



Dorset Council Housing Need Assessment Update

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Glossary

There are a number of terms and acronyms used throughout the Housing Need Assessment (HNA) which have specific meanings based on the following definitions.

Where appropriate these definitions reflect those in the National Planning Policy Framework (NPPF),¹ Planning Practice Guidance (PPG),² and the Office for National Statistics (ONS) Census 2021 dictionary.³

Key Terms

Housing Need Assessment (HNA)

An assessment to determine *housing need* and assess the size, type and tenure of housing needed for different groups in the community including those who need *Affordable Housing* (including *Social Rent*); families with children; looked after children; *older people* (including those who need retirement housing, housing-with-care and care homes); students; people with disabilities; service families; people who rent their homes; and people wishing to commission or build their own homes.

National Planning Policy Framework (NPPF)

The *National Planning Policy Framework (NPPF)* sets out the Government's planning policies for England and how these are expected to be applied.

Planning Practice Guidance (PPG)

National Planning Practice Guidance (PPG) is an online resource that provides advice and guidance on various aspects of the planning system. It is intended to be read alongside the *NPPF* and helps both plan makers and decision-makers understand and apply national planning policies. The *PPG* is a material consideration in planning decisions, meaning it must be taken into account when assessing planning applications.

Local Planning Authority (LPA)

The public authority whose duty it is to carry out specific planning functions for a particular *local area*.

Local area

Local area refers to the specific geographic area covered by a *local planning authority*.

Local plan

A plan for the future development of a *local area*, drawn up by the *local planning authority* in consultation with the community, under the Town and Country Planning (Local Planning) (England) Regulations 2012.

Housing need

An unconstrained assessment of the minimum number of homes needed in a *local area*. Assessing *housing need* is the first step in the process of deciding how many homes need to be planned for. It should be undertaken separately from assessing land availability and establishing a *housing requirement* figure.

Local Housing Need (LHN) figure

The number of homes identified as being needed through the application of the *standard method* set out in national *planning practice guidance*.

Standard method

The *standard method* for assessing *local housing need* is a formula used to determine the minimum number of homes a *local planning authority* in England should plan for in their *local area*. It uses *local dwelling stock* to establish a baseline figure which is then adjusted upwards to reflect local affordability pressures.

Housing requirement

The minimum number of homes that a *local plan* seeks to provide during the plan period. In addition to the *local housing need figure*, any needs that cannot be met within neighbouring areas should also be taken into account.

The planned *housing requirement* may be higher than the identified *housing need* to reflect growth aspirations, which should not normally have to be thoroughly justified at examination.

The planned *housing requirement* may be lower than the identified need where it can be justified by evidence on land availability, development constraints, and any other relevant matters.

Where the *local plan* cannot provide for the identified *housing need*, this should be discussed with neighbouring *local planning authorities* under the Duty to Cooperate.

¹ <https://www.gov.uk/government/publications/national-planning-policy-framework--2>

² <https://www.gov.uk/government/collections/planning-practice-guidance>

³ <https://www.ons.gov.uk/census/census2021dictionary>

Types of Housing and Housing Schemes

Dwelling

A unit of accommodation, for example a house or flat, that will either be the *usual residence* of a *household* or an *unoccupied dwelling* without any *usual residents*.

Unoccupied dwelling

A *dwelling* that has no *usual residents* living in the accommodation, such as empty homes for sale.

Unoccupied dwellings may be used by short-term residents or visitors, such as holiday homes, or as a second home for a *household*.

Communal establishment

A managed *communal establishment* is a place that provides managed full-time or part-time supervision of residential accommodation.

Examples include:

- university halls of residence and boarding schools,
- care homes, hospitals, hospices, and maternity units,
- hotels, guest houses, hostels, and bed and breakfasts, all with residential accommodation for seven or more guests,
- prisons and other secure facilities,
- Single Living Accommodation (SLA) in military bases
- staff accommodation, and
- religious establishments.

It does not include sheltered accommodation, serviced apartments, nurses' accommodation, and houses rented to students by private landlords.

Use Class C2 (residential institution)

A building used as a *communal establishment* providing residential accommodation and care.

Use Class C3 (dwellinghouse)

A building used as a *dwelling* for:

- a *family* or individual living as a single *household*, or
- up to six unrelated people living together as a single *household*, with or without care.

The accommodation must be self-contained, with exclusive use of living, sleeping, cooking, and bathroom facilities that are not shared with another household.

General needs housing

Housing to meet the needs of the general population.

Supported housing

Housing with support services for people who need help to live independently, typically vulnerable groups such as people with disabilities, mental health needs, or those at risk of homelessness. Support does not always involve personal care, and it may include help with managing health or daily living.

Specialist housing for older people

There are different types of *specialist housing* designed to meet the diverse needs of *older people*:

- age-restricted general market housing,
- housing with support, such as retirement living or sheltered housing, with some support provided to help residents live independently, and
- housing with care, such as extra care housing with access to support services and staff, typically providing 24-hour onsite care.

These are *dwellings* in *Use Class C3*, as they have facilities that are not shared with other households, although community facilities may also be available. *Specialist housing* can also include bedspaces in *communal establishments* in *Use Class C2*, such as residential care homes and nursing homes.

Any single development may contain a range of different types of *specialist housing for older people*.

Market Housing

Housing for sale or rent, for those who can afford to rent or buy housing in the *local area*.

Affordable Housing

Housing for sale or rent for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for *essential local workers*) that complies with one or more of the definitions in Annex B of the *NPPF*.

Social Rent

Social Rent housing meets the following conditions:

- the rent is set in accordance with the Government's rent policy for *Social Rent*,
- the landlord is a registered provider, and
- provisions are included for the housing to remain at an affordable price for future eligible *households*, or for the subsidy to be recycled for alternative *Affordable Housing* provision.

Private Sector Leased (PSL) housing

A scheme where local authorities lease and manage privately owned properties to provide housing for *households* that are often homeless and in need of temporary accommodation.

Build to Rent

Purpose built housing that is typically 100% rented out. It can form part of a wider multi-tenure development comprising of 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 and management control.

Rural exception sites

Small sites used for *Affordable Housing* in perpetuity where sites would not normally be used for housing. *Rural exception sites* seek to address the needs of the local community by accommodating *households* who are either current residents or have an existing family or employment connection.

A proportion of *Market Housing* may be allowed on the site at the *local planning authority's* discretion: for example, where essential to enable the delivery of *Affordable Housing* without grant funding.

Self-build and custom-build housing

Housing built by an individual, a group of individuals, or persons working with or for them, to be occupied by that individual. Such housing can be either *Market Housing* or *Affordable Housing*. A legal definition, for the purpose of applying the Self-build and Custom Housebuilding Act 2015 (as amended) is contained in section 1(A1) and (A2) of that Act.

Census and Demography

Usual resident

A person who has stayed or intends to stay in the *local area* for a period of 12 months or more, or has a *usual residence* in the *local area* and intends to be outside the *local area* for less than 12 months.

Usual residence

The primary address of a *usual resident*.

Household

A *household* is defined as:

- one person living alone, or
- a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room, or dining area.

This includes:

- all sheltered accommodation units in an establishment (irrespective of whether there are other communal facilities), and
- all people living in caravans on any type of site that is their usual residence, and who has no other usual residence elsewhere in the UK.

A *household* must contain at least one *usual resident* whose *usual residence* is the *household* address.

A group of short-term residents living together is not classified as a *household*, and neither is a group of people at an address where only visitors are staying.

All *households* have one *Household Reference Person (HRP)*.

We would note the definition of a household used in the Census 2021 is different to that used in the Housing Act 2004 and this study uses the Census definition.

Household Reference Person (HRP)

A *Household Reference Person* serves as a reference point, mainly based on economic activity and age, to characterise a whole *household*. The person is not

necessarily the member of the *household* in whose name the accommodation is owned or rented.

Dependent child

A *dependent child* is a person aged 0 to 15 years or a person aged 16 to 18 years who is in full-time education and lives in a *family* with their parent, parents, grandparent or grandparents. It does not include any person aged 16 to 18 years who has a spouse, partner or child living in the *household*.

Non-dependent child

A *non-dependent child* is a person living with their parent(s) and who is either aged 19 years or over and has no spouse, partner or child living in the *household*, or aged 16 to 18 years and who is not in full-time education and has no spouse, partner or child living in the *household*.

Non-dependent children are sometimes referred to as "adult children".

Older people

People over or approaching retirement age, including the active, newly-retired through to the very frail elderly; and whose housing needs can encompass accessible, adaptable general needs housing through to the full range of *specialist housing for older people* including those with support or care needs.

Essential local workers

Public sector employees who provide frontline services in areas including health, education and community safety – such as NHS staff, teachers, police, firefighters and military personnel, social care and childcare workers.

Family

A group of people who are any of the following:

- a married, civil partnered, or cohabiting couple with or without children (the children do not need to belong to both members of the couple),
- a lone parent with at least one child who lives in the same *household*,
- a married, civil partnered, or cohabiting couple with grandchildren where the parents of those grandchildren are not present, or
- a single or couple grandparent with grandchildren where the parents of those grandchildren are not present.

Children can be *dependent* or *non-dependent*, and a family can have a mixture of *dependent* and *non-dependent children*.

All families have one *Family Reference Person (FRP)*.

Family Reference Person (FRP)

A *Family Reference Person* is identified by criteria based on the family make up.

In a lone parent family, the *FRP* is the lone parent.

In a couple family, the *FRP* is chosen from the two people in the couple based on their economic activity (in the priority order: full-time job, part-time job, unemployed, retired, other). If both people have the same economic activity, the *FRP* is identified as the elder of the two or, if they are the same age, the first member of the couple on the Census form.

Multi-generational family household

A *household* where people from across more than two generations of the same extended family live together. This includes *households* with grandparents and grandchildren, whether or not the intervening generation also live in the *household*.

Multi-family household

A *household* that consists of two or more *families*.

The *families* can be:

- unrelated (for example, two unrelated couples sharing a house),
- related and *multi-generational* (for example, a cohabiting couple plus children and elderly parents, or a married couple plus their teenage daughter and her child),
- related but not *multi-generational* (for example, a cohabiting couple plus their son and girlfriend, or two brothers and their partners sharing a house).

Concealed family

Concealed families are couple or lone parent *families* living in *multi-family households*, where the *FRP* is not the *Household Reference Person (HRP)*.

As an example:

George and Amy live at the same address as their daughter, Emily, and her husband and daughter. Because Emily is not a *dependent child* and has her own *family*, the *household* contains two *families*.

Family one are husband George and wife Amy. George is the *Family Reference Person (FRP)*.

Family two are daughter Emily, husband Simon and their daughter Eve. Emily is the *FRP*.

As there is more than one *family* in the *household*, the *FRPs* are prioritised to decide who is the *HRP*.

In this *household*, George is the *HRP*. This means that Emily's *family* is a *concealed family*. Their *HRP* is George, and they will be included as part of his *household* in relevant outputs.

Potential household

Potential households are *concealed families*, *non-dependent children*, or other individuals living as part of an existing *household* that want to live independently and form a separate *household*.

Summary of Acronyms

DCLG	Department for Communities and Local Government (2006-2018) https://discovery.nationalarchives.gov.uk/details/c/F268656
DPA	Dwellings Per Annum
DWP	Department for Work and Pensions https://www.gov.uk/government/organisations/department-for-work-pensions
EHS	English Housing Survey https://www.gov.uk/government/collections/english-housing-survey
FRP	Family Reference Person
HDT	Housing Delivery Test https://www.gov.uk/government/collections/housing-delivery-test
HMO	House in Multiple Occupation
HNA	Housing Needs Assessment
HRP	Household Reference Person
HRR	Household Representative Rate
LA	Local Authority
LAHS	Local Authority Housing Statistics https://www.gov.uk/government/collections/local-authority-housing-data
LHN	Local Housing Need
LHNA	Local Housing Needs Assessment
LPA	Local Planning Authority
MHCLG	Ministry of Housing, Communities and Local Government https://www.gov.uk/government/organisations/ministry-of-housing-communities-local-government
MYE	Mid-Year Estimates https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates
NHS	National Health Service https://www.nhs.uk/
NPPF	National Planning Policy Framework https://www.gov.uk/government/publications/national-planning-policy-framework--2
ONS	Office for National Statistics https://www.ons.gov.uk/
ORS	Opinion Research Services https://www.ors.org.uk/
PPG	Planning Practice Guidance https://www.gov.uk/government/collections/planning-practice-guidance
PRS	Private Rented Sector
PSL	Private Sector Leased
RP	Registered Provider

Executive Summary

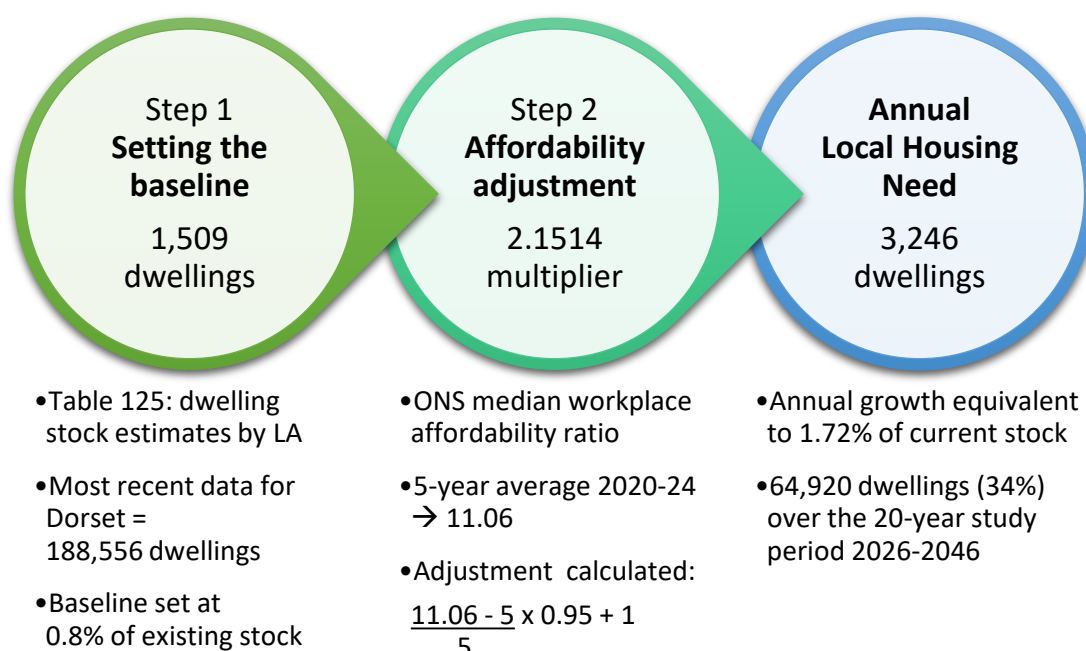
Introduction

1. Dorset Council and Bournemouth, Christchurch and Poole Council commissioned Opinion Research Services (ORS) to prepare a Housing Needs Assessment (HNA) which provides a robust evidence base about the housing needs of their local area which would inform their strategic policies, as required by the NPPF and associated Planning Policy Guidance (PPG). This document represents the study for Dorset, with a separate report having been produced for Bournemouth, Christchurch and Poole.

Government Policy

2. The Government published the original National Policy Planning Framework (the Original NPPF) in 2012. A revised version of the National Planning Policy Framework (the Revised NPPF) was published in July 2018, and it was updated in February 2019, July 2021, December 2023 and December 2024.
3. The current Government published an updated version of the NPPF in September 2026. Planning Practice Guidance (PPG) was updated in December 2024 to derive a new methodology for local for local authority areas to calculate local housing need based upon their existing number of dwellings and the ratio of median house prices to median incomes in the area. Based on the 2025 released inputs for Dorset Council, the standard method calculation identifies that the minimum LHN figure for the local area is currently 3,246 dwellings per year. On this basis, the minimum amount of housing to be planned for in the local area over the 20-year study period 2026-2046 is 64,920 dwellings. We note that this period may not coincide with the new Dorset Council Local Plan.

Figure 1: Annual Local Housing Need for Dorset based on the Government's standard method calculation (Source: Dwelling stock estimates by local authority district, MHCLG May 2025; House price to workplace-based earnings ratio, ONS March 2025)



Establishing Current Unmet Need for Affordable Housing

4. In order to assess the current need for affordable housing, we initially calculate the number of households in Dorset Council area who are not suitably housed and who are unable to afford market housing. These include all households that are currently homeless, those who are currently housed in temporary accommodation, concealed families living as part of another household, households overcrowded in the social or private rented sector, and people otherwise not counted who are in a reasonable preference category on the housing register.
5. Based on a detailed review of both the past trends and current estimates, our analysis has concluded that 4,014 households are currently living in unsuitable housing and are unable to afford their own housing. This includes 1,225 households who are not currently separate households, almost all of whom are members of overcrowded households who need to move to their own accommodation.
6. Of these households, 1,066 currently occupy affordable housing which does not meet the current householders' needs, mainly due to overcrowding. These households all require moving, predominantly to larger properties, but this would also free an affordable home. Providing more suitable housing for these households will enable them to vacate their existing affordable housing property, which can subsequently be allocated to another (smaller) household in need of affordable housing.
7. **Therefore, there is a net affordable housing need of 2,948 households ($4,014 - 1,066 = 2,948$) from existing households.**
8. However, there are around 10,700 potential households in the area who want to live independently but do not occupy a separate home at the base date of the Plan in 2026. Many of these potential households have not been able to form a new household as they are unable to afford to rent or buy suitable housing. Of the 10,700 potential households, an assessment of their affordability shows that around 7,900 would not be able to afford suitable housing in the context of Dorset delivering 3,246 dwellings per annum. The 7,900 households includes 1,200 households without a separate home who were not suitably housed due to their current housing being overcrowded, and their needs have already been counted. It is important that the remaining 6,700 households are counted when establishing the current need.

Overall Need for Affordable Housing

9. To assess the projected future Affordable Housing need, it is necessary to consider need from new households (in particular, the proportion of newly forming households who are unable to rent or buy Market Housing) as well as the number of existing households falling into need. It is also necessary to consider the number of additional households who aspire to homeownership who cannot afford to buy.
10. The annual net increase in households unable to afford to rent or buy suitable housing is 839 households per annum, with 25 being likely to have formed in Market Rent by those who aspire to homeownership, cannot afford buy, but are likely to have sufficient income and savings to afford Affordable Home Ownership. Therefore, affordable need will grow in the Dorset Council area by 865 (rounded) households per annum.
11. Figure 2 summarises the HNA analysis and sets out the information sources used at each stage, which identify that there will be a need to provide Affordable Housing for a total of 29,200 households.

Figure 2: Current unmet need and future need from households needing Affordable Housing in Dorset Council 2026-46
(Source: ORS Model. Note: Figures may not sum due to rounding)

Total need from households needing Affordable Housing	Step	Source	Scenario B
CURRENT NEED			
Current unmet need from households unable to afford	A		4,014
Less households occupying Affordable Housing	B		-1,066
Existing households aspiring to own who cannot afford to buy	C		1,010
Potential households that want to live independently	D		7,909
Net current need in 2026	E	A - B + C + D	11,857
FUTURE NEED			
Net annual need	F		865
Net future need over the 20-year period 2026-46	G	F × 20	17,299
TOTAL NEED 2026-46	H	E + G	29,156
Average annual need	I	H ÷ 20	1,458

12. The current need from 11,900 households and the future need from a further 17,300 households result in the total need from 29,200 households over the 20-year Local Study period, which is an average of 1,458 per year. This includes all households who are unable to afford to rent or buy suitable housing and all households who want to own but cannot afford to buy where Affordable Home Ownership would provide a suitable housing option. **We note the figure of 29,200 represents households. At any one time, some dwellings will be vacant and including an allowance for vacant homes will take the dwelling need figure to 29,500 or 1,475 per year.** The total need identified by the HNA analysis is a net figure; therefore, any future losses from the current stock (such as demolition, sales through Right to Buy, or market sales) would increase the number of affordable homes needed by an equivalent amount.
13. Figure 3 provides a breakdown of the size, type, and tenure of housing needed across the Dorset Council local planning authority area over the 20-year period 2026-2046, based on the overall identified need for Market Housing and Affordable Housing. The outputs identify the mix of general needs housing, based on the number of bedrooms, and the specialist older person housing need, based on the type of housing. The split between the need for market and affordable housing is derived from affordability analysis, including for private renters who may benefit from affordable home ownership. The size mix is derived from the size of property needed by new those in affordable housing and the size of the properties occupied by different household types in the market sector.

Figure 3: Overall Market Housing and Affordable Housing need by property type and number of bedrooms 2026-2046
(Source: ORS Model. Note: Figures may not sum due to rounding)

Local Housing Need 2026-2046		Market Housing	Affordable Housing	TOTAL
General Needs Housing	1 bedroom	729	11,391	12,120
	2 bedrooms	12,937	8,492	21,429
	3 bedrooms	12,811	6,059	18,870
	4+ bedrooms	6,545	1,114	7,659
Specialist Older Person Housing	Housing with Care	604	493	1,097
	Housing with Support	1,822	1,923	3,745
Dwellings in Use Class C3		35,448	29,472	64,920
Annual Need				
General Needs Housing	1 bedroom	36	570	606
	2 bedrooms	647	425	1,071
	3 bedrooms	641	303	944
	4+ bedrooms	327	56	383
Specialist Older Person Housing	Housing with Care	30	25	55
	Housing with Support	91	96	187
Dwellings in Use Class C3		1,772	1,474	3,246

Policy Implications for Affordable and Other Housing Need

14. Based on the HNA evidence, Dorset Council will determine the appropriate housing requirement to be planned for over the Local Study period. To reiterate a key point from the introduction chapter, it is important to recognise that the HNA provides an unconstrained assessment of housing need for the local area on a policy-neutral basis, which is the first step in the process of deciding how many homes need to be planned for. Based on this evidence, the Council will determine the appropriate housing requirement to be planned for over the Local Study period.
15. Whilst the HNA forms an important part of the wider evidence base to inform the development of more detailed housing and planning policies, it is important to recognise that these findings should not be considered in isolation as they will form part of the wider evidence base.
16. The HNA does not seek to determine rigid policy conclusions; instead, it sets out the likely implications of different options which may be available for policy makers to consider together with recommendations where appropriate. On this basis, the HNA will provide a key component of the evidence required to develop and support a sound policy framework, but the Council will need to determine individual policies based on relevant policy decisions.
17. The HNA has identified a need for 35,400 homes for market sale or rent (55% of the total dwellings) and 29,500 affordable homes (45%). This includes an identified need for around 4,800 self-contained specialist older person housing units, comprising of both Housing with Care and Housing with Support.
18. The need for Affordable Housing includes need for 29,500 dwellings, comprising of 1,300 dwellings (5%) for households who could afford Affordable Rent and 23,200 dwellings (79%) to be provided as Social Rent for

households who could not afford Affordable Rent. An additional 5,000 dwellings (17%) are required to be affordable to own properties.

19. The HNA analysis also concluded that 40% of homes on new developments should comply with the optional higher accessibility, adaptability, and wheelchair housing standards:
 - » 6% of homes should comply with Requirement M4(3) Wheelchair User Dwellings, and
 - » 34% should comply with Requirement M4(2) Accessible and Adaptable Dwellings.
20. The analysis also identified that 10% of all new Affordable Housing should comply with Requirement M4(3) and concluded that it would be appropriate for all specialist older person housing to comply with Requirement M4(3) where it is practical for this to be achieved.

1. Introducing the Study

- 1.1 The National Planning Policy Framework (NPPF, August 2026) sets out in the Government's objective of significantly boosting the supply of homes with the aim of meeting each area's identified housing need with an appropriate mix of housing types for the BCP Council area in Section 6:

*The objective of the policies in this chapter is to support the delivery of a **substantial increase in the supply of homes and traveller sites**, by ensuring that a sufficient amount and variety of land can come forward where needed. This includes planning for an appropriate mix of accommodation for the local community and ensuring that land with permission is developed without unnecessary delay.*

National Planning Policy Framework, August 2026 (emphasis added)

- 1.2 Dorset Council and Bournemouth, Christchurch and Poole Council (BCP Council) commissioned Opinion Research Services (ORS) to prepare a Housing Needs Assessment (HNA) which provides a robust evidence base about the housing needs of their local area that would inform their strategic policies as required by the NPPF and associated Planning Policy Guidance (PPG). This document represents the study for Dorset Council, with a separate report having been produced for BCP.

