



## **Oxford City Council**



## **Balance of Dwellings Study: Final Report**

**July 2007**



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# 1 Introduction

## Appointment

- 1.1 Fordham Research were commissioned in February 2006 by Oxford City Council to undertake research into the balance between the supply of dwellings by size and type in Oxford, and the demographic need for the different sizes and types of dwellings. The brief for the study is set out in Appendix 3.
- 1.2 This report presents the findings from our work.

## Why is this study necessary?

- 1.3 This study has grown from a desire to provide adequate underpinning for Policy HS.8 (Balance of Dwellings) in the adopted Local Plan. As it stands, this policy would need specific supporting analysis if it was to be useful and effective, or to be developed and taken forward into the emerging Local Development Framework. There is no doubt as to the broad principle; it is reasonable for local authorities to want to exercise a degree of control over the mix of new dwellings, even in the market sector.
- 1.4 The notion of 'sustainable' and 'mixed and balanced' communities has gained a considerable hold in Government and general thinking since the turn of the present century. It has much to commend it. Like motherhood and apple-pie, who would argue against a balanced community? In practice, however, many people might not like what was presented to them as balance. Nor is it easy to find fixed points on which to construct a logic for any particular movement towards 'balance,' whatever that might be.
- 1.5 In other words the notion of 'balance' like that of 'sustainability' is not straightforward, and requires a good deal of further consideration to produce something that is capable of implementation. Even so, the Planning Inspector concluded after the 2004 Local Plan Inquiry, that a mix policy was sensible. The City Council now requires an operational policy, based on detailed analysis, which can be robustly defended - if it becomes necessary - at a planning inquiry.
- 1.6 This present study aims to provide that analytical basis. It is believed to be a novel and pioneering effort. It is therefore bound to contain elements that will require revision in the light of experience. However, it is a serious attempt to provide guidance in a difficult area.





## 2. Mixed and sustainable communities

### Balance and sustainability

- 2.1 It is not hard to see why this topic is one about which there is a great deal of general discussion, but little by way of practical instruction. The guidance available promotes the positive gains from these broad concepts, but provides no detailed advice. That is itself instructive: it is easy to see that the idea is worthwhile, but much less easy to see how it might be implemented.
- 2.2 We will consider the principle of the matter before entering into the difficulties of specification. Even there, problems do exist. The view that balanced and mixed housing provision is desirable in order to achieve sustainable communities has become a central plank of Government policy. However, operational guidance as to how to achieve this has been thin on the ground.
- 2.3 Mixed and balanced housing provision has arisen as a desirable goal, at least in part to address the problems that arose in the past, firstly from large 'mono tenure' areas of social rented housing, and secondly from the tenure's steady residualisation, increasingly concentrating a small number of household groups and types together, and leading to perceived, or actual, behaviour problems.

### Sustainability in general

- 2.4 The desire for sustainable communities goes wider than this. It aims to create localities in which the range of housing types and tenures in the housing stock will, in the longer term, continue to cater for households' needs as far as possible as they age and mature.
- 2.5 Providing a full range of tenure price and dwelling size will help to reduce local turnover, enabling those households who are integrated into (and play a full part in) their local community to move locally, and hence remain in that community, as their needs, means and aspirations change.
- 2.6 This aim of stability, i.e. facilitating movement within the locality, would have important implications for what is required to address an 'unbalanced' area. It suggests that, in the first instance, the profile of such an area should perhaps be widened by 'building out' from what there is, rather than 'counterbalancing' it with housing of a radically different type or tenure. This would indicate, for example, that in an area containing largely social rented housing, new provision might focus in the first place upon shared ownership, low cost home ownership, or modest market housing of 2 & 3 bedrooms, providing opportunities for those who wish to trade up, to move locally; or perhaps properties suitable for older households to move on to. An area containing mainly 1 & 2 bedroom apartments might similarly require market housing for younger families.
- 2.7 Counterbalancing' on the other hand would mean for instance that the balance of a large area of predominantly 3 bedroom social rented housing for families, could be 'improved' by mainly providing expensive blocks of 1 & 2 bed (market) apartments; or that an area of mainly market apartments would benefit from the provision of additional 4 bedroom social rented dwellings.
- 2.8 It is not clear therefore that the pursuit of sustainable and balanced communities allows unequivocal advice to be developed about how best to improve the balance of the housing stock in a local area. It is easier to suggest what kinds of housing are not required, than what is required. We would favour the approach of widening out the existing profile because there is a clear potential link with household behaviour.
- 2.9 The counterbalance approach, on the other hand, runs the risk of creating the sorts of divided and polarised community that have come to exist in certain parts of London, for instance, where the 'new' community has no connection with, nor desire to mix with, the old.

- 2.10 There is therefore, in situations where clear and defensible guidance can be produced, a reasonable case for requiring new build provision in Oxford to contribute to increasing the balance of the housing stock within its locality. In recent years almost all new build development in Oxford has taken place on previously developed land within the established urban fabric, much on relatively small sites. Of course, with new housing on relatively small sites, the degree of diversity that can be achieved within the single development may in practical terms be limited.

## **A successful example of balance**

- 2.11 Milton Keynes provides an example where balanced housing provision was being actively sought and, in our view, was successfully achieved, more than two decades ago.
- 2.12 Balanced provision was seen as an important goal in formulating the Plan for Milton Keynes. It was achieved only partially in the early years of the City's development because of the heavy concentration upon rented, rather than sale housing as development got under way. Nonetheless the policy enabled quite a good mix of rented dwelling sizes to be achieved at local level, with typically a full profile being sought in individual 'grid squares' – areas of typically 800-1,500 dwellings delineated by the City's road grid layout.
- 2.13 From the late 1970s as sale housing came to represent the majority of new build, it became necessary to refine the policy in order to ensure a balanced provision in terms of tenure and price profile. It was accepted that individual grid squares provided varying opportunities, so that a reasonable minimum degree of balance should be sought in each, ensuring for instance that primary schools, on a similar scale, drew from a reasonably well mixed local catchment.
- 2.14 However, larger groups of perhaps 4 to 6 grid squares – such as might constitute the catchment for major facilities such as a secondary school or health centre – were expected collectively to produce a fully balanced profile between themselves. The target profile at this higher level accorded with the profile being sought for City provision on a year to year basis; it should be borne in mind that new build constituted a very large element of the total supply until comparatively late in the City's development.
- 2.15 The balance policy is believed to have been very successful in delivering balanced communities during the life of the Development Corporation and for some time after that. However, it could not of course address the problems in the earliest developed areas, which were built with a preponderance of rented housing (though with a well balanced size profile).
- 2.16 A New Town Development Corporation essentially owned all development land and had planning powers. It could sell the land for individual sites to developers on the basis of a relatively highly prescriptive development brief for each site. As well as many other planning and design matters the brief set out a required profile in terms of up to five (later 6 and briefly 7) price categories, expressed in price terms and indexed, which together encompassed the full range of market provision from the smallest most basic dwelling to the largest unit. By diligent planning and using careful graduations in density, a range of price categories could be achieved in every grid square.
- 2.17 The different policy levers available in Milton Keynes, as well as the very different development situations, mean that the approach outlined above could never be transferred directly to Oxford. However it represents a valuable and important example that, we would suggest, can be drawn upon in developing appropriate principles for an 'Oxford' approach.

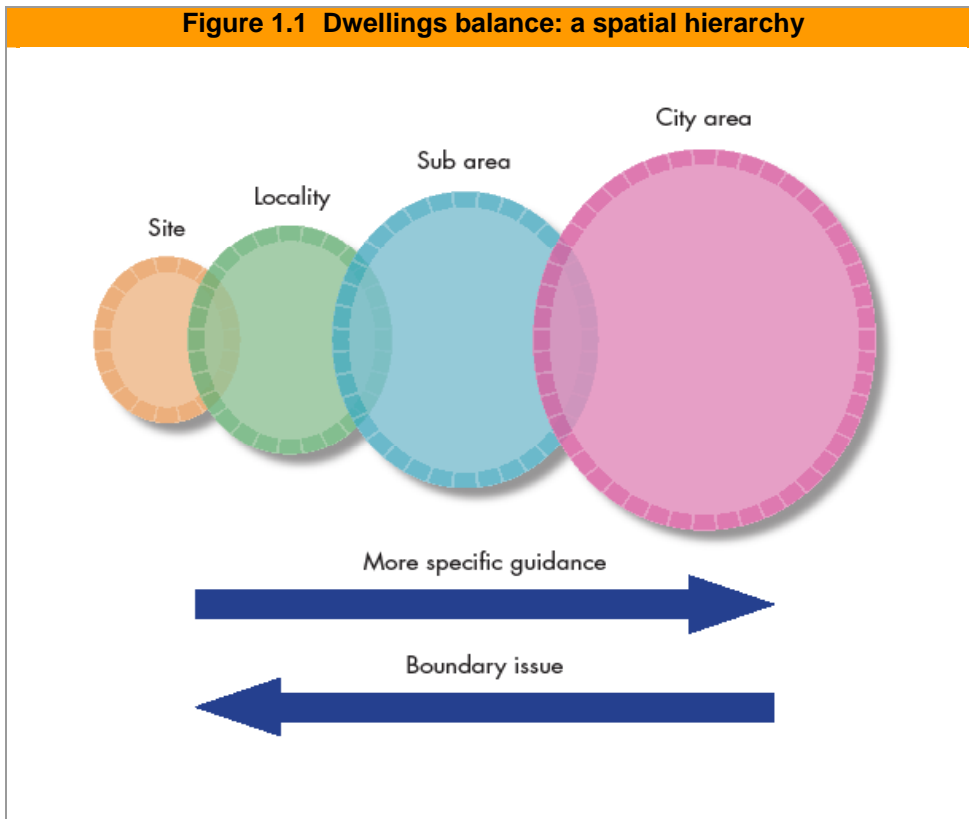
## **An Oxford approach**

- 2.18 In a city such as Oxford, which provides an almost continuous urban area, it is not clear how a 'local area' should be defined. Communities could be said to exist at quite a local level - the lower school catchment for instance, broadly corresponding in scale to the Milton Keynes grid square. In practice there are a variety of local communities, using or defined by a variety of different facilities, and especially in an organically developed, continuous area, overlapping.

- 2.19 The choice of area boundary is to some extent arbitrary. This potentially creates a 'boundary issue' where it might be difficult robustly to defend applying two significantly different policy requirements on adjoining sites which lay on either side of an area boundary. The availability of relevant data will inevitably, have a bearing on the choice of area, where much secondary data is commonly available at ward or postcode level.
- 2.20 The scale of the area is an important consideration. The larger in scale the area is, the less the frequency of boundary issues. Larger areas might also allow scope to take account of clear major physical boundaries, further reducing boundary problems.
- 2.21 However there is also, clearly, some relationship between scale and the degree of balance. We would not expect nor should we require a small area to display as much balance as a larger one. This will reflect the way housing has been provided in the past, and the way it is now being provided. We should recognise realistically that there are differences in the quality and opportunities presented in different areas, and that there is no 'right' or perfect profile.
- 2.22 Choosing larger rather than smaller areas is likely to produce areas which are already more balanced, whilst smaller areas might produce a great multiplicity of different, or even opposite, requirements designed to address local variations.

## **A conceptual framework**

- 2.23 The key principle that is emerging is that a whole series - a hierarchy - of areas may be relevant in achieving a balance in dwellings. There is the need to secure an adequate balance of dwelling provision to meet the future needs of Oxford's population as a whole. That could involve:
- 2.24 Meeting those needs each year as they are expressed, through households wishing to move within and to the City, as well as, or instead of:
- achieving the 'right' balance in the stock – say at the end of a Plan period – for Oxford as a whole.
- 2.25 At the other end of the scale, there is the desirability of achieving some degree of balance of dwelling types within the individual housing site as it is developed or redeveloped.
- 2.26 Between these two extremes, it would be possible to seek desirable levels of balance and diversity at one or more intermediate spatial levels. In Milton Keynes' case, there were two such intervening levels: the grid square, and the larger group of 6-10,000 dwellings. Given that Oxford is of a broadly similar scale to Milton Keynes, it is possible to contemplate two similar spatial groupings, within each of which an appropriate balance could be sought. Within the smaller, attention would focus on achieving a reasonable degree of diversity, avoiding undue concentrations of one type of household or grouping, and promoting a reasonable degree of local mobility. Within the larger, a wider balance and full range of groups would be accommodated, at the same time making a due contribution to meeting the City's requirements overall for new provision.



