



HOUSING VISION

The Implications of Household Projections for Meeting Housing Need in Sandbach: 2013-2030

Final Report

March 2015



The Implications of Household Projections for Meeting Housing Need in Sandbach: 2013-2030

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EXECUTIVE SUMMARY

- ES 1 Sandbach is facing very dramatic changes in its population and household structure which will lead to a very different pattern of need for housing in the period to 2030. Significant falls are projected in the need and demand for family housing and very significant increases projected in the need and demand for housing suitable for older households. Without intervention to provide suitable alternatives for older people, tensions will grow between the housing required and the housing available.
- ES 2 The current age structure is similar to that for Cheshire East, with lower younger and larger older populations than regionally or nationally.
- ES 3 Compared with the region and nationally, Sandbach and Cheshire East have higher proportions of older households; of couple households with no children and of households with dependent children; and lower proportions of lone parent households.
- ES 4 Sandbach's population was characterised by a much higher level of inflow from elsewhere in the UK and much lower outflow than for Cheshire East, the region or nationally. This is indicative of the effect of new housebuilding.
- ES 5 Most UK movement in and out of the Sandbach consisted of single person households in the private rented sector. The main age group moving into Sandbach was people aged 20-34 and the main group moving out was those aged 16-19, most likely to access further or higher education; employment and/or more affordable housing.
- ES 6 2,250 more people commuted out of Sandbach in 2011 than commuted in.
- ES 7 Over 5,000 people aged 16-74 commuted out of Sandbach each day of whom 38% commuted less than 5 km; 26% commuted between 5 and less than 10 km; 20% commuted between 10 and less than 20 km; and 16% commuted 20 km or further.
- ES 8 The main Travel to Work destinations from Sandbach are at or in the vicinity of Crewe, Middlewich, Knutsford, Holmes Chapel and Congleton; and
- ES 9 The main Travel to Work locations from which people commuted into Sandbach were at or in the vicinity of Sandbach, Middlewich and Crewe.
- ES 10 Sandbach's 16+ population is projected to grow by nearly 6% over the period 2013-2030, an increase of 857 people from 15,035 in 2013 to 15,892 in 2030.
- ES 11 A 4% fall is projected in those aged 16-34 and of 20% in those aged 35-54. Rapid growth of 26% is projected for those aged 55-64 and of 38% for those aged 65+.
- ES 12 The number of households in Sandbach is projected to grow by 9% over the period 2013-2030, an increase of 689 from 7,942 to 8,630.

- ES 13 Decline of 5% is projected for the 16-34 age group and of 19% for the 35-54 age group. Growth of 22% is projected for the 55-64 age group and of 40% for the 65+ age group.
- ES 14 The number of (mostly older) one person households is projected to grow by 18% over the period 2013-2030. Such households are likely to require smaller one and two bed accommodation.
- ES 15 The number of (mostly older) two person households with no dependent children is projected to grow by 17% over the period 2013-2030. Such households are likely to require two bed accommodation
- ES 16 The number of two person households with dependent children is projected to decline by 15% over the period 2013-2030. Such households are likely to require a minimum of two bed and typically three bed or larger housing.
- ES 17 Sandbach has a higher income distribution than the UK, the average household income is 11.2% higher than the UK average.
- ES 18 A local assessment of affordability identified an affordable housing requirement (social rent only) of 29%; an intermediate housing requirement (shared equity/ownership and Affordable Rent) of 9%; and a market sector requirement (full cost home ownership) of 62%.
- ES 19 Matching housing required to household projections implies a decline of 11 in the requirement for one bed flats; of 40 for two bed flats and houses; of 301 for three bed and larger houses, and growth of 1,041 in the requirement for housing suitable for older people, including downsizing flats; bungalows and houses and for housing with care and support.
- ES 20 It will be difficult to reconcile the surplus of family housing against the increased requirement for downsizing and more manageable homes for older people.

1. INTRODUCTION AND APPROACH

1.1 The purpose of this report is to assess, in relation to the Parish of Sandbach:

1. Demographic Profile:

- who lives in the area now?
- what are the patterns of UK migration and commuting?

2. Current Housing Supply:

- what choices do consumers have in the area?
- how affordable is local housing?

3. Future Housing Need:

- how might the population and household structure change between 2013 and 2030?
- what are the implications for the future need and demand for housing?

1.2 The main data sources consulted are:

- Census 2011;
- 2012-based Subnational Population Projections;
- 2012-based Subnational Household Projections;
- Land Registry; and
- Rightmove and zoopla online property websites

1.3 The approach adopted to determining future housing need has been to undertake an assessment of projected changes to the household structure of Sandbach and the associated requirement for all housing including market housing over the period 2013-2030. Demographic and household data for areas within local unitary and district councils are limited. Consequently it is necessary to make use of data available at local authority level to supplement the more local data.

1.4 2012-based Household Projections were released in February 2015. At the time of writing, the detailed files were not available. However, 2012-based Subnational Population Projections, produced by the Office for National Statistics (ONS) are available and these have been used to model population and household projections in Sandbach over the period 2013-2030 as follows:

- The transformation rates from ONS' 2012 Subnational Population Projections for Cheshire East have been applied for each single year of age. Thus If the number of 1 year olds in 2013 in Cheshire East is x and the number of 2 year olds in 2014 is y , this gives a ratio (y/x) which has been applied to the Sandbach population.

- The number of births in Sandbach is assumed to be a constant proportion of those in the district, any variation is likely to be slight.
 - The transformation rates for Cheshire East include the effect of district-wide mortality and net migration rates; they do not include migration within the district, and there may be variations in local mortality and fertility rates.
- 1.5 Household representative rates from the Census have been applied to the population projection for Sandbach for all those aged 16+ to produce projected change in the number of households over the period 2013-2030. The limited data available to date suggest that the projected household formation trends might have a negative effect on household growth in Cheshire East, with a reduction in lower household representative rates. (Source: CLG Live Table 15 <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections#based-live-tables> .Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)
- 1.6 2012-based Household Projections were released in February 2015, and these enable households to be projected by:
- Broad age band of household representative, i.e.: 16-34; 35-54; 55-64 and 65+; and
 - Broad household type, i.e.: one person household; two or more persons with no dependent children and two or more person with dependent children.
- 1.7 An adjustment is made for those living in non-household accommodation, such as Care Homes. In line with CLG's method it is assumed that numbers in this type of accommodation stay at the 2011 level, except for those aged 75 or older. For the latter group, the proportion remains constant but numbers change in line with the projected growth in numbers of older people.
- 1.8 The results are set out in chapter 3. These are trend-based projections, and are subject to the caveats that apply to ONS' projections; further caveats apply due to the limitations on data at the Sandbach level. As noted above, migration between Sandbach and the rest of Cheshire East is not included. The projections should be regarded as indicators of 'organic growth' driven mainly by the composition of the local population.
- 1.9 The projections do not reflect policies that may affect future growth and migration, such as the Draft Local Plan Strategy for Cheshire East.

