior quality to that delivered through traditional construction, and can achieve better energy performance; can reduce the effects of site deliveries, noise and pollution by shortening the construction period and thus reducing disruption to local communities; and can require lower levels of workers, helping to mitigate and manage the potential effects of construction skills shortages.

11.59 To maximise the role which modern methods of construction can have in accelerating delivery, it is critical that this type of construction requires a highly detailed design to be agreed at an earlier stage, with the ability to make changes to the design and space planning subsequent to this being quite limited.

R18: The Council should through the work undertaken on masterplanning both schemes encourages the use of modern methods of construction; recognising the benefits of it in delivering housing at high volumes. The Council should work with the site promoters to actively engage potential delivery partners; and should consider how the planning process can effectively support the delivery of factory-built homes.

Maintenance and Management of the Housing Stock

11.60 The delivery of a successful new community requires a clear understanding of how assets generated by the development process will be managed in perpetuity. The Garden City Principles as set out in the introduction to this report acknowledge that maintenance and management is undertaken for the benefit of the community; but it can also benefit Councils and indeed developers and site promoters.

11.61 This report has set out the key principles to be followed for achieving success in the long-term; and it is clear that new communities will not be sustainable without well organised management structures and a reliable revenue stream. The Council will be able to facilitate this through a framework to maintain and manage those assets; as well as providing reassurance to new residents of the community and providing them with genuine involvement in the development of their community.

11.62 There are various options and ideas which could be taken forward by the Council; however, at this stage there is no agreed masterplan for either site which can be used to inform a framework for maintenance and management and potential options need careful consideration through engagement of a range of stakeholders. This report has set out an overview of the bodies that can drive the long-term management of the development and the models which are used to support this; as well as case studies where this has been successful.