- 2.27 These four components are illustrated above in Figure 1.1. Successive layers of area could each introduce their own requirements for balance – for the site, the locality, the sub area and Oxford as a city. In principle, these could be conflicting and contradictory, with different layers providing different requirements each designed to secure balance at their own level.
- 2.28 Whilst the three largest units themselves would be relatively fixed in size and scale, the scale of the individual site will of course vary greatly – from developments of perhaps 500 dwellings or more, down to 1 or 2 dwellings. The level of balance to be achieved for the individual site will vary accordingly. At the upper end of the site size scale, large new settlements or significant urban extensions which stand apart to some degree from the existing urban area fabric, will effectively represent their own locality. To that extent, such developments would have to provide their own balance, rather than correcting an imbalance somewhere else.
- 2.29 In considering such major sites, incidentally, we should also recognise that the established housing stock provides a wider range of housing solutions to meet households' needs, than is provided by new build development alone. Older and new build housing to this extent are complementary. The older stock for instance will include:
- i) market housing which can be purchased (or rented) at levels significantly below the price at which new build can be produced; or
  - ii) dwellings in sizes and of types which developers cannot now viably replicate (even though it sometimes seems they might wish to!)
- 2.30 These aspects mean that the appropriate mix on a large urban extension will need careful consideration. It must first create its own balance, and then the mix may need to address some of the needs which are normally only met by the existing stock. For both these reasons the appropriate profile may have to be different from that required for Oxford as a whole.

## **The way forward**

- 2.31 We have suggested that providing policy guidance about the sorts of housing required to improve local balance in Oxford is a far from straightforward task. We have proposed a hierarchy of four areas at which balance should be assessed. There is a range of data available at one or more of these levels to inform the study.
- 2.32 Ultimately, however, what can be done to modify the balance of the housing stock in each of a series of local areas within Oxford will be limited by market considerations – demand for additional market housing, and the most pressing needs for affordable housing.
- 2.33 The main aim of the study is to promote better balance, so far as that can be measured. Even if the achievable changes are often only going to be at the micro level, they can be valuable. The approach developed in this study is designed to improve balance in that context.





## 3 Policy background & pressures

### Introduction

- 3.1 This Section first sets out the policy background, and then outlines the pressures and concerns that led to the present study being commissioned.

### National guidance

- 3.2 There has been a steadily growing emphasis in terms of national policy on the importance of ensuring that development provides a mix of dwelling size and type, more latterly as part of an overall concern to providing for sustainable communities.

- 3.3 In 2000, PPG3 (Housing) first introduced the idea of mixed communities:

*'10. The Government believes that it is important to help create mixed and inclusive communities, which offer a choice of housing and lifestyle. It does not accept that different types of housing and tenures make bad neighbours. Local planning authorities should encourage the development of mixed and balanced communities: they should ensure that new housing developments help to secure a better social mix by avoiding the creation of large areas of housing of similar characteristics.'*

*11. Local authorities should take account of assessments of local housing need in determining the type and size of additional housing for which they should plan. They should assess the composition of current and future households in their area, and of the existing housing stock, and formulate plans which:*

- *secure an appropriate mix of dwelling size, type and affordability in both new developments and conversions to meet the changing composition of households in their area in the light of the likely assessed need'*

- 3.4 The focus upon sustainable communities was set out in February 2003 (*'Sustainable Communities: building for the future'*). The implication was to plan for a full mix of needs and requirements, and to ensure that the range of need was met at local level to avoid creating larger areas of similar housing.

- 3.5 However the guidance was taken further with the publication of Planning Policy Statement 3: Housing (PPS3) Nov 2006. This sought a wide choice of housing types and the creation of sustainable, inclusive and mixed communities in all areas. But the Government is also seeking to:

*(1(b)) 'deliver a better balance between housing demand and supply in every housing market'...*

- 3.6 In particular, the guidance suggests that Local Development Frameworks should

*'set out the balance between different household types to be provided for across the plan area, and where necessary to achieve mixed communities, the circumstances or broad locations in which this balance may be different;'*

### PPS3

- 3.7 At quite an advanced stage in the study, the Government published the final PPS3 (November 2006). This suggested that

*'Key characteristics of a mixed community are a variety of housing, particularly in terms of tenure and price and a mix of different households such families with children, single person households and older people'.*

- 3.8 Regional Spatial Strategies should set out the region's approach to achieving a good mix of housing. At local level, Local Development Documents should indicate the likely overall proportions of households that require market and affordable housing;

*'the likely profile of household types requiring market housing e.g. multi-person, including families & children (x%), single persons (y%), couples (z%);*

*and the size and type of affordable housing required.*

- 3.9 Developers should bring forward proposals for market housing which reflect demand and the profile of households requiring market housing, in order to sustain mixed communities. In planning at site level, Local Planning Authorities should ensure that the proposed mix of housing on large strategic sites

*'reflects the proportions of households that require market or affordable housing and achieves a mix of households as well as a mix of tenure and price'.*

For smaller sites the mix

*should contribute to the creation of mixed communities having regard to the proportions of households that require market or affordable housing, and the existing mix of housing in the locality'.*

- 3.10 It is felt that the approach taken to the present study is consistent with this guidance.

- 3.11 Local Planning Authorities should plan for the full range of market housing, and should take account of the need to deliver low-cost market housing, which is now no longer regarded as affordable housing.

### PPS1

- 3.12 Planning Policy Statement 1: Delivering Sustainable Development (PPS1), promotes sustainable development as one of the Government's key objectives. It is seen as "the core principle underpinning planning." This should be achieved by promoting a just society that places importance of 'social inclusion' and the creation of 'sustainable communities.'

- 3.13 Paragraph 14 in PPS1 states:

*"The Government is committed to developing strong, vibrant and sustainable communities and to promoting community cohesion in both urban and rural areas. This means meeting the diverse needs of all people in existing and future communities, promoting personal well-being, social cohesion and inclusion and creating opportunity for all citizens."*

- 3.14 Paragraph 16 goes on to say that:

*"Development plans should promote development that creates socially inclusive communities, including suitable mixes of housing".*

## Local Plan

- 3.15 The concern to achieve an appropriate balance of dwelling type and size is acknowledged in the Oxford Local Plan 2001-2016, adopted in November 2005. Policy HS.8 states:

*'In determining planning applications for residential development, the City Council will have regard to the local distribution of dwelling types (including size of unit, tenure, and specialist occupation) with a view to achieving a balanced and suitable distribution of dwelling types; both within the site and within each locality'.*

- 3.16 The supporting text makes clear that the City Council may refuse permission for residential development that does not help to achieve an appropriate mix of dwelling types. Further, there should be a reasonable mix of dwelling sizes within each new development. The City Council proposes to publish guidance to highlight sites, sizes of sites and localities where Policy HS.8 is likely to be critical.

## Emerging regional context

- 3.17 In late 2006 Oxford was designated under the Department of Communities and Local Government Growth Point initiative. It is proposed that additional homes would be provided by 2016. A key element in this further growth will be a major redevelopment at the West End in the City Centre, which is to deliver around 700 new dwellings.
- 3.18 Regional guidance to shape Oxford's development in the longer term is being provided by the emerging regional Spatial Strategy for the South East. The Draft South East Plan was submitted to Government in March 2006, and an Examination in Public began in late November 2006. The Panel's Report is due to be published in Autumn 2007.
- 3.19 Policy H1 of the draft regional spatial strategy proposes that Oxford provide a total of 7,000 dwellings over the period 2006-26.
- 3.20 Policy H6 deals with the Type & Size of New Housing. It suggests that local authorities should identify a full range of existing and future housing needs in their areas; these should include a range of specified groups. Local Development Documents should require *'an appropriate range of housing opportunities in terms of a mix of housing types, sizes and tenures'*. The supporting text, whilst acknowledging the demographic trend, i.e. towards smaller households, recognises that this does not mean that only small units will need to be built in future.

## Emerging Plan: Local Development Framework

- 3.21 Work is now progressing on the various documents that together will comprise the new Local Development Framework for Oxford. This will guide development in Oxford to 2026. The Preferred Options document for the Core Strategy proposes to provide for a total of 11,000 dwellings over the period 2006-2026.
- 3.22 The policy recommendations from the present study will need to take account of, and relate to, the categories of housing provision under consideration in the emerging LDF. One important consideration will be housing density. The emerging Core Strategy includes quite significant numbers of units located in the City Centre and other District Centre locations. To support sustainability principles, housing provision in these locations is envisaged as being relatively high density, with a strong focus on smaller units.

## **Oxford: policy concerns**

- 3.23 Since the late 1990s, the South East has experienced a booming housing market. Rising house prices rippling outwards from London have produced affordability problems for local populations, placing owner occupation beyond the reach of growing numbers of new and emerging households, and bringing further pressure on the limited stocks of social rented homes.
- 3.24 As an area which has been particularly attractive in terms of employment growth and as an attractive and desirable area to live in its own right, Oxford has suffered from exceptionally acute housing pressures, whilst at the same time providing relatively limited opportunities for new housing provision. House prices have been very high, higher in fact than in nine or ten London Boroughs, and lower than no more than 9 or 10 local authority areas bordering London, in Hertfordshire, Buckinghamshire & Surrey.
- 3.25 With prices at London levels, there have been concerns that Oxford was experiencing a London style development market, with considerable emphasis on the production of small dwelling units, predominantly as apartments, and that new housing suitable for families was not being provided in any significant numbers.
- 3.26 It should be acknowledged that concern about this pattern of housing provision is not confined to Oxford. In many other urban areas, a major switch to the provision of apartments in blocks has followed the publication of PPG3 (2000). This reflects to a considerable extent the promotion of higher densities and the emphasis on the reuse of existing previously developed land.
- 3.27 Also not confined to Oxford is the fact that buy-to-let purchasers represent a significant component of the market for new build apartment dwellings. These units are purchased with an expectation that they will provide continuing letting income together with anticipated capital growth. A view given support by the steadily rising market over the last decade. This has been exacerbated by a recent TV programme in which Oxford was identified as the best location in the UK to invest in the residential market. (Kirstie Alsop – Location Location Location)
- 3.28 Concerns have arisen about the perceived lack of housing at reasonable prices for families who would wish to remain in Oxford. There have also been pressures for the conversion of older family sized properties to small apartments. The pressures are considered especially intense in particular areas of Oxford.
- 3.29 Overlaying these concerns are parallel concerns. A key one about the use of family sized dwellings as Houses in Multiple Occupancy (HMOs). Such properties do not require planning permission, in some circumstances. They should be licensed; however licensing is concerned with a narrow range of matters pertinent to the property, and not with a wider corporate policy context. Some properties are in any case believed to be occupied as HMOs on an unlicensed basis.
- 3.30 Whilst HMOs are occupied by a number of single persons they are also in Oxford a source of accommodation for students. There is considerable concern about the use of HMOs and other family dwellings by students in Oxford, reducing their availability as part of the general housing stock to meet the needs of families.
- 3.31 Separately, conversions of family sized dwellings, and their use otherwise as HMOs and for student accommodation, are felt to give rise to additional car parking pressures, often in areas where on street parking is already difficult.

## **Similar concerns elsewhere**

- 3.32 These concerns are not confined to Oxford. Two other studies have considered the trend towards small units, in London and in the South East as a whole.

- 3.33 The London research study *Think Big: Delivering family homes for Londoners* was produced by the National Housing Federation, and focused primarily on the supply of affordable housing for families. It looked at the reasons why so many small units were being produced; land value pressures, lack of robust policy and inadequate grant levels on the affordable side were cited most commonly and of course the emphasis in measuring performance on numbers of units also contributed.
- 3.34 Although the London Housing Board had set a target of 30% for dwellings of 3 plus bedrooms, only 23% of rental units under construction were 3 plus beds, with figures of 19% and 17% respectively for intermediate and market dwellings. A number of policy recommendations were designed to address the shortfall of larger units, dealing with policy coordination, grant administration, public sector land provision and land assembly arrangements, and so on. However the study provides little by way of any analytical support for the need to provide a larger proportion of 3 bedrooms + dwellings, other than in terms of affordable requirements. That is not to say that the latter is not an important consideration, either in London or elsewhere.
- 3.35 A corresponding study was produced by DTZ Consulting for the South East England Development Agency (SEEDA). The Report (*Housing Type & Size in the South East*, published Jan 2007) considered how & why the size & type of new completions had changed in recent years, whether this mattered, whether the pattern varied between local market areas, and what could & should be done about these matters.
- 3.36 Some 53% of the SE's market dwelling completions in 2005-06 were flats, a rise of over twenty points since 2001-02. A similar, though rather dramatic, surge was seen at the peak of the last housing market cycle, in 1989-90. In London flats comprise over 80% of completions, whilst the Eastern & SW regions have also seen rises, though there flats are not yet in the majority. Public sector affordable dwellings also show large increases in flat completions, to higher levels than the market sector in fact.
- 3.37 Various factors may have contributed to these changes, including demographic changes; market changes, such as the growth in buy to let, declining affordability, and more intense competition for land; and planning policy changes, with increased emphasis on density and the reuse of previously developed land. DTZ felt on balance that demographic changes were not principally responsible, since the relationship between dwelling size and household size remained a loose one. The primary explanation lay with an interaction between market and planning factors.
- 3.38 Shortages of accommodation in London and the South East are causing problems for the economy and the public sector in particular. There is some evidence that new house building is not providing what purchasers want, and a suggestion that developers compete for land more than they do for customers, since nearly everything they build can be sold. There is concern about overcrowding and stress, most particularly in the social sector, and it is fairly clear that Right To Buy sales have disproportionately depleted the family stock.
- 3.39 The report concluded with a number of policy recommendations, focusing on monitoring; density maxima, and a range of other policy actions to secure more family sized affordable housing; administrative initiatives; and relatively modest proposals to influence the mix of market provision.