2. DEMOGRAPHIC PROFILE: POPULATION AND HOUSEHOLD PATTERNS AND PROJECTIONS

2.1 This section complements the Rural Community Profile for Sandbach (Parish) produced by Action with Communities in Rural England (ACRE) in December 2013 and provides the following outputs:

1. profiles of Sandbach's population by age and household composition at 2011;
2. patterns of migration and commuting to and from Sandbach; and
3. projections of Sandbach's population and household structure over the period 2013-2030. Please note: that due to rounding, there may be slight variations from overall totals when sub-samples are added.

Population by age and household composition

2.2 The following table sets out the age structure of the population at 2011.

Table 2.1: age structure in Sandbach, 2011

Age Bands	Sandbach		Cheshire East		North West		England	
	No	%	No	%	No	%	No	%
Age 0 to 15	3,076	17.1	65,753	17.8	1,324,548	18.8	10,022,836	18.9
Age 16 to 17	492	2.7	9,249	2.5	177,491	2.5	1,314,124	2.5
Aged 18 to 24	1,208	6.7	27,013	7.3	681,102	9.7	4,970,636	9.4
Aged 25 to 44	4,408	24.5	91,067	24.6	1,861,118	26.4	14,595,152	27.5
Age 45 to 64	5,194	28.9	105,673	28.6	1,836,763	26.0	13,449,179	25.4
Age 65 plus	3,598	20.0	71,372	19.3	1,171,155	16.6	8,660,529	16.3
All Categories	17,976	100.0	370,127	100.0	7,052,177	100.0	53,012,456	100.0

(Source: KS102EW 2011 Census data, ONS website, <http://www.ons.gov.uk> and NOMIS website <http://www.nomisweb.co.uk>)

Key findings

- The age structure of the population is similar to that for Cheshire East. Both Sandbach and Cheshire East have lower younger and larger older populations than regionally or nationally.

2.3 The following table sets out household composition at 2011.

Table 2.2: household composition in Sandbach, 2011

Household Composition	Sandbach Parish		Cheshire East		North West		England	
	No	%	No	%	No	%	No	%
One Person Household:								
Aged 65 and over	1,111	14.2	21,409	13.4	386,650	12.8	2,725,596	12.4
Other	1,191	15.2	25,919	16.3	582,652	19.4	3,940,897	17.9
One Family Only:								
All aged 65 and over	849	10.8	16,201	10.2	234,507	7.8	1,789,465	8.1
Married or same-sex civil partnership couple: No children	1,172	14.9	23,073	14.5	350,228	11.6	2,719,210	12.3
Married or same-sex civil partnership couple: Dependent children	1,390	17.7	26,545	16.6	423,069	14.1	3,375,890	15.3
Married or same-sex civil partnership couple: All children non-dependent	500	6.4	9,766	6.1	179,277	6.0	1,234,355	5.6
Cohabiting couple: No children	415	5.3	8,293	5.2	147,764	4.9	1,173,172	5.3
Cohabiting couple: Dependent children	292	3.7	6,128	3.8	130,840	4.3	890,780	4
Cohabiting couple: All children non-dependent	39	0.5	754	0.5	16,506	0.5	108,486	0.5
Lone parent: Dependent children	429	5.5	9,367	5.9	242,754	8.1	1,573,255	7.1
Lone parent: All children non-dependent	203	2.6	4,908	3.1	118,007	3.9	766,569	3.5
Other household types:								
With dependent children	86	1.1	2,426	1.5	70,603	2.3	584,016	2.6
All full-time students	1	0.0	173	0.1	14,567	0.5	124,285	0.6
All aged 65 and over	12	0.2	357	0.2	8,324	0.3	61,715	0.3
Other	150	1.9	4,122	2.6	103,801	3.4	995,677	4.5
All Categories	7,840	100.0	159,441	100.0	3,009,549	100.0	22,063,368	100.0

(Source: KS105EW 2011 Census data, ONS website, <http://www.ons.gov.uk> and NOMIS website <http://www.nomisweb.co.uk>)

Key findings

- Compared with the region and nationally, Sandbach and Cheshire East have:
 - more older households;
 - more couple households with no children;
 - more households with dependent children; and
 - less lone parent households.

Patterns of migration

- 2.4 Migration within the UK can have an important impact on housing markets, especially for locations which are attractive for people as places to live. The following table summarises patterns of migration in and out of the parish for the population in the year preceding the Census day of 27th March 2011. The term 'associated area' refers to the next level of geography up the hierarchy of Census data and therefore as the table area is the parish then the associated area is the local authority of Cheshire East.

Table 2.3: UK migration for Sandbach, 2011

Migration pattern	Sandbach Parish		Cheshire East		North West		England	
	Number	%	Number	%	Number	%	Number	%
Inflow: lived elsewhere 1 year ago outside the area but within the 'associated area'	766	4.3	5,699	1.5	78,478	1.1	94,064	0.2
Inflow: lived elsewhere 1 year ago outside the 'associated area' but within the UK	406	2.3	6,888	1.9	15,896	0.2	-	n/a
UK inflow total	1,172	6.9	12,587	3.4	94,374	1.3	689,734	1.3
Outflow: moved out of the area but within the 'associated area'	740		5,018		82,207		96,753	
Outflow: moved out of the 'associated area' but within the UK	511		7,656		17,251		-	
UK outflow total	1,251		12,674		99,458		-	
Net migration within the UK	-79		-87		-5,084		-2,689	
Lived at the same address 1 year ago	16,440	91.5	333,411	90.1	6,280,615	89.1	46,510,130	87.7
Lived elsewhere 1 year ago: within the same area	287	1.6	21,885	5.9	624,357	8.9	5,812,592	11.0
Inflow: lived elsewhere 1 year ago outside the UK	77	0.4	2,244	0.6	52,831	0.7	595,670	1.1
Total residents	17,976	100.0	370,127		7,052,177		53,012,456	

(Source: UKMIG001 2011 Census data, ONS website, <http://www.ons.gov.uk> and NOMIS website <http://www.nomisweb.co.uk>)

Key findings

- Sandbach's population was characterised by a much higher level of inflow from elsewhere in the UK and much lower outflow than Cheshire East, the region or nationally. This is indicative of the effect of new housebuilding.
- The net effect of UK migration to and from Sandbach was a loss of 79 people.

2.5 Having established patterns of migration, it is useful to understand the type of people who are moving in and out. The following table summarises patterns of migration by age band in the year to the 2011 Census.