Overview of the Housing workstream

- 1.3 The "standard method in national planning guidance" sets out a formulaic approach to determine the minimum Local Housing Need (LHN) figure and prescribes the use of specific data for the calculation. Therefore, whilst the responsibility for establishing housing need continues to rest with the local planning authority, this is constrained to a minimum LHN figure which is determined centrally by the Government.
- 1.4 On this basis, the Housing workstream of the HNA provides robust evidence about the need for housing (Market Housing and Affordable Housing) and the housing needs of different groups across the local area. Using a wide range of secondary data and administrative data sources, the HNA:
- » Determines the local housing need figure using the standard method in national planning guidance,
 - » Confirms the minimum number of homes needed over the 20-year period 2026-2046,
 - » Identifies the resident population and households that are likely to occupy these homes,
 - » Considers the alignment between future housing and employment growth in the area,
 - » Provides evidence about the appropriate mix of housing types needed for the local community, and
 - » Establishes the appropriate balance between Market Housing and Affordable Housing.
- 1.5 It is important to recognise that the HNA provides an unconstrained assessment of housing need for the local area on a policy-neutral basis, which is the first step in the process of deciding how many homes need to be planned for. Based on this evidence, Dorset Council will determine the appropriate housing requirement to be planned for over the Local Plan period.
- 1.6 If the Council is unable to plan for sufficient housing to meet the identified housing need, it will be important for this to be discussed with neighbouring local authorities under the Duty to Co-operate. However, when

determining the overall amount of housing to be planned for, it will also be important for the Council to account for any needs which cannot be met within neighbouring areas.

- 1.7 When assessing the appropriate mix of housing types needed for different groups in the community, evidence from the HNA should not be considered in isolation as it will form part of the wider evidence base to inform the development of housing and planning policies.
- 1.8 The HNA does not seek to determine rigid policy conclusions; instead, it sets out the likely implications of different options that may be available for policy makers to consider together with recommendations where appropriate. On this basis, the HNA will provide a key component of the evidence required to develop and support a sound policy framework, but individual policies will be determined based on relevant policy decisions.

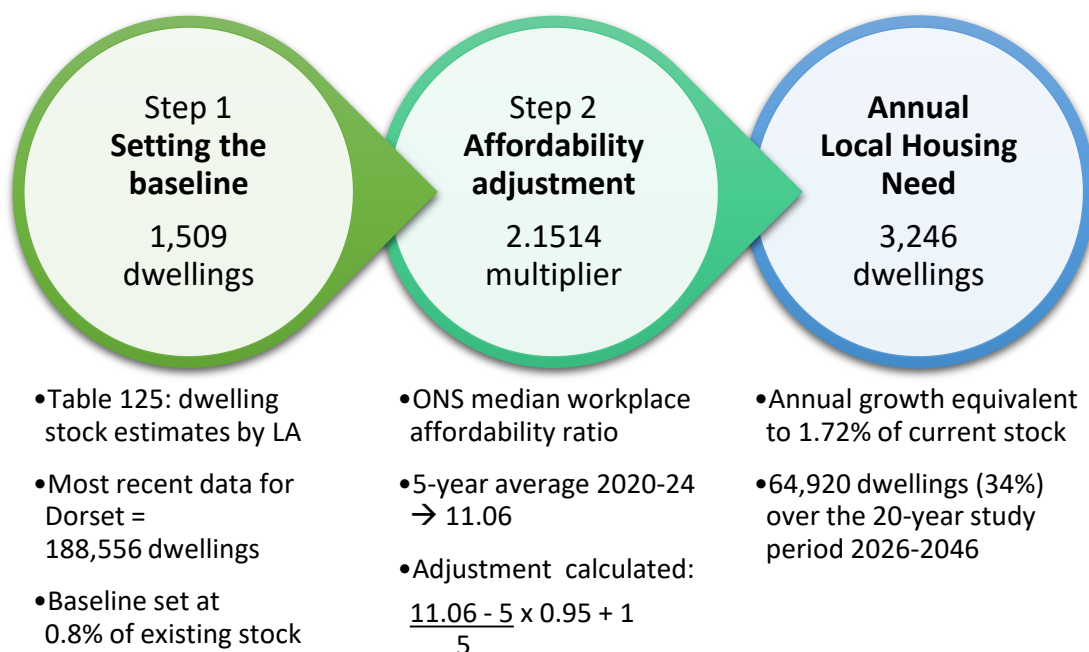
2. Establishing Local Housing Need

- 2.1 The NPPF confirms that planning authorities should normally use the standard methodology to establish a minimum Local Housing Need (LHN) figure.

Standard Method

- 2.2 The process set out in Planning Practice Guidance (PPG) for Housing Need Assessment establishes the annual LHN figure by using dwelling stock estimates published by the Ministry of Housing, Communities and Local Government (MHCLG) to set the Step 1 baseline and the median house price to workplace-based earnings ratio published by the Office for National Statistics (ONS) to calculate the Step 2 affordability adjustment.⁴

Figure 4: Annual Local Housing Need for Dorset based on the Government's standard method calculation (Source: Dwelling stock estimates by local authority district, MHCLG May 2025; House price to workplace-based earnings ratio, ONS March 2025)



- 2.3 Based on the 2025 released inputs for Dorset, the standard method calculation identifies that the minimum LHN figure for the local area is currently 3,246 dwellings per year. On this basis, the minimum amount of housing to be planned for in the local area over the 20-year study period 2026-2046 is 64,920 dwellings. We note that this period may not coincide with the new Dorset Local Plan, but it has been developed to allow for flexibility in planning in the area. We would also note that based upon data released in March and May 2026, the new standard method figure for Dorset would be 3,272 dwellings per annum.
- 2.4 The HNA has been prepared on the basis that 64,920 dwellings will be planned for in Dorset over the 20-year study period 2026-2046.
- 2.5 If Dorset Council is unable to plan for sufficient housing to meet the identified housing need, it will be important for this to be discussed with neighbouring local authorities under the Duty to Co-operate.

⁴ PPG ID 2a-004-20241212

However, when determining the overall amount of housing to be planned for, it will also be important for Dorset Council to take account for any needs which cannot be met within neighbouring areas. The government are currently in the process of introducing a new Spatial Development Strategy as a new sub-regional tier of planning, to help to facilitate cross boundary planning.

Setting the Housing Need in Context

- ^{2.6} Based on the standard method calculation, the Council will have to substantially increase current rates of supply in the new Local Plan in order to deliver the minimum number of homes needed. Delivering to the standard method is designed to help respond to high housing costs and the national housing crisis, which may have suppressed past rates of household formation. Given this context, delivering this number of homes is likely to result in accelerating population increases above the rate projected by the Office of National Statistics, but the overall number will depend on the balance between homes provided for seeking to increase the local household formation rates and homes provided for in-migration driven population growth.

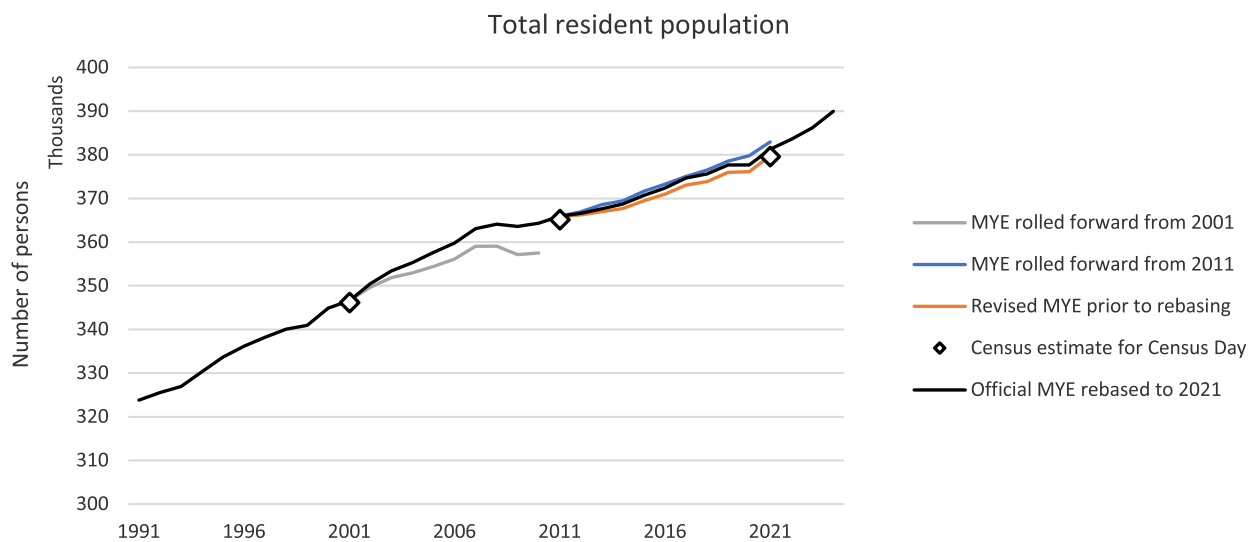
3. Growth of the Local Community

- 3.1 The following demographic analysis identifies the resident population and households who currently live in the local community and considers how these could change. On this basis, it is possible to establish the types of households who are likely to occupy homes in the area in future based on the identified housing need.

Population Trends

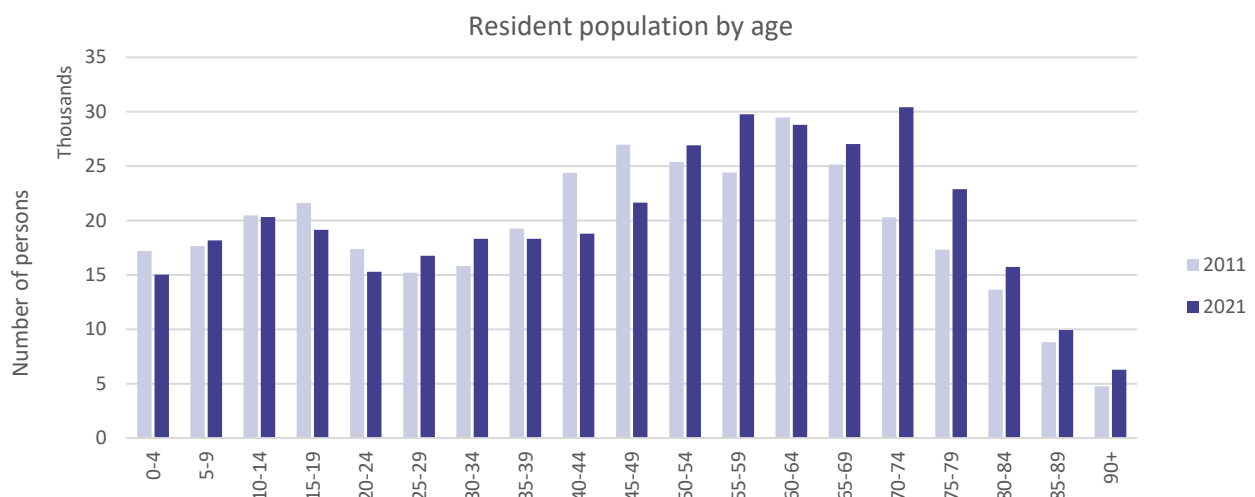
- 3.2 Figure 5 shows that the population of Dorset has increased consistently, with annual growth over the period since 2011 averaging 1,850 persons per year and there being estimated resident population of around 390,000 persons in mid-2024.

Figure 5: Official population estimates 1991-2024 (Source: Census data, ONS; Mid-year population estimates, ONS)



- 3.3 Figure 6 shows the population by age on Census Day in 2011 and 2021. There has been an increase across some age groups, with the largest growths being in those residents aged 50 to 59 (increasing by 6,900 persons) and those aged 70 or over (increasing by 22,300). However, the population aged 15 to 49 years fell by 19,100 persons.

Figure 6: Total resident population 2011 and 2021 by 5-year age group (Source: Census data, ONS)



- 3.4 The mid-year estimates (MYE) data provides further details about changes in the population over the same period. Figure 7 summarises the 10-year population change by age group (people of the same age) and age cohort (people born in the same year).

Figure 7: 10-year change in resident population by age group and age cohort (Source: Mid-year population estimates, ONS.
Note: darker and lighter shading used to identify the same populations from 2011 when considered by age group and by age cohort)

Age	Total population 2021	2011 population by age group	10-year change by age group	2011 population by age cohort	10-year change by age cohort	Natural change	Net migration and other change
Aged 0-15	57,592	59,728	-2,136	20,761	+36,831	+29,765	+7,066
Aged 16-24	31,105	34,795	-3,690	34,472	-3,367	-71	-3,296
Aged 25-34	35,017	31,135	+3,882	39,290	-4,273	-159	-4,114
Aged 35-44	37,367	43,215	-5,848	31,135	+6,232	-276	+6,508
Aged 45-54	48,122	52,674	-4,552	43,215	+4,907	-700	+5,607
Aged 55-64	58,995	53,611	+5,384	52,674	+6,321	-1,794	+8,115
Aged 65-74	57,420	46,006	+11,414	53,611	+3,809	-4,505	+8,314
Aged 75-84	39,206	31,038	+8,168	46,006	-6,800	-9,029	+2,229
Aged 85 or over	16,421	13,695	+2,726	44,733	-28,312	-28,342	+30
TOTAL	381,245	365,897	+15,348	365,897	15,348	-15,111	+30,459

- 3.5 When considering the change by age group, it is evident that there are large increases in those aged 55-64, 65-74, and 75-84 years, amounting to 25,000 persons in total. However, there was a large decrease in those aged 35-54 years (a decrease of 10,800 persons) and those aged 0-24 years (a decrease of 5,800 persons).
- 3.6 When considering changes by age cohort, it is evident that the number of residents in older cohorts has reduced. For example, the cohort of 46,000 residents aged 65-74 in 2011 would be 10 years older (therefore aged 75-84) by 2021. There were around 39,200 persons aged 75-84 resident in 2021, which represents 6,800 fewer persons over the decade. This is a consequence of natural change (9,000 deaths) partially offset by a net gain of around 2,200 persons from residents in this age cohort having moved into the area.

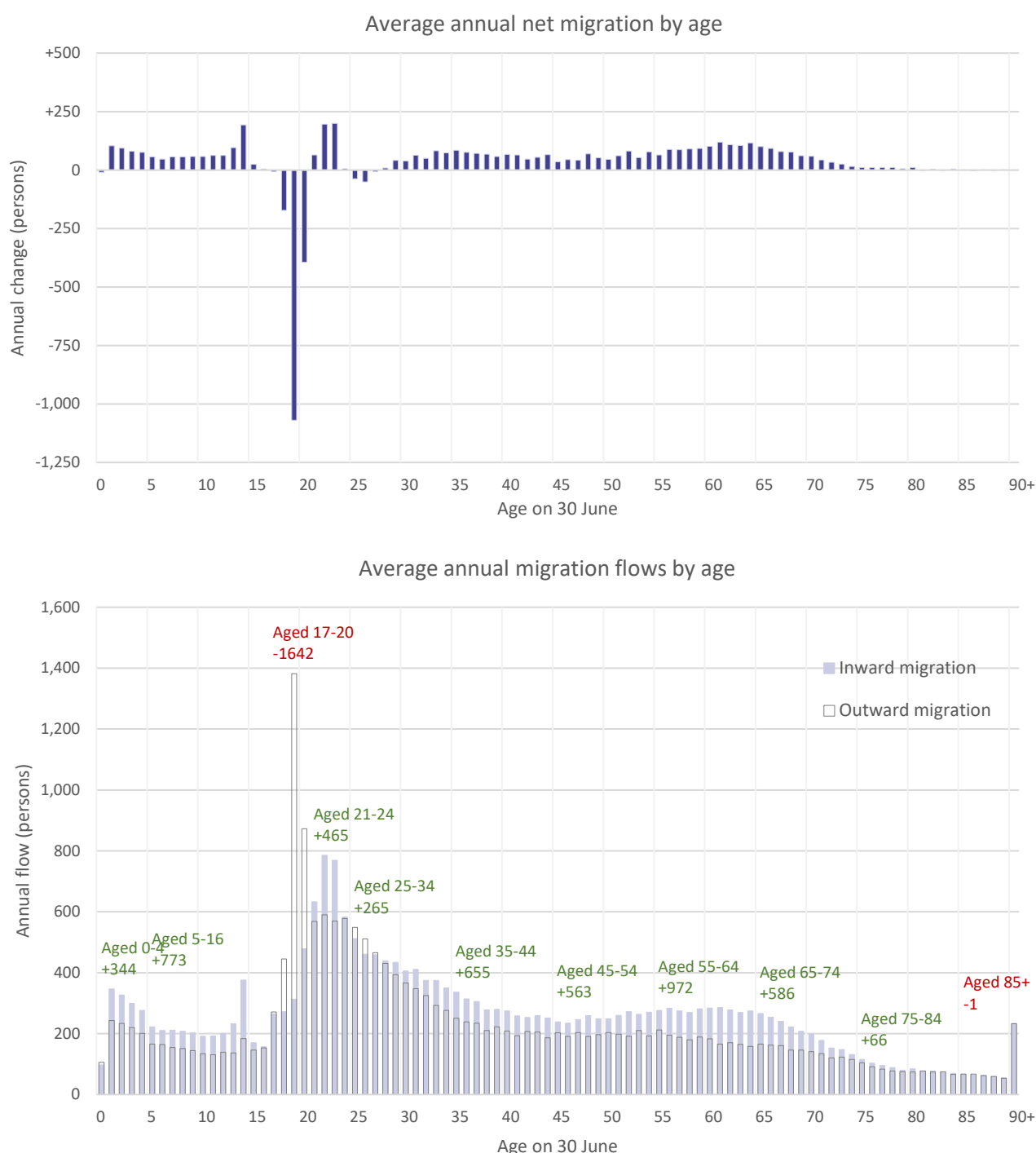
Components of Population Change

- 3.7 Considering population change across all ages, it is apparent that natural change accounted for a net loss of 15,100 residents over the decade (i.e. there were 15,100 fewer births than deaths recorded). The population growth was due to people moving from elsewhere to live in the area. A net total of 30,500 persons resident in 2021 had moved to the area over the decade.
- 3.8 The overall level of inward migration to the area was actually higher than this given that the net migration figure took account of a loss of older teenagers or young adults and residents around retirement age moving away from the area to live elsewhere. It is important to note that this analysis is based on the age of the population at the end of the 10-year period in 2021; therefore, some individuals would have been younger at the time of their move.
- 3.9 Figure 8 shows trends in annual migration flows to and from the area (and the associated net migration) based on all moves over the years from 1 July 2011 to 30 June 2012 through to 1 July 2020 to 30 June 2021.

Gross migration shows all persons who moved to the area, whilst net migration subtracts any who left the area. Therefore, gross migration flow must be positive, but net migration can be negative if more people left than moved to the area. This shows the age of migrants at the end of the year in which they moved (i.e. their age on 30 June), which is helpful to understand the population moving to live in the area.

- 3.10 Whilst the average net change for most ages is fewer than 100 persons each year, there are large net outward flows of those aged 18-20 years, which will include many who will be studying as full-time students. This is offset to some extent against inward flows of those aged 21-23, which will include some adult children returning to the parental home after concluding their studies. Flows of migrants over this period would have been impacted by Brexit and the pandemic.

Figure 8: Average annual net migration and migration flows by age 2011-2021 (Source: Mid-year population estimates, ONS)



Household and Dwelling Estimates

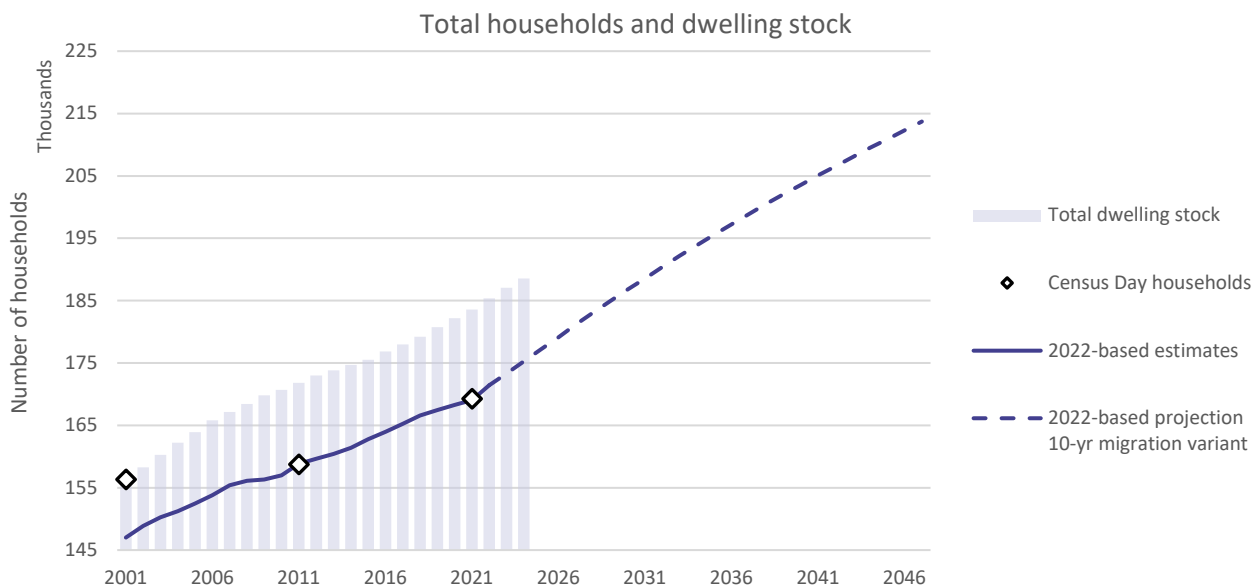
- 3.11 Figure 9 shows that the latest ONS official household projections estimated there to be 171,400 households in Dorset in 2022. 2022 is the base date for the most recent ONS projections, which were published in 2025. Household numbers are projected to increase to around 213,700 households over the 25-year period 2022-2047, which represents an average growth of 1,691 households each year. The 2021 Census identified around 169,300 households on Census Day, which was in line with the 171,400 households which had been projected for 2022.
- 3.12 We note that the ONS produces a range of household projections which consider different migration assumptions. The Office for Statistics Regulation “*Review of population estimates and projections produced by the Office for National Statistics*” was published in May 2021.⁵ In considering the number of years used for the base period for internal migration, the review noted (paragraphs 2.32-2.33):

To illustrate, a projection that has been produced using 5 years of past trend data will be less suitable for making planning decisions for the forthcoming 15 to 25 years than one that has 10 years or even 25 years of historical trend. The more years of past trend data that are included, the more stable the projection for future local planning needs ... The pros and cons of switching from a 5-year to 2-year base for the principal projections are likely to vary depending on the use to which they are put.

- 3.13 Although the review concluded that “*more years of past trend data*” would generally provide a “*more stable projection for future local planning needs*”, it also acknowledged that “*those involved in local planning decisions lack the confidence to use the variant projections as they are not seen as carrying the same weight as the principal projection*” (paragraph 2.34).
- 3.14 It is important to recognise that each of the variant scenarios are official projections; therefore, it is necessary to consider which scenario has the assumptions that are most likely to be appropriate for the purposes of assessing housing need. Consistent with the OSR observations, ORS would normally recommend a 10-year trend as this typically provides a more stable projection for plan-making.