## Summary

- 3.40 There is a good deal of concern at the present time about the ability of the housing stock in Oxford to meet future needs, in particular from households and families, and whether what is being produced through new build dwellings and conversions is meeting those needs fully enough. There is concern that properties suitable for families are being occupied by students and as HMOs.

- 3.41 National and regional planning guidance encourages the City Council to consider the balance of dwellings being provided, and to ensure that it meets the needs of the variety of household groups requiring accommodation in Oxford. The adopted Local Plan provides a policy to influence the size of dwellings to be provided, although an operational policy has yet to be developed. The present study is intended to aid that process, but will also provide further input to inform policies in the emerging Local Development Framework.
- 3.42 Concerns about these sorts of issues are not confined to Oxford. Recent studies have addressed the emphasis on small units in London, and in the South East as a whole. Whilst these provide valuable context they do not suggest analytical solutions to influencing what is built.
- 3.43 An approach designed to address those concerns and to produce the required operational guidance is developed in the next Section.



## 4. Proposed approach

### Introduction

- 4.1 A range of information is available potentially to inform the study. The proposed approach will draw from these sources in order to provide an assessment of the balance of dwellings in Oxford. The assessment will in turn inform proposals in respect of Plan policy, and might inform other complementary initiatives.

### Available data sources

- 4.2 There are a number of data sources in respect of the current stocks of homes and households. For instance, housing stock **data from the Valuation Office** shows the profile of the housing stock in terms of a large number of variables, including size, no of bedrooms, house type (though not current tenure). It is available for postcode sector, and electoral ward.
- 4.3 **2001 Census data** is available for small areas and electoral wards including showing household and dwelling characteristics and age structure.
- 4.4 **2003 Survey data** is available from the Household Requirements Study (HRS) 2004 for Oxford. Because this uses sample data, it would not be sufficiently robust to provide detailed profiles for electoral wards. However its great virtue is the facility of primary data sources to explore variations in household and housing characteristics through targeted analysis using cross tabulations. The HRS data also provides, in the form of the Balanced Housing Model, a means of forecasting future housing requirements, by looking at what sorts of accommodation households expecting to move home would require, and what sorts they would vacate.
- 4.5 **Other local information** would include data on the locations of HMOs, electoral information, the numbers in receipt of private sector housing benefit, data on the social rented (Council's and RSLs') housing stock profile.
- 4.6 Turning to trends in development, data from the planning system on **recent planning applications** will produce a picture of the sorts of new residential accommodation being built, as well as those being lost through redevelopment, as a result of conversion and demolition.
- 4.7 Looking forward to the future, **population and household projections** are available nationally and from the Oxfordshire County Council, identifying how Oxford households' demographic characteristics will change over time – and in the case of the County Council projections, giving projected changes in age structure down to ward level. Supporting and complementing this, we looked at what the available data tells us about University students occupying the general housing stock, and how their numbers might change in the future.
- 4.8 These various data sources have considerable potential. They allow us to look at the current stock of dwellings in some detail; to see what sorts of requirements the current population has for new dwellings; to adjust those requirements for future demographic changes; to see how the current housing stock should be adjusted to allow for those changes; and to see what the future housing stock will look like if current development patterns continue, in the absence of the specific policy guidance which this present study seeks to provide.
- 4.9 Some care needs to be taken with demographic projections. The results from these projections depend, often quite crucially, on the assumptions they use, particularly in relation to migration patterns. There is a danger of circularity; for instance, projections based on future dwelling provision at ward level should not be used to support requirements for additional housing in those same locations.

- 4.10 It should also be emphasised that demographic projections, alone, cannot be used to infer the balance of dwelling requirements at some future date, at ward or at any other level. That is because the relationship between households' size and structure, and the accommodation they require, is not a mechanical one. In the case of market housing, and most particularly owner occupied housing, it is apparent that households are entirely free, within the constraint of cost, to choose housing of a larger size and type than they might be said to 'require'.
- 4.11 The evidence indicates that in fact they do so. Data from the many housing surveys we have carried out confirms that significant numbers of owner occupier households indeed occupy larger units than the minimum they would need for their household numbers and composition – both at the time of the move, and in overall terms, as they remain where they are and the household's size declines as it matures. The latter situation applies in almost all tenure groups, in fact. This means that an approach which took the range of household types at some future date, and simply applied occupancy assumptions to them, would have limited validity. It certainly would not provide a more reliable view than that of the market.

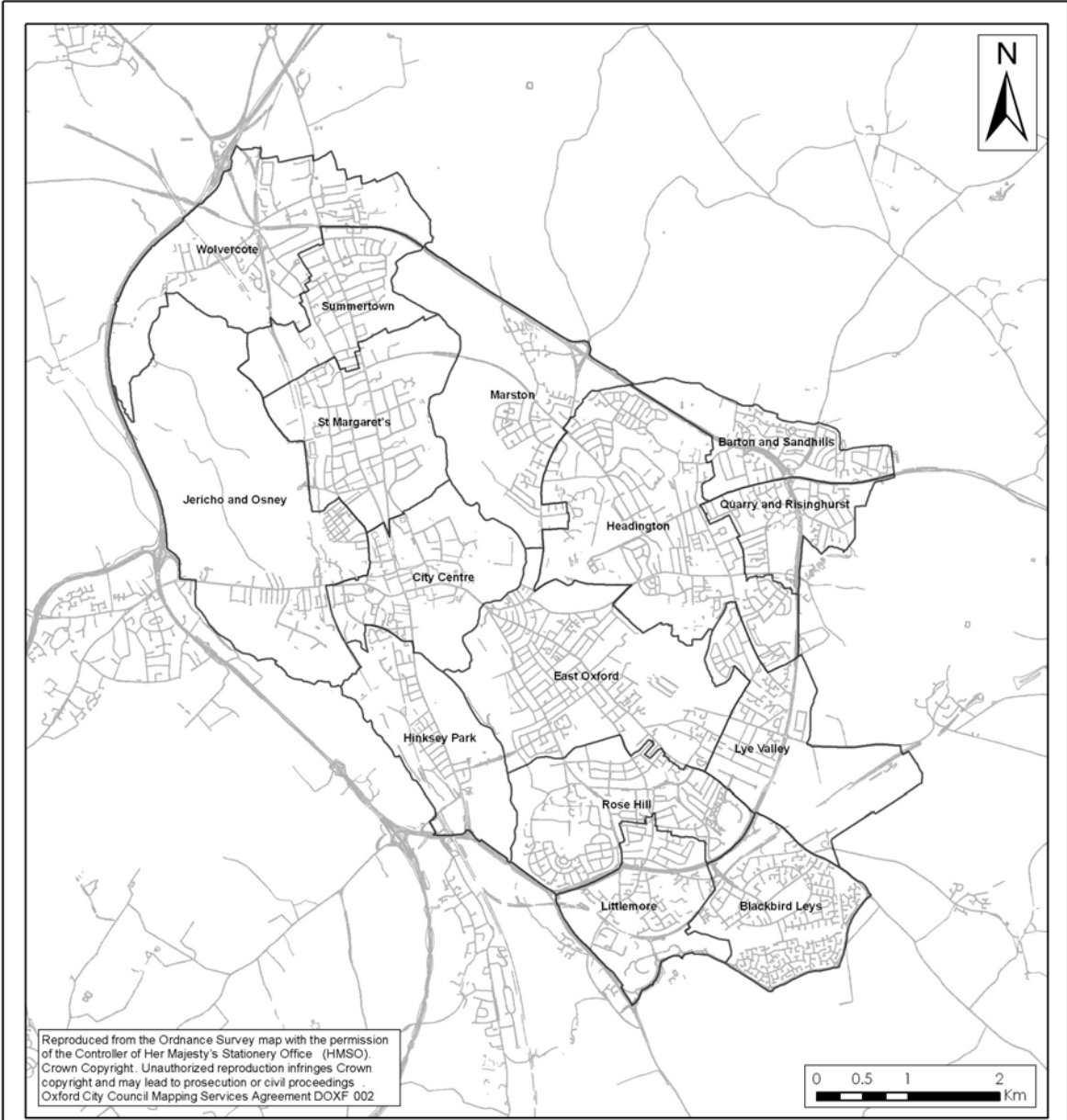
### **Towards a preferred approach: data implications for area definitions**

- 4.12 In this situation, the availability of household survey data collected for the Housing Requirements Study is of especial value. It provides scope for investigating in detail the circumstances, needs and preferences of particular households living in different geographical areas of Oxford.
- 4.13 The Housing Requirements Study was produced in April 2004. It drew on data collected during early 2003, from a sample of 2,013 households. When households in communal establishments and student households were excluded the sample for analysis was 1,875. Whilst this data can usefully paint a picture of the sorts of households who live in different parts of Oxford, it can show the relationship between household and current housing, and suggest future (i.e. next year's) housing requirements for those who expect to move.
- 4.14 This is very powerful information. The HRS was necessarily based upon a sample survey, of some 2,500 households. There is therefore a practical upper limit to the level of detail it can provide, without unacceptably high sampling error.
- 4.15 In fact, the survey data can provide meaningful results for around four geographical sub areas; the margin of sampling error would become too great with a larger number, to allow robust conclusions to be drawn and used to inform and support planning policies. This means that whilst it could provide useful guidance at City and broad sub area level, it would not generate sufficiently robust results at the level of the locality. Any information to support policies for smaller areas will need to come from a very much larger sample, or in practice 100% data, such as Census statistics, or VOA data.

### **Towards a preferred approach: sub area definitions**

- 4.16 At the outset of the study, it was necessary to identify appropriate sub areas. Generally speaking, much of the 100% data available for smaller localities was available for either ward (24) or postcode sector (19) areas. Following discussions with the City Council, it was agreed that in seeking to define boundaries for sustainable communities the geography of Oxford represents the starting point. The Oxford Green Space Study considered Oxford as a collection of 'urban villages'. Whilst this approach provided a good geographical basis for defining sustainable communities it does not take account of the relationship to wards. Ward boundaries allow for population and household forecasts to be taken into account. In addition wards are used by the Area Committees as the context for determining planning applications.
- 4.17 The 'urban villages' boundaries are then related to wards. Whilst there are some differences, by grouping together wards, a very similar pattern emerges. This results in a total of 15 local communities, referred to hereafter as Neighbourhood Areas, which are shown in Figure 4.1 below.