Table 2.4: UK migration by age band for Sandbach

Migration pattern	0 to 4		5 to 15		16 to 19		20 to 24		25 to 34		35 to 49		50 to 64		65 to 74		75 plus		All	
	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%	No	%
Lived elsewhere 1 year ago outside the area but within 'associated area'	49	5.5	87	4.0	32	3.8	116	13.6	190	10.6	156	3.8	76	2.1	30	1.5	30	1.9	766	4.3
Lived elsewhere 1 year ago outside the 'associated area' but within the UK	25	2.8	25	1.1	14	1.6	76	8.9	107	6.0	87	2.1	29	0.8	23	1.1	20	1.3	406	2.3
UK inflow total	74	8.3	112	5.1	46	5.4	192	22.5	297	16.6	243	5.9	105	2.9	53	2.6	50	3.2	1,172	6.6
Moved out of the area but within the 'associated area'	52		79		40		96		164		166		79		28		36		740	
Moved out of the 'associated area'	15		35		130		81		93		81		52		17		7		511	

area' but within the UK																				
UK outflow total	67		114		170		177		257		247		131		45		43		1,251	
Net migration within UK	7		-2		-124		15		40		-4		-26		8		7		-79	
Lived at the same address 1 year ago	780	87.2	2,018	92.5	793	93.4	619	72.7	1,435	80.0	3,807	92.0	3,525	96.0	1,954	96.4	1,509	96.0	16,440	91.5
Lived elsewhere 1 year ago; within same area	34	3.8	44	2.0	9	1.1	29	3.4	43	2.4	70	1.7	34	0.9	16	0.8	8	0.5	287	1.6
Lived elsewhere 1 year ago outside the UK	6	0.7	8	0.4	1	0.1	11	1.3	18	1.0	19	0.5	6	0.2	3	0.1	5	0.3	77	0.4
Total residents	894	100	2,182	100	849	100	851	100	1,793	100	4,139	100	3,670	100	2,026	100	1,572	100	17,976	100

(Source: UKMIG001 2011 Census data, ONS website, <http://www.ons.gov.uk> and NOMIS website <http://www.nomisweb.co.uk>)

Key findings

- Those least likely to move home were aged 50+;
- The main age band which moved into Sandbach consisted of those aged 20-34; and
- The main net loss by age band consisted of those aged 16-19 which is likely to be to access further or higher education; employment and/or more affordable housing.

2.6 The following table summarises patterns of migration by household composition in the year to the 2011 Census. The first table focuses on family households and the second on One Person and Other households.

Table 2.5: UK migration by household composition for family households in Sandbach

Migration	All aged 65+	Married or same-sex civil partnership couple: No children	Married or same-sex civil partnership couple: Dependent children	Married or same-sex civil partnership couple: All children non-dependent	Cohabiting couple: No children	Cohabiting couple: Dependent children	Cohabiting couple: All children non-dependent	All households
Inflow: lived elsewhere one year ago outside the area but within the 'associated area'	9	28	36	4	21	16	0	248
Inflow: lived elsewhere one year ago outside the 'associated area' but within the UK	10	13	13	2	14	5	0	123
UK inflow total	19	41	49	6	35	21	0	371
Moved out of the area but within 'associated area'	7	25	35	2	22	13	0	246
Moved out of the 'associated area' but within the UK	4	15	12	4	6	3	0	125
UK outflow total	11	40	47	6	28	16	0	371
Lived at same address one year ago	823	1,105	1,304	433	289	228	31	7,030
Lived elsewhere 1 year ago; within the same area	2	9	13	1	2	8	0	89
Lived elsewhere one year ago outside the UK	3	3	8	0	1	0	0	18

Table 2.6: UK migration by household composition for One Person and Other households in Sandbach

Migration	One person household			Other household types			All households
	Aged 65+	Other	All aged 65+	With dependent children	All full-time students	All aged 65+	
Lived elsewhere 1 year ago outside the area but within 'associated area'	17	81	9	1	0	1	248
Lived elsewhere 1 year ago outside the 'associated area' within the UK	11	44	10	0	0	0	123
UK inflow total	28	125	19	1	0	1	371
Moved out of the area but within 'associated area'	20	76	7	2	0	0	246
Moved out of the 'associated area' but within the UK	6	62	4	2	0	0	125
UK outflow total	26	138	11	4	0	0	371
Lived at the same address 1 year ago	1,073	1,045	823	66	0	11	7,030
Lived elsewhere 1 year ago; within same area	8	18	2	1	0	0	89
Lived elsewhere 1 year ago outside the UK	2	1	3	0	0	0	18

(Source: UKMIG011 2011 Census data, ONS website, <http://www.ons.gov.uk> and NOMIS website <http://www.nomisweb.co.uk>)

Key findings

- The main household type moving in and out of Sandbach was one person households; and
- Most movement out of Sandbach was of one person households aged under 65.

2.7 The following table summarises patterns of migration by tenure in the year to the 2011 Census.

Table 2.7: UK migration and tenure for households in Sandbach

Migration	Owned: Owned outright	Owned: Owned with a mortgage or loan or shared ownership	Social rented: Rented from Local Authority	Social rented: other social rented	Private rented: private landlord or letting agency	Private rented: other private rented or living rent free	All
Lived elsewhere 1 year ago outside the area but within 'associated area'	28	71	5	31	107	6	248
Lived elsewhere 1 year ago outside the 'associated area' within the UK	29	28	2	5	56	3	123
Inflow: Total	57	99	7	36	163	9	371
Moved out of the area within the 'associated area'	27	66	7	30	108	8	246
Moved out of the 'associated area' within the UK	26	27	5	6	60	1	125
Outflow: Total	53	93	12	36	168	9	371
Lived at same address 1 year ago	2,912	2,846	126	531	499	116	7,030
Lived elsewhere 1 year ago; within the same area	14	20	4	11	34	6	89
Lived elsewhere 1 year ago outside the UK	8	6	0	0	4	0	18

(Source: UKMIG011 2011 Census data, ONS website, <http://www.ons.gov.uk> and NOMIS website <http://www.nomisweb.co.uk>)

Key findings

- Most movement was within the private rented sector among those who were owning with a mortgage or loan or shared ownership.

Patterns of commuting

2.8 Travel to work patterns can also have an important impact on housing markets, especially where locations are attractive to commuters as places to live. The following table summarises the extent of commuting in and out of Sandbach in 2011.

2.9 The following table summarises patterns of commuting at 2011.

Table 2.8: travel in and out of Sandbach to and from work, 2011

Travel to Work	No
Live and Work in Sandbach Parish	1,620
Travel Out to Work from Sandbach Parish	5,660
Travel Into Work to Sandbach Parish	3,405
Net Travel to Work	-2,255

(Source: WU01EW 2011 Census data, ONS website, <http://www.ons.gov.uk> and NOMIS website <http://www.nomisweb.co.uk>)

Key findings

- 2,250 more people commuted out of Sandbach than commuted in.