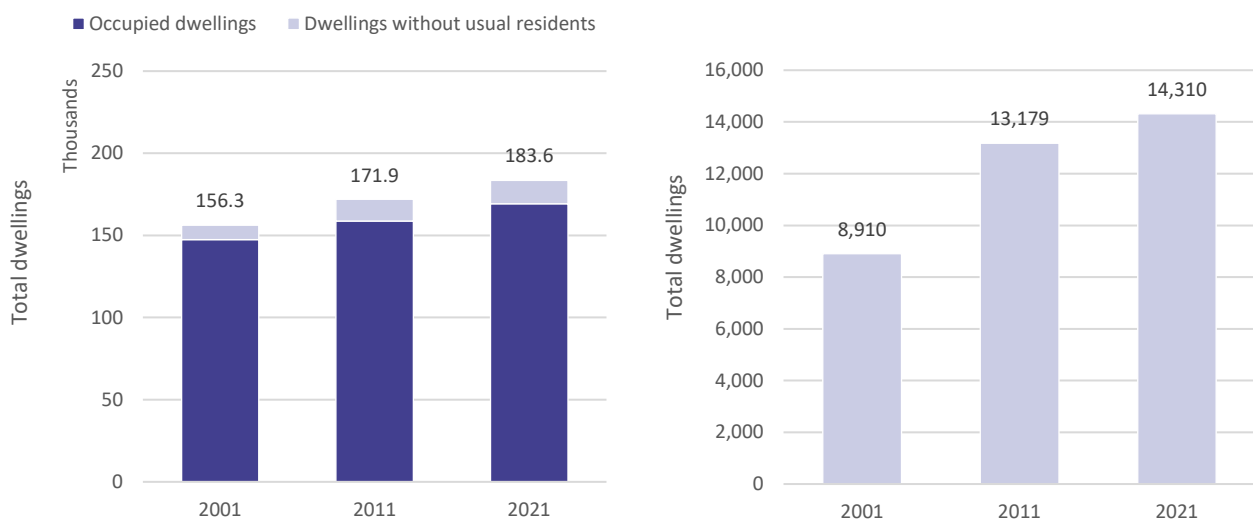
⁵ <https://osr.statisticsauthority.gov.uk/publication/review-of-population-estimates-and-projections-produced-by-the-office-for-national-statistics/>

Figure 9: Household estimates and projections 2001 to 2047 and Dwelling estimates 2001 to 2024 for Dorset (Source: Census data, ONS; Household projections for England 2022-based, ONS; Dwelling stock estimates by local authority district, MHCLG)



- 3.15 Figure 10 shows that the number of dwellings which were vacant or second homes on Census Day was higher in 2021 than it had been in previous Census years, with around 14,300 dwellings identified without full-time residents. This represents an increase of just under 1,200 dwellings (9%) over the 10-year period 2011-2021, with some of the growth likely to be driven by an increase in holiday homes such as Airbnbs. However, the percentage of the stock empty barely changed, with an increase from 7.6% in 2011 to 7.8% in 2021.

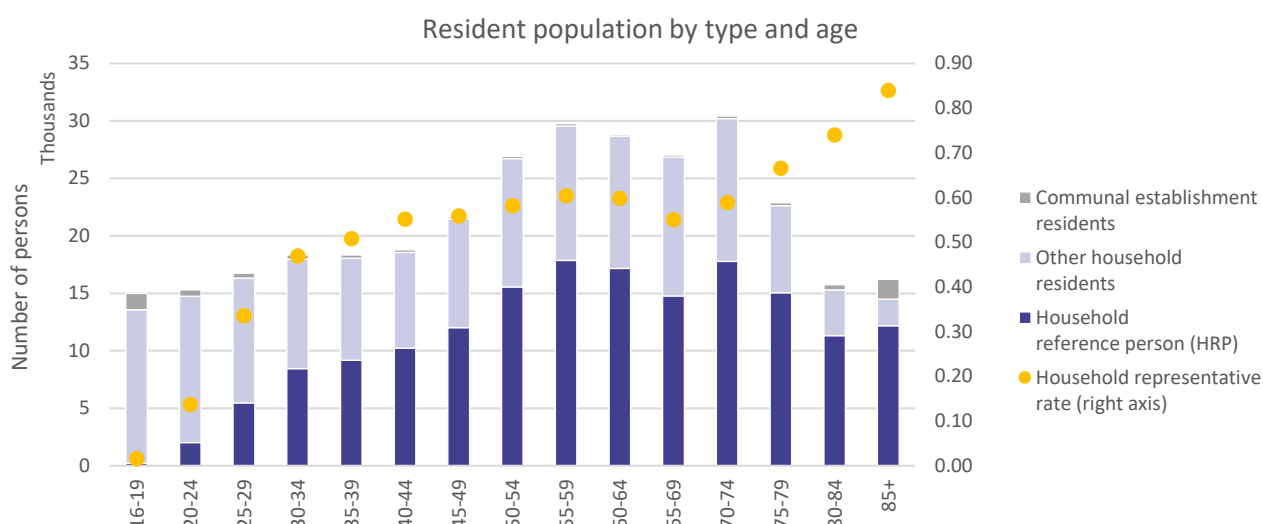
Figure 10: Estimates of occupied dwellings and dwellings without usual residents 2001 to 2021 (Source: Census data)



- 3.16 Figure 11 shows the age distribution of household and communal establishment residents aged 16 or over. For the household population, the Household Reference Person (HRP) is identified separately from other household residents. This is the person who serves as a reference point and a representative of the whole household; they are determined statistically based mainly on their economic activity status and age. There is one reference person in every household, so the number of HRP residents will equal the number of households.

- 3.17 The Household Representative Rate (HRR) identifies the proportion of household residents who are reference persons and represent their household within each age group. Fewer than half of residents aged under 35 are reference persons, so the HRR for these age groups is lower than 0.5. In line with national trends, the rates for these groups have been reducing as fewer young people have been able to form independent households.

Figure 11: Resident population aged 16 or over by resident type and age, household representative rate by age, 2021
(Source: Census data, ONS)



- 3.18 Figure 12 identifies the number of household residents and reference persons in 2011 and 2021. Based on this data, we can see how the household representative rates have changed over the 10-year period, with a clear drop in those aged 16-24. However, rates for those over 75 years have risen as a lower share of older persons have been moving into communal housing than in the past. Households with a HRP aged 15 years or under may be data errors or, potentially, supervised lone parents.

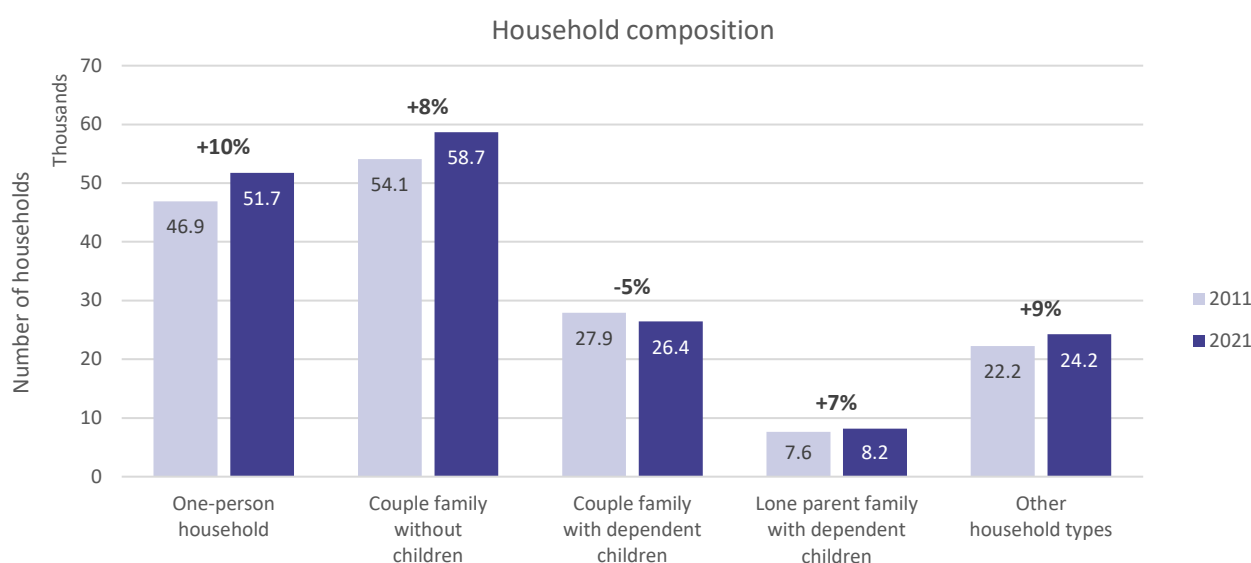
Figure 12: Household residents, household reference persons, and household representative rate by age, 2011 and 2021
(Source: Census data, ONS)

	Household residents		Household reference persons (HRP)		Household representative rate (HRR)	
	2011	2021	2011	2021	2011	2021
Aged 0-15	59,846	56,565	10	15	0.0002	0.0003
Aged 16-24	34,431	28,317	3,078	2,231	0.0894	0.0788
Aged 25-34	31,027	34,319	12,471	13,920	0.4019	0.4056
Aged 35-44	43,632	36,599	23,054	19,404	0.5284	0.5302
Aged 45-54	52,372	48,224	30,365	27,561	0.5798	0.5715
Aged 55-64	53,887	58,242	30,959	35,023	0.5745	0.6013
Aged 65-74	45,447	57,064	25,980	32,561	0.5717	0.5706
Aged 75-84	30,942	37,912	21,242	26,377	0.6865	0.6957
Aged 85 or over	13,569	14,494	9,756	12,169	0.7190	0.8396
TOTAL	365,153	371,736	156,915	169,261	-	-

Household Composition

- 3.19 Over the 10-year period 2011 to 2021, the number of households increased from around 158,700 to 169,300, which represents an increase of 7% overall.
- 3.20 Figure 13 shows the change over the same period based on household composition. There was a 10% increase in one-person households, an 8% growth of single-family couple households without children, and 7% growth in lone parent households, and a 9% in other household types. The number of couples with dependent children saw a 5% reduction over the 10-year period.

Figure 13: Household composition, 2011 and 2021 (Source: Census data, ONS)



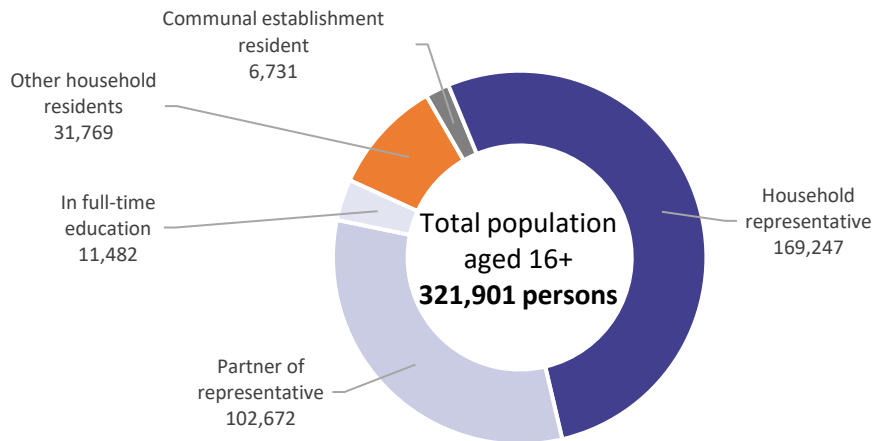
- 3.21 Other household types include student households or other groups of adults living together, households with more than one family living together, single families living with other adults, and single-family households with only non-dependent (adult) children.
- 3.22 Figure 14 provides some further details about residents and families that would form other household types. Almost 16,000 of the 24,200 other households (66%) were single-family households with only adult children, and of the remainder, around 1,800 (7%) were multi-family households which contain two (or more) families. Whilst data about the number of multi-family households is not available from the 2011 Census, the number of concealed families (i.e. families living in a multi-family household where another family is the main family) increased by 480 households whilst there was also an increase of over 1,900 adult children who were living with their parents (18%).

Figure 14: Non-dependent children, concealed families, and multi-generational households (Source: Census data, ONS)

Category	2011	2021	Change 2011-2021	% change 2011-2021
Single-family households with all children non-dependent	14,067	15,973	+1,906	+14%
Multi-family households	-	1,830	-	-
Concealed families	1,375	1,857	+482	+35%
Multi-generational households	-	2,565	-	-
Families with non-dependent children	19,858	21,705	+1,847	+9%
Non-dependent children	24,287	26,225	+1,938	+8%

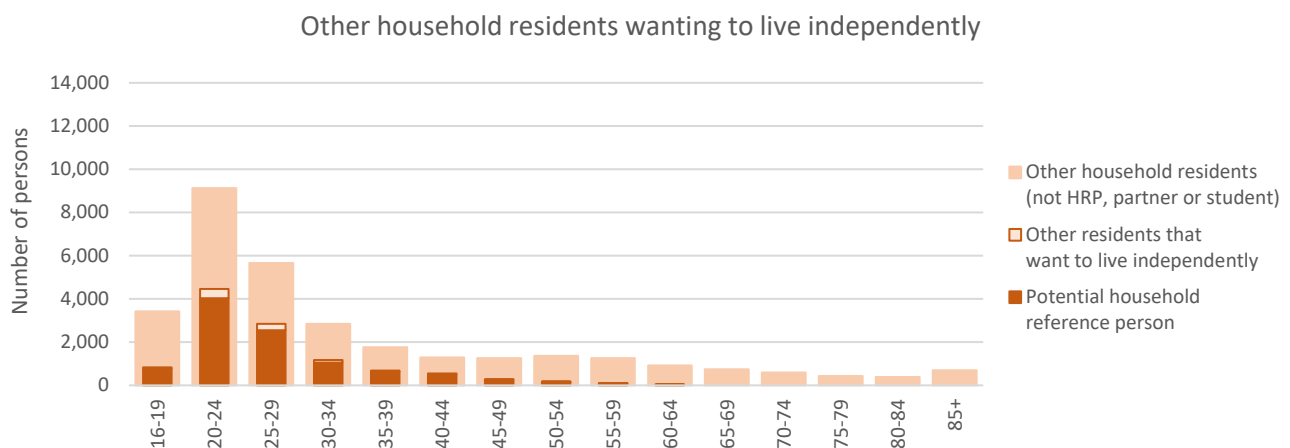
- 3.23 Using Census data, the resident population can be separated into different categories. Figure 15 shows the breakdown for the 321,900 residents aged 16 or over on Census Day 2021.

Figure 15: Segmentation of resident population aged 16 or over on Census Day 2021 (Source: Census data, ONS)



- 3.24 It is apparent that most residents were living as established households who already had a separate home at the time of the Census. 169,200 residents (53%) were the household reference person, 102,700 residents (32%) were the reference person's partner, and 11,500 residents aged 16 or over (4%) were in full-time education. Of the remainder, around 31,800 residents (10%) were not students and lived in a household where they were not the reference person or their partner, whilst 6,700 (2%) lived in a communal establishment.
- 3.25 The other household residents would include many of the 26,200 adult children living in their parental home (all of those no longer in full-time education) and the 1,900 representatives of concealed families, as well as those living in multi-adult households where they are not the reference person. Many of these individuals would have chosen to live in their current household, including some living in multi-generational households. However, it is likely that others would want to live independently if they were able to do so.
- 3.26 English Housing Survey (EHS) data identifies that around two fifths (38%) of "other" household residents would prefer to live independently, and the majority of these (87%) would be the reference person for the new household. Applying age-specific EHS rates to the Census data for Dorset identifies that 11,200 of the "other" residents would want to live independently, forming 10,100 potential households, and these households have been considered when developing the scenarios for assessing future housing need.

Figure 16: Residents wanting to live independently and potential household representatives by age (Source: ORS Model)



Baseline Population

- 3.27 The HNA forms part of the evidence base that will inform the emerging Local Plan, which will plan for the development needs of the area over the 20-year period 2026-2046. Given this context, it is necessary to establish the baseline population at the base date of the Plan in 2026.
- 3.28 The Census identified a stock of around 183,600 dwellings in 2021 (Figure 10), and the current inputs to the standard method calculation (Figure 4) estimated that there was a stock of around 188,600 dwellings in 2024. At the start of the study period in 2026, it is estimated that there are likely to be around 192,700 dwellings, of which 178,700 will be occupied by households with a total of around 386,600 residents. A further 7,800 residents will live in communal establishments, which yields an overall population of around 394,400 persons at the base date, including around 181,900 economically active residents. We note that data for economic activity is based on sample surveys, so any individual data point should be treated with caution.

Figure 17: Summary of baseline demographics at the start of the study period, 2026 (Source: ORS Model)

	Baseline 2026
Total dwellings	192,692
Established households	178,732
Household residents	386,608
Communal establishment residents	7,841
TOTAL POPULATION	394,449
Economically active residents	181,871

- 3.29 Figure 18 provides a detailed breakdown of the baseline households by the age of household reference person, identifying the number of established households by household composition and a further 10,700 potential households who want to live independently but do not occupy a separate home at the base date of the Plan in 2026. This represents an increase of around 600 potential households over the five-year period since the 2021 Census.

Figure 18: Baseline number of households by household composition and age of household reference person, 2026 (Source: ORS Model)

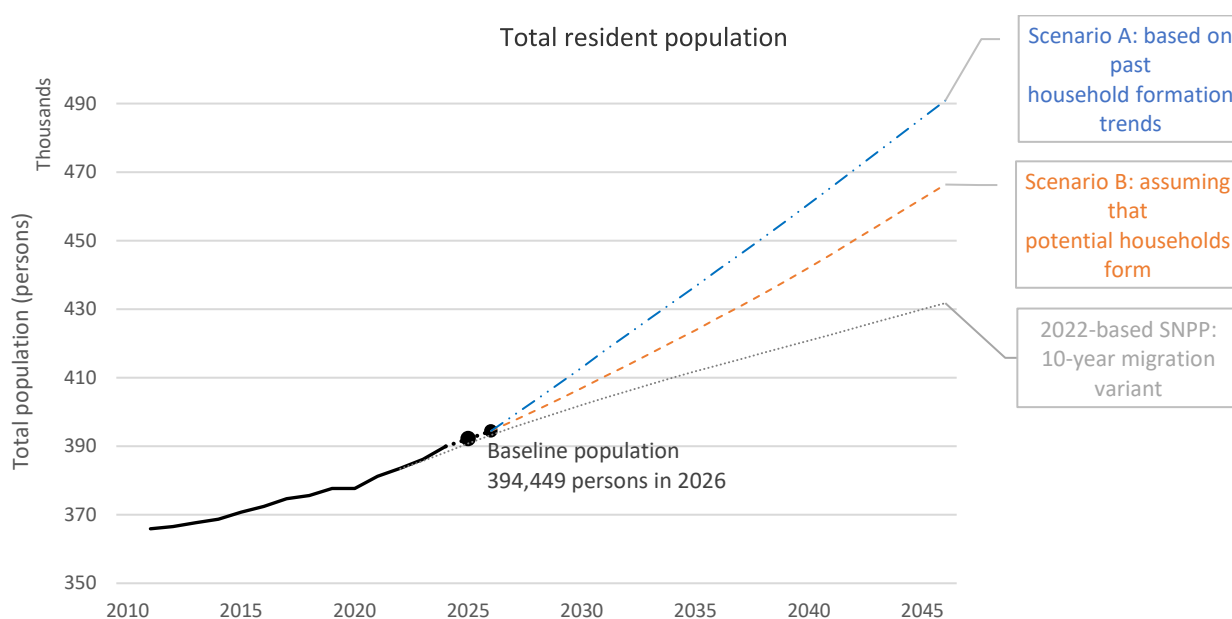
Household composition	16-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	Total
One-person household	907	2,539	3,188	4,758	9,830	12,214	14,192	8,312	55,940
Couple family without children	623	3,213	2,570	4,336	14,762	17,524	16,143	3,992	63,163
Couple family with dependent children	336	4,280	10,969	8,336	2,344	191	51	0	26,508
Lone parent family with dependent children	430	1,876	3,155	2,269	451	54	16	0	8,251
Other household types	393	1,175	1,763	4,946	8,901	4,047	2,583	1,061	24,870
TOTAL HOUSEHOLDS	2,690	13,083	21,646	24,644	36,289	34,030	32,985	13,365	178,732
<i>Potential households that want to form independently</i>	<i>5,278</i>	<i>3,671</i>	<i>1,291</i>	<i>377</i>	<i>126</i>	<i>-</i>	<i>-</i>	<i>-</i>	<i>10,742</i>

Population Growth

- 3.30 Based on the Government's standard method calculation (Figure 4), there is a need to plan for a minimum of 64,920 dwellings over the 20-year study period 2026-2046. In assessing the appropriate mix of housing, it is necessary to establish demographic projections which align with this number of homes.
- 3.31 The population and household projections for the HNA are based on the official projections and cover the 20-year period 2026-2046. The HNA projections use fertility and mortality rates from the 2022-based official projections and the latest migration trends for the local area, and they take account of the ONS mid-year population estimates (for the period to mid-2024) and outputs from the 2021 Census.
- 3.32 Whilst recent trends provide the starting point, the dwelling-led projections seek to align household growth with the LHN figure through aggregating key assumptions:
- » The starting population is based on ONS population estimates for mid-2024, which are then projected forwards to 2026 based on the Council's trajectory of recorded dwelling completions,
 - » Household growth is established for the 20-year period 2026-2046 using ONS 2022 based population and household projections based on the 10-year migration trend variant scenario,
 - » The growth in the institutional population who need communal accommodation over the projection period is established using estimates and rates from the 2021 Census,
 - » Dwellings without a usually resident household (which include vacant homes, second homes, and holiday lets) are estimated based on rates from the 2021 Census. This includes any properties which are temporarily vacant due to households moving out before a new household moves in as well as properties which have no usual resident due to them being second homes or holiday lets,
 - » Household formation rates are based on 2021 Census data for the proportion of household residents who are representatives of either established households or potential households (concealed families or individuals that would prefer to live independently), and
 - » To align with the dwelling targets, the rate of inward domestic migration is increased to ensure that population and household growth aligns with the number of dwellings identified by the LHN figure.
- 3.33 The HNA has considered two scenarios for future population growth over the study period 2026-2046. Both scenarios are based on the 64,920 dwellings identified by the standard method and assume that the housing need will provide for natural growth (based on new household formations offset against dissolutions) and will enable recent migration trends to continue, but the assumptions then diverge as follows:
- » **Scenario A** is based on past household formation trends and assumes that the increase to housing supply will enable additional population growth (above recent migration trends). To meet the identified housing need in this scenario, we have increased the estimate for the number of people moving to the area until the population is sufficient to occupy the new dwelling stock (with allowances for unoccupied dwellings and additional residents living in communal establishments), and
 - » **Scenario B** is based on increased household formation and assumes that the increase to the housing supply will enable the 10,700 potential households identified (i.e. people living in the local area as part of another household who want to live independently) to form separate households as part of the 64,920 overall dwelling growth.

- 3.34 The below (Figure 19) shows the total resident population, including the projected growth over the period 2026-2046 based on the two scenarios and the 2022-based sub-national population projections, which assume that recent migration trends continue.
- 3.35 Whilst both dwelling-led scenarios identify higher population growth than the two sub-national projections based on recent trends over the whole study period, the projected population in 2046 is notably higher in Scenario A (490,900 persons) than it is in Scenario B (466,400). Based on Scenario A, there is a projected growth of 96,400 persons, which is 34% more than the growth of 71,900 persons identified by Scenario B.

Figure 19: Population estimates and projections 2011 to 2046 (Source: Mid-year population estimates, ONS; Sub-national population projections for England 2022-based, ONS; ORS Model)



- 3.36 Figure 20 provides a summary of the projected growth, with baseline estimates set out alongside the Scenario A and Scenario B outputs for 2046 and the change from 2026-2046. The population growth in Scenario A is projected to be nearly 25,000 persons higher than Scenario B because Scenario B includes an additional 10,700 local household forming, whilst Scenario A assumes that the same dwellings will be occupied by migrant households.

Figure 20: Population growth by resident type, household growth and average household size, 2026-2046 (Source: ORS Model)

	Baseline 2026	Scenario A 2046	Change 2026- 2046	Annual Change	Scenario B 2046	Change 2026- 2046	Annual Change
HOUSING NEED							
Total households	178,732	238,949	60,217	3,011	238,949	60,217	3,011
Unoccupied dwellings	13,959	18,662	4,703	235	18,662	4,703	235
Total Dwellings (Use Class C3)	192,692	257,612	64,920	3,246	257,612	64,920	3,246
TOTAL HOUSING NEED	-	-	64,920	3,246	-	64,920	3,246
RESIDENT POPULATION							
Household residents	386,608	483,031	96,423	4,821	458,525	71,917	3,596
<i>Average household size (persons)</i>	<i>2.163</i>	<i>2.021</i>	<i>-0.142</i>		<i>1.919</i>	<i>-0.244</i>	
Communal establishment residents	7,841	7,841	0		7,841	0	
TOTAL POPULATION	394,449	490,872	96,423	4,821	466,366	71,917	3,596

3.37 Scenario A's population growth is higher than Scenario B's due to the average number of persons resident in each household. Scenario A projects an average of 2.021 persons in 2046, whilst Scenario B projects 1.919. Both represent a reduction on the average of 2.163 persons estimated for the start of study period in 2026 due to the population ageing (as most older residents either live as couples without children or live alone). This would be the continuation of a long-term trend in Dorset of falling household size. However, Scenario B also reflects the assumed increase in household formation. As the potential households identified would form from within the existing population, these additional households do not result in any additional residents, thereby reducing the average number of residents per household overall. All figures are derived by dividing the population by the number of households.