Figure 4.1 Neighbourhood Areas

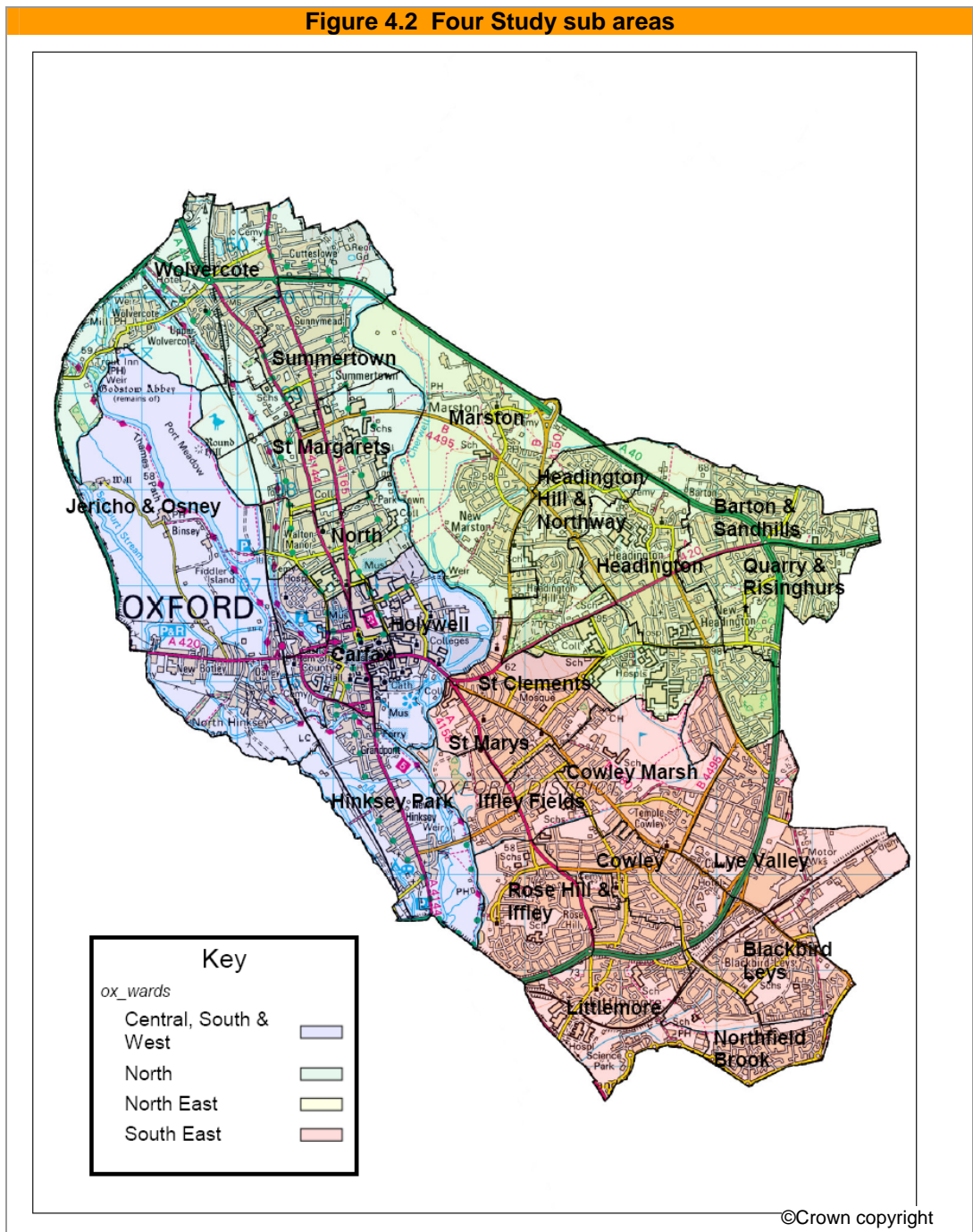


Proposed Neighbourhood Areas

4.18 We next considered how these areas could be grouped up to form wider sub areas. Careful consideration of Oxford’s geography suggested that the city could be divided into four sub areas, which were relatively well separated by natural features, i.e. river valleys and areas of open space.

- 4.19 The four areas were:
- North Oxford
  - Central South & West Oxford
  - North East Oxford (Marston/Headington/Headington Quarry)
  - South East Oxford (St Clements & Cowley Marsh, southwards).

4.20 The four sub areas are shown coloured in Figure 4.2.



- 4.21 Postcode sector data could be aligned reasonably well with these four groups (except that where postcode data was used, Jericho, part of the Jericho & Osney Ward, and hence part of Area 2, would be included in North Oxford due to boundary constraints).
- 4.22 These areas meant that an assessment of dwelling balance in Oxford could be carried out using a four tier hierarchy as proposed in Figure 1.1, involving 15 localities based on wards or amalgamations of wards, and four sub areas grouping these localities further.

### Preferred approach

- 4.23 Our approach to the assessment involves the following steps
- an assessment of the data on the current dwelling stock and the households contained in it, at City & sub area level
  - a similar assessment where data is available, at Neighbourhood Area level. This will contrast the local profile with that for the City & wider sub area, drawing attention to major differences and departures from a balanced situation
  - an assessment of trends in housing supply, and a forecast of how the future stock might be if those trends continued;
  - a parallel assessment of demographic trends, drawing upon household & population forecasts, and anticipated changes in student numbers within the general housing stock;
  - an estimate of future housing requirements, drawing upon the HRS 'Balanced Housing Model' methodology but adjusted for the above demographic changes;
  - an estimate of how the present stock would need to change to accommodate these demographic changes
- 4.24 We anticipate that following this series of steps it will be possible to develop potential guidance designed to secure appropriate balance from new development at the four levels of spatial area we have identified.
- 4.25 The **first** step is set out in the next Section, with each further step following in the sequence.





# 5 Existing housing and households

## Introduction

5.1 This section looks at the characteristics of the households and housing stock in Oxford as a whole, and in the four sub areas. It draws upon data from a number of sources:

- 2001 Census data
- data provided by the Valuation Office Agency (VOA), describing the current housing stock
- data from the 2003 Housing Requirements Study
- other data from miscellaneous City and County Council sources

5.2 These are considered in turn below.

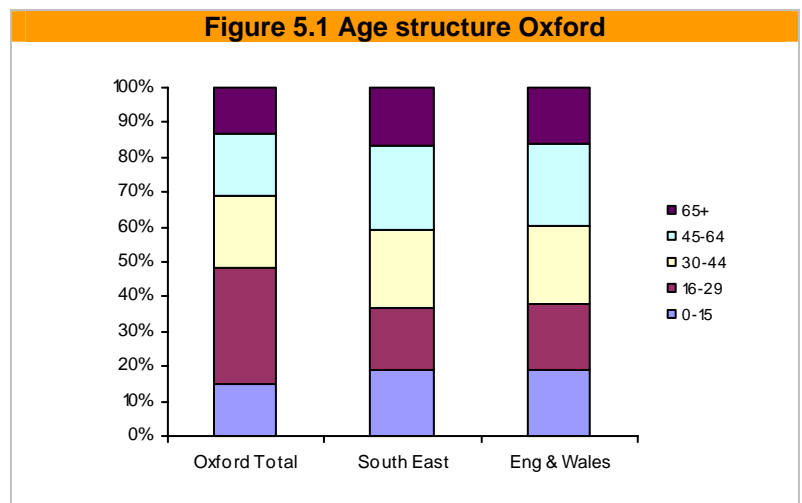
## 2001 Census

5.3 Census data tells us about a very wide range of characteristics. However it is now some 6 years old. We have focused on those topics which can not be properly illustrated using other more recent data sources.

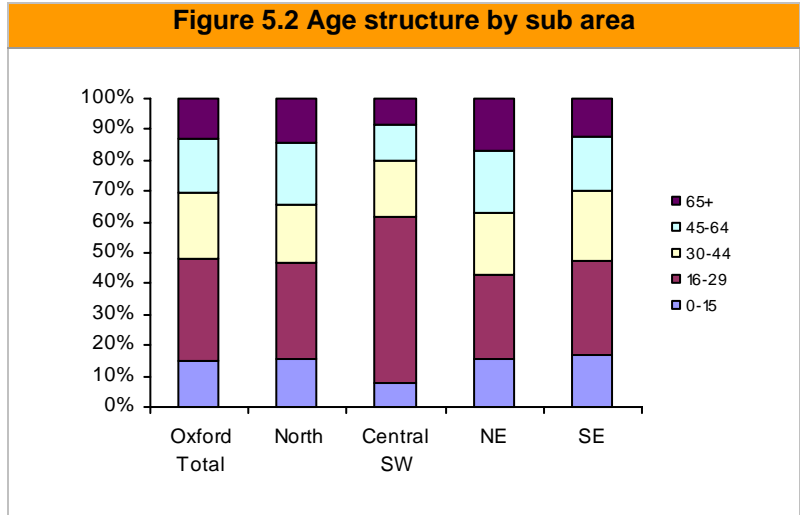
## Age

5.4 The profile of Oxford's population in terms of broad age structure is illustrated in Figure 5.1.

5.5 Compared to the South East as a whole, Oxford contains significantly more aged 16-29, and fewer middle aged persons. This reflects at least in part the student population. The national age structure is only marginally different from the region's.

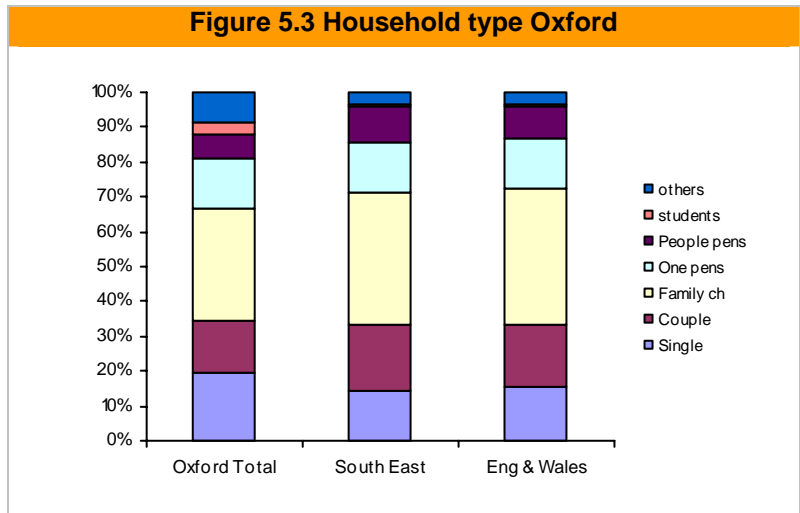


5.6 Looking at the individual sub areas, it is clear that there are variations. The main difference is between the Central SW areas and the others. The CSW contains far more aged 16-29, and fewer children or older adults. The other areas broadly match the Oxford profile, though the North East contains more older households.

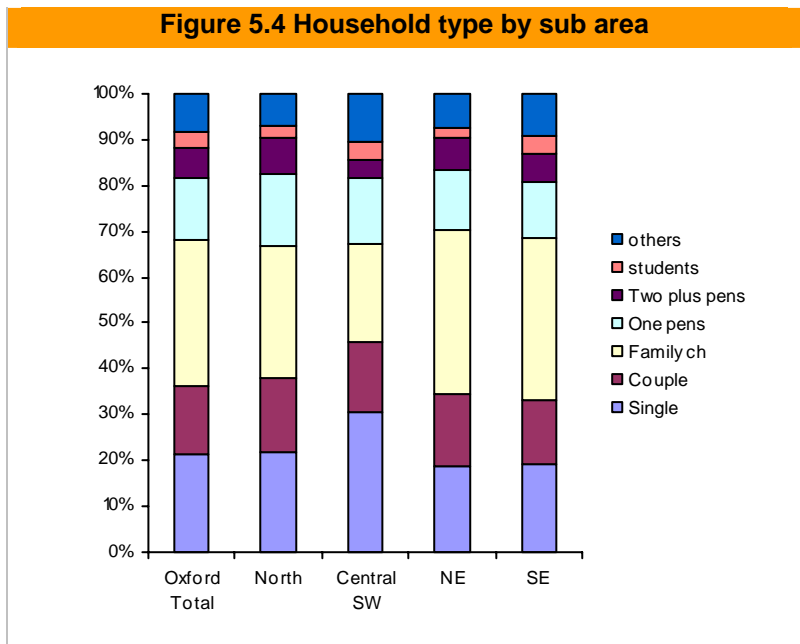


### Household type

5.7 The household type data shows that Oxford contains more single persons and students than the South East (or the country as a whole, which is not significantly different from the region). There are fewer couples and families, and larger numbers of 'other' households.



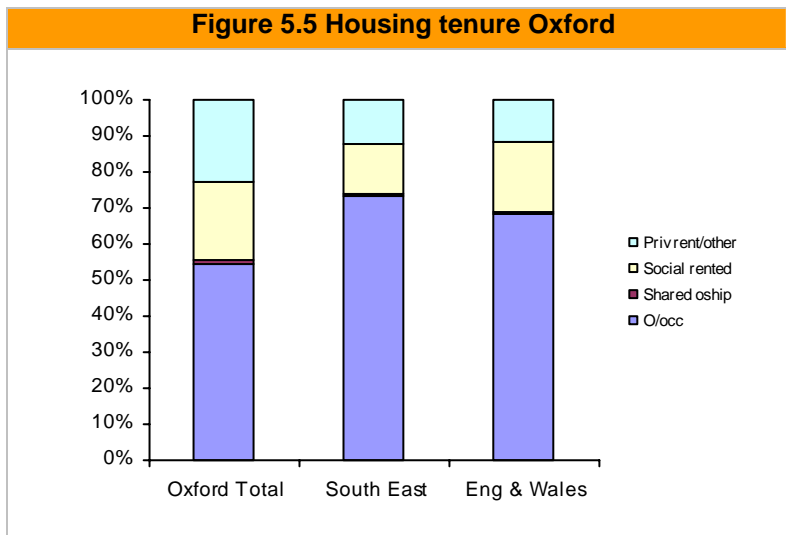
5.8 As with age structure, there are variations between the sub areas, and as before mainly between the Central SW area and the others. The CSW accommodates more singles and students - and far fewer families. Whilst the North contains more elderly households, generally speaking the suburban areas appear to be reasonably well balanced; they show a good mix of different household types.