2.10 The following table summarises patterns of commuting for the workday population at 2011 consisting of the Usual Resident Population Aged 16 to 74 years either Employed or Not Employed but living in the Area.

Table 2.9: distance travelled to work for Workday Population, 2011

Distance	Number 16-74	% of 16-74	Number of commuters	% of commuters
Less than 2 km	1,350	12.2	1,350	27.0
2 km to less than 5 km	551	5.0	551	11.0
5 km to less than 10 km	1,303	11.8	1,303	26.0
10 km to less than 20 km	1,023	9.3	1,023	20.4
20 km to less than 30 km	339	3.1	339	6.8
30 km to less than 40 km	225	2.0	225	4.5
40 km to less than 60 km	138	1.2	138	2.8
60 km and over	76	0.7	76	1.5
Work mainly at or from home	993	9.0		
No fixed place	561	5.1		
Not in employment	4,482	40.6		
All Categories	11,041	100.0	5,005	100.0

Source: WD702EW 2011 Census data, ONS website, <http://www.ons.gov.uk> and NOMIS website <http://www.nomisweb.co.uk>

Key findings

- Over 5,000 people aged 16-74 commuted out of Sandbach each day of whom:
 - 38% commuted less than 5 km;
 - 26% commuted between 5 and less than 10 km;
 - 20% commuted between 10 and less than 20 km; and
 - 16% commuted 20 km or further.
- 9% of people worked from home.

2.11 Commuting patterns are best understood through maps which can identify the 'Middle Level Super Output Areas' (MSOAs) to or from which people travelled to work. MSOAs are one of the levels of geography at which census data is provided and consist of between 5,000 and 15,000 people and 2,000 to 6,000 households. The maps demonstrate that

- in relation to Travel to Work from Sandbach: the main destinations to which people travelled are at or in the vicinity of Crewe, Middlewich, Knutsford, Holmes Chapel and Congleton; and
- in relation to Travel to Work into Sandbach: the main locations from which people travelled are at or in the vicinity of Sandbach, Middlewich and Crewe.

Map 2.1

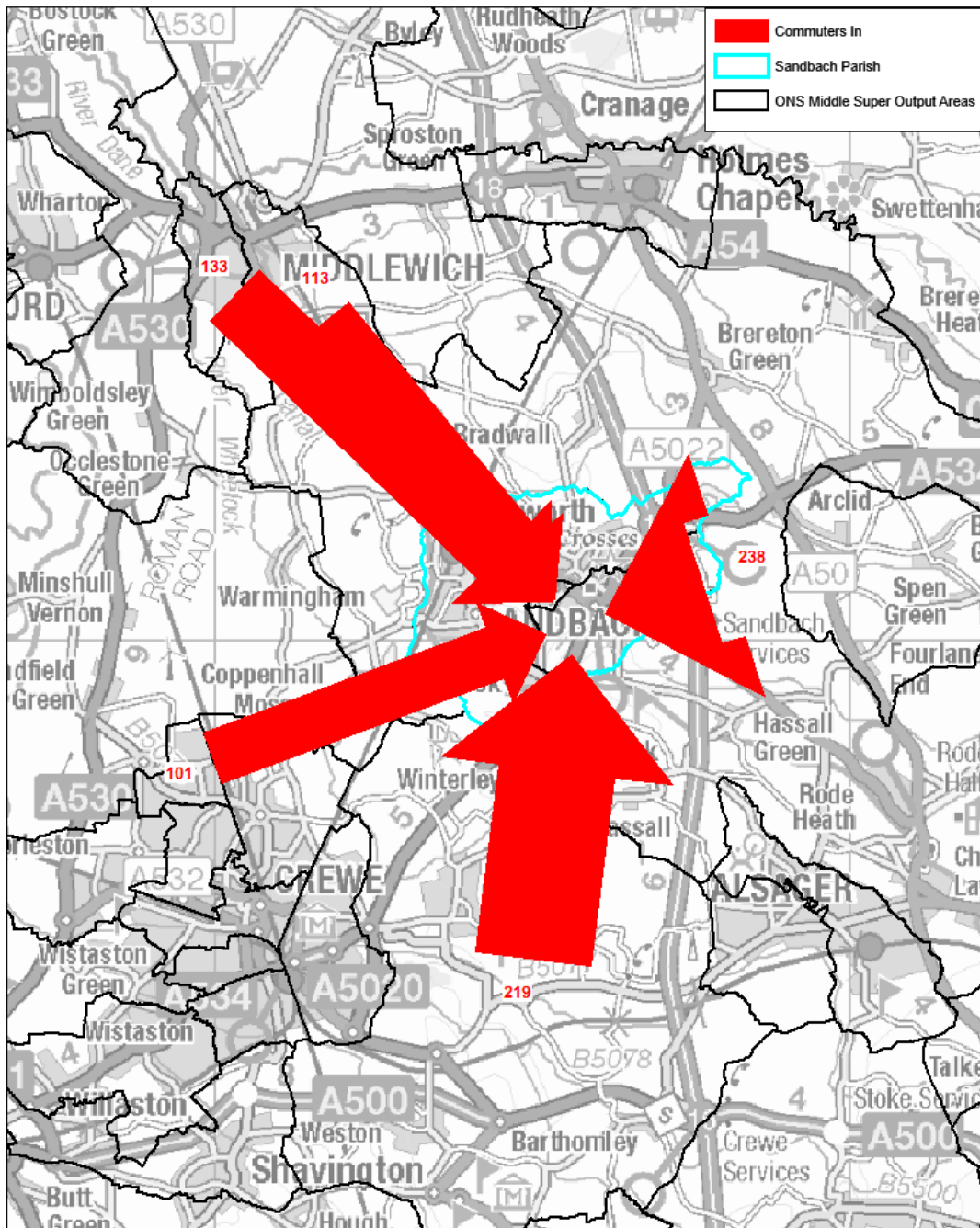
Travel to ONS Middle Super Output Areas where more than 100 people travelled from Sandbach Parish to Work



Source: Table WU01EW, 2011 Census Data, Office for National Statistics, NOMIS website, <http://nomisweb.co.uk>.
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Map 2.2

Travel from ONS Middle Super Output Areas where more than 100 people travelled into Sandbach Parish to Work