Future Households

3.38 Figure 21 provides a breakdown of the projected household composition, with baseline estimates set out alongside the Scenario A and Scenario B outputs for 2046 and the change from 2026-2046.

Figure 21: Household growth by household composition, 2026-2046 (Source: ORS Model)

Household composition	Baseline 2026	Scenario A 2046	Change 2026-2046	Annual Average	Scenario B 2046	Change 2026- 2046	Annual Average
One-person household	55,940	79,143	+23,203	+1,160	88,211	+32,270	+1,614
Couple family without children	63,163	83,527	+20,364	+1,018	83,392	+20,229	+1,011
Couple family with dependent children	26,508	34,024	+7,517	+376	32,867	+6,360	+318
Lone parent family with dependent children	8,251	10,468	+2,217	+111	10,466	+2,215	+111
Other household types	24,870	31,787	+6,917	+346	24,013	-856	-43
TOTAL HOUSEHOLDS	178,732	238,949	+60,217	+3,011	238,949	+60,217	+3,011

3.39 Both scenarios identify a similar increase overall, with total growth of around 60,200 additional households. However, there are notable differences in the household composition.

- » **Scenario A** identifies growth across all household types, with one-person households and couples without children having the largest increases (23,200 and 20,400 respectively), families with dependent children increasing by 9,700 (including 7,500 couples and 2,200 lone parents), and the number of other household types increasing by 6,900 to a total of 31,800 by 2046.
- » **Scenario B** identifies a larger growth of one-person households (32,300) and similar numbers of couples without children (20,200) on the basis that potential households have been able to form independently, a lower growth of families with dependent children (8,600) as fewer are projected to move to the area, and the number of other household types falling, with a total of 24,000 by 2046 as a consequence of fewer concealed families and adult children living with parents. This is a result of assuming that more existing potential households in the Dorset Council area will form, so fewer dependent children will be living at home, and the number of other household types will fall.

3.40 Figure 22 provides a further breakdown of the projected household growth based on the household composition and the age of the household representative. It is evident that many more young residents aged under 35 would form households under Scenario B than under Scenario A (10,900 cf. 2,900), with a larger number of one-person households aged 16-34 and aged 35-54. However, these are inevitably offset against a lower household growth across other age groups.

Figure 22: Household growth by household composition and age of household reference person, 2026-2046
(Source: ORS Model)

Change 2026-2046	Scenario A				Scenario B			
	16-34	35-54	55-74	75+	16-34	35-54	55-74	75+
One-person household	+563	+2,666	+3,958	+16,016	+8,447	+4,963	+3,812	+15,048
Couple without children	+687	+2,304	+5,744	+11,630	+1,502	+3,065	+5,208	+10,454
Couple with children	+964	+6,152	+380	+21	+861	+5,213	+267	+18
Lone parent with children	+413	+1,720	+78	+6	+454	+1,679	+76	+5
Other household types	+254	+2,346	+1,961	+2,356	-358	-1,220	-1,028	+1,750
TOTAL HOUSEHOLDS	+2,879	+15,188	+12,121	+30,028	+10,906	+13,700	+8,335	+27,276

Aligning Jobs and Workers

3.41 Figure 23 identifies the growth in economically active residents, with the baseline estimates for 2026 set out alongside the Scenario A and Scenario B outputs for 2046 and the associated change from 2026-2046.

Figure 23: Change in economically active residents over the 20-year study period 2026-2046 (Source: ORS Model)

Change 2026-2046	Baseline 2026	Scenario A 2046	Change 2026-2046	Scenario B 2046	Change 2026-2046
Economically active residents	179,433	229,295	+49,862	216,921	+37,488

3.42 The growth of resident workers identified by Scenario A would create an additional 49,900 economically active residents, whereas the Scenario B growth would support around 37,500 more economically active residents. Again, the difference between these two numbers relates to more local potential households

forming in Scenario B, so fewer migrant households are assumed to move to Dorset. As a comparison, the economically active population of Dorset grew by around 15,000 over the period 2004-2024, but this period was not associated with the high rate of dwelling growth proposed by the standard method.

Scenario Testing Summary

- 3.43 Having considered the two scenarios in detail, it is evident that Scenario B (i.e. providing the homes needed for local residents who want to form a separate household and live independently) better aligns with the Government's objectives of addressing the impact of past undersupply.
- 3.44 Scenario B also provides a more credible demographic projection which broadly aligns with official projections which reflect past trends based on the higher levels of housing delivery which have been sustained over recent years. Scenario B also provides an assessment of future jobs growth, which is more in line with past trends. Therefore, the HNA has assessed the size, type, and tenure of housing needed for different groups in the community on the basis of Scenario B.
- 3.45 However, delivering Scenario B is likely to need more Affordable Housing to be provided (as the majority of the potential households have not formed due to them being unable to afford to buy or rent suitable housing in the local area). This is considered further when assessing the need for Affordable Housing, and it will be important for this to be tested in the context of economic viability.

4. Affordable Housing Need

- 4.1 The NPPF sets out in Policy HO1(2)(a) that within the context of establishing need, those groups who require Affordable Housing should be identified:

*At the most appropriate level, development plans should also take into account an assessment of the size, type and tenure of housing or other accommodation needed for different groups. These groups include, but are not limited to: a. **Those who require affordable housing (including Social Rent)** ...*

National Planning Policy Framework, August 2026 (emphasis added)

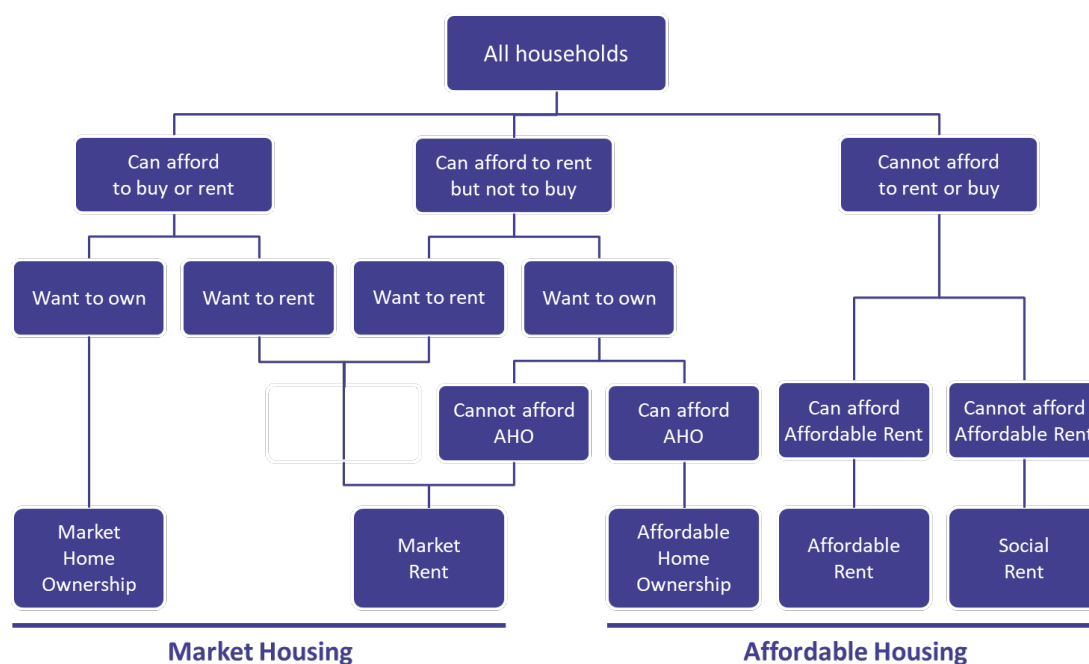
- 4.2 Furthermore, Policy HO5(1)(a)(i) states that development plans should be:

*Setting requirements for the **type and mix of affordable housing** required to meet identified local needs, including the minimum proportion of Social Rent homes required as part of major development*

National Planning Policy Framework, August 2026 (emphasis added)

- 4.3 Given this context, PPG sets out that “all households whose needs are not met by the market can be considered in affordable housing need” and that “strategic policy-making authorities will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market”.⁶
- 4.4 Affordable Housing is a strategic priority for Dorset. The HNA considers the needs of all households living in the local area. Household affordability is a key consideration in determining both the need for Affordable Housing and the type and tenure of homes likely to be needed by households who are unable to afford. Figure 24 identifies the way in which affordability is considered when assessing the need for Affordable Housing in the context of households’ aspiration to own.

⁶ PPG ID 2a-018-20190220 and ID 2a-019-20190220

Figure 24: Considering affordability when establishing the need for Market Housing and Affordable Housing

House Prices and Rents

4.5 Figure 25 shows lower quartile house prices for existing and newly built dwellings in Dorset based on the number of bedrooms. Land Registry Price Paid Data does not include the number of bedrooms there are in a property, but we have modelled this based upon the existing stock of the area by property type. Newly built dwellings generally attract a premium, and the difference in values is likely to be down to a range of factors which include the location of newbuild housing, the relative size of properties, gardens, the availability of parking, comparative quality and condition of existing stock, and other intangible issues such as character. For larger properties, second hand homes can be more expensive because newbuild properties tend to have smaller gardens and are less distinct in appearance.

4.6 When considering rented housing, it is important to reflect on the range of different options available.

- » Private Rent is based on the lower quartile of rents recorded by the Valuation Office Agency (properties rented by Housing Benefit claimants are not included in the sample) and the Price Index of Private Rents published by the Office for National Statistics, and
- » Social Rent and Affordable Rent are based on the gross rent (including any service charges) for general needs housing (which excludes supported housing and housing for older people) for the year ending March 2024, based on information published by the Regulator of Social Housing.

Figure 25: House prices and weekly rent thresholds in Dorset 2024-25 (Source: Price Paid Data, HM Land Registry; House Price Statistics, Price Index of Private Rents, ONS; Statistical Data Return, Regulator of Social Housing)

House Prices and Rents	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
HOMEOWNERSHIP				
Lower quartile house price for existing dwellings	£165,250	£222,054	£280,000	£437,904
Lower quartile house price for newly built dwellings	£247,875	£263,362	£286,605	£419,580
Equity based on 70% of house price for newly built dwellings	£173,512	£184,353	£200,624	£293,706
WEEKLY RENT				
Lower quartile private rent	£145.07	£188.83	£224.17	£290.96
Affordable Rent	£139.80	£169.02	£201.24	£253.73
Social Rent	£107.91	£122.21	£136.32	£149.81

Income Needed for Home Ownership

- 4.7 The income needed to purchase Market Housing will depend on the house price together with the mortgage income multiplier and the available deposit (or percentage loan-to-value). For example, if we consider a property costing £170,000 and assume the buyer could afford a deposit of 10%, then the outstanding mortgage requirement would be £153,000. Using a typical income multiple of 3.5x, we can calculate an income of just over £43,700 would be needed ($43,714 \times 3.5 = £153,000$).
- 4.8 Whilst some households will have higher deposits available and others will seek to extend their borrowing as far as possible, the initial assumptions of a 10% deposit and a 3.5 x mortgage multiplier provide a reasonable indication of the income that first-time buyer households are likely to need to buy a home in this area. Based on these assumptions, Figure 26 shows the household income levels needed to buy an existing dwelling at the current lower quartile house price for each property size, though households will tend to have higher deposits when purchasing larger homes (often including equity from the sale of another property) so it is relatively artificial to consider incomes in isolation. Figure 26 also shows the income needed for a 50% equity share in a newly built dwelling, which is assumed to be the threshold for Affordable Home Ownership.

Income Needed to Rent Housing

- 4.9 The income needed to rent housing will depend on the monthly rent together with the income multiplier allowed for housing costs. The previous DCLG Strategic Housing Market Assessments Practice Guidance (Version 2, August 2007)⁷ stated:

*“A household can be considered able to afford market house renting in cases where the rent payable was up to 25 per cent of their **gross** household income” (page 42)*

- 4.10 However, this previous Guidance was rescinded in 2014 following the publication of the NPPF and PPG. Although the PPG does not propose a specific multiplier for assessing housing costs, it notes that *“care should be taken ... to include only those households who cannot afford to access suitable housing in the market”*.⁸
- 4.11 The English Housing Survey (EHS) provided information about the percentage of gross household income that households spent on their housing costs in 2015-16.⁹ Based on the Household Reference Person and partner,

⁷ <https://www.gov.uk/government/publications/strategic-housing-market-assessments-practice-guidance>

⁸ PPG ID 2a-020-20190220

⁹ <https://www.gov.uk/government/statistics/english-housing-survey-2015-to-2016-headline-report>

households renting privately spent on average 41% of their income (including housing benefit) on rent, compared to an average of 31% for households in social rent. Taking account of all income earners (irrespective of whether they contribute to the housing cost) reduced the average to 35% at that time. This demonstrates that many households in both private and social rented properties pay considerably more than 25% of gross household income on their housing costs.

- 4.12 The proportion of household income allocated to housing costs is necessarily based on a judgement. At the lower end of the range, the previous DCLG Practice Guidance sets out a percentage of 25%. However, as the EHS identifies that households renting privately spend 41% of their gross income **on average**, so there must be many households currently spending more than 41% of their income on housing costs (which will be offset against others spending lower proportions). This leads to our judgement that **35% of income** provides a reasonable basis for assessing the **maximum** that households should expect to pay for their housing costs.

Housing Affordability Thresholds

- 4.13 Based on the above assumptions, Figure 26 shows the annual incomes needed to afford Market and Affordable Home Ownership, Market Rent, Affordable Rent and Social Rent. To place these figures into context, the median household income for Dorset in 2024 was £52,100, so 50% of all households had an income below this level. However, this includes many older households who do not have significant housing costs and have equity in their existing homes. Affordable home ownership for a newbuild property is more affordable than market ownership of an existing property for 2-bedroom plus properties, but it is more expensive than a 1-bedroom property.

Figure 26: Annual household income thresholds for housing options in Dorset by number of bedrooms (Note: Calculated based on the house prices and rents set out in Figure 25)

Annual Household Income Affordability Thresholds	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
ANNUAL INCOME TO AFFORD TO OWN <i>based on 10% deposit and 3.5x mortgage multiplier</i>				
Market Home Ownership (Existing)	£42,493	£57,100	£72,000	£112,604
Affordable Home Ownership (Newbuild)	£50,991	£54,177	£58,959	£86,314
ANNUAL INCOME TO AFFORD TO RENT <i>based on 35% of gross income (without housing benefit)</i>				
Market Rent	£21,628	£28,151	£33,419	£43,377
Affordable Rent	£20,841	£25,198	£30,001	£37,826
Social Rent	£16,087	£18,220	£20,323	£22,333

Current Unmet Need

- 4.14 In terms of establishing the current unmet need for Affordable Housing, the PPG draws attention to those types of households considered to be in housing need whilst emphasising the need to avoid double-counting and the need to only include those households who are unable to afford their own housing.

How can the current unmet gross need for affordable housing be calculated?

Strategic policy-making authorities will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market.

The unmet (gross) need for affordable housing by assessing (sic) past trends and current estimates of:

- » *the number of homeless households;*
- » *the number of those in priority need who are currently housed in temporary accommodation;*
- » *the number of households in over-crowded housing;*
- » *the number of concealed households;*
- » *the number of existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and*
- » *the number of households from other tenures in need and those that cannot afford their own homes, either to rent, or to own, where that is their aspiration.*

Care should be taken to avoid double-counting, which may be brought about with the same households being identified on more than one transfer list, and to include only those households who cannot afford to access suitable housing in the market.

Planning Practice Guidance, ID 67-006-20190722

4.15 To assess the current need for Affordable Housing, the number of households who are not suitably housed and who are unable to afford Market Housing must be identified. Figure 27 sets out the current need for Affordable Housing at the base date of the study period in 2026 and identifies 4,014 households who are living in unsuitable housing and unable to afford suitable housing in Dorset. This includes 1,225 who are not currently separate households, which will include households in temporary accommodation and those where moving one or more household members would resolve existing overcrowding.

Figure 27: Assessing current unmet need for Affordable Housing in 2025 (Sources: Census data, ONS; Homelessness statistics, Local Authority Housing Statistics, MHCLG)

Current unmet housing need from households unable to afford to rent or buy	Source	Not currently heading a separate household	Occupying Market Housing	Occupying Affordable Housing
Homeless households in priority need Living in temporary accommodation	Homelessness statistics	<i>B&B or Hostel</i> 19	<i>PRS or PSL</i> 60	<i>LA or RSL stock</i> 81
Homeless households in priority need Without temporary accommodation provided	Homelessness statistics	0	-	-
Households living in overcrowded housing Households living in overcrowded housing	Census data	1,206	473	836
Other households in unsuitable housing Needing to move on medical or welfare grounds or where failure to meet the identified need would cause hardship	LAHS data 2025	-	1,190	149
Sub-total		1,225	1,723	1,066
TOTAL CURRENT UNMET NEED				4,014

Households that Aspire to Homeownership

- 4.16 When considering the number of households from other tenures who aspire to homeownership, data from the English Housing Survey shows that over half (56.6%) of households who rent privately and a fifth (21.1%) of those in social rented housing plan to own their home in the long-term.

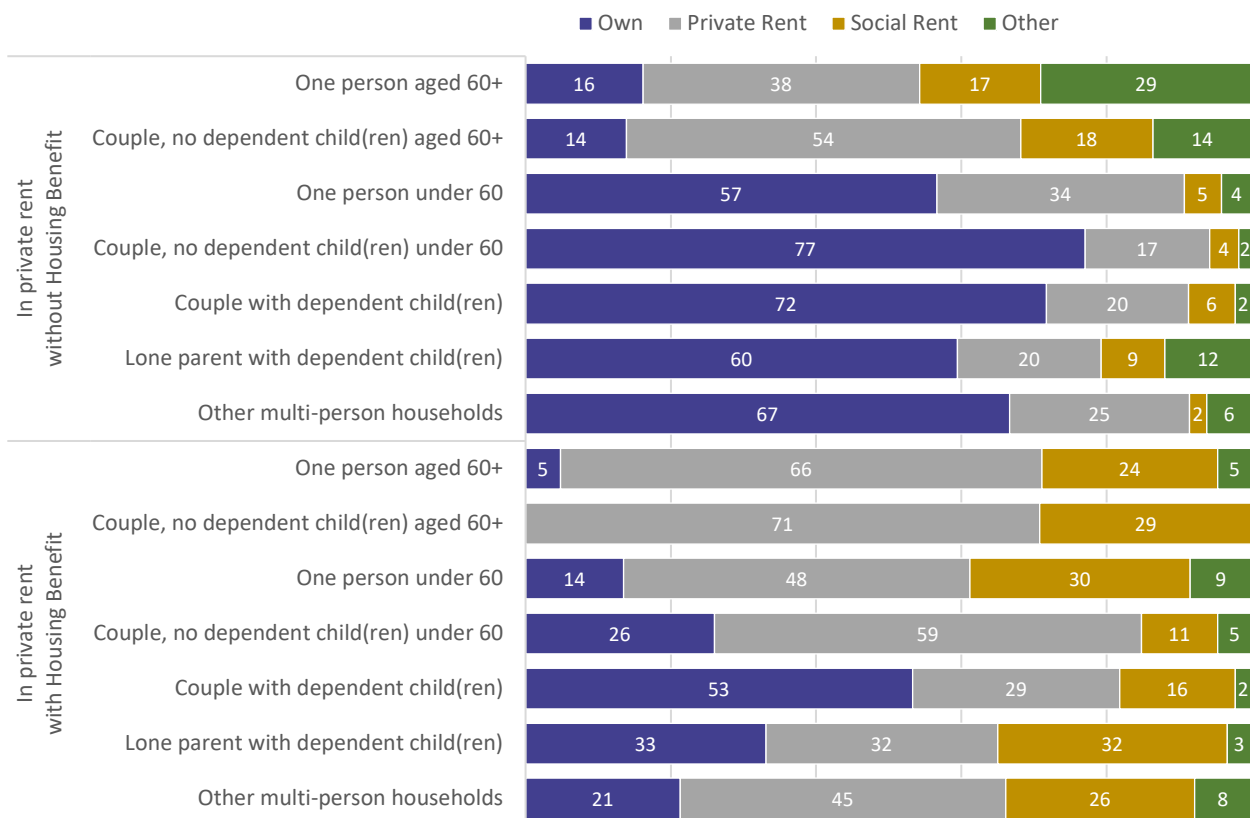
Figure 28: Long-term tenure aspirations (Source: English Housing Survey 2022/23, MHCLG)

Current tenure	Long-term plan			
	Owner occupier	Rent from private landlord	Rent from social landlord	Other
Owner occupied	97.1%	0.3%	0.5%	2.1%
Rent from private landlord	56.6%	29.2%	9.5%	4.7%
Rent from social landlord	21.1%	1.4%	74.2%	3.3%

- 4.17 These figures relate to aspirations only, and there is no test within the data as to whether this aspiration is affordable. Therefore, it is therefore worth considering the responses of those currently in private rent in more detail in order to understand the types of household aspiring to buy.
- 4.18 Figure 29 shows long-term tenure aspirations of different types of households currently renting privately either with or without Housing Benefit.

Figure 29: Long-term tenure expectation for those renting from a private landlord with and without Housing Benefit support (Source: English Housing Survey, MHCLG. Note: Own includes shared ownership)

Long-term tenure expectations of those currently in private rent



- 4.19 Through combining data on the number of households of each type in each age group living in private rented housing and paying their own rent with the aspiration data from the EHS, Figure 30 establishes the number of existing households that aspire to homeownership. It is important to recognise that all of these households can afford to rent Market Housing; therefore, none would have previously been counted as needing Affordable Housing.

Figure 30: Existing households in private rent without Housing Benefit that aspire to homeownership by household composition and age of household reference person (Source: ORS Model. Note: Figures may not sum due to rounding)

Household composition	16-24	25-34	35-44	45-54	55-64	65+	Total
One-person household	300	613	306	224	221	191	1,855
Couple family without children	269	692	218	178	225	124	1,705
Couple family with dependent children	70	501	543	205	108	0	1,427
Lone parent family with dependent children	8	0	48	25	20	4	105
Other household types	195	277	269	484	650	239	2,114
TOTAL HOUSEHOLDS	841	2,083	1,384	1,115	1,225	558	7,205

- 4.20 Therefore, we can conclude that there are around 7,200 households currently living in Dorset who do not own their own home but aspire to do so. Of these households, most (60%) are aged under 45, including around 2,100 (29%) aged 25-34.
- 4.21 It is important to recognise that the figures for those who aspire to homeownership are based upon those households who can afford to rent Market Housing without Housing Benefit support, but not all of these households would necessarily choose to buy Affordable Home Ownership, and others may not need Affordable Home Ownership if their circumstances change to such a degree that they can afford to buy without financial assistance. It is also important to recognise that the identified demand could only be realised if Affordable Home Ownership products could be delivered at prices that were genuinely affordable in the area based on local incomes.
- 4.22 Neither the NPPF nor PPG identify that any affordability criteria should be applied to those households who aspire to homeownership but cannot afford to buy their own home. However, it is appropriate to consider the extent to which these households could plausibly afford Affordable Home Ownership products if they were provided. Figure 31 sets out that 1,043 households who can afford to rent privately at the lower quartile rate in Dorset can also afford the mortgage cost of a second-hand home. A further 3,482 would be unable to afford a 70% share of a newbuild home, and 1,670 do not have sufficient savings for a deposit. Therefore, only 1,010 household would have been able to afford a newbuild affordable home ownership property with 70% equity and would have sufficient saving to be able to purchase the property.