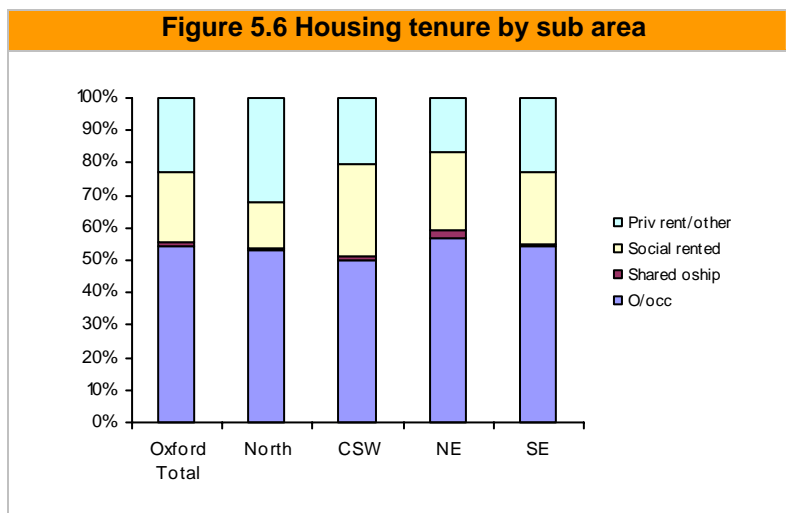
## Housing tenure

5.9 Although Oxford's housing tenure profile will have moved on since 2001, particularly through right to buy (RTB) purchases, the Census data provides the best evidence of tenure profile at local small area level, and to some extent RTB changes will have occurred across the board.

5.10 Oxford's tenure profile shows a rather more even distribution between the three principal groups than for the South East (and to a lesser extent countrywide) where owner occupation is overwhelmingly the largest group. Shared ownership provision has been very limited, although of course a fair amount is likely to have been added since 2001.



5.11 Perhaps surprisingly, the Central SW area is not particularly skewed in terms of tenure, as it is in demographic terms. Here the North has perhaps the most variant profile, with a much larger private rented sector, and fewer social rented units. The SE has the most balanced profile compared to the City as a whole.



## VOA database

5.12 Data from the VOA has been made available at a small area level, which allowed it to be aggregated to both Neighbourhood area level and sub area level. There were 55,585 household records in total, although for historic data collection reasons, data were not available under every heading for every household.

5.13 Data was provided for ten data headings, briefly summarised in Appendix 1. They deal with a range of dwelling characteristics. Below we focus on the most relevant topics. The data was provided as a count of each variable. This meant cross tabulations by heading was not possible.

5.14 Whilst the headings do cover the dwelling's origin to some degree, they do not relate to its current tenure (i.e. privately owned v Council or RSL rented stock). However, we were able to draw on a database of social rented homes, including both the council's, and the RSLs' stock. This made it possible for the size profiles (no of bedrooms) for privately owned and social rented housing, to be distinguished.

5.15 When interrogating the VOA data, it became apparent that this included a number of properties which contained a very substantial number of bedrooms. From discussions with VOA this appears to include properties which, though residential in nature, would more properly be regarded as communal establishments. Examples include County Council establishments, private care homes, student accommodation and so on. It is not practical to identify and exclude such properties. However they are not felt to distort unduly the profile provided by the data. For example, in total properties of 8 or more bedrooms (most likely to be such establishments) represent only 8.6% of all properties of 5 bedrooms or more.

### Dwelling Stock

5.16 Table 5.1 describes the balance of market and social rented housing in each area. 40% of all housing is located in the SE area of Oxford. The SE also has the highest proportion of social rented dwellings at 26%. In contrast only 9% of the North's stock is social rented. The Central SW area has the fewest dwellings, with only 12% of the total.

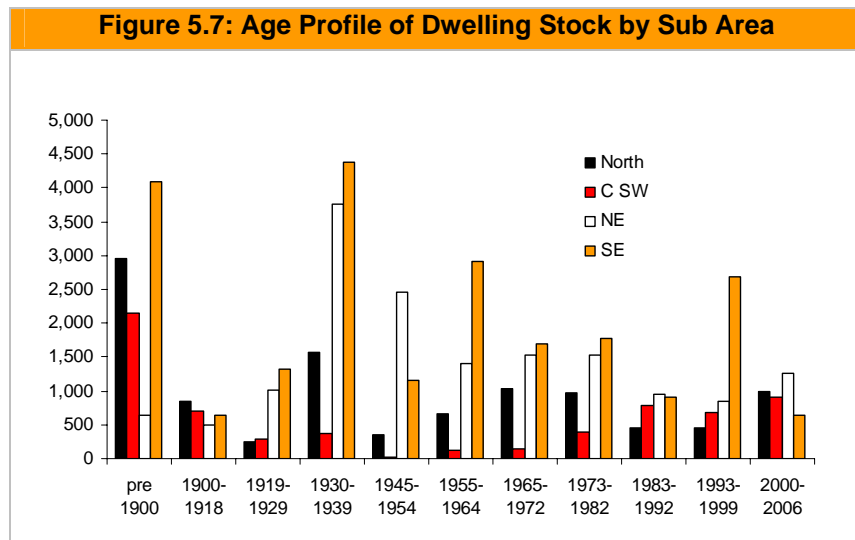
| Table 5.1: The Balance of Private and Social Rented Housing |                           |                           |                         |                          |
|---|---------------------------|---------------------------|-------------------------|--------------------------|
|   | Total Number of Dwellings | Proportion of Total Stock | Social rented dwellings | Percentage Social Rented |
| SE  | 22,280                    | 40%                       | 5,823                   | 26%                      |
| NE  | 15,929                    | 29%                       | 3,110                   | 20%                      |
| North   | 10,671                    | 19%                       | 980                     | 9%                       |
| Central SW  | 6,705                     | 12%                       | 982                     | 15%                      |
| <b>Total</b>  | <b>55,585</b>             | <b>100%</b>               | <b>10,895</b>           | <b>20%</b>               |

Source: VOA data 2006: social rented data (Council/RSL) from Oxford City Housing dept

### Dwelling Age

5.17 Almost half of Oxford's total dwelling stock was built before 1939, with a high rate of supply during the 1930s.

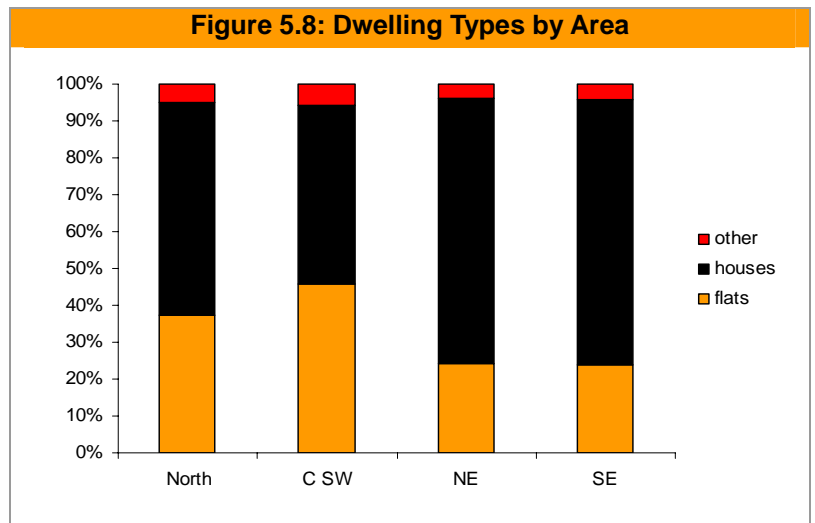
5.18 Figure 5.7 shows that, since the early 20<sup>th</sup> Century, housing provision has been focused to some degree on SE & NE Oxford. However since 2000 development has been more evenly distributed across the four sub areas. Central/SW has come more to the fore, and the SE has declined in significance.



Source: VOA data 2006

## Dwelling Type

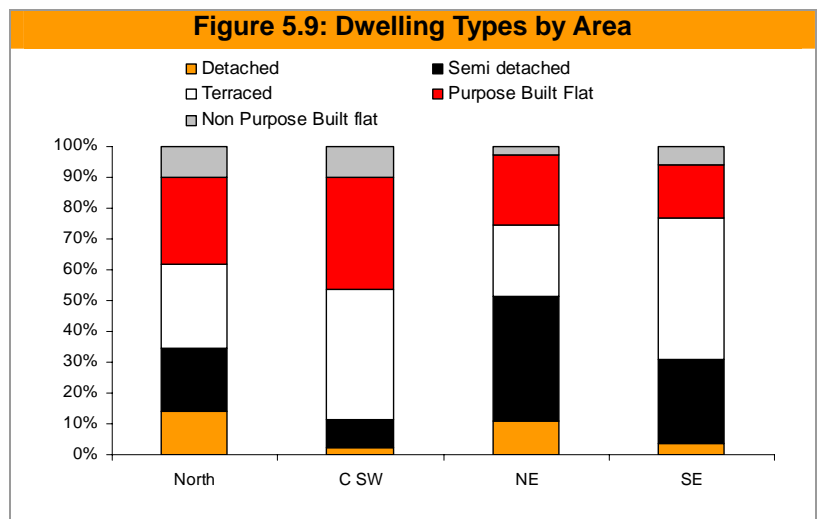
5.19 Figure 5.8 shows the range of dwelling types in Oxford. Almost 45% of dwellings in Central SW are flats. The North also has a high proportion of flats whereas the NE and the SE are more dominated by houses. Most dwellings in the 'other' category are bungalows: there are fewer of these in Oxford than elsewhere (England 9.7%; London & the SE Region 6%).



Source: VOA data 2006

5.20 We look at dwelling type in a little more detail in Figure 5.9. This considers whether houses are detached, semi or terraced, and whether or not flats were purpose built.

5.21 The chart suggests the four areas have very different dwelling characteristics. The stock in the North is dominated by detached houses with a large number of non purpose built flats – typically conversions of larger dwellings. In contrast, terraced houses are the most prominent dwelling type in the SE. Central SW has very few detached and semi detached dwellings; the stock is concentrated in terraced houses and flats.

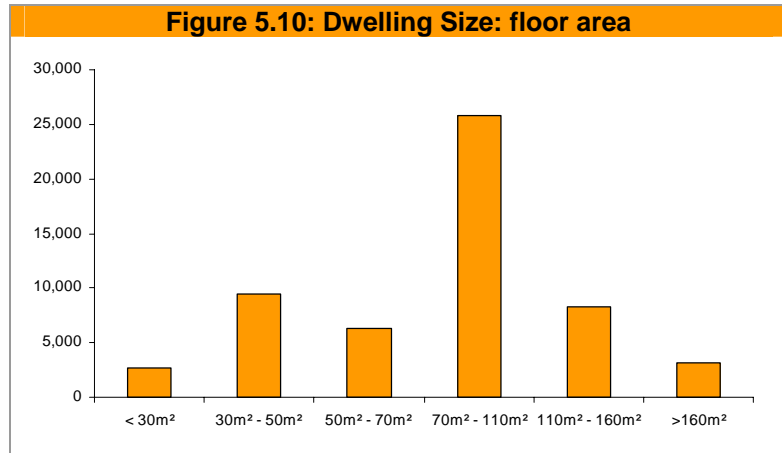


Source: VOA data 2006

### Dwelling Size – floor area

5.22 The VOA data uses six size groups to classify dwelling size in terms of floorspace area. Figure 5.10 shows the profile of the total stock in terms of this floorspace classification.

5.23 The stock is dominated by houses of between 70-110m<sup>2</sup> (755-1,185 sq ft). This is a broad group, which covers the ground from the larger 2 bed properties to relatively comfortably-sized 4 bedroom units, and includes almost all 3 bedroom homes.