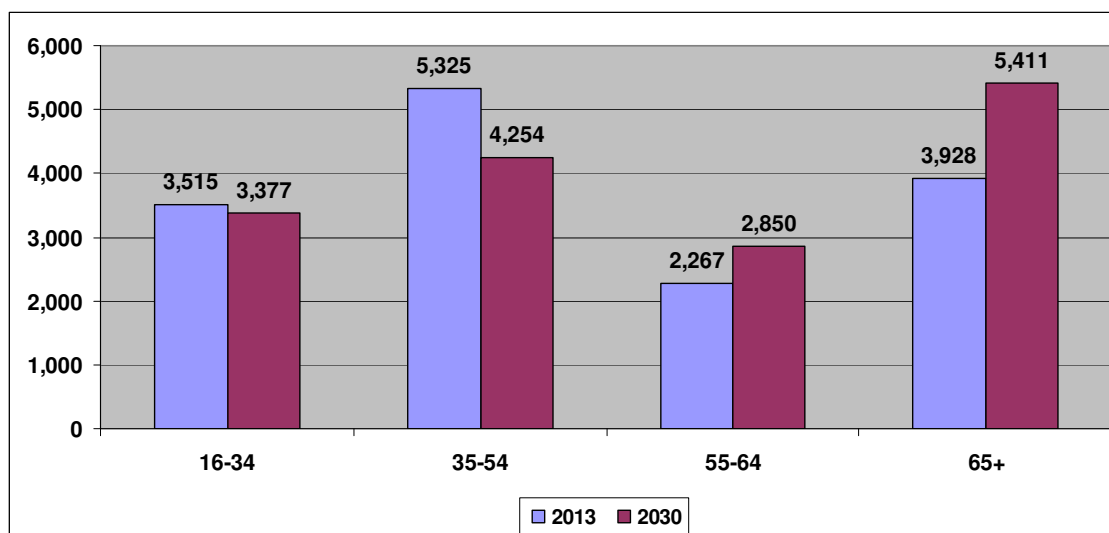


Source: Table WU01EW, 2011 Census Data, Office for National Statistics, NOMIS website, <http://nomisweb.co.uk>.
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(<http://www.nationalarchives.gov.uk/doc/open-government-licence>).
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Population and household projections, 2013-2030

2.12 This section turns to the question of how the population and household structure of Sandbach might change between 2013 and 2030. The following table sets out population projections for Sandbach for all those aged 16+.

Table 2.10: 2012-based 16+ population projections for Sandbach, 2013-2030



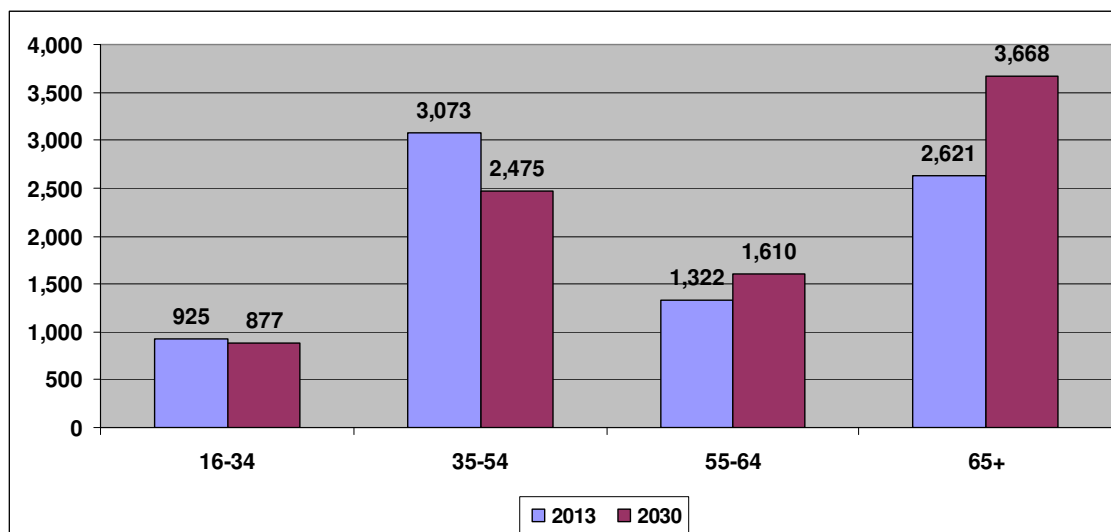
(Source: Housing Vision derived from Sub-National Population Projections ONS 2012, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings

- Sandbach's 16+ population is projected to grow by nearly 6% over the period 2013-2030, an increase of 857 people from 15,035 in 2013 to 15,892 in 2030.
- A fall of 4% is projected in numbers aged 16-34.
- Decline is projected of 20% for the 35-54 age group most of whom are likely to be members of family households.
- Rapid growth of 26% is projected in the 55-64 age group and of 38% over 65s most of whom are likely to be members of smaller single or couple households.

2.13 The following table sets out the household projections for Sandbach by age band.

Table 2.11: 2012-based household projections for Sandbach by age band, 2013-2028



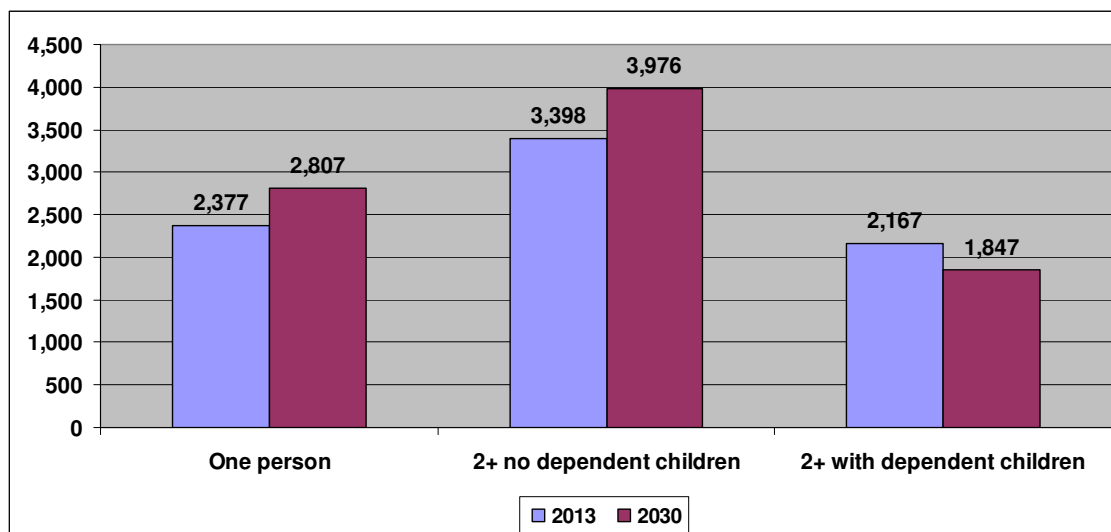
(Source: Housing Vision derived from Sub-National Population Projections ONS 2012, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings

- The number of households in Sandbach is projected to grow by 9% to 8,630 over the period 2013-2030, an increase of 689 from 7,942 to 8,630.
- Decline of 5% is projected for the 16-34 age group and of 19% for the 35-54 age group.
- In addition, the projection assumes that the number of people aged 65 or older in non-household accommodation would increase by about 100.
- Growth of 22% is projected for the 55-64 age group and of 40% for the 65+ age group.