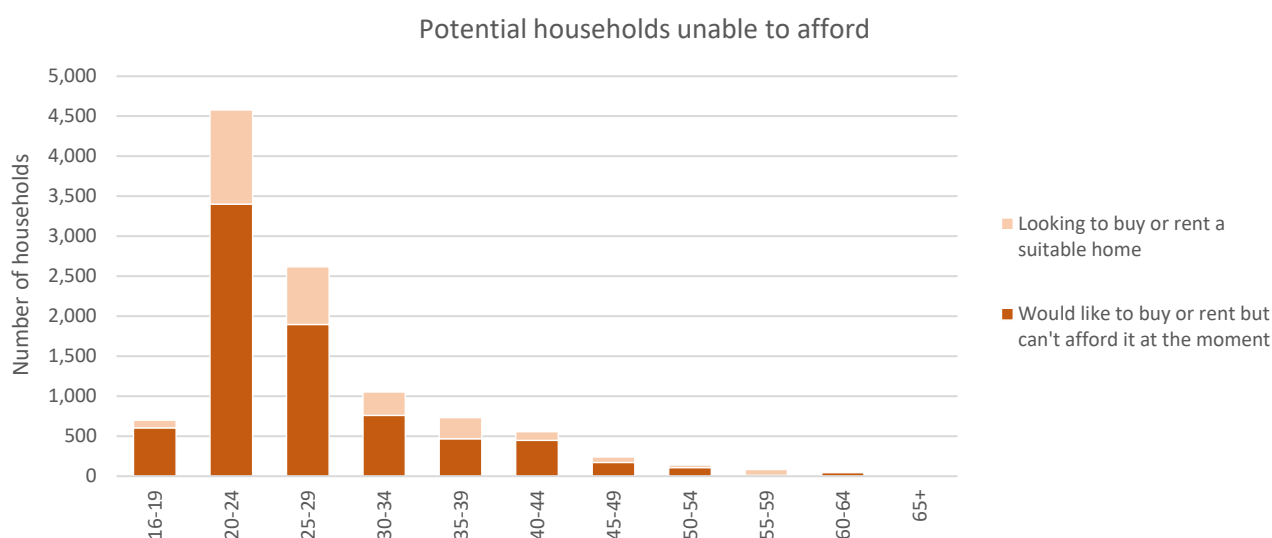
Figure 31: Need from households that aspire to homeownership but cannot afford to buy Market Housing in Dorset (Source: ORS Model. Note: Figures may not sum due to rounding)

Current unmet need from households that aspire to homeownership but cannot afford to buy	Number of households
Households renting privately that aspire to homeownership	7,205
Less households that could afford to buy an existing dwelling at the lower quartile price	-1,043
Less households unable to afford based on 70% of the lower quartile price for newly built dwellings	-3,482
Less households with savings of less than £5,000	-1,670
HOUSEHOLDS THAT ASPIRE TO OWN BUT CANNOT AFFORD TO BUY MARKET HOUSING that are likely to form an effective demand for Affordable Home Ownership products	1,010

Need from Potential Households

- 4.23 The previous analysis established that there would be around 10,700 potential households in the area who wanted to live independently but did not occupy a separate home at the base date of the study in 2026 (Figure 18). Many of these potential households have not been able to form a new household as they are unable to afford to rent or buy suitable housing. Of the 10,700 potential households, an assessment of their affordability shows that around 7,900 would not be able to afford suitable housing in the context of Dorset delivering 3,246 dwellings per annum. The breakdown by age of these households is shown in Figure 32.
- 4.24 Figure 27 previously identified that there were 1,200 households without a separate home who were not suitably housed due to their current housing being overcrowded, and their needs have already been counted. It is important that the remaining 6,700 households are counted when establishing the current need.

Figure 32: Potential household unable to afford suitable housing (Source: ORS Model)



Newly Arising Need

- 4.25 In terms of establishing the newly arising need for Affordable Housing in future years, the PPG draws attention to new household formation (in particular, the proportion of newly forming households unable to buy or rent in the market area) as well as the number of existing households falling into need, such as those who experience relationship separation or a loss of income, meaning that they can no longer afford their housing costs.

How can the number of newly arising households likely to be in affordable housing need be calculated (gross annual estimate)?

Projections of affordable housing need will have to reflect new household formation, the proportion of newly forming households unable to buy or rent in the market area, and an estimate of the number of existing households falling into need. This process will need to identify the minimum household income required to access lower quartile (entry level) market housing (strategic policy-making authorities can use current costs in this process, but may wish to factor in anticipated changes in house prices and wages). It can then assess what proportion of newly forming households will be unable to access market housing.

Planning Practice Guidance, ID 2a-021-20190220

- 4.26 In order to assess the projected future Affordable Housing need, it is necessary to consider need from new households (in particular, the proportion of newly forming households unable to rent or buy Market Housing) as well as the number of existing households falling into need. It is also necessary to consider the number of additional households who aspire to homeownership that cannot afford to buy.
- 4.27 The ORS Model establishes future Affordable Housing need based on the dwelling-led household projections together with a range of secondary data sources in order to profile how the stock will have to change to meet the needs of the future population. The Model provides robust and credible evidence over the full Study period and recognises how housing market trends and drivers are likely to impact on the appropriate housing mix. The Model recognises that the proportion of households unable to buy or rent in the market area will not be the same for all household types, so the appropriate proportion is determined separately for each household type and age group.
- 4.28 The affordability percentages in Figure 33 are calculated using detailed information on existing households living in the local area from Census data alongside administrative data published by DWP regarding housing benefit claimants, including those in receipt of the housing element of Universal Credit. For each type of household in each age group, the table identifies the percentage of households who are unable to afford their housing costs for a suitable property without spending too high a share of income on rent, which is based on them either occupying Affordable Housing or receiving housing benefit to enable them to afford Market Housing.

Figure 33: Assessing affordability by household type and age (Source: Census data, ONS; Housing Benefit claimants, DWP)

Percentage of households unable to afford to rent or buy	16-24	25-34	35-44	45-54	55-64	65+
One-person household	25%	14%	31%	38%	37%	42%
Couple family without children	17%	8%	10%	10%	11%	19%
Couple family with dependent children	57%	28%	14%	11%	17%	37%
Lone parent family with dependent children	94%	85%	61%	52%	58%	68%
Other household types	17%	31%	22%	20%	20%	19%

- 4.29 Based on the dwelling-led projections, the HNA analysis identifies the annual need from new households who are unable to afford to rent or buy and existing households who are falling into need. This increase must be offset against changes to households previously identified as being in need. The annual net increase in households unable to afford to rent or buy suitable housing is 842 per year in Scenario A and 839 households per annum in Scenario B, with Scenario A showing 12 households and Scenario B showing 25 household who are likely to have formed in Market Rent who aspire to homeownership, cannot afford buy, but are likely to have sufficient income and savings to afford Affordable Home Ownership.

Figure 34: Annual future need from households needing Affordable Housing by type 2026-46 (Source: ORS Model. Note: Figures may not sum due to rounding)

Annual future need from households needing Affordable Housing	Scenario A	Scenario B
Net increase in households unable to afford to rent or buy suitable housing	842	839
Need from additional households aspiring to homeownership that cannot afford to buy	12	25
NET ANNUAL NEED based on the increase in households needing Affordable Housing	854	865

Households Needing Affordable Housing

- 4.30 Figure 35 summarises the HNA analysis and sets out the information sources used at each stage, which identify that there will be a need to provide Affordable Housing for a total of 29,150 households.

Figure 35: Current unmet need and future need from households needing Affordable Housing in Dorset 2026-46 (Source: ORS Model. Note: Figures may not sum due to rounding)

Total need from households needing Affordable Housing	Step	Source	Scenario B
CURRENT NEED			
Current unmet need from households unable to afford	A	Figure 27	4,014
Less households occupying Affordable Housing	B	Figure 27	-1,066
Existing households aspiring to own who cannot afford to buy	C	Figure 31	1,010
Potential households that want to live independently	D	Figure 32	7,909
Net current need in 2026	E	A - B + C + D	11,857
FUTURE NEED			
Net annual need	F	Figure 34	865
Net future need over the 20-year period 2026-46	G	F × 20	17,299
TOTAL NEED 2026-46	H	E + G	29,156
Average annual need	I	H ÷ 20	1,458

- 4.31 For the base date of the study, the HNA identifies a current unmet need from around 4,000 households who are unable to afford to rent or buy suitable housing. Some of these households occupy Affordable Housing and taking account of the properties they would vacate reduces the net need.
- 4.32 In addition to the households unable to afford, there were 7,900 potential households identified who want to live independently who have not previously been counted as they cannot afford to rent or buy suitable housing. This yields an overall current need from around 11,900 household at the base date of the Plan in 2026.
- 4.33 Over the 20-year study period, there will be additional need from new and existing households who are unable to afford to rent or buy suitable housing and new households who aspire to own but cannot afford to buy. Together, these yield an average annual net future need of around 865 households per year, which equates to a total net future need from around 17,300 households over the 20-year period 2026-2046.
- 4.34 The current need from 11,900 household and the future need for a further 17,300 households result in the total need from 29,200 households over the 20-year study period, which is an average of 1,458 per year. This

includes all households who are unable to afford to rent or buy suitable housing and all households who want to own but cannot afford to buy where Affordable Home Ownership would provide a suitable housing option. **We note the figure of 29,200 represents households. At any one time some dwellings will be vacant, and including an allowance for vacant homes will take the dwelling need figure to 29,500.** The additional 300 homes will allow for short-term vacancies.

- 4.35 The total need identified by the HNA analysis is a net figure; therefore, any future losses from the current stock (such as demolition, sales through Right to Buy, or market sales) would increase the number of affordable homes needed by an equivalent amount. The analysis also assumes that the number of households in receipt of Housing Benefit to enable them to afford Market Rent will not change.

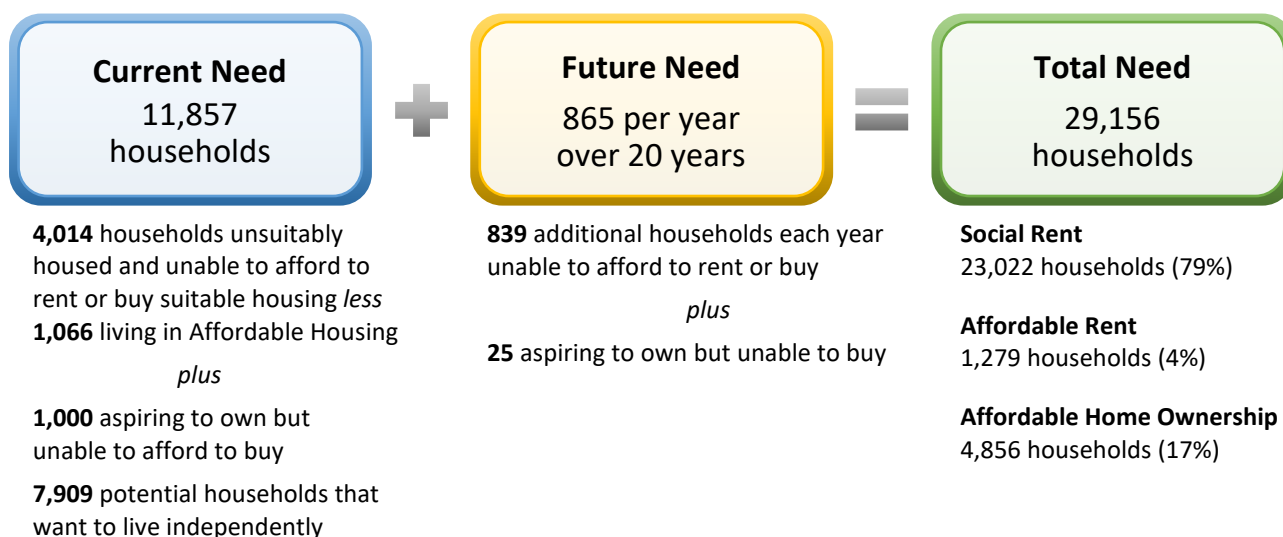
Private Rented Housing

- 4.36 Private rented housing (with or without Housing Benefit) does not meet the definitions of Affordable Housing and is not counted as Affordable Housing supply. However, households in receipt of Housing Benefit can afford their housing costs given that they receive a specific payment based on their rent, so they are not counted towards the need for Affordable Housing. The current rules around Universal Credit may mean that households are still spending a high share of their income on rent, but this has been assessed by the DWP as affordable. However, if Housing Benefit support was no provided (or if there was not sufficient private rented housing available at a price they could afford) then this would increase the need for Affordable Housing.
- 4.37 As policy decisions about housing benefit support provided to households living in the private rented sector are determined by the Government, it will be necessary for the Council to consider the possible impact of any changes when determining the most appropriate Affordable Housing targets for the area.

Overall Need for Affordable Housing

- 4.38 Figure 36 summarises the HNA analysis, which identifies a need to provide Affordable Housing for a total of 29,200 households over the 20-year study period 2026-2046. Please note the figures here relate to households. To adjust these figures to dwellings requires a recognition that some properties will be vacant at any one time, and this adjustment is made in Chapter 6.

Figure 36: Current need and future need from households needing Affordable Housing in Dorset 2026-2046 (Source: ORS Model. Note: Figures may not sum due to rounding)



- 4.39 Households needing Affordable Housing represent 48% of the total household growth identified by the dwelling-led projections (Figure 21, Scenario B). Given the current need from around 11,900 households at the start of the study period, it would seem appropriate for the Council to aim to maximise Affordable Housing delivery in the early years of the emerging Dorset Council Local Plan where possible.
- 4.40 It is important to recognise that the overall number of dwellings that need to be provided will inevitably be higher than the 29,156 households identified as there will always be a proportion of unoccupied dwellings due to transactional vacancies. **The HNA analysis has identified need for around 29,500 dwellings to be delivered as Affordable Housing over the 20-year study period 2026-2046, which is equivalent to 45% of the overall housing need identified by the standard method calculation. Therefore, nearly half of the need would be for affordable housing.**

Future Mix of Affordable Housing

- 4.41 Figure 37 provides a breakdown of the identified need for Affordable Housing based on the number of bedrooms needed and the type of housing that households would be able to afford, calculated using the affordability framework previously set out in Figure 24 for tenure and Figure 30 for household type, which, in turn, feeds into the size mix.

Figure 37: Total need for Affordable Housing by type of Affordable Housing and number of bedrooms 2026-2046 (Source: ORS Model. Note: Figures may not sum due to rounding)

Tenure	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms	Total
Social Rent	11,426	7,588	3,563	445	23,022
Affordable Rent	745	354	135	45	1,279
Affordable Home Ownership	605	1,758	2,270	222	4,856
TOTAL HOUSEHOLDS	12,777	9,699	5,969	712	29,156

- 4.42 The HNA analysis identifies a need for around 24,300 dwellings to be provided as rented Affordable Housing, comprising of 1,300 dwellings (21%) for households who could afford Affordable Rent (without Housing Benefit and spending no more than 35% of their income on rent) and 23,022 dwellings (79%) to be provided as Social Rent for households that could not afford Affordable Rent.
- 4.43 When considering the future delivery of affordable homes for rent, this does not necessarily mean that 14% of the rented affordable housing on each site should be Affordable Rent with the remainder being Social Rent. Instead, it might be more appropriate for the Council to focus on delivering Social Rent as the only rented provision on those sites where it is economically viable to do so, with Affordable Rent only being delivered on those sites where it is necessary due to viability issues or where housing is specifically being provided for essential local workers. The Council will need to monitor the mix of rented Affordable Housing delivered across every site to ensure that the overall balance is achieved.
- 4.44 When considering the size of Affordable Housing needed, 44% of households would need 1 bedroom and a further 33% would need 2 bedrooms, which will include some who need specialist older person housing. There is a need to provide more than 700 dwellings as homes for larger families (with 4 or more bedrooms), and whilst this represents only 2% of the total need, this still represents around 35 homes every year over the 20-year study period.

Setting the Need for Affordable Housing in Context

- 4.45 Figure 38 summarises the annual supply of Affordable Housing which has been delivered in the local area each year since 2021/22.¹⁰ This covers Social Rent, Affordable Rent, and Affordable Home Ownership.

Figure 38: Affordable Housing supply by source and tenure, 2021/22-2025/26 (Source: Dorset Council Records)

Year	Affordable Rent	Social Rent	Low Cost Home Ownership	Rent Plus	First Homes	Total Completions
2021/22	355		174			529
2022/23	358		306			664
2023/24	325	40	148			513
2024/25	224	22	198	0	0	444
2025/26	177	28	197	0	21	423
TOTAL	1,439	90	1,023	0	21	2,573

- 4.46 Between 2021/22 and 2025/26, a total of 2,573 affordable homes were delivered in Dorset, representing an average of 515 homes per year. This average was comprised of 306 affordable homes for rent and 209 homes for affordable homeownership.
- 4.47 The current supply of Affordable Housing falls significantly short of the annual need identified by the HNA of 1,458 affordable homes each year (Figure 37). As a result, not enough permanent homes are being delivered to accommodate homeless households currently living in temporary accommodation. In addition, other households in need of Affordable Housing are facing lengthy waiting times: often many years for those needing larger family homes. The HNA has identified that the Council will need to plan for a further increase in housing delivery in order to meet the minimum number of homes needed under the new standard method. The annual LHN figure has been calculated at 3,246 dpa, whereas recent housing delivery has averaged 1,465 dpa. Therefore, there will need to be an increase of around 122% in the overall number of homes delivered each year.
- 4.48 Increasing the overall number of homes delivered will help support the provision of more Affordable Housing as the majority of new affordable homes are typically secured through Section 106 contributions which are linked to Market Housing developments. However, the HNA identifies a need for 1,458 affordable homes per year (Figure 35), which becomes 1,475 dwellings per year when vacancies are included, whereas recent delivery has averaged only 515 dpa (Figure 38). On this basis, the number of affordable homes currently being delivered each year needs to increase nearly threefold (an uplift of 186%) to fully meet identified need.
- 4.49 When considering the size of affordable homes, Census data shows that the number of households renting a home with four or more bedrooms from a social landlord increased from 667 to 669 between 2011 and 2021, which is an increase of 2 over 10 years. Current waiting times for properties with four or more bedrooms can be as short as one year, but they do reach four years in parts of Dorset. Therefore, past growth in larger affordable homes has been negligible.
- 4.50 Given this context, delivering the identified need for over 700 family homes (Figure 37) with four or more bedrooms over the 20-year study period (equivalent to an average of 35 large homes each year) is likely to require a considerable step change. Therefore, Dorset Council will need to consider whether the delivery of larger affordable homes should be prioritised, especially given the difficulties which are experienced when trying to secure suitable permanent accommodation for families needing larger homes.

¹⁰ It is noted that MHCLG publish annual figures for all local authorities in England. The MHCLG figures for Dorset Council show lower rates of delivery, but Dorset Council is exploring the differences with MHCLG.

5. Housing Need for Different Groups

- 5.1 The NPPF (August 2026) requires that local planning authorities consider the housing needed for a range of different groups in the community so that any specific needs can be reflected in planning policies in Policy HO1(2):

At the most appropriate level, development plans should also take into account an assessment of the size, type and tenure of housing or other accommodation needed for different groups. These groups include, but are not limited to: a. Those who require affordable housing (including Social Rent) as defined in the glossary at Annex B; b. Older people (including those who require retirement housing, housing-with-care and care homes); c. Disabled people; d. People who rent their homes; e. Families with children; f. Looked after children (evidence of need for which can be found in the relevant local authority's Children's Social Care Sufficiency Strategy) and those who require other specialist community-based accommodation (where evidence of need is available for the relevant local authority); g. Students; h. Travellers; and i. People wishing to commission or build their own homes.

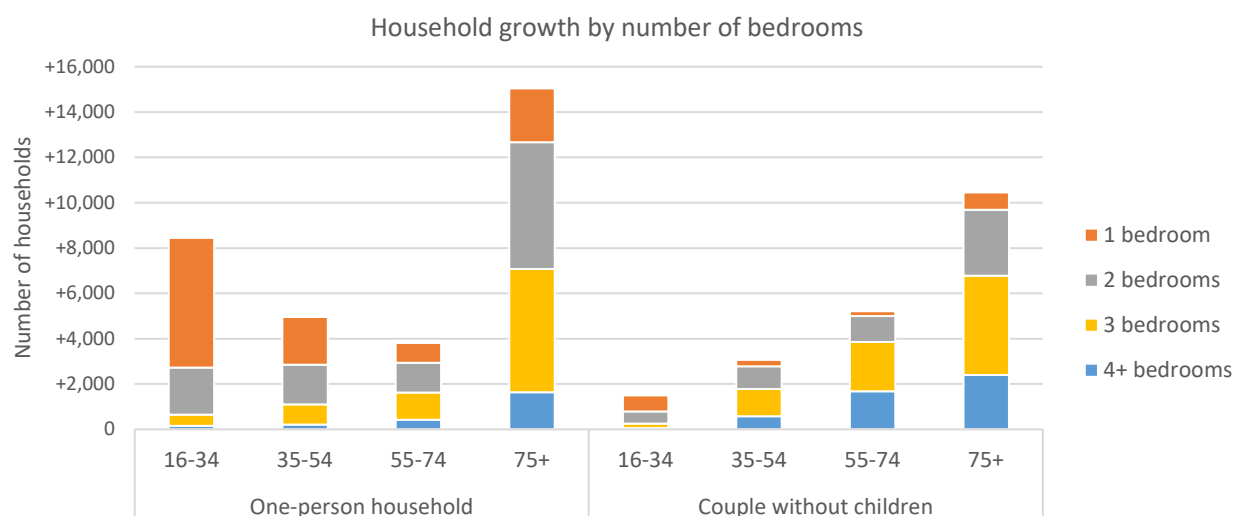
National Planning Policy Framework, August 2026 (emphasis added)

- 5.2 The needs of those who require Affordable Housing (including Social Rent) have already been established. This chapter considers the specific housing needs of the other identified groups in turn except for Travellers as a separate Gypsy and Traveller Accommodation Assessment will consider their needs as set out in Planning Policy for Traveller Sites.

Housing for Families with Children

- 5.3 Figure 21 previously identified a projected increase of 8,600 families with children under Scenario B (14% of the household growth) over the 20-year period 2026-2046. Around three quarters of these households were couple families (6,400), and the remaining quarter were lone parent families (2,200). Nevertheless, whilst single families only represent up to 17% of the projected household growth, when considering the need for additional family housing, it is important to recognise that many couples without children and one-person households will also choose to occupy family housing.
- 5.4 Figure 39 illustrates the mix of housing by number of bedrooms which the additional couples without children and one-person households are likely to occupy, assuming that current occupancy trends continue.

Figure 39: Household growth and number of bedrooms based on current occupancy trends by household composition and age of household reference person, 2026-2046 (Source: ORS Model)

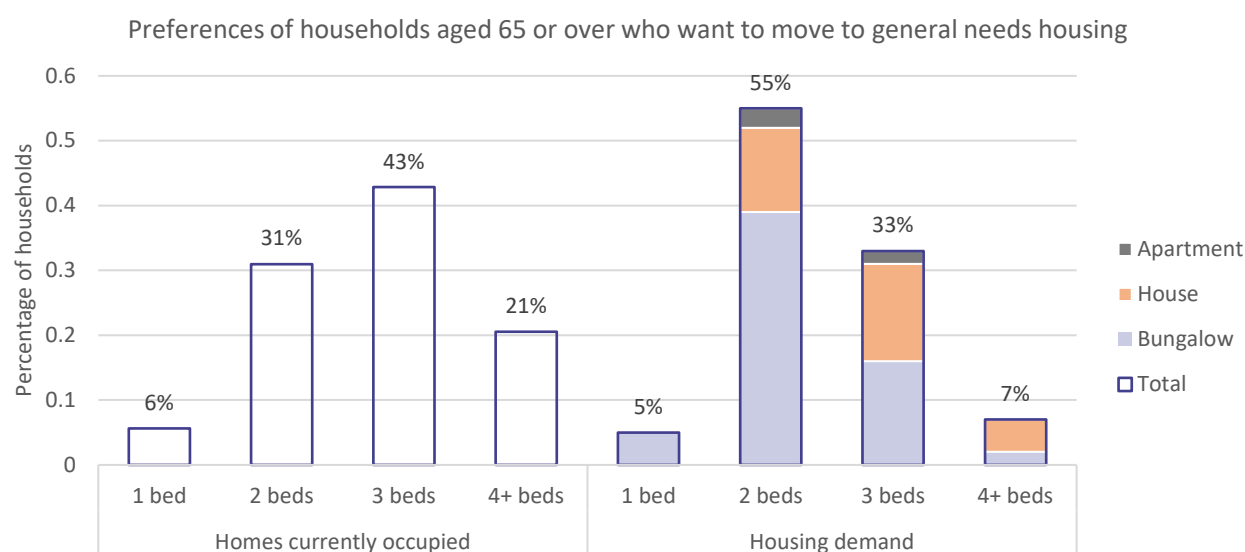


- 5.5 On the basis of current occupancy trends, it is likely that many older couples without children and one-person households will continue to occupy larger homes after their adult children have left to live independently. Where the current occupiers of family housing choose not to move, these existing properties will not be vacated; therefore, they not be available for new families with children, so it will be necessary to provide additional family housing for these new families. However, if larger properties can be vacated then the need for newbuild will be reduced.
- 5.6 In addition to the family homes needed to accommodate the projected increase of 8,600 families with children, the analysis identifies that there would also be a need to provide an additional 23,100 family homes, given the increase in households without children who are likely to stay in their current family home based on current trends. Therefore, it will be necessary to provide family housing for around 31,700 households (which is equivalent to 53% of the projected household growth), assuming there is no change to current occupancy patterns.