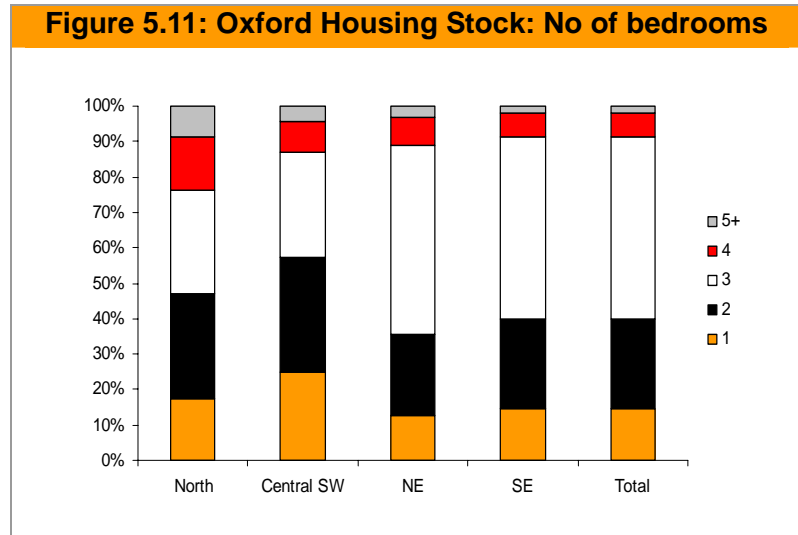
Source: VOA data 2006

5.24 Central SW area has the largest number of smaller sized dwellings, as might be expected given the high proportion of flats within the area.

### Dwelling size – No of bedrooms

5.25 Dwelling size is more frequently considered in terms of the number of bedrooms.

5.26 Figure 5.11 describes the size of the total stock by the number of bedrooms. For Oxford as a whole, almost half of all homes have three bedrooms. The SE is the most balanced by comparison, and once again Central SW the least. However North Oxford has many more large (4 bed+) dwellings.



Source: VOA data 2006

### HRS data

5.27 HRS data is a useful source to supplement what is available from the Census and VOA data. One instance is the issue of turnover, which as we have already suggested may be a key ingredient in constructing balanced and stable communities.

- 5.28 Before considering this, however it should be noted that the focus of the Housing Requirements Study was on housing need. The Study's survey-based approach did not allow for the requirements of students to be examined adequately; their responses could not be reliably used to predict the future housing requirements of (other) students in the future. For most purposes the responses from students were excluded from analysis. The picture given below therefore does not in general include student 'households'.

## Turnover

- 5.29 It is appropriate to look at how turnover varies across the housing stock, and the table below shows how annual turnover rates vary with housing tenure.

- 5.30 There are major differences between tenures. Turnover in the private rented stock is very much higher; six times that for the owner-occupied sector. In fact, though, the nature of the survey means that this figure probably understates turnover in private rented homes.

| Table 5.2 Turnover by tenure |                              |
|------------------------------|------------------------------|
| Tenure                       | Annual turnover (% of hhlds) |
| Owner-occupied               | 5.8%                         |
| Private rented               | 35.2%                        |
| Social rented                | 10.2%                        |
| TOTAL                        | 13.1%                        |

Source: Oxford HRS data

- 5.31 House type has some impact on turnover, though it is secondary to tenure. Flats/maisonettes have appreciably higher turnover than houses, in every tenure.

| Table 5.3 Turnover of stock by tenure and type |                |                |               |       |
|--|----------------|----------------|---------------|-------|
| Accommodation type                             | Owner-occupied | Private rented | Social rented | TOTAL |
| Flat/maisonette                                | 10.2%          | 38.2%          | 11.4%         | 20.5% |
| Terraced house                                 | 6.6%           | 34.7%          | 7.6%          | 12.2% |
| Semi-det house                                 | 4.3%           | 30.5%          | 9.5%          | 8.4%  |
| Detached house                                 | 6.8%           | 30.1%          | 18.4%         | 10.6% |
| Other  | 0.0%           | 43.0%          | 7.1%          | 19.3% |
| TOTAL  | 5.8%           | 35.2%          | 10.2%         | 13.1% |

Source: Oxford HRS data

- 5.32 We have considered turnover in terms of household size and dwelling size. The differences are not great for household size per se.

- 5.33 However they do vary by dwelling size, as Table 5.4 shows. The figures suggest that 1 & 2 bed units have markedly higher turnover than larger family units, particularly in the owner occupied sector. In the rented tenures 4 bed dwellings also display higher turnover.

| Table 5.4 Turnover of stock by tenure and dwelling size |                |                |               |
|---|----------------|----------------|---------------|
| No of bedrooms  | Owner-occupied | Private rented | Social rented |
| 1   | 10.2%          | 39.9%          | 10.3%         |
| 2   | 8.9%           | 34.0%          | 11.0%         |
| 3   | 4.3%           | 30.2%          | 9.1%          |
| 4+  | 5.3%           | 40.7%          | 18.2%         |
| TOTAL   | 5.8%           | 35.3%          | 10.2%         |

Source: Oxford HRS data

## Household type

- 5.34 The Housing Requirements Study analysed household structure in terms of a typology of eight groups. The groups are related to the Census groups considered earlier (Table 5.3), but also take more account of age. They therefore provide a basis for looking later in the Report at how future demographic changes will impact upon the balance of dwellings needed by the future population.

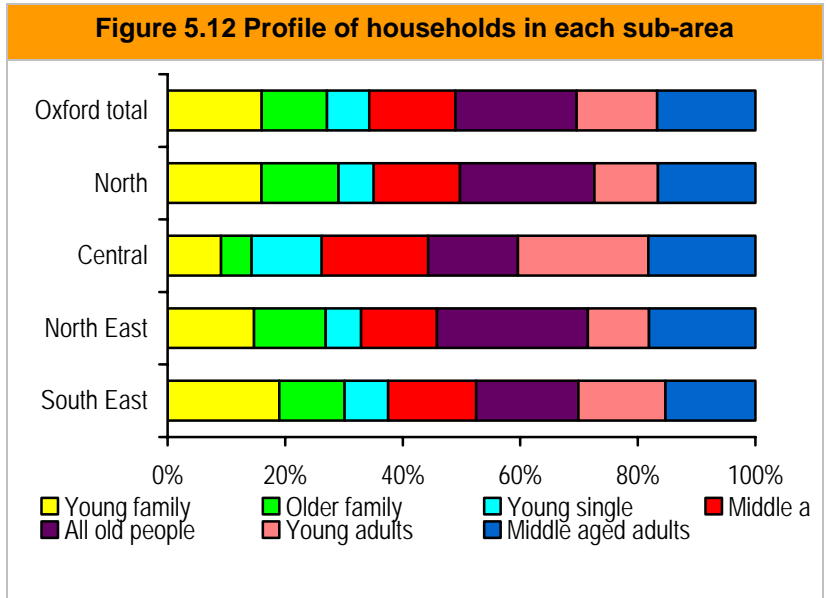
5.35 It should be noted that the focus of the Requirements Study was on housing need. The Study’s survey based approach did not allow for the requirements of students to be examined adequately; their responses could not be reliably used to predict what other future students’ future housing requirements might be. For most purposes the responses from students were excluded from analysis. The picture given below therefore excludes the student data

| Household type     | Definition   |
|--------------------|--|
| Young family       | Family household in which the majority of children are under 12 or average age of the children is under 12.  |
| Older family       | Family household in which the majority of children are aged between 12 and 22 or over or average age of the children is over 12.                         |
| Young single       | One person household in which the resident is under 36.  |
| Middle-age single  | One person household in which the resident is aged between 36 and 64.  |
| Old single         | One person household in which the resident is 65 or over.  |
| Young adults       | Multi-person household without children in which the majority of people are under 36 or the average age of the residents is under 36.                    |
| Middle-aged adults | Multi-person household without children in which the majority of people are aged between 36 and 64 or the average age of the residents is between 36-64. |
| Old adults         | Multi-person household without children in which the majority of people are 65 or over or the average age of the residents is 65 or over.                |

Source: Oxford HRS data

5.36 The HRS data indicates that Oxford contains a relatively even mix of these different household groupings. Figure 5.12 show that elderly households are the largest group (though that is because one person and multi person elderly households have been amalgamated here). Young single households are in fact the smallest numerically.

5.37 Figure 5.12 compares the profiles for each of the four sub-areas. It suggests that the Central sub-area is the most unbalanced, though even then there is still a reasonable mixture of household types. Of the rest, the North & NE contain most pensioners. Families are more likely to be found in the North and SE. It would be difficult to say that any one of the three suburban areas was significantly less (or more) ‘balanced’ than the other two.



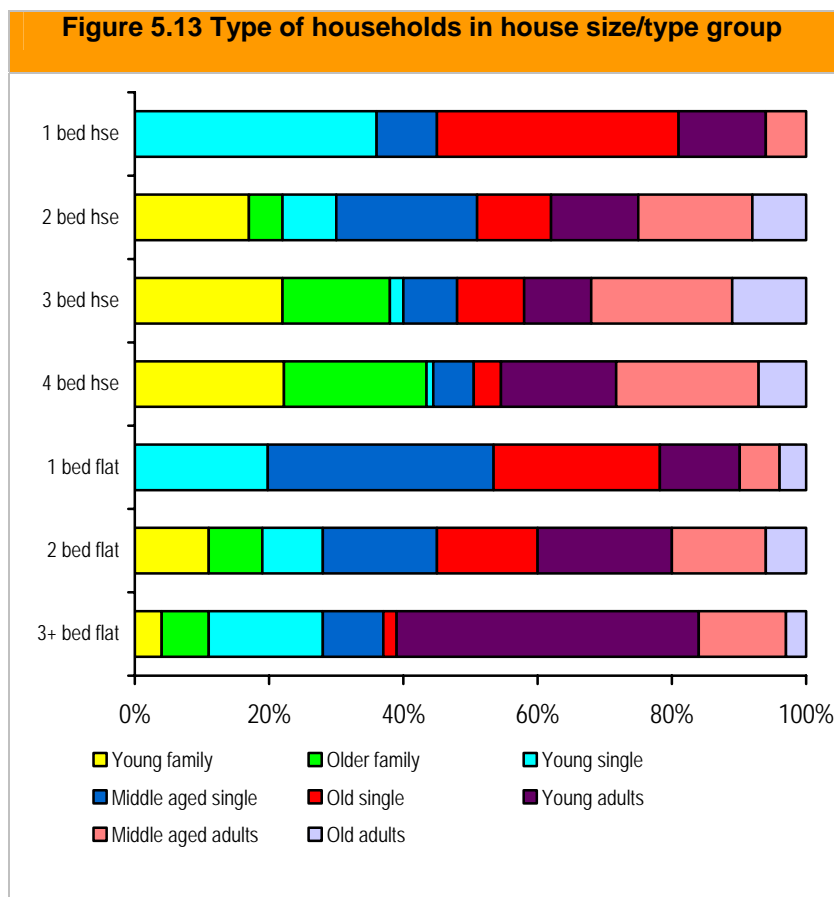
Source: Oxford HRS data

### Household type and dwelling occupied

5.38 The HRS data is particularly useful in being able to tell us what sort of household lives in what sort of house – something which could not be obtained easily from other data.

5.39 Figure 5.13 shows that a wide mix of household types live in most household sizes - and conversely households of each type can be found in a wide variety of dwellings.

5.40 The principal exceptions are 1 bed flats and houses, where around four fifths of households are one person. Two bed flats contain fewer families, and more single person households, than 2 bed houses. The relatively small difference results from tenure mix differences: private rented 2 bed flats actually contain more children than 2 bed houses.



Source: Oxford HRS data

### Sub area turnover

5.41 Table 5.4 shows how turnover varies between sub areas. The variation is significant; turnover in the Central sub-area is more than double that in North East sub-area.

**Table 5.5 Turnover of stock by sub-area**

| Sub-area   | Annual turnover (% of households) |
|------------|-----------------------------------|
| North      | 15.0%                             |
| Central    | 21.0%                             |
| North East | 9.6%                              |
| South East | 12.3%                             |
| TOTAL      | 13.1%                             |

Source: Oxford HRS data

5.42 As we saw earlier, turnover varies quite significantly by tenure - and within tenure by dwelling size. This means that all the sub area variations in turnover could be entirely due to differences in the tenure/size mix profiles of the sub areas. We can check this by applying the turnover rates in Table 5.4 to the sub areas' profiles: Table 5.6 compares what turnover would be expected in this way with the actual figures from Table 5.5.

5.43 It shows that turnover is higher than expected in the North & Central areas, and lower than expected in the NE. Turnover in the SE is in line with that expected. However the differences are relatively small.

| Table 5.4 Turnover of stock by sub-area |                              |        |        |
|---|------------------------------|--------|--------|
| Sub-area                                | Annual turnover (% of hhlds) |        |        |
|   | Expected                     | Actual | Note   |
| North                                   | 13.8%                        | 15.0%  | HIGH   |
| Central                                 | 19.0%                        | 21.0%  | HIGH   |
| North East                              | 11.3%                        | 9.6%   | LOW    |
| South East                              | 12.2%                        | 12.3%  | NORMAL |

Source: Oxford HRS data

5.44 This suggests that none of the sub areas can be identified as particularly demonstrating less stability or balance than the others. However NE Oxford appears to be slightly more stable. This may reflect the larger elderly population there.