2.14 The following table sets out the household projections for Sandbach by broad household type between 2013 and 2030.

Table 2.12: 2012-based household projections for Sandbach by household type, 2013-2030



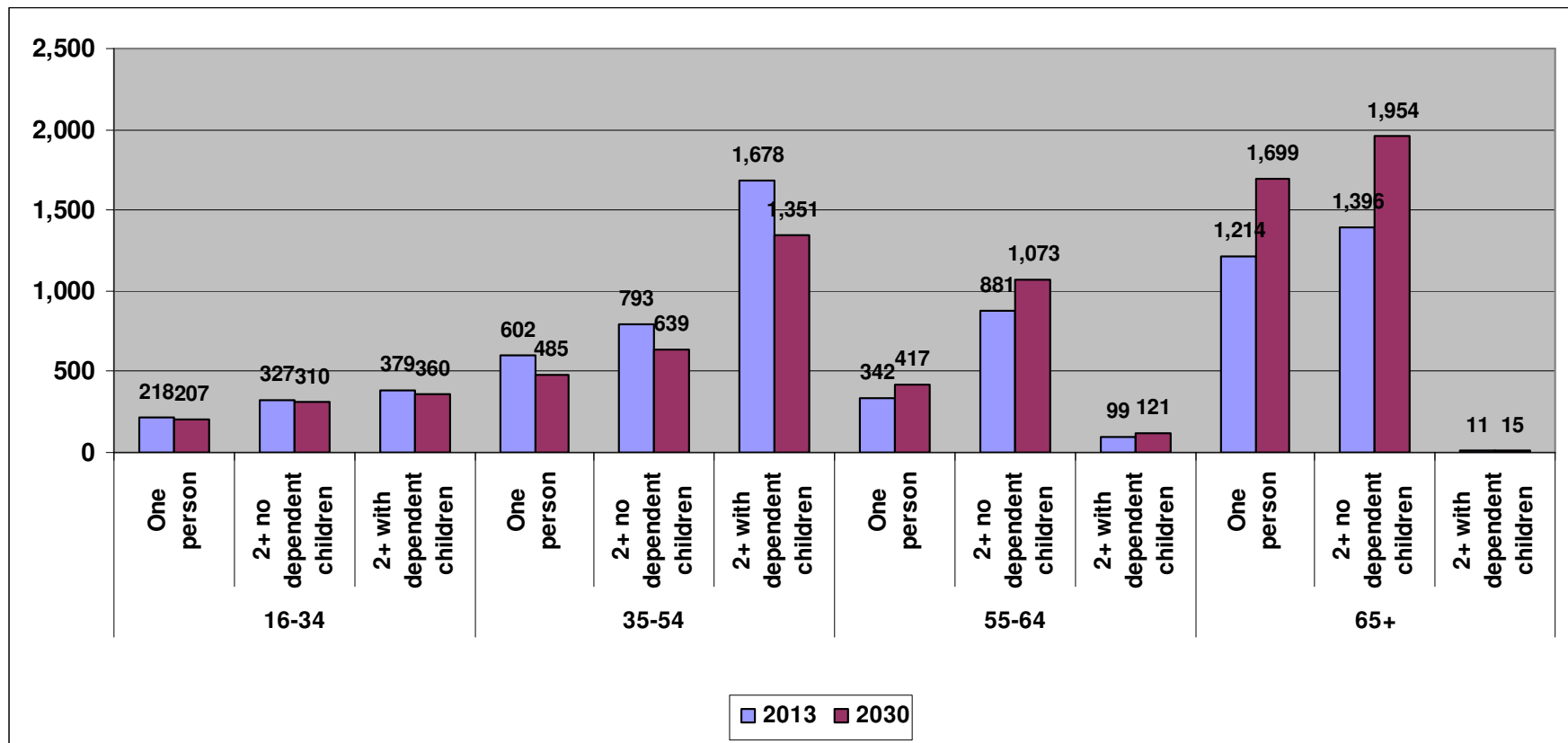
(Source: Housing Vision derived from Sub-National Population Projections ONS 2012, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings

- The number of one person households is projected to grow by 18% over the period 2013-2030. Such households are likely to require smaller one and two bed accommodation.
- The number of two person households with no dependent children is projected to grow by 17% over the period 2013-2030. Such households are likely to require two and three bed accommodation
- The number of two person households with dependent children is projected to decline by 15% over the period 2013-2030. Such households are likely to require a minimum of two bed and typically three bed or larger housing.

2.15 The following table sets out the household projections for Sandbach by age band and broad household type between 2013 and 2030. In considering this table, the user should bear in mind that the projections do not assume any changes in household formation rates over the period; differences between 2013 and 2030 are driven by changes in the age make-up of the population. Please note that the sum of the projections disaggregated by age band and household type creates a total of 691 compared with 689 in previous tables.

Table 2.13: 2012-based household projections for Sandbach by age band and household type, 2013-2030



(Source: Housing Vision derived from Sub-National Population Projections ONS 2012, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>. Contains public sector information licensed under the Open Government Licence v1.0 <http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings

- There are very large projected increases in the number of smaller older person households. There are increases in all types of household for those aged 55-64 and very large increases in the number of smaller older person households.
- In contrast, there are decreases in all types of household and especially family households for those aged 35-44.

3. HOUSING SUPPLY: CHOICE AND AFFORDABILITY IN SANDBACH

- 3.1 in order to determine the mix of housing implied by household projections it is necessary to identify the costs of market housing and the affordability of housing options for local people. This section focuses on choice in the home ownership and private rented sectors.

Home ownership market

- 3.2 The following table uses Land Registry data to summarise the number of sales and average property prices for the 3 years between January 2012 and December 2014.

Table 3.1: the annual volume of sales and average prices in Sandbach for the 3 years from January 2012 to end of December 2014

Year	Sandbach	
	No. of Sales	Average Price
1/1/2012 to 31/12/2012	255	£180,999.49
1/1/2013 to 31/12/2013	343	£181,455.87
1/1/2014 to 31/12/2014	407	£192,261.32
Annual average	335	£185,716.01

(Source: Land Registry)

Key findings:

- The average number of transactions over the 3 year period was 335, increasing from 255 in 2012 to 407 in 2014.
- The 2014 average price of £192.3k has increased by 6% since 2012.

- 3.3 The following table summarises the number of sales and average price by property type between 2012 and 2014.