Freeing Up Larger Family Homes

- 5.7 In terms of freeing up larger properties, even if offered suitable housing for their needs, many older households are unlikely to move due to personal ties or the alternative accommodation options being more expensive. However, a 2024 Ipsos Mori survey for MHGLG¹¹ shows that around 8% households aged 65 or over are likely to consider moving to specialist older person housing, and a further 17% of households aged 65 or over would not want to move to older person housing but would choose to move within the general housing stock if there were suitable homes available that better met their needs. Given that the number of households aged 65 or over is projected to increase to 113,600 households by the end of the Plan in 2046, there could be opportunity for up to 19,300 existing homes to be vacated if the right type of general needs housing could be provided for these households, with 14,600 of these being in market housing.
- 5.8 Figure 40 provides a breakdown of the size of homes which older households currently occupy and the likely housing demand for the type and size of homes which those willing to move are likely to want.

¹¹ [Housing Preferences for Older People Survey | Ipsos](#)

Figure 40: Preferences of household aged 65 or over who want to move to general needs housing (Source: ORS Model)

- 5.9 From the data, it is evident that of those older households living in Market Housing, the majority (62%) currently occupy homes with at least three or four bedrooms. Therefore, providing suitable housing for these households would be likely to lead to a large number of family homes being vacated.
- 5.10 Most older households are seeking two-bedroom homes (55%); although, there is also a reasonable demand for three-bedroom homes (33%), often from households currently living in properties with four-bedrooms or more. There is a clear preference for bungalows, with over three fifths (62%) identifying that this would be their choice, and the expectation from most is that this will be their outcome. On this basis, if there were not enough bungalows available, it is likely that many of these households would not vacate their existing family home. It is evident that there is very little demand for apartments from these households, which may be part of the reason for them not choosing specialist older person housing but wanting to remain in the general housing stock instead.
- 5.11 Figure 41 identifies the net difference between the housing currently occupied and the homes sought by these households in the market sector. Whilst it is important to recognise that many older person households plan to stay in their current home and some would never want to move, the evidence shows that there are many thousands of older person households who are looking to move to suitable homes within the general housing stock in Dorset if the right type of homes could be provided.

Figure 41: Impact of providing general needs housing to meet market demand from households aged 65 or over (Source: ORS Model)

Number of bedrooms	Homes currently occupied	Housing demand	Net difference
1 bedroom	820	730	-90
2 bedrooms	4,522	8,030	3,507
3 bedrooms	6,256	4,818	-1,438
4+ bedrooms	3,001	1,022	-1,979
TOTAL	14,600	14,600	-

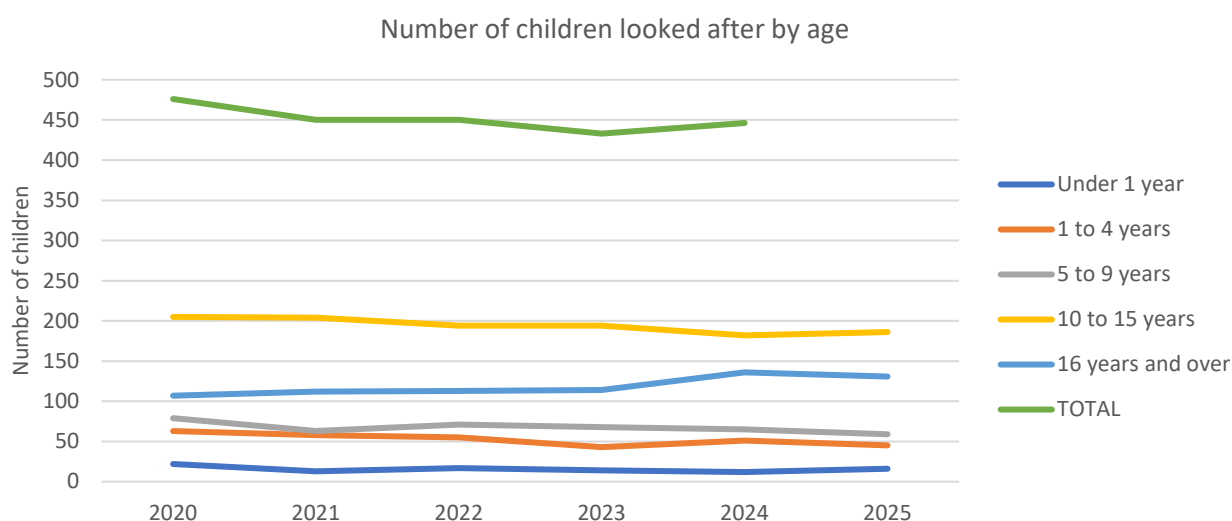
- 5.12 Over the 20-year study period 2026-46, providing suitable general needs housing for older persons could reduce the number of households needing family housing (with three or more bedrooms) by up to 3,500

(1,400 fewer 3-bedroom homes and 2,000 fewer with 4-bedrooms or more). However, this would depend on providing general needs housing which older households would choose to live in.

Looked After Children

- 5.13 The Government issued a Written Ministerial Statement in May 2023 which stressed the importance of providing accommodation for looked after children, referring to the NPPF requirement to consider the needs of different groups in the community and stating that Local Planning Authorities should “*consider whether it is appropriate to include accommodation for children in need of social services care*” as part of their HNA.
- 5.14 The August 2026 NPPF states in Policy HO1(2)(f) that “*evidence of need for which can be found in the relevant local authority’s Children’s Social Care Sufficiency Strategy*”. Dorset Council developed a “Sufficiency and Commissioning Strategy for Children Looked After and Care Leavers 2024-2027” in order to set out how they will meet their legal obligations regarding the care and placement of looked-after children.¹² The strategy outlines how the Council intends to ensure that there is a range of suitable accommodation available to meet the diverse and changing needs of children in its care.
- 5.15 The Council’s legal duties are underpinned by Section 22G of the Children Act 1989 (as amended by the Children and Young Persons Act 2008), which places a general duty on local authorities to take steps to secure, so far as reasonably practicable, sufficient accommodation within their area to meet the needs of looked-after children. This includes ensuring that placements are appropriate to the individual needs of children and ensuring that they are located within the authority’s area wherever it is consistent with their welfare.
- 5.16 Figure 42 summarises the latest information on the overall number of children in care by age group over the last five years. Those aged 10-15 years have remained the largest group, but the number aged 16 or over notably increased during 2023.

Figure 42: Number of children in care by age group, 2020-2025 (Source: Education Statistics, Department for Education)



¹² [Sufficiency and Commissioning Strategy for Looked After Children and Care Leavers 2022-24](#)

Care Leavers

- 5.17 Interpreting the ministerial statement of May 2023 in an inclusive sense would also require an assessment the need from young people leaving care to be included. Figure 43 shows the accommodation arrangements and suitability of accommodation for young people currently aged 17 to 21 who were looked after children when aged 16.

Figure 43: Accommodation arrangements and suitability of accommodation for young people currently aged 17 to 21 who were looked after children when aged 16 by age group, 2025 (Source: Education Statistics, Department for Education)

	Aged 17-18	Aged 19-21
Independent living	0	79
Semi-independent, transitional arrangements	32	24
With parents or relatives	6	35
With former foster carers	22	19
Other type of accommodation	21.5	52
TOTAL	84	209
Accommodation considered suitable	83	198
Accommodation considered not suitable	0	0
No information available	1	11

- 5.18 Based on this information, we can establish that 293 young people currently aged 17 to 21 were looked after when aged 16, which is equivalent to an average of 73 in each individual year of age. On this basis, it is expected that approximately 73 young people leaving care each year will require accommodation, representing a total of 1,500 individuals over the 20-year period 2026-2046. Although these needs will already be included within the overall need for Affordable Housing (Figure 35), more detailed planning and coordination with children and young people's social care services will be necessary to ensure that care leavers are appropriately and suitably housed, with a supply of affordable housing being required each year.

Housing for Older People

- 5.19 The UK population is ageing, and people can expect to live longer healthier lives than previous generations, so the older population living in England is forecast to grow significantly over the next 20 years. Given this context, PPG recognises the importance of providing housing for older people.
- 5.20 It is important to plan housing that is suitable for this increase in older people within the population, with a key requirement being to predict the type of housing which will best meet their needs. Whilst most will remain living in the same area and many will not move from their current homes, those that do move in their later years are likely to be looking for housing suitable for older people.
- 5.21 This housing comes in a number of different forms, and the distribution between these different types needs to be explored. In terms of formal definitions and terminology, the following list was developed by Three Dragons for a joint study undertaken with ORS:
- » Age Exclusive housing: housing that is age restricted (typically to age 55 and over) and may offer access to the careline service which is available to households living in general needs housing but does not offer warden support or any communal facilities, meals, or bespoke site-specific care packages. Residents in age exclusive housing tend to be younger than residents in

sheltered or extra care housing and are less likely to experience a range of frailties or disabilities,

- » Sheltered housing: this is also age restricted but will normally have either an onsite or visiting scheme manager or access to a bespoke helpline. There will normally be communal facilities, which may include a café or shop, but there is no bespoke site-specific care package. Scheme residents are typically 75 or over, but the scheme may include some residents aged 65-74,
- » Extra Care housing: this is also age restricted, will normally have an onsite scheme manager, and will provide a range of communal facilities. However, residents will also have access to a site-specific bespoke care package, usually including paying for a specified minimum number of hours of care a week with the option to increase usage if required. The care provider is CQC registered with specific carers allocated to the scheme. Scheme residents are typically 75 or over. Extra care housing can also be known as very sheltered housing, assisted living, enhanced sheltered, or as housing with care,
- » Dementia housing: this type of housing is designed to offer specific support to people with midstage dementia who struggle with general needs housing but are not so frail that they need to live in a care home. The scheme layout is dementia friendly and there is normally onsite care and support as well as a range of communal activities and a café. The care provider is CQC registered with specific carers allocated to the scheme,
- » Care Homes – non independent accommodation for high care needs (residential and nursing C2). It is not directly considered in this section but was factored into the household projections;
- » Accessible housing - housing which is, or can be, adapted for use by someone with a limiting health condition or by someone who is a wheelchair user. This is considered below in a separate section of this report, and they typically meet the highest share of the overall needs of older persons.

5.22 In terms of modelling need, we firstly consider the need for sheltered housing, extra care, and care homes, which are all modelled on the need for those age 75 years and older. We will then return to older people with dementia and age exclusive housing.

5.23 The below Figure 44 identifies the types of dwellings occupied by households aged 75 or over in the local area based on 2021 Census data. The Census does not provide details about specialist older person housing, but information about this stock is maintained by the Elderly Accommodation Counsel.

Figure 44: Existing dwelling stock occupied by households aged 75+ (Source: Census data, ONS; Specialist Older Person Housing based on data published by the Elderly Accommodation Counsel for 2025)

	Owner occupied	Private rented	Rented from social landlord	TOTAL
DWELLINGS OCCUPIED BY HOUSEHOLDS AGED 75+				
1 bedroom	1,450	524	1,665	3,639
2 bedrooms	9,893	992	1,138	12,023
3 bedrooms	14,421	637	554	15,612
4 or more bedrooms	7,046	177	49	7,272
TOTAL HOUSEHOLDS	32,810	2,330	3,406	38,546
SPECIALIST OLDER PERSON HOUSING				
Housing with Support	2,352	40	3,813	6,165
Housing with Care	461	0	311	772
TOTAL SPECIALIST OLDER PERSON HOUSING UNITS	2,813	40	4,124	6,937

- 5.24 We can compare how much older persons' housing exists in Dorset and compare this to the number of older households. The stock of specialist older person housing rented from a social landlord (4,124 homes) is more than the number of households aged 75 or over living in housing rented from a social landlord at the time of the Census (3,406 households). Therefore, the stock is also being utilised by households aged under 75 years.
- 5.25 The owner-occupied stock of specialist older person housing (2,813 homes) represents 25% of all one- and two-bedroom dwellings which are occupied by owner occupiers aged 75 or over. As many older owner occupiers live in properties with three-bedrooms or more, the specialist older person housing stock represents only 9% of households when considering all owner occupiers aged 75 or over. Therefore, the market stock for older persons in Dorset is very small and only contributes marginally to meeting the needs of the older population who are interest living in the general housing stock.
- 5.26 PPG for "Housing for older and disabled people" was published in June 2019. This states that:

The future need for specialist accommodation for older people broken down by tenure and type (e.g. sheltered housing, extra care) may need to be assessed and can be obtained from a number of online tool kits provided by the sector ... Evidence from Joint Strategic Needs Assessments prepared by Health and Wellbeing Boards can also be useful. The assessment of need can also set out the level of need for residential care homes.

Planning Practice Guidance, ID 63-004-20190626

- 5.27 The Housing Learning and Improvement Network (LIN) has published a number of different online toolkits which have provided standardised rates for estimating demand for specialist older person housing products. These have been based on applying prevalence rates per 1,000 people aged 75 or over, as summarised in Figure 45.^{13, 14} The table also presents baseline rates from a model developed by Sheffield Hallam University Centre for Regional Economic and Social Research (CRESR).¹⁵ As an example, the SHOP@ National Benchmark 2016 suggested that for every 1,000 persons aged 75 years or older, there should be 100 housing with

¹³ http://www.housinglin.org.uk/library/Resources/Housing/Support_materials/Reports/MCGVdocument.pdf

¹⁴ <http://www.housinglin.org.uk/library/Resources/Housing/SHOP/SHOPResourcePack.pdf>

¹⁵ <https://www.shu.ac.uk/centre-regional-economic-social-research/projects/all-projects/older-peoples-housing-care-and-support-needs-in-greater-cambridge-2017-2036>

support dwellings, 13 extra care dwellings and 43 residential care bedspaces and 45 nursing care bedspaces. This implies 202 of the 1,000 persons would reside in some form of dedicated older persons accommodation.

Figure 45: Benchmark Figures for Specialist Older Person Housing

Form of Provision <i>Demand per 1,000 persons aged 75+</i>	More Choice, Greater Voice Toolkit 2008	Housing in Later Life SHOP Resource Pack 2012	SHOP@ National Benchmark 2016	Housing LIN Review Proposals 2016	Sheffield Hallam CRESR Model 2017
Housing with Support: Retirement Living or Sheltered Housing	125	180	100	100	153.2
Housing with Care: Extra Care or Enhanced Sheltered	45	65	14	35 "Proactive" rate	19.5
Sub-total	170	245	114	135	172.7
Residential care	65	-	43	40	-
Nursing care	45	-	45	45	-
Sub-total	110	-	88	85	110.8
OVERALL TOTAL	280	-	202	220	283.5

5.28 These rates provide a useful framework for understanding the potential demand for different forms of older person housing, but there is limited detail about the derivation of the figures published by the Housing LIN.

5.29 The More Choice, Greater Voice toolkit recognises that the suggested framework simply:

"...represents an attempt to quantify matters with explicit numerical ratios and targets. It is contentious, but deliberately so, in challenging those who must develop local strategies to draw all the strands together in a way that quantifies their intentions." (page 44)

5.30 Similarly, the SHOP resource pack acknowledged that the framework simply provides a baseline, which extrapolates *"...crude estimates of future demand from existing data"* (page 36), and the 2016 Review acknowledged that the Housing in Later Life report had *"suggested a large increase in leasehold housing for older people which were not substantiated at the time"* (page 4).

5.31 In contrast, the baseline rates for the CRESR model were established based on:

"the level and composition of supply of age-exclusive housing, specialist housing, and care beds across the 100 English local authorities with the highest overall provision of each broad type of older person housing per 1,000 older people (aged 75 years or older)." (page 26)

5.32 The Housing LIN states that the More Choice, Greater Voice Toolkit and SHOP Resource Pack are both now out-of-date and remain published only as an 'archived' resource for public policy interest purposes. The more recent SHOP@ analysis tool is provided through the Housing LIN consultancy services where target prevalence rates are established based on local circumstances.

5.33 The Housing LIN 2016 Review identified the following benchmarks for tenure mix based on the relative affluence or deprivation of the local authority area (Figure 46). Given that the English indices of deprivation ranked Dorset in the third quartile of all local authorities,¹⁶ the relevant tenure mix benchmark would be that

¹⁶[Local Deprivation Explorer 2025](#)

of an “Affluent” area. This does not necessarily imply that new development should exactly follow this mix, but it provides a guide to rebalancing the provision between affordable and market housing.

Figure 46: Proposed tenure mix for 2035 influenced by the affluence/deprivation ratio from the Housing LIN 2016 Review

	Most Deprived		Deprived		Affluent		Most Affluent	
Form of Provision	% Rented	% Leasehold	% Rented	% Leasehold	% Rented	% Leasehold	% Rented	% Leasehold
Sheltered, Age Exclusive	80	20	67	33	50	50	33	67
Housing With Care	75	25	50	50	33	67	25	75

Split based on quantiles of ONS deprivation index

It can be expected that the % of public sector sheltered, age exclusive accommodation will retain a higher % than housing with care as there already exists a substantial level of current service provision

- 5.34 In contrast, the CRESR Model determined the tenure mix for each type of housing based on the proportion of residents aged 75 or over living in owner occupation, and the “above median” benchmarks apply for Dorset. These give rented-to-owned ratios of 84:16 for Sheltered Housing and 87:13 for Extra Care. However, as the CRESR Model is based on the mix of current provision, these benchmarks may not always reflect the most appropriate distribution when planning for additional provision.

“These tenure splits reflect current provision, which is significantly skewed towards social rented provision. If there is a desire to expand the provision of older people’s housing beyond current levels, this is likely to require disproportionate increases in ownership forms of supply. This is in part due to demand being focused on these ownership forms, particularly in areas with high levels of existing older homeowners.”

- 5.35 The HNA is based on a rate of population growth which aligns with the LHN figure (Figure 19). Based on Scenario B, the dwelling-led projections identify that the population aged 75 or over is likely to increase by 27,276 persons over the 20-year period 2026-2046, which is equivalent to an average of 1,364 persons per year.
- 5.36 Given this context, the population projections underlying the Local Housing Need figure show a substantial increase in the older population over the projection period. It is important to recognise that many of these extra residents will be aged 85 or over and they are likely to have increasingly complex care and support needs, including dementia, mental health conditions, and frailty related needs. Therefore, it will be necessary to consider the associated changes in the profile of housing need.
- 5.37 Figure 47 considers the need for specialist older person housing for older households in Dorset over the 20-year period 2026-2046. This uses baseline rates based on the existing supply and considers appropriate target rates, taking account of the range of different benchmarks identified by the toolkits. The baseline rate is the level of existing provision per 1,000 persons aged 75 years and above and the target rate is where the toolkit suggest the existing provision per 1,000 persons aged over 75 years should be at the end of the study period.
- » The target rates are based on the average of (i) the baseline rate for the local authority and (ii) the mid-point of the benchmark range except for Affordable Housing with Support (which

excludes the rate from the CRESR Model) and Affordable Housing with Care (which excludes the Housing LIN rate) as neither of these benchmarks seem appropriate for the local area,

- » Based on the identified target rates, the projected number of residents aged 75 or over at the end of the 15-year period in 2044 is used to establish the overall gross need, and
- » The existing supply is then offset in order to identify the net housing need for the period to 2046.

Figure 47: Need for Specialist Older Person Housing to 2046 (Source: ORS Model. Note: Figures may not sum due to rounding)

Form of provision	Existing supply	Baseline rate	Benchmark range	Target rate	Total 2046	Change 2026-2046
Market Housing	2,813	43	-	53	5,239	2,426
Housing with Care	461	7	6-23	11	1,065	604
Housing with Support	2352	36	47-50	42	4,174	1,822
Affordable Housing	4,164	63	-	66	6,580	2,416
Housing with Care	311	5	11.55	8	804	493
Housing with Support	3,853	58	50	58	5,776	1,923
TOTAL	6,977	106	-	119	11,819	4,842
<i>Housing with Care</i>	<i>772</i>	<i>12</i>	-	<i>19</i>	<i>1869</i>	<i>1097</i>
<i>Housing with Support</i>	<i>6,205</i>	<i>94</i>	-	<i>100</i>	<i>9,950</i>	<i>3,745</i>

- 5.38 On this basis, there would be need to provide an additional **4,842 specialist older person housing units over the 20-year period 2026-2046** (equivalent to an average of 242 dwellings per year), of which 50% would need to be provided as Affordable Housing.
- 5.39 We note that the current 'Dorset's Extra Care Housing Strategic Statement 2024-2039' identifies a need for 4,422 supported and extra care units over the period 2021-2038 (Table 5a), which was derived from the Local Housing Need Assessment 2021. This analysis assumed that there would be a slight increase in the rate of provision per 1,000 persons aged 75+ years but a lower population growth rate. Therefore, the figures are consistent with each other.
- 5.40 It is important to recognise that the HNA analysis assumes that there would be a continuation of current types of housing, although it is uncertain if older people will aspire to these types of specialist housing in the future. Some types of specialist housing are already experiencing lower demand, and other, newer types of provision may appear to meet changing aspirations in the future. The delivery of specific schemes for specialist older person housing need should be considered in partnership with other agencies, particularly those responsible for older person support needs. It will be important to consider other factors and constraints in the market such as:
- » **Demographics:** the changing health, longevity, and aspirations of Older People mean that people will live increasingly healthy longer lives, and they may have different housing needs in future,
 - » **New supply:** development viability of schemes and the availability of revenue funding for care and support services need to be carefully considered before commissioning any new scheme, so the Council and its partners will need to take account of this when deciding the mix of homes,

- » **Existing supply:** this may be inappropriate for future households, and it is already experiencing lower demand as other forms of specialist older person housing may be more suited to future needs, and
- » **Other agencies:** any procurement of existing supply needs to be undertaken with other agencies who also plan for the future needs of Older People, particularly the Health Service and local authority Supporting People Teams.

Older People with Dementia

- 5.41 Based on figures for 2024/25, the NHS estimates there to be around 4,187 people aged 65 or over who have been diagnosed with dementia in Dorset.¹⁷
- 5.42 Applying the age-specific dementia prevalence rates to the HNA dwelling-led projections suggests that the **number of residents aged 65 or over with dementia is likely to increase by 1,500 over the 20-year period 2026-2046**, with the overall number likely to exceed 5,700 persons by 2046. However, it is important to recognise that new treatments could become available in future which reduce the prevalence rates and the numbers likely to be affected. Nevertheless, it is likely that the number of residents requiring support will continue to increase and it will be important for the Council to consider the implications of this growth on the services that are provided and the associated housing needs.
- 5.43 We would also note that the figures for housing with care and housing with support set out earlier do not include any Class C2 provision such as nursing or residential homes. Until the 2022 based population and household projections, the ONS modelled the need for Class C2 for those aged 75 years or older by assuming that the percentage of this population in Class C2 remained constant. Therefore, if 5% of the population aged 75+ years are currently in Class C2, then the ONS modelling assumed that there would still be 5% in Class C2 at the end of their projections. This was changed in the 2022 based projections to assume that the number of persons in Class C2 remained constant, so no growth will occur.
- 5.44 If we were to revert to the earlier ONS modelling for the Dorset area, 5.94% of the population aged 75 years or older currently occupy Class C2 bedspaces. The population aged 75 years or older is projected to rise from 65,974 in 2026 to 101,341 in 2045. This in turn would imply a that further 2,102 nursing care and residential home bedspaces are required.
- 5.45 However, we note that the age at which people typically require Class C2 bedspaces has been rising over time. Therefore, the percentage of household who require Class C2 bedspaces has been falling. If this fall was to continue, then a much lower need for Class C2 would occur. In practice, an extra 2,102 bedspaces should be seen as a top end estimate for the number of bedspaces needed to address the need for Class C2, but the true need is likely to be lower.