## Other data

5.45 Data on registrations of Houses in Multiple Occupancy (HMOs) is summarised in Table 5.5. It is believed to underestimate the total incidence of multiple occupancy, probably quite substantially. However it is possible that the unrecorded incidence follows a similar pattern to that which is recorded.

5.46 There are some 2,241 licensed HMOs in Oxford, 3.1% of the total dwelling stock. The North East has fewer than average, whilst the South East, the largest area, has more, and indeed over half of the City total.

| Table 5.5 Licensed HMOs |            |           |
|-------------------------|------------|-----------|
| Area                    | No of HMOs | % of dwgs |
| North                   | 318        | 3.1%      |
| Central                 | 320        | 4.5%      |
| North East              | 364        | 2.4%      |
| South East              | 1,239      | 5.4%      |
| Total                   | 2,241      | 3.1%      |

Source: Oxford City Council data

## Summary

5.47 There is a considerable range of data which can be used to describe the balance of dwellings in Oxford's housing stock. The data suggests that in a number of respects the housing stock in Oxford is quite varied, and accommodates a wide range of household types.

5.48 Oxford's housing contains more young adults, single persons and students, and conversely fewer middle aged, than the region or the country as a whole. Tenure is more mixed, with lower owner occupation and more renters, both private and social.

5.49 Almost half of Oxford's stock was built pre 1939, with a significant amount built during the 1930s. Much of the housing provided in the period 1900-1939 was in the NE and SE sectors. A considerable proportion of the stock is between 70-110 sq m in size, and almost half (48%) of homes have 3 bedrooms.

5.50 About four fifths of 1 bedroom flats and houses are occupied by single person households. In the other size/type categories there is a surprisingly wide mixture of household types. About a fifth of two bedroom properties are occupied by families (i.e. with a child under 16) though many fewer 2 bed flats than houses contain children, except in the private rented sector.

- 5.51 Dwelling turnover, a key ingredient in building balanced and stable communities, varies by dwelling size and tenure. Smaller units and flats experience higher movement rates; private rented housing, of all sizes, turns over much faster than the other tenures. The differences in turnover between the four sub areas can largely be explained by these differences, but after they have been allowed for the NE sub area still turns over more slowly than the other areas.
- 5.52 The differences between the sub areas vary with the measure under consideration. The Central & SW area is quite distinct from the three suburban areas, with many more flats, and smaller units, and fewer larger ones. It consequently contains more single persons and students, and fewer families. However it has a reasonable tenure mix.
- 5.53 On the whole, the other, suburban, areas are relatively well balanced, in terms of both the dwelling stock and the mix of household types. The North has least social rented housing, more detached and more flats, many more 4 bedroom plus homes, and more households are elderly.
- 5.54 The NE & SE areas' stocks are more likely to be houses, and 3 bed dwellings. The NE has most 3 bed units. It also contains more elderly – possibly explaining the favourable turnover rate. The SE has more terraced dwellings, and fewest flats; it also contains fewer large properties, in either bedrooms or floor area terms.
- 5.55 The North East has fewer, and the South East more, licensed HMOs than the City average proportion. However there are believed to be very substantial numbers of unrecorded multi occupancy.
- 5.56 We would suggest from the analysis in this Chapter that there are no overwhelming grounds for seeking to change the balance of the current dwelling stock at City or sub area level. It is clear that the Central & SW sub area's stock is significantly less balanced than the other three, mainly because there are much higher numbers of smaller units, and flats. However we recognise it is not practical to seek a fully balanced stock in Central Oxford, and the Council may not consider it desirable on sustainability and other grounds to do so.
- 5.57 The various measures of the dwelling profile for Oxford provide both a useful context and benchmarks when looking at the balance of dwellings in each Neighbourhood Area, as we will do in the next Section.





## 6 Locality profiles

### Introduction

- 6.1 We now consider the fifteen individual localities, known as Neighbourhood Areas, outlined in Section 4 (Fig 4.1). It is possible to look at these in terms of a number of key indicators, including those measures set out in the previous Section, which enable us to compare the locality's housing balance with the city wide picture.

| Table 6.1 Locality dwelling numbers |               |
|-------------------------------------|---------------|
| Neighbourhood Areas                 | Dwellings     |
| Wolvercote                          | 2,924         |
| Summertown                          | 2,748         |
| St. Margaret's                      | 4,663         |
| City Centre                         | 2,564         |
| Jericho & Osney                     | 2,151         |
| Hinksey Park                        | 2,324         |
| Marston                             | 2,675         |
| Headington                          | 5,239         |
| Barton & Sandhills                  | 3,985         |
| Risinghurst                         | 3,316         |
| East Oxford                         | 8,080         |
| Lye Valley                          | 2,438         |
| Rosehill                            | 4,374         |
| Littlemore                          | 3,044         |
| Blackbird Leys                      | 5,059         |
| <b>Total</b>                        | <b>55,582</b> |

Source: VOA data

- 6.2 The Neighbourhood Areas vary somewhat in size, as Table 6.1 shows. Most are broadly in the range 2,500-5,000 dwellings (although East Oxford area is substantially larger, at around 8,000 dwellings). This means that some areas could reasonably be expected to be more 'balanced' than others.

### Neighbourhood Area analysis

- 6.3 The following analysis has been undertaken for each Neighbourhood Area, to consider the spatial dimension at the local level. The first section includes a brief description of its size and residential townscape/landscape character, together with a locality profile. The locality profile is provided in a commentary, which is drawn from the Census 2001 information, and covers the main topics considered in the previous Section providing a local assessment of the particular age structure and household type, together with a detailed consideration of the existing dwelling stock.

- 6.4 The second section seeks to identify the underlying pressures within a Neighbourhood Area, and provides an assessment of the effects that continued conversions and more small units will have on achieving a balanced mix of housing. These highlight the pressure that exist within the local Neighbourhood Areas, providing the context to assess the suitability for seeking to regulate the loss of family dwellings and the impact of conversions and the increase in the number of small units on the suburban character of the area.
- 6.5 A 'traffic light model' approach has been used to highlight the areas experiencing the greatest pressure. Each area is assessed according to a range of key indicators of pressure, such as townscape character, proportion of properties in multiple occupation (including student use), recent rate of conversions, and creation of small units from new residential developments.
- 6.6 These factors are given an individual score, which is then totalled to indicate the scale of pressure within each Neighbourhood Area. The assessment of these 'key indicators' is then presented in the form of a matrix for each area. The traffic light model then, uses the total score to provide broad a broad assessment of each respective area.
- 6.7 The 'red' light highlights those areas where the pressures are particularly intense, whilst those under the least pressure are highlighted as 'green'. Those within the 'amber' areas are experiencing considerable and growing pressure.
- 6.8 The assessment of the townscape / landscape character is based principally on detailed research on the local character of Oxford. This study was undertaken by Land Use Consultants who assessed the townscape and landscape characteristics that define particular areas of the City. Whilst the local areas did not always directly correspond to the Neighbourhood Areas it was possible to amalgamate them to give an overall assessment.
- 6.9 The recent rate of new build for small units, together with the rate of conversions were derived from the City Council's database for a five year period. The figures were separated for both new build and conversions to give a proportionate score for each.
- 6.10 The data for the level of Houses in Multiple Occupation (HMO)'s was obtained from the Environmental Health Section of the City Council. This was then split into the Neighbourhood Areas and a score given according to the proportion of the total in each area.
- 6.11 The assessment of parking pressure relies on information obtained from the County Council, as Highway Authority on the location and status of Residents Parking Zones within Oxford. This provides a broad indication of the pressure on parking that exists within local Neighbourhood Areas.

## **Wolvercote & Cutteslowe**

- 6.12 The Wolvercote & Cutteslowe Neighbourhood Area comprises the Wolvercote ward.
- 6.13 Wolvercote's historic village core includes two areas at Upper Wolvercote and Lower Wolvercote. The principal residential areas are Interwar/post-war suburbs, which include the majority of the North Oxford fringes and Cutteslowe.
- 6.14 In relation to age structure Wolvercote has more elderly, and fewer young adults than the City. This position is reflected in the household types, which show more 2+ elderly households, and very few students.
- 6.15 Housing tenure is broadly balanced, although social rented is rather low and there is little shared ownership. The housing stock shows a high proportion of flats/maisonettes but few bungalows. The mix of dwelling sizes reveals that Wolvercote has more of the larger, and many more very large dwellings, compared to the city profile.

**Table 6.3 Wolvercote: assessment of pressures**

| Key indicator                           | Assessment | Score |
|---|------------|-------|
| Townscape/landscape character           | High       | 5     |
| Recent rate of new build of small units | Very low   | 1     |
| Level of multiple occupation (HMOs)     | Low        | 2     |
| Parking pressures (RPZ)                 | Moderate   | 3     |
| Recent rate of conversions              | Very low   | 1     |
| Total score                             |            | 12    |

- 6.16 The assessment of the underlying pressures in Wolvercote showed a high townscape / landscape character, moderate parking pressures, low level of multiple occupation, and compared to other Neighbourhood areas relatively low levels of new build of small units and recent rate of conversions.
- 6.17 Therefore according to the 'traffic light model' approach, Wolvercote is shown to be experiencing considerable and growing pressure. It is therefore identified as being an 'amber' area.

## Summertown

- 6.18 The Summertown Neighbourhood area comprises the Summertown ward.
- 6.19 The urban character of Summertown is defined by two distinct residential areas - the inter-war/post war suburbs of Sunnymede, and part of the North Oxford fringes to the north. Whilst to the south is the Victorian suburb of Summertown.
- 6.20 The age structure is generally well balanced, although there are slightly fewer young adults. The overall distribution of household types is well balanced, the only exception being that there are relatively few students.
- 6.21 Housing tenure is relatively well balanced, except for quite a high proportion of properties in the private rented sector. House types are reasonably well balanced but there are very few bungalows. There are more larger dwellings, and slightly more of the very smallest units. Overall Summertown has more dwellings with 4+ bedrooms.

**Table 6.4 Summertown: assessment of pressures**

| Key indicator                           | Assessment | Score |
|---|------------|-------|
| Townscape/landscape character           | Moderate   | 3     |
| Recent rate of new build of small units | Low        | 2     |
| Level of multiple occupation (HMOs)     | Medium     | 3     |
| Parking pressures (RPZ)                 | High       | 5     |
| Recent rate of conversions              | Very low   | 1     |
| Total score                             |            | 14    |

- 6.22 The assessment of the underlying pressures in Summertown showed high parking pressures, moderate town/landscape character and levels of multiple occupation (HMO's), a low level of new build of small units, and comparatively low rates of conversions.
- 6.23 Therefore according to the 'traffic light model' approach, Summertown is shown to be experiencing considerable and growing pressure. It is therefore considered to be identified as being an 'amber' area

## St. Margarets

- 6.24 The St. Margarets Neighbourhood Area comprises both St. Margaret's and North wards.

- 6.25 This area is dominated by the North Oxford Victorian suburb. It also includes a part of the Summertown area to the north.
- 6.26 The age structure of this area is well balanced with just slightly more young adults than the city. The household type also shows a somewhat high proportion of students.
- 6.27 Housing tenure is comparatively balanced, although social rented homes and shared ownership are quite low. In relation to house type there are very few bungalows. There is a high proportion of the very large sized properties and fewer medium sized units. Conversely there is a relatively high proportion of the smallest sized units. This position is reflected in the number of bedrooms with a high proportion of properties with 5 bedrooms and above, but somewhat too few properties with 3 bedrooms – half the City proportion.

| <b>Table 6.5 St Margarets: assessment of pressures</b> |            |       |
|--|------------|-------|
| Key indicator  | Assessment | Score |
| Townscape/landscape character                          | High       | 5     |
| Recent rate of new build of small units                | High       | 5     |
| Level of multiple occupation (HMOs)                    | High       | 4     |
| Parking pressures (RPZ)                                | High       | 5     |
| Recent rate of conversions                             | High       | 5     |
| Total score  |            | 24    |

- 6.28 The assessment of the underlying pressures in St. Margaret’s area showed a particularly high scoring for the majority of the key indicators. The level of multiple occupation (HMO’s) being the only indicator to score slightly lower.
- 6.29 Therefore according to the ‘traffic light model’ approach, the St. Margaret’s area is shown to be within the category experiencing the greatest pressure. It is therefore considered to be identified as being a **red** area.