Table 3.2: number of sales by property type and average prices in Sandbach for the 3 years from January 2012 to December 2014

Property type	Sandbach		
	No. of Sales	% of Sales	Average Price £
Detached	418	41.6	£245,004.64
Semi Detached	326	32.4	£157,020.50
Terraced	216	21.5	£131,292.41
Flats and Apartments	45	4.5	£104,106.89

(Source: Land Registry)

Key findings:

- Detached properties made up 42% of sales at an average price of £245k.

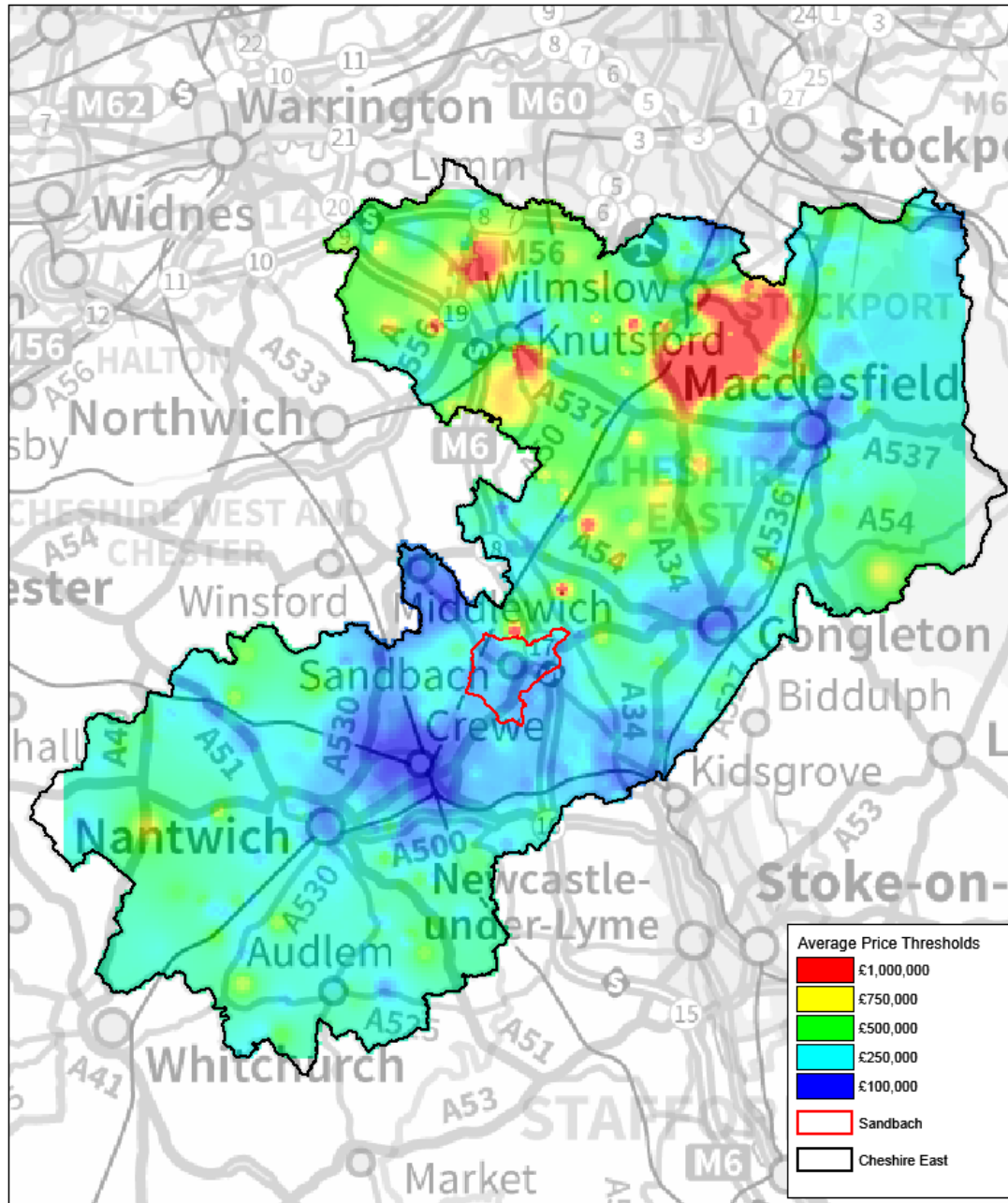
- Sales of semi-detached houses made up 32% of sales at an average price of £157k.
- Terraced houses made up 22% of sales at an average price of £131.3k.
- Flats and apartments made up only 5% of sales at an average price of £104k.

3.4 The following map identifies the spectrum of average sales prices and enables lower and higher prices hot spots to be identified for all properties sold in Sandbach in 2014. Please note that the maps are constructed around price thresholds as indicated then shaded colours are applied according to the averages between them; the white fringe areas are a product of the software. The maps have been created using the inverse distance weighting method of interpolation in MapInfo thematic mapping options. This method is used for data values that produce arbitrary values over the grid and is especially suited to sparse data. The map shows that:

- Sandbach has on average higher prices than Crewe but is below higher priced areas to the north and north east.

Map 3.1

Average House Prices for Sales Registered with the Land Registry during the period 1/1/2014 to 31/12/2014 in Cheshire East with Sandbach Parish Overlaid



Source: Land Registry Website, <https://www.gov.uk/government/statistical-data-sets/price-paid-data-downloads>
 This data covers the transactions received at the Land Registry in the period 1/1/2014 to 31/12/2014.
 (c) Crown copyright 2015. Contains Ordnance Survey Data (c) Crown copyright and database right 2015.
 Contains Royal Mail data (c) Royal Mail copyright and database right 2015. Contains National Statistics data.
 (c) Crown copyright and database right 2015.

Private rental market

3.5 The following table profiles private rented properties advertised by type.

Table 3.3: the number of properties advertised by property type at 2nd March 2015

Property type	Average	
	Number	%
Detached	6	15.8
Semi-detached	10	26.3
Terraced	12	31.6
Flats/apartments	8	21.1
Bungalows	2	5.3
Total advertised	38	100%

(Sources: rightmove and zoopla)

Key findings:

- 38 properties was advertised at March 2015
- The main property types advertised were terraced houses (32%); semi-detached houses (26%) and flats (21%).

3.6 The following table estimates the supply of homes from the private rented

Table 3.4: average per calendar monthly rent for privately rented properties in Sandbach at 2nd March 2015

Property Type	Average Monthly Rent
Detached	£870.00
Bungalow	£795.00
Semi	£653.00
Terrace	£581.67
Flat	£524.38
Average	£645.13

(Source: rightmove and zoopla)

Key findings:

- Average rentals varied from £524 per calendar month for a flat to £870 for a detached house.