¹⁷ <https://fingertips.phe.org.uk/search/dementia#page/4/gid/1/pat/6/par/E12000008/ati/502/are/E06000060/iid/247/age/1/sex/4/cat/-1/ctp/-1/yrr/1/cid/4/tbm/1/page-options/tre-do-1>

Age Exclusive Housing

- 5.46 As noted in the previous section, Age Exclusive housing is age restricted (typically to age 55 and over) and does not offer warden support or any communal facilities, meals, or bespoke, site-specific care packages. Residents in age exclusive housing tend to be younger than residents in sheltered or extra care housing, and they are less likely to experience a range of frailties or disabilities.
- 5.47 In practice, age exclusive housing is part of the general housing need stock with a restriction on the age of the occupier. By 2046, there will be around 79,000 households in Dorset aged 55-74 years. Therefore, the potential scale of need from this group is high, but the vast majority will not be seeking age exclusive housing.
- 5.48 In December 2024, MHCLG published the results of a large-scale survey of older persons conducted on their behalf by Ipsos Mori¹⁸. 54% of respondents thought that it is most likely that they would remain in their current home, and many thought that they would require other forms of older person housing. 7% of all respondents expected to move to age restricted sheltered/retirement housing, but among those would be households seeking housing with support. This includes 5% who were aged 50-64 years.
- 5.49 Many also did prefer to move to a range of different housing options. 12% of all respondents (10% for those aged 50-64 years and 13% for those age 65-74 years) reported that moving to a property with an age threshold would be more likely to encourage them to move. Therefore, age exclusive housing does appeal to older persons, but this 12% would overlap with those seeking housing with support and housing with care.
- 5.50 The modelling in Figure 47 sets out a need for 3,700 dwellings for housing with support for those aged 75 years or older. Taking the 5% of households aged 55-75 years who are expecting to move to sheltered/retirement housing as an absolute maximum would require a supply of around 3,900 age restricted properties across affordable and market housing in Dorset in 2046. This is the total need, not an additional figure, so it would include any age restricted properties currently available, including many park home sites. However, this figure is likely to represent the upper limit of demand, with many of the households seeking housing with support.

¹⁸ [Housing Preferences for Older People Survey | Ipsos](#)

Housing for People with Health Problems and Disabilities

Accessible and Adaptable Housing

- 5.51 The Government's reform of Health and Adult Social Care is underpinned by a principle of sustaining people at home for as long as possible, and Part M of the Building Regulations for new developments covers the required standards for accessibility, adaptability, and wheelchair housing based on three categories.¹⁹
- 5.52 Requirement M4(1) Visitable Dwellings is mandatory for all new homes, whereas the Local Plan will identify the proportion of new homes in the local area that must comply with Requirement M4(2) Accessible and Adaptable Dwellings and Requirement M4(3) Wheelchair User Dwellings. PPG confirms that it will be for the LPA to set out how they demonstrate the need for these higher standards, and they provide further details on the evidence that should be used:

What evidence should local planning authorities use to demonstrate a need to set higher accessibility, adaptability and wheelchair housing standards?

Based on their housing needs assessment and other available datasets it will be for local planning authorities to set out how they intend to approach demonstrating the need for Requirement M4(2) (accessible and adaptable dwellings), and/or M4(3) (wheelchair user dwellings), of the Building Regulations ... To assist local planning authorities in appraising this data the government has produced a summary data sheet. This sets out in one place useful data and sources of further information which planning authorities can draw from to inform their assessments ...

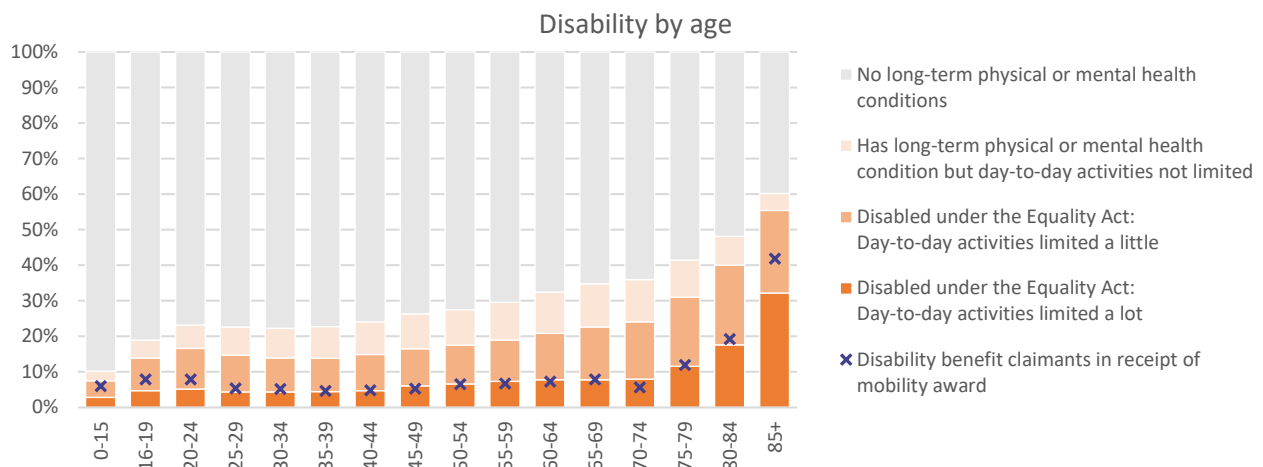
Planning Practice Guidance, ID 56-007-20150327

- 5.53 The summary data sheet that is referenced is the "Guide to available disability data" (DCLG, March 2015).²⁰ This provides a general indication of the situation on disabled housing need at that time based on information on the demographics and housing stock across England. It also identifies various local authority data sources including population estimates and projections, Census data on long-term health problems and disabilities, and benefit claimant data. The HNA has considered population estimates and projections in detail, and Figure 48 presents the disability data for Dorset based on the latest available data.

¹⁹ <https://www.gov.uk/government/publications/access-to-and-use-of-buildings-approved-document-m>

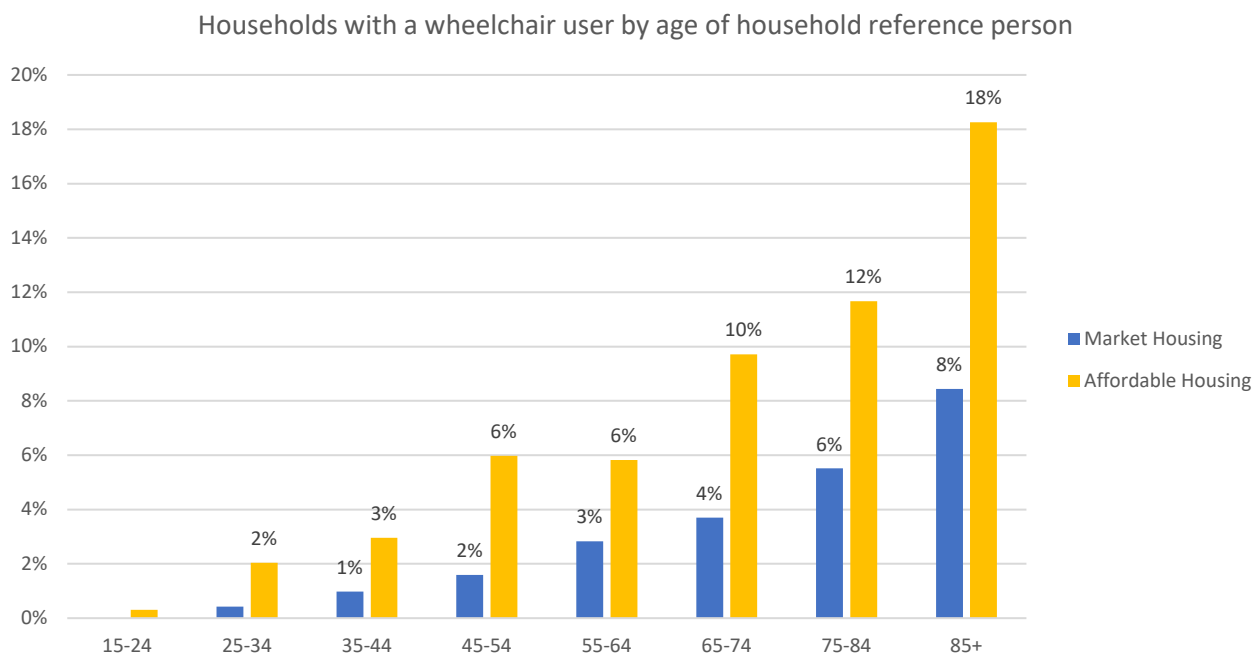
²⁰ <https://www.gov.uk/government/publications/building-regulations-guide-to-available-disability-data>

Figure 48: Disability status by age, 2021; and disability benefit claimants in receipt of mobility award by age, 2025
(Source: Census data, ONS; Benefit claimant data, DWP)



5.54 The MHCLG data sheet showed that around one in thirty households in England (3.3%) had at least one wheelchair user, although the rate was notably higher for households living in Affordable Housing (7.1%). English Housing Survey (EHS) data provides further details based on the proportion of households by age, and combining this national data with local data on disability benefit claimants in receipt of mobility award provides the basis for deriving age-specific rates for Dorset (Figure 49).

Figure 49: Households with a wheelchair user in Market Housing and Affordable Housing by age (Source: ORS Model)



5.55 Figure 50 identifies the number of households with a wheelchair user based on applying the derived rates to the dwelling-led household projections. The baseline estimates for 2026 are set out alongside the outputs for 2046 and the associated change from 2026-2046.

Figure 50: Households needing wheelchair housing (Source: ORS Model. Note: Figures may not sum due to rounding)

Households with a wheelchair user	Baseline estimate 2026	Projected total 2046	Change 2026-2046	Annual Need 2026-2046
Market Housing	4,259	5,370	+1,110	+56
Affordable Housing	3,868	6,849	+2,982	+149
TOTAL HOUSEHOLDS	8,127	12,219	+4,092	+205
Households aged 75 or over	3,980	7,130	+3,150	+158

- 5.56 The projected household growth identifies an increase of around 4,100 additional households with a wheelchair user over the 20-year period, or 205 per annum. which is equivalent to 6% of the 64,920 dwellings identified by the standard method. On this basis, it would be appropriate for **6% of homes on all new developments to comply with Requirement M4(3) Wheelchair User Dwellings.**
- 5.57 The analysis also identifies an increase of 3,000 households who are likely to have a wheelchair user who need Affordable Housing over the 20-year period 2026-2046, which is equivalent to an average of 149 per year. On this basis, the need for wheelchair adapted Affordable Housing represents 10% of the overall need (29,156). **Therefore, 10% of all new Affordable Housing should comply with Requirement M4(3).**
- 5.58 It is also notable that three quarters (77%) of the projected increase in households with a wheelchair user are aged 75 or over, which equates to 3,000 households over the 20-year period. This would include some households who need specialist older person housing.
- 5.59 Although not all households aged 75 or over who need wheelchair adapted housing will live in specialist older person housing, it is likely that many households that choose specialist older housing will need wheelchair adapted homes either at the time that they move or at a later stage due to a deterioration in their health. **Therefore, it seems appropriate for all specialist older person housing to comply with Requirement M4(3)** where it is practical for this to be achieved. However, this does not necessarily apply to age exclusive housing.
- 5.60 When considering the proportion of new homes in the local area which should comply with Requirement M4(2) Accessible and Adaptable Dwellings the August 2026 NPPF, Policy HO5(1)(b) states that “no less than 40% of homes on major developments are delivered to M4(2) standards”.
- 5.61 In order to establish the need for homes to comply with Requirement M4(2) Accessible and Adaptable Dwellings, Figure 51 identifies the number of households with one or more persons with a long-term physical or mental health condition which limits their day-to-day activities who are disabled under the Equality Act 2010 based on data from the 2021 Census and the dwelling-led household projections. Based on this overall number of households, the number of households who are likely to need adaptations or moving to a more suitable home is estimated using national data from the EHS.

Figure 51: Households with one or more persons that are disabled under the Equality Act 2010 where this affects their housing need, 2025 (Source: ORS Model. Note: Figures may not sum due to rounding)

Households with one or more persons with a long-term physical or mental health condition that limits their day-to-day activities	Number of households
Households with one or more persons that are disabled under the Equality Act 2010	59,452
Less households where their disability does not affect their housing need	-39,496
Total households where a disability affects their housing need	19,957
Current home is suitable for their needs	16,662
Current home requires adaptation	1,604
Need to move to a more suitable home	1,690

5.62 Figure 51 identifies that of the 59,500 households in the area with one or more persons who are disabled, around 20,000 have a disability which affects their housing needs. Most of these households (16,700: 83%) already live in a home that is suitable for their needs. However, the analysis identified that there are 1,604 households who need adaptations to their current home and 1,690 households who need to move to a more suitable home, which both represent a current unmet need for accessible housing.

Based on the dwelling-led household projections, we can establish the future need for accessible housing based on the projected household growth and the changing demographics of the area. Figure 52 identifies that there are likely to be around 24,336 households who will need accessible housing to be provided for them by 2046, which represents 40% of the overall household growth. This includes households with a wheelchair user as those households would evidently be counted as having a health problem which affects their housing need.

Figure 52: Current unmet need and future need from households needing accessible housing in Dorset 2026-2046 (Source: ORS Model. Note: Figures may not sum due to rounding)

	Total households
EXISTING HOUSEHOLDS	
Current unmet need from households needing to move to accessible housing	1,690
Households likely to develop health problems that will affect their housing need within the next 10 years	5,138
Total need from existing households in 2026	6,828
FUTURE POPULATION GROWTH	
Additional households in 2046 likely to experience health problems that affect their housing need or likely to develop health problems within 10 years	17,508
TOTAL NEED 2026-46	24,336
Total household growth	60,217
<i>Need for accessible housing as percentage of household growth</i>	<i>40%</i>

5.63 In determining the proportion of new homes in the local area which should comply with the higher standards, it is important to recognise that not all households will want to move to new developments. Some will seek to adapt their current home, and others will move to another dwelling more suitable for adaptation. Nevertheless, EHS data identifies that many existing homes are not suitable for adaptation to meet the standards, and others would require major works, so many households needing accessible housing are likely to consider new homes even if that may not be their first choice.

- 5.64 It is also important to recognise that not every new home that is built to meet the higher accessibility standards will be occupied by households with health problems that affect their housing needs – so more homes which meet the higher accessibility standards would need to be provided than the absolute number of households identified above.
- 5.65 Based on the evidence, it would be appropriate for the Council to seek 45% of homes on new development to comply with the optional higher accessibility, adaptability, and wheelchair housing standards. **This should comprise 6% of homes which comply with Requirement M4(3) Wheelchair User Dwellings and 34% which comply with Requirement M4(2) Accessible and Adaptable Dwellings.**

Housing for People who Rent

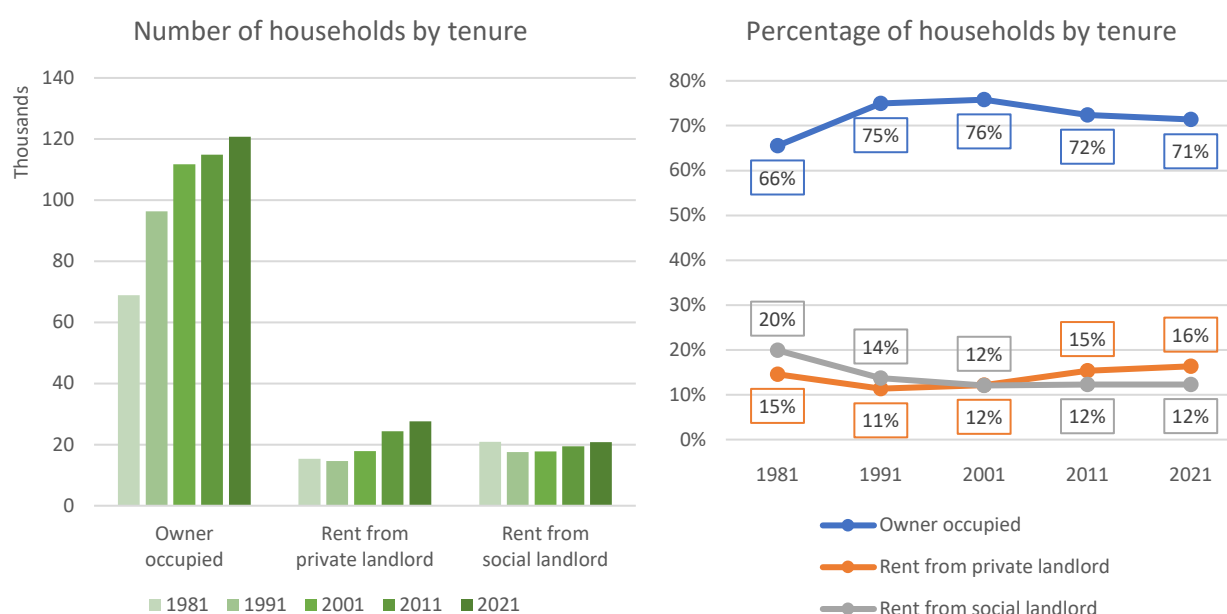
- 5.66 The PPG recognises the importance of understanding the likely future role of the private rented sector.

Tenure data from the Office for National Statistics can be used to understand the future need for private rented sector housing. However, this will be based on past trends. The level of changes in rents, (known as “market signals”), may reflect the demand in the area for private rented sector housing. Evidence can also be sourced from the English Housing Survey, Office for National Statistics Private Rental Index, the Valuation Office Agency, HomeLet Rental Index and other commercial sources.

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- 5.67 When considering the local housing market, it is worth noting the historic changes to tenure in the local area, as recorded by past Census data (Figure 53).

Figure 53: Households by tenure 1981-2021 (Source: Census data, ONS)



- 5.68 In 2021, around 120,800 households (71%) were owner occupiers, whereas 48,500 households (29%) rented their homes. The proportion of owner-occupied households has declined over the past 20 years, falling from 76% in 2001. Despite this, homeownership remains higher than the 66% recorded in 1981, shortly after the introduction of the Housing Act 1980, which established the Right to Buy scheme. This allowed local authority

tenants to purchase their homes at discounted prices, leading to a significant increase in owner occupation. By 1991, the percentage of owner occupiers had risen to 75%, whilst the proportion of households renting from a social landlord had decreased from 20% to 14%.

5.69 There has been a notable shift in the composition of the rental sector over this time. In 1981, around 57% of tenants rented from a social landlord, with 43% renting privately. By 2021, around 42% rented from a social landlord, with 58% renting privately. Many private renters now depend on Housing Benefit to enable them to afford their housing costs, and the private rented sector is generally not seen as a long-term tenure option for many households (Figure 28).

5.70 Figure 54 summarises the Census breakdown of households that rented their home in 2021 alongside the change recorded over the 10-year period since 2011.

Figure 54: Tenure of households that rent, 2011-2021 (Source: Census data, ONS)

	2011	2021	Change 2011-2021	% change 2011-2021
Rented from private landlord or letting agency	15,708	22,778	7,070	45%
Other private rented	2,557	4,834	2,277	89%
Living rent free	2,133	39	-2,094	-98%
Private rent or live rent free	20,398	27,651	7,253	36%
Rented from social landlord	16,364	20,836	4,472	27%
TOTAL	36,762	48,487	11,725	32%

5.71 The number of households who rent increased from around 36,700 in 2011 to 48,500 in 2021, which represents an additional 11,800 households and an overall increase of 32% over the decade. However, growth was not evenly distributed, with a 27% increase in households renting from a social landlord.

5.72 Providing sufficient Affordable Housing to meet this need is likely to reduce the number of households relying on the private rented sector. However, demand for private rented accommodation is likely to continue, particularly amongst younger households who have limited other options available should they wish to form their own household and live independently. Therefore, it is unlikely that the overall number of households renting privately will reduce significantly without a substantial shift in long-term trends.

5.73 The Government recognises the importance of the private rented sector, but they are committed to developing a fairer, more stable rental market with greater accountability for landlords. To support this objective, the Renters' Rights Bill was introduced and passed its final parliamentary stage in July 2025. The Bill seeks to strengthen tenant protections and improve housing standards across the sector. Key provisions include:

- » The abolition of Section 21 “no-fault” evictions,
- » A move towards periodic tenancies,
- » Restrictions on rent increases and a cap of one month’s rent in advance,
- » Prohibition of discrimination against tenants in receipt of benefits or those with children,
- » An extension of Awaab’s Law, requiring landlords to promptly address serious hazards.

5.74 The Bill also introduces a national Decent Homes Standard, a private rented sector database, and a new ombudsman to support more efficient dispute resolution and ensure stronger enforcement of tenants’ rights. From a local perspective, the introduction of the Renters Reform Bill is viewed as a positive development.

Proposed measures such as higher property standards and the creation of a national landlord register are expected to bring benefits. However, the additional cost of bringing some properties up to standard could mean that older rented homes could be sold and removed from the rental market. This could boost the supply of market ownership properties but would reduce the rental properties. In turn, this could make finding suitable properties to address statutory homelessness obligations for Dorset more difficult.

Houses in Multiple Occupation

- 5.75 Under the Housing Act 2004, a House in Multiple Occupation (HMO) is defined as a dwelling occupied by three or more people from more than one family where at least one occupant pays rent. For example, this includes groups of unrelated adults sharing a house.
- 5.76 HMOs can be categorised based on how properties are subdivided and the extent of shared amenities:
- » **Section 257 buildings:** Converted flats in a building where more than one third of the flats are privately rented on short-term tenancies and where the building conversion does not comply with 1991 (or later) building regulations,
 - » **Shared houses:** Properties that might otherwise be family homes but are occupied by three or more unrelated adults living in the dwelling and sharing facilities, and
 - » **Bedsits:** Dwellings converted for multiple occupation where individual rooms typically have separate addresses with exclusive sleeping facilities but cooking or bathroom facilities are shared with others living in the building.
- 5.77 The 2021 Census identified 2,046 Households of Multiple Occupancy who lived in HMOs in the local area. These were households – defined as groups of individuals who share cooking facilities and a living room, sitting room, or dining area – who lived in dwellings where at least three unrelated tenants rented the accommodation from a private landlord. However, there would be many other households living in HMOs as defined by the Housing Act 2004.
- 5.78 Figure 55 provides a breakdown of all households living in private rented accommodation (including those living rent free) as recorded by the 2021 Census along with changes for the 10-year period since 2011.

Figure 55: Household composition of households in private rent, 2011-2021 (Source: Census data, ONS)

Household composition	2011	2021	Change 2011-2021	% change 2011-2021
One-person household	6,950	9,362	2,412	+35%
Single family household	11,813	16,504	4,691	+40%
Other household types	1,635	1,785	150	+9%
TOTAL	20,398	27,651	7,253	+36%
Other household types with two persons	-	688	-	-
Other household types with three of four persons	-	752	-	-
Other household types with five or more persons	-	345	-	-

- 5.79 It is also important to note that all self-contained flats, maisonettes, or apartments that were part of a converted or shared house would have been counted as separate dwellings by the Census, regardless of whether or not the conversion complied with building regulations. On this basis, there are likely to be many more properties which would be HMOs under the Housing Act 2004 definition.

- 5.80 Although the Census does not provide a definitive total for the number of Houses in Multiple Occupation, the Council is required to submit annual estimates to Government of the number of HMOs in their local area. The Housing Act 2004 also introduced mandatory licensing for all HMOs in England with five or more persons, and the Council has to provide an estimate of the total number of mandatory licensable HMOs and confirm the number of properties that are currently licensed in their area (Figure 56).