Household income

3.7 Household income is the most important factor in determining access to housing. The following table applies a 'PayCheck Profile' produced by

industry specialists CACI to profile the proportion of households receiving gross incomes across a range of income bands. It is important to emphasise that this profile includes income from all sources, including social security benefits, and is for all household types. This data has been applied in the Housing Requirements Toolkit.

Table 3.5: gross household income, Sandbach, percentages, March 2015

Income band	Sandbach	United Kingdom
£0 - £5k	1.8%	2.5%
£5 – 10k	7.7%	10.0%
£10 - 15k	10.4%	12.4%
£15 – 20k	9.9%	10.9%
£20 – 25k	8.4%	8.9%
£25 - 30k	7.8%	8.0%
£30 – 35k	7.4%	7.3%
£35 - 40k	6.5%	6.2%
£40 - 45k	6.1%	5.7%
£45 - 50k	5.2%	4.7%
£50 - 55k	4.5%	4.0%
£55 – 60k	3.9%	3.3%
£60 - 65k	3.2%	2.7%
£65 - 70k	2.6%	2.2%
£70 - 75k	2.3%	1.9%
£75 - 80k	1.8%	1.4%
£80 - 85k	1.6%	1.3%
£85 - 90k	1.4%	1.1%
£90 - 95k	1.2%	1.0%
£95 - £100k	1.1%	0.8%
£100-120k	2.6%	2.1%
£120-140k	1.3%	1.0%
£140-160k	0.7%	0.5%
£160-180k	0.3%	0.3%
£180-200k	0.1%	0.1%
£200k +	0.1%	0.1%
Mean income	£40,226	£36,173
Median income	£32,646	£28,391
Lower quartile	£17,547	£15,078

(Source: PayCheck data, CACI, March 2015)

Key findings:

- Sandbach has a higher income distribution and higher average, median and lower quartile incomes than the UK;
- At £40,226, the average household income is 11.2% higher than the UK average.

Determining the affordability of housing

3.8 There are two main approaches to determining the affordability housing:

1. The residual income approach which calculates how much income is left over for housing after relevant living expenses have been taken into account for different household types. If there is insufficient income left for housing costs, a household has an affordability problem. This approach requires calculations to be made for a very wide variety of household types and income levels and is more appropriate for middle to higher income groups.
 2. The second approach - which has been applied here - involves setting an affordability threshold or benchmark which identifies the maximum proportion of a household's gross or net income which should be spent on housing costs. This is a straightforward approach which is considered more appropriate for lower to middle income groups.
- 3.9 A baseline affordability threshold has been applied of 25% of gross household income which is equivalent to 34% of net household income where net income is assumed to constitute 74% of gross.
- 3.10 A 2 bed house has been used as an 'average' housing type as it can meet the requirements of most additional households, the majority of which are small. The affordable cost of accessing this property has been calculated for all tenures from social renting to new build home ownership. The following table lists the outcome and provides a hierarchy of affordability from those who can only afford social rented housing to the additional percentages who can afford other options.

Table 3.6: affordability hierarchy, proportion of households who can afford each sector, March 2015

Sector	Proportion of households
Social rent only	28.6%
Shared equity/ownership	4.0%
Affordable Rent	5.3%
Owner occupier	62.1%

(Source: CACI and Housing Vision)

Key findings:

- The implication of this assessment is that there is:
 - an affordable housing requirement (social rent only) of 29%;
 - an intermediate housing requirement (shared equity/ownership and Affordable Rent) of 9%; and
 - a market sector requirement (full cost home ownership) of 62%.

4. THE IMPLICATIONS OF HOUSEHOLD PROJECTIONS FOR MEETING HOUSING NEED IN SANDBACH, 2013-2030

4.1 This section assesses the implications of household projections for meeting housing need in Sandbach over the period 2013-2030. Please note: that due to rounding, there may be slight variations from overall totals when sub-samples are added. From Table 2.3, the net effect of household projections is:

- an increase of 430 in the requirement for housing for single person households and of 578 for couple households with no dependent children; and
- a decline of 320 in the requirement for family housing from two person households with dependent children.

4.2 From Table 2.4, the net effect of household projections by age band and household type is:

- for those aged 16-34: a decline of 11 in the requirement for housing for single households; a decline of 17 in the requirement from couple with no dependent children and of 19 family homes;
- for those aged 35-54: a decline of 117 in the requirement for housing for single households; a decline of 154 in the requirement from couples with no dependent children and a decline of 327 in the requirement for family housing;
- for those aged 55-64: an increase of 75 in the requirement for housing from single households; increase of 192 from couples with no dependent children an increase of 22 in the requirement for family housing and;
- for those aged 65+: an increase of 485 in the requirement for housing for single households; an increase of 558 from couples with no dependent children and an increase of 4 in the requirement for family housing.

4.3 A 'housing mix model' has been applied which matches household types to the housing archetypes; there will in reality be some variation from these patterns:

- For young singles under 35: one bed flats or shared housing.
- For young couples under 35: two bed flats.
- For families under 35: two bed houses.
- For singles and couples aged 35-54: two bed flats and houses.
- For families aged 35-54: three bed or larger houses.

- For couples and separated singles aged 55-64: two bed flats and houses.
- For older empty nesters aged 65 plus: two bed downsizing flats; bungalows and houses, and housing with care and support.

4.4 Applying the 'Housing Mix Model' to the household projections derived for Sandbach implies:

- for those aged 16-34: a decline in the requirement for 11 one bed and for 17 two bed flats and for 19 two bed houses;
- for those aged 35-54: a decline of 271 in the requirement for two bed flats and houses and a decline of 327 in the requirement for three bed houses;
- for those aged 55-64: an increase of 267 in the requirement for two bed downsizing flats or houses and an increase of 22 in the requirement for three bed housing; and
- for those aged 65+: an increase of 1,043 in the requirement for two bed flats; bungalows and houses; housing with care and support increase of four in the requirement for family housing.

4.5 The following table identifies the effect of projected increases or declines in requirements for different types of housing as follows.

Table 4.1: the effect of household projections on the future need for housing in Sandbach, 2013-2030

Type of housing	Increased requirement	Decreased requirement	Net effect
1 bed flats or shared housing	-	11	-11
2 bed flats and houses	267	288	-21
2 bed houses	-	19	-19
3 bed and larger houses	26	327	-301
2 bed downsizing flats; bungalows and houses; housing with care and support	1,043	-	+1,041
Total	1,336	645	691

(Source: Housing Vision)

Key findings

- The overall effect is very large growth in the requirement for housing suitable for older people, including downsizing flats; bungalows and houses and for housing with care and support; and
- a large decline in the requirement for 3 bed and larger houses.

- 4.6 It will be difficult to reconcile the surplus of family housing against the increased requirement for downsizing and more manageable homes for older people.