Figure 56: Number of HMOs and properties with mandatory HMO licences, 2020/21 to 2024/25 (Source: Local Authority data)

Category	2020/21	2021/22	2022/23	2023/24	2024/25
Estimated total number of HMOs	1,242	1,242	1,242	1,242	1,250
Estimated number of mandatory licensable HMOs	120	110	110	110	110
Properties with mandatory HMO licenses	98	94	94	95	89

- 5.81 At the time of the 2021 Census, the Council estimated that approximately 1,242 properties in the area met the definition of a HMO under the Housing Act 2004. The most recent estimate (2023/24) suggests that this has not changed significantly. This represents less than 0.7% of the total dwelling stock, so there are limited opportunities for households seeking HMO accommodation in the local area.
- 5.82 Of the HMOs identified, around 110 properties are likely to require a mandatory HMO license, and 89 are currently licensed.

Build to Rent

- 5.83 In seeking to improve housing options within the private rented sector, the Government has encouraged institutional investors to consider Build to Rent developments as part of their portfolios. The NPPF defines Build to Rent as purpose-built housing that is typically 100% rented, offering longer tenancy agreements (usually three years or more) and professional management under single ownership and control.
- 5.84 Build to Rent has the potential to offer a more secure and flexible long-term housing option for households currently renting privately. These schemes typically provide longer tenancy agreements, fewer restrictions, and greater flexibility in how homes are occupied and used. To further support growth in this sector, the Government has introduced reforms to pension fund regulations aimed at encouraging longer-term investment, which could include Build to Rent property portfolios.
- 5.85 Savills publish regular reviews of the Build to Rent market.²¹ These highlight that the sector now comprises over 132,000 homes, with an additional 51,000 under construction and 110,000 in the planning pipeline, which will bring the total stock to approximately 293,000 homes nationally. Build to Rent accounted for 8% of all new-build completions across England and Wales in 2024, which is up from 5% in 2019. With increasing institutional investment and reforms promoting longer-term funding strategies, the sector is expected to play an even more significant role in housing delivery across the UK.
- 5.86 As a sub-set of Build to Rent, one type of dwelling which may be seen as addressing the needs of younger households is shared housing with small, purpose-built units and shared amenity spaces. These are high-quality purpose-built co-housing/co-living rather than traditional HMOs.
- 5.87 The growth of co-living schemes has followed the growth of Build to Rent. Savills produced a report in 2023²² which outlines that there were 3,422 co-living beds operational in the UK, with 82% of these being in London

²¹ https://www.savills.co.uk/research_articles/229130/376156-0

²² [Savills UK | Spotlight: UK Co-living - Q2 2023](#)

and over 6,000 being under construction or with planning permission in London. Therefore, it is a very small, but growing, sector.

- 5.88 Savills report that typical tenancies are around 9-12 months, with a maximum stay typically being three years, with many residents having recently moved to the UK. Therefore, Co-living is not going to become a long-term solution to meeting market housing needs. The only age restriction on most Co-living schemes is that the person must be over 18 years old, but evidence shows 72% are aged between 26 and 40 years.²³ Therefore, as a policy led response to the increasing lack of housing for younger people in the area, the schemes could have a role in short term housing for groups such as recent graduates looking to establish themselves in Dorset as an alternative to living in HMOs.

Housing for Other Groups

Housing for Essential Local Workers

- 5.89 Annex B of the NPPF defines “Public sector employees who provide frontline services in areas including health, education and community safety – such as NHS staff, teachers, police, firefighters and military personnel, social care and childcare workers” as essential local workers.
- 5.90 Essential local worker households that cannot afford market rents and those that aspire to homeownership but cannot afford to buy will already be counted within the overall assessment of affordable housing need, so their needs will not add to the previously identified need for affordable housing. However, it will be important for the Council to ensure that housing allocation policies consider their needs specifically, and it may be appropriate to consider if any specific affordable homes should be set aside for essential local workers that are unable to afford suitable housing. This would not add to the overall housing need for Dorset Council but would instead be a different form of priority within the housing register.
- 5.91 As a guide to the scale of key worker households, an ONS study linked to the pandemic response in 2020 found that 31% of the workforce of Dorset Council area were key workers, but this included high number of retail and other employees who are not deemed to be key workers for planning purposes. As noted in Chapter 4, the median household income in Dorset Council area is £52,100, but many key workers will have higher than median incomes.

²³ [Insights into co-living tenant profiles - BTR News](#)

Housing for Students

5.93 PPG includes specific reference to identifying the needs of students:

Strategic policy-making authorities need to plan for sufficient student accommodation whether it consists of communal halls of residence or self-contained dwellings, and whether or not it is on campus ... Local Planning Authorities will also need to engage with universities and other higher educational establishments to ensure they understand their student accommodation requirements

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- 5.94 When considering data from the Census, a total of 4,800 full-time students aged 16 or over were resident in the local area in 2001, which increased to 6,000 over the decade to 2011 (equivalent to a growth of 131 additional students each year) and decreased to 5,800 by 2021 (an average of 22 per year).
- 5.95 When considering student housing needs, it is necessary to consider those young people who would have normally been resident in the area separately from those choosing to move to the area specifically for study. Given this context, it is reasonable to assume that any full-time students aged 16 or 17 (as well as some already aged 18 on Census-day) would have been attending schools or sixth form colleges in the area, with most continuing to live with their parents or other family. Therefore, it is more appropriate to consider those full-time students who would have been aged 18 or over at the start of September.
- 5.96 Figure 57 identifies the types of accommodation which are occupied by full-time students aged 18 or over 20-year period 2001 to 2021. The overall number of full-time students (excluding those in schools and sixth form colleges) is estimated to have increased from around 4,800 to 5,800 over the 20-year period: an extra 1,000 students resident in the local area, which is equivalent to a growth of 50 per year on average. All of the additional students have either been accommodated in the number living with parents or in other types of households. This is unsurprising as Dorset does not contain a major higher education provider who attracts students from elsewhere in the country or from overseas.

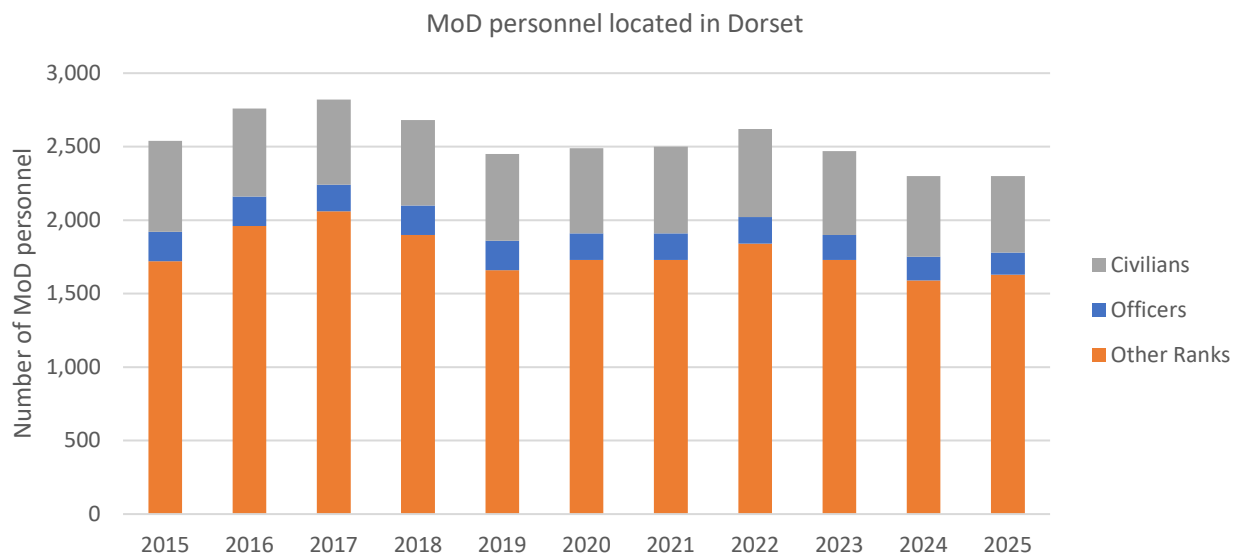
Figure 57: Full-time students aged 18 or over resident in Dorset in 2001, 2011 and 2021 by accommodation type (Source: Census data, ONS)

Accommodation type	Total 2001	Total 2011	Total 2021	Change 2001-2021	Annual average
Living with parents	2,903	3,938	3,994	1,091	55
Living in a communal establishment	558	412	384	-174	-9
Living in an all-student household	209	291	159	-50	-3
Living alone	171	178	170	-1	0
Living in another household type	916	1,231	1,121	205	10
TOTAL	4,757	6,050	5,828	+1,071	+54

Housing for Service Families

^{5.97} Dorset is the home to Blandford Camp, Bovington Camp (Stanley Barracks, Allenby Barracks, Gunnery School Lulworth Camp), West Moors Fuel Depot and Royal Marines at Hamworthy. Ministry of Defence (MoD) annual location statistics²⁴ show that there has been a fall in the number of MoD personnel stationed in Dorset. Unless any further significant changes are planned, the needs of service personnel will not impact the identified LHN. The current Government are seeking to increase defence spending, but much of this will be focused on equipment, with little projected growth in overall personnel numbers.

Figure 58: MoD personnel in Dorset 2015-2025 (Source: MoD Annual location statistics 2025)



²⁴ [Location statistics for UK regular armed forces and civilians: 2025 - GOV.UK](https://gov.uk/location-statistics-for-uk-regular-armed-forces-and-civilians-2025)

Housing for People Wishing to Build their Own Homes

5.98 Self-build and custom housebuilding currently represent less than 10% of housing completions in the UK, which compares to rates of around 40% in France and 70 to 80% elsewhere in Europe.

5.99 Given this context, a Private Members Bill introduced the Self-Build and Custom Housebuilding Act 2015²⁵ and subsequent amendments made in the Housing and Planning Act 2016²⁶ place a duty on LPAs to:

- » Keep a register (and publicise this) of eligible prospective 'custom' and self-build individuals, community groups, and developers,
- » Provide sufficient serviced plots with planning permission for self-build or custom housebuilding to meet the need on the register and to offer these plots to those on the register at market value, and
- » Allow developers working with housing associations to include self-build and custom housebuilding as part of their affordable housing contribution.

5.100 PPG for self-build and custom housebuilding was published in 2021.²⁷ This updated the definition of self-build and custom housebuilding and set out how the need should be assessed and met.

Self-build and custom housebuilding covers a wide spectrum, from projects where individuals are involved in building or managing the construction of their home from beginning to end, to projects where individuals commission their home, making key design and layout decisions, but the home is built ready for occupation ('turnkey') ...

In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout. Off-plan housing, homes purchased at the plan stage prior to construction and without input into the design and layout from the buyer, are not considered to meet the definition of self-build and custom housing.

Planning Practice Guidance, ID: 57-016-20210208

5.101 LPAs are expected to grant sufficient permissions to meet the numbers on their register within three years, with demand measured across base periods that run from 31 October until 30 October the following year. However, whilst authorities must meet the demand for plots identified by their register, they are also expected to consider other data sources.

Local planning authorities should use the demand data from the registers in their area, supported as necessary by additional data from secondary sources (as outlined in the housing and economic development needs guidance), to understand and consider future need for this type of housing in their area. Secondary sources can include data from building plot search websites, enquiries for building plots recorded by local estate agents and surveys of local residents. Demand assessment tools can also be utilised.

Planning Practice Guidance, ID: 57-011-20210208

²⁵ <http://services.parliament.uk/bills/2014-15/selfbuildandcustomhousebuilding.html>

²⁶ <http://services.parliament.uk/bills/2015-16/housingandplanning.html>

²⁷ [Self-build and custom housebuilding - GOV.UK \(www.gov.uk\)](http://www.gov.uk/government/publications/self-build-and-custom-housebuilding)

5.102 MHCLG produced an action plan in 2021 which aimed to further support development of the self-build and custom housebuilding sector.²⁸ The Government at that time also commissioned an independent review into the scaling up of self-build and custom housebuilding,²⁹ which they responded to in June 2022.³⁰ The review focused primarily on supply side factors limiting the delivery of self-build and custom housebuilding and produced six key recommendations which were broadly supported by the Government:

- » Greater role for Homes England,
- » Raise awareness of the Right-to-Build,
- » Support community-led housing, diversity of supply, and levelling-up,
- » Promote greener homes and more use of advanced manufacturing,
- » Support custom and self-build housebuilding through the planning reforms, and
- » Iron out issues around tax which act as disincentives to build.

5.103 More recently, the Levelling Up and Regeneration Act 2023 has introduced two further provisions relating to self-build and custom housebuilding:

- » The Act imposes a new duty on councils to include pre-existing unmet demand for self-build and custom build housing when calculating their current level of demand, and
- » The demand for self-build and custom housebuilding in any “12-month base period should be treated as including any demand from an earlier 12-month base period which has not been met within the time period allowed for complying with the duty to meet that demand”.

5.104 Before the formation of Dorset Council in April 2019, the former district and borough councils each operated their own Self-Build and Custom Housebuilding Registers, which were all established by April 2016. During this period, a number of Local and Neighbourhood Plans were adopted across Dorset, many of which introduced supportive policy approaches to self-build and custom housebuilding. Examples include the Purbeck Local Plan (2025) and the Gillingham Neighbourhood Plan (2018), both of which encourage developers to make 5% of plots available for self-build on sites delivering 20 or more homes. Following local government reorganisation, Dorset Council revised its approach in October 2020 by adopting a new two-part register. The Part 1 register includes applicants who satisfy a ‘local connection’ test, and entries on this part must be matched by the grant of sufficient planning permissions for serviced plots within three years. The Part 2 register does not impose this legal duty, although the Council is still required to have regard for entries when exercising its planning, housing, land disposal, and regeneration functions.

5.105 Figure 59 provides a record of all of the applications which were received across both the former and current registers as well as which permissions were granted, which have been monitored through the number of Self-Build CIL Exemptions issued. The previous approach of simply counting planning permissions granted was discontinued in October 2020 to reflect updated national guidance and recent planning appeal decisions.

²⁸ <https://www.gov.uk/government/publications/self-and-custom-build-action-plan/self-and-custom-build-action-plan>

²⁹ <https://www.gov.uk/government/publications/independent-review-into-scaling-up-self-build-and-custom-housebuilding-report>

³⁰ <https://www.gov.uk/government/publications/government-response-to-the-independent-review-into-scaling-up-self-build-and-custom-housebuilding>

Figure 59: Self-build and Custom Housebuilding Register (Source: Right to build registers monitoring data, MHCLG). Additional local data was supplied by Dorset Council for years 2018/2019, 2019/2020 & 2024/2025)

Base period	Entries added during period	Individuals	Groups	Planning permissions granted	Self Build CIL Exemptions (Part 1)
Up to 30 October 2016	235	235	0	-	
31 October 2016 to 30 October 2017	202	201	1	284	56
31 October 2017 to 30 October 2018	255	255	0	189	72
31 October 2018 to 30 October 2019	295	295	0	201	70
31 October 2019 to 30 October 2020	376	376	0	184	64
31 October 2020 to 30 October 2021	205	205	0	-	64
31 October 2021 to 30 October 2022	110	110	0	-	70
31 October 2022 to 30 October 2023	75	75	0	-	59
31 October 2023 to 30 October 2024	60	60	0	-	69
31 October 2024 to 30 October 2025	39	39	0	-	48
TOTAL	1,852	1,851	1	856	586

- 5.106 Whilst the self-build and custom housebuilding register may not capture all demand for this type of housing in the local area, the alternative sources suggested by PPG – such as the Need a Plot website – now rely on information from local authority registers. As a result, the housing register and actual plot uptake provide the only available sources of data.
- 5.107 Whilst the number of applicants added to the register has varied from year-to-year, the number has averaged 185 per year over the 10-year period to date, but this has fallen to 58 in the past 3 years. Based on this number continuing to be sustained in future, the overall need is likely to represent around 1,160 additional households over the 20-year study period 2026-2046. This represents less than 2% of the overall household growth identified by the dwelling-led projections (Figure 20, Scenario B), so self and custom housebuilding should aim to deliver around 2% of the standard method for Dorset.
- 5.108 To deliver this volume of plots, there are two main policy options which have been adopted across the country. Many areas have encouraged and promoted self and custom housebuilding sites to come forward as standalone sites, where all the dwellings will be self and custom built. Many other planning authorities have sought to set a policy such as requiring 5% of all sites over 100 units to be self and custom built. This has the advantage of bringing forward more sites, but on large sites the self and custom building typically cannot take place while the main site is being developed due to health and safety concerns around construction sites. This policy also typically adversely affects viability and may see fewer affordable units being delivered on sites. Given the scale of need for the Dorset area and the recent record of delivery, a continuation of the current policy would appear to be appropriate.
- 5.109 Experience elsewhere suggests that the self-build and custom housebuilding sector works relatively well for households who are seeking to build bespoke properties on single plot sites and as part of multi-plot sites. However, such households tend to be relatively affluent and can afford to build homes to their own design. There is less evidence that needs of those with lower budgets are being met, as the price of plots remains high which is arguably a reflection of the market for self and custom housebuilding being supply constrained and that suitable plots attract a premium which is offsetting any potential discounts from CIL exemptions.
- 5.110 The Government's new Help-to-Build scheme may help to make self-build and custom housebuilding more accessible and affordable. For households with lower budgets, some will want to be heavily involved in the

building of their final property (and possibly undertaking some of the work themselves to save on costs) whereas there will be others who would only want to help design and customise the interior of their new home within a pre-built exterior. The Council could work proactively with both groups.

- ^{5.111} There is also potential to encourage builders to deliver market homes that is either customised at the outset, or which could be built with a standard exterior but with an interior that the final occupant could customise. Both of these approaches can be considered to fit within the definition of custom-built housing; and could both be encouraged with the provision of small and larger sites.

6. Summary of Overall Housing Needs

- 6.1 Figure 60 sets out the overall housing mix identified by the HNA based on the housing need identified by the standard method calculation.
- 6.2 This provides a breakdown of the size, type, and tenure of housing needed across the Dorset local planning authority area over the 20-year period 2026-2046 based on the overall identified need for Market Housing and Affordable Housing. The outputs identify the mix of general needs housing, based on the number of bedrooms, and the specialist older person housing need, based on the type of housing. The split between the need for market and affordable housing is derived from affordability analysis, including for private renters who may benefit from affordable home ownership. The size mix is derived from the size of property needed by those in affordable housing and the size of the properties occupied by different household types in the market sector. All of the groups set out in Chapter 5 are also included in the figures below.

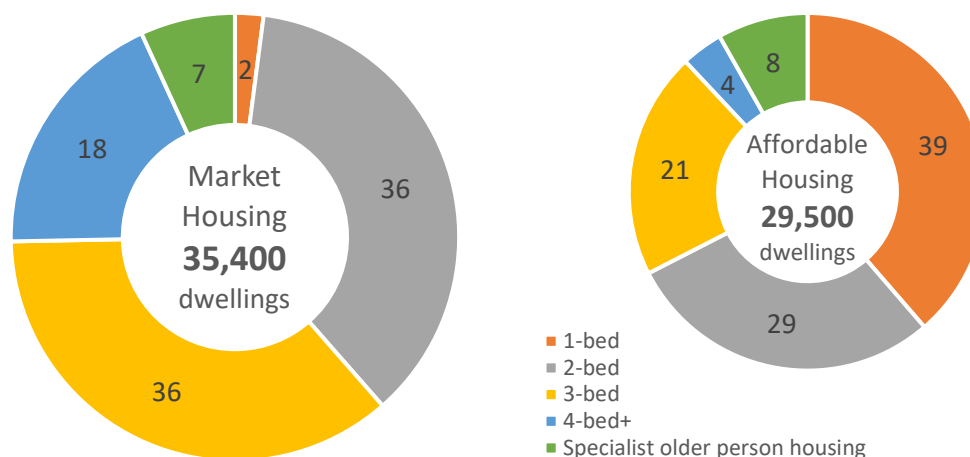
Figure 60: Overall Market Housing and Affordable Housing need by property type and number of bedrooms 2026-2046
(Source: ORS Model. Note: Figures may not sum due to rounding)

Local Housing Need 2026-2046		Market Housing	Affordable Housing	TOTAL
General Needs Housing	1 bedroom	729	11,391	12,120
	2 bedrooms	12,937	8,492	21,429
	3 bedrooms	12,811	6,059	18,870
	4+ bedrooms	6,545	1,114	7,659
Specialist Older Person Housing	Housing with Care	604	493	1,097
	Housing with Support	1,822	1,923	3,745
Dwellings in Use Class C3		35,448	29,472	64,920
Annual Need				
General Needs Housing	1 bedroom	36	570	606
	2 bedrooms	647	425	1,071
	3 bedrooms	641	303	944
	4+ bedrooms	327	56	383
Specialist Older Person Housing	Housing with Care	30	25	55
	Housing with Support	91	96	187
Dwellings in Use Class C3		1,772	1,474	3,246

- 6.3 The HNA has identified a need for 35,400 homes for market sale or rent (55% of the total dwellings) and 29,500 affordable homes (45%). This includes an identified need for around 4,800 self-contained specialist older person housing units, comprising of both Housing with Care and Housing with Support.

6.4 Figure 61 summarises the percentage mix of the identified need for Market Housing and Affordable Housing.

Figure 61: Percentage mix of Market Housing and Affordable Housing need by property type and size (Source: ORS Model)



Overall Housing Need

Market Housing

- 6.5 The need for Market Housing includes around 2,400 self-contained specialist older person housing units, comprising of both Housing with Care and Housing with Support, which represents around 7% of the total homes for market sale or rent.
- 6.6 The HNA analysis also identified the need to provide general needs housing which older households would choose as this could release up to 3,500 family homes.

Affordable Housing

- 6.7 The need for Affordable Housing includes need for 29,500 dwellings, comprising of 1,300 dwellings (4%) for households who could afford Affordable Rent and 23,200 dwellings (79%) to be provided as Social Rent for households who could not afford Affordable Rent. An additional 5,000 dwellings (17%) are required to be affordable to own. Within the need for rented affordable homes, there is an identified need for around 2,500 specialist older person housing units, comprising of Housing with Care and Housing with Support.
- 6.8 As previously noted, when considering the future delivery of affordable homes for rent, this analysis does not necessarily mean that 4% of the rented affordable homes on each site should be Affordable Rent with the remainder being provided as Social Rent. Instead, it might be more appropriate to focus on delivering Social Rent as the only rented provision those sites where it is economically viable to do so, with Affordable Rent only being delivered on those sites where it is necessary due to viability issues or where housing is specifically being provided for essential local workers. The Council will need to monitor the mix of rented Affordable Housing delivered across every site to ensure that the overall balance is achieved.

Specific Housing Needs

Accessible and Adaptable Housing

- 6.9 The HNA analysis also concluded that 40% of homes on new developments should comply with the optional higher accessibility, adaptability, and wheelchair housing standards:
- » 6% of homes should comply with Requirement M4(3) Wheelchair User Dwellings, and
 - » 34% should comply with Requirement M4(2) Accessible and Adaptable Dwellings.
- 6.10 The analysis also identified that 10% of all new Affordable Housing should comply with Requirement M4(3) and concluded that it would be appropriate for all specialist older person housing to comply with Requirement M4(3) where it is practical for this to be achieved.

Final Conclusions

- 6.11 Based on the HNA evidence, the Council will determine the appropriate housing requirement to be planned for over the Local Plan period. To reiterate a key point from the introduction chapter, it is important to recognise that the HNA provides an unconstrained assessment of housing need for the local area on a policy-neutral basis, which is the first step in the process of deciding how many homes need to be planned for. Based on this evidence, the Council will determine the appropriate housing requirement to be planned for over the Local Study period.
- 6.12 If Dorset Council is unable to plan for sufficient housing to meet the identified housing need, it will be important for this to be discussed with neighbouring local authorities. However, when determining the overall amount of housing to be planned for, it will also be important for Dorset Council to take account of any needs which cannot be met within neighbouring areas. The Government are currently in the process of introducing a new Spatial Development Strategy to help to facilitate cross boundary planning.
- 6.13 Whilst the HNA forms an important part of the wider evidence base to inform the development of more detailed housing and planning policies, it is important to recognise that these findings should not be considered in isolation as they will form part of the wider evidence base.
- 6.14 The HNA does not seek to determine rigid policy conclusions but instead sets out the likely implications of different options that may be available for policy makers to consider together with recommendations where appropriate. On this basis, the HNA will provide a key component of the evidence required to develop and support a sound policy framework, but the Council will need to determine individual policies based on relevant policy decisions.

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