**City Centre**

- 6.30 The City centre Neighbourhood Area comprises the Carfax and Holywell wards.
- 6.31 The historic city core defines the townscape character of this area. The University fringe to the north and the Western fringe to the south comprise principally commercial uses.
- 6.32 The age structure of the City centre is very imbalanced with a high proportion of young adults and significantly low levels of people in all the other older age groups. This is reflected in the household types which shows high numbers of single person households, and very few families with children. Pensioners living as couples are also quite low.
- 6.33 Housing tenure is generally quite well balanced, although the social rented sector is slightly high. The mix of housing types for houses and flats/maisonettes is comparatively balanced. There are very few bungalows. In relation to dwelling size there are high proportions in all the smaller floorspace groups, and really very few medium sized units, although perhaps surprisingly the very largest units match the City profile. The number of bedrooms shows a high proportion of 1 bed units and, again, very few 3 bed properties.

| <b>Table 6.6 City Centre: assessment of pressures</b> |            |       |
|---|------------|-------|
| Key indicator   | Assessment | Score |
| Townscape/landscape character                         | High       | 5     |
| Recent rate of new build of small units               | Moderate   | 3     |
| Level of multiple occupation (HMOs)                   | Medium     | 3     |
| Parking pressures (RPZ)                               | High       | 5     |
| Recent rate of conversions                            | Very low   | 1     |
| Total score   |            | 17    |

- 6.34 The assessment of the underlying pressures in the City centre showed a high townscape / landscape character and considerable parking pressures, moderate rates of new build of small units and levels of multiple occupation, and comparatively low levels of conversions.
- 6.35 Therefore according to the 'traffic light model' approach, the City centre is shown to be experiencing considerable and growing pressure. It is therefore considered to be an 'amber' area.

## Jericho & Osney

- 6.36 The Jericho and Osney Neighbourhood Area comprises the Jericho and Osney ward.
- 6.37 This area includes the Victorian residential suburbs of Jericho and New Osney. Inter-war/post war suburban development flanks the Botley Road.
- 6.38 The age structure of Jericho and Osney is quite well balanced, although there are relatively few children. The household types show reasonable proportions of most groups, but families with children are slightly under-represented and there are few elderly 2 person households.
- 6.39 Housing tenure is in fact well balanced except for there being little shared ownership. The mix of dwelling types shows much fewer houses and many more flats than the City as a whole. There are almost no bungalows. The dwelling size is generally well balanced except that there are more units of the smallest size, either in floorspace or bedrooms terms.

**Table 6.7 Jericho & Osney: assessment of pressures**

| Key indicator                           | Assessment    | Score |
|---|---------------|-------|
| Townscape/landscape character           | Moderate/High | 4     |
| Recent rate of new build of small units | Low           | 2     |
| Level of multiple occupation (HMOs)     | Medium        | 3     |
| Parking pressures (RPZ)                 | High          | 5     |
| Recent rate of conversions              | Low           | 2     |
| Total score                             |               | 16    |

- 6.40 The assessment of the underlying pressures in Jericho and Osney showed relatively high levels of parking pressures reflecting its location near to the city centre, the townscape / landscape character is fairly high, whilst the levels of multiple occupation showed a moderate scoring. The recent rates of new build of small units and conversions was low, in comparison to other Neighbourhood Areas.
- 6.41 Therefore according to the 'traffic light model' approach, Jericho and Osney is shown to be experiencing considerable and growing pressure. It is therefore identified as being within an 'amber' area.

## Hinksey Park

- 6.42 The Hinksey Park Neighbourhood Area comprises the Hinksey Park ward.
- 6.43 The residential townscape character of this area comprises the Victorian suburb of Grandpont and an Inter-War / Post War suburb of New Hinksey. The majority of this residential development lies to the west of the Abingdon Road.
- 6.44 The age structure and household type profiles for Hinksey Park are very well balanced.
- 6.45 Housing tenure is generally well balanced, although with a low level of shared ownership. The house types are reasonably well balanced. The dwelling sizes show a higher proportion of dwellings in the very smallest group. In relation to the number of bedrooms, though, the dwelling stock is quite well balanced.

| <b>Table 6.8 Hinksey Park: assessment of pressures</b> |               |           |
|--|---------------|-----------|
| Key indicator  | Assessment    | Score     |
| Townscape/landscape character                          | Moderate/high | 4         |
| Recent rate of new build of small units                | Moderate      | 3         |
| Level of multiple occupation (HMOs)                    | High          | 4         |
| Parking pressures (RPZ)                                | High          | 5         |
| Recent rate of conversions                             | Low           | 2         |
| <b>Total score</b>                                     |               | <b>18</b> |

- 6.46 The assessment of the underlying pressures in Hinksey Park showed parking pressures to be high, with a relatively high scoring for townscape / landscape character and the levels of multiple occupation. The recent rates of new build of small units scored in the moderate range whilst the recent rate of conversions was comparatively low levels.
- 6.47 Therefore according to the 'traffic light model' approach, Hinksey Park is shown to be experiencing considerable and growing pressure. It is therefore identified as being an **amber** area.

## Marston

- 6.48 The Marston Neighbourhood Area comprises the Marston ward.
- 6.49 To the north east of the area is the historic village core of Old Marston. The principal residential area is an Inter-War / Post War suburb of New Marston, which includes the village of New Marston to the south.
- 6.50 The age structure shows that Marston has slightly fewer young adults, and rather more elderly people, but overall is comparatively balanced. In relation to household types there are fewer single people but a higher proportion of elderly couples.
- 6.51 The housing tenure shows comparatively high owner occupation and correspondingly, slightly low levels of other tenures. In relation to house types there are relatively few flats, and slightly more bungalows. In dwelling size terms there are generally fewer smaller dwellings, whether measured in floor area or bedroom numbers. There is a high proportion of the largest 5+ bed properties.

| <b>Table 6.9 Marston: assessment of pressures</b> |               |           |
|---|---------------|-----------|
| Key indicator                                     | Assessment    | Score     |
| Townscape/landscape character                     | Moderate/high | 4         |
| Recent rate of new build of small units           | Very low      | 1         |
| Level of multiple occupation (HMOs)               | Medium        | 3         |
| Parking pressures (RPZ)                           | Medium        | 4         |
| Recent rate of conversions                        | Low           | 2         |
| <b>Total score</b>                                |               | <b>14</b> |

- 6.52 The assessment of the underlying pressures in Marston showed a relatively high scoring for the townscape/landscape character and level of parking pressure. The level of multiple occupation was considered to be moderate whilst the rates of new build of small units and conversions was comparatively low.
- 6.53 Therefore according to the 'traffic light model' approach, Marston is shown to be experiencing considerable and growing pressure. It is therefore considered to be identified as being an **amber** area.

## Headington

- 6.54 The Headington Neighbourhood Area comprises three wards, Churchill, Headington Hill and Northway.
- 6.55 Old Headington, to the north of the London Road, forms the historic village core, whilst to the west is the garden suburb of Headington Hill. To the south is the Victorian suburb of New Headington. The other residential areas comprise the interwar/post-war developments of Marston and New Headington.
- 6.56 The age structure of Headington is well balanced. The household types show relatively few elderly couples, and a high proportion of students.
- 6.57 The tenure of housing is very well balanced, with only shared ownership being comparatively low. The profiles of house type, dwelling size and number of bedrooms are generally well balanced.

**Table 6.10 Headington: assessment of pressures**

| Key indicator                           | Assessment    | Score |
|---|---------------|-------|
| Townscape/landscape character           | Moderate/high | 4     |
| Recent rate of new build of small units | Low           | 2     |
| Level of multiple occupation (HMOs)     | High          | 4     |
| Parking pressures (RPZ)                 | High          | 5     |
| Recent rate of conversions              | Moderate      | 3     |
| Total score                             |               | 18    |

- 6.58 The assessment of the underlying pressures in Headington showed high levels of parking pressures, together with high quality townscape/landscape character and relatively high levels of multiple occupation. The recent rates of conversions appeared to be at a moderate level but comparatively low levels of new build of small units.
- 6.59 Therefore according to the 'traffic light model' approach, Headington is shown to be experiencing considerable and growing pressure. It is therefore identified as being an 'amber' area.

## Barton & Sandhills

- 6.60 The Barton & Sandhills Neighbourhood Area comprises the Barton and Sandhills ward.
- 6.61 This area comprises the Interwar/post-war residential suburbs of Barton to the north, Sandhills to the east and part of New Headington to the west
- 6.62 The age structure of Barton is quite well balanced. Elderly households are slightly under represented and the proportion of students is extremely low. There is a higher proportion of families with children.
- 6.63 Housing tenure shows a high proportion of owner occupation, and very little shared ownership. Whilst the mix of housing types is well balanced there are considerable numbers of bungalows. The dwelling size profile shows a significant shortage of the very smallest and the very largest units but is otherwise well balanced. In relation to the number of bedrooms the principal imbalance is the relative lack of the largest (4 & more particularly 5 bed+) properties.

| <b>Table 6.11 Barton &amp; Sandhills: assessment of pressures</b> |               |           |
|---|---------------|-----------|
| Key indicator   | Assessment    | Score     |
| Town/landscape character  | Moderate      | 3         |
| Recent rate of new build of small units                           | Moderate/high | 4         |
| Level of multiple occupation (HMOs)                               | Very low      | 1         |
| Parking pressures (RPZ)   | High          | 5         |
| Recent rate of conversions  | Low           | 2         |
| <b>Total score</b>  |               | <b>15</b> |

- 6.64 The assessment of the underlying pressures in Barton & Sandhills showed a high level of parking pressure and fairly high rates of new build of small units. The townscape / landscape character was considered to be moderate. The recent rate of conversions was comparatively low and generally low levels of multiple occupation.
- 6.65 Therefore according to the ‘traffic light model’ approach, Barton & Sandhills is shown to be experiencing considerable and growing pressure. It is therefore considered to be identified as being an ‘amber’ area.

### Risinghurst

- 6.66 The Rissinghurst Neighbourhood Area comprises the Quarry & Rissinghurst ward.
- 6.67 These residential areas lie to west and east of the eastern by pass. To the west is the historic village core of Headington Quarry, with part of the Post War / Inter War suburb of New Headington. Whilst to the east is the Inter-War / Post War suburb of Risinghurst.
- 6.68 The age structure of the Risinghurst and Quarry area is reasonably well balanced, although there are comparatively few young adults. This position is also reflected in the household type which shows a low proportion of single people, and also relatively few students.
- 6.69 Housing tenure shows a very large proportion of shared ownership and a high level of social rented. The private rented sector is somewhat under represented. There is quite a well balanced mix of house types, although the proportion of bungalows is high. There are fewer dwellings in the smallest and largest floorspace groups, but otherwise a good balance. In relation to the number of bedrooms, the stock is reasonably well balanced with a good range of family housing. In bedroom size terms there are very few of the larger 5+ bed properties.

| <b>Table 6.12 Risinghurst: assessment of pressures</b> |               |           |
|--|---------------|-----------|
| Key indicator  | Assessment    | Score     |
| Townscape/landscape character                          | Moderate/high | 4         |
| Recent rate of new build of small units                | Low           | 2         |
| Level of multiple occupation (HMOs)                    | Low           | 2         |
| Parking pressures (RPZ)                                | High          | 5         |
| Recent rate of conversions                             | Moderate      | 3         |
| <b>Total score</b>                                     |               | <b>16</b> |

- 6.70 The assessment of the underlying pressures in Risinghurst showed a high level of parking pressure, moderate townscape/landscape character and recent rate of conversions. Whilst the recent rate of new build of small units and multiple occupation was considered to be comparatively low.
- 6.71 Therefore according to the ‘traffic light model’ approach, Risinghurst is shown to be experiencing considerable and growing pressure. It is therefore identified as being an ‘amber’ area.

## East Oxford

- 6.72 The East Oxford Neighbourhood Area comprises four wards, Iffley Fields, St. Mary's, St. Clements, and Cowley Marsh.
- 6.73 The historic village core of Temple Cowley lies to the east. The two principal residential areas include the Victorian suburb of East Oxford and the interwar/post-war suburbs of Cowley Marsh and part of Florence Park.
- 6.74 The age structure of East Oxford shows relatively few elderly but more young adults. The household type highlights the lack of elderly couples, whilst the proportion of students shows they are considerably over represented in the neighbourhood.
- 6.75 The tenure of housing is generally well balanced but with shared ownership low. The house type profile shows a reasonable proportion of houses and flats, but comparatively few bungalows. The profiles of dwelling floorspace and the number of bedrooms suggest a well balanced stock, except that the largest floorspace group appears to be rather under represented.

**Table 6.13 East Oxford: assessment of pressures**

| Key indicator                           | Assessment | Score |
|---|------------|-------|
| Townscape/landscape character           | High       | 5     |
| Recent rate of new build of small units | Low        | 2     |
| Level of multiple occupation (HMOs)     | Very high  | 5     |
| Parking pressures (RPZ)                 | High       | 5     |
| Recent rate of conversions              | High       | 5     |
| Total score                             |            | 22    |

- 6.76 The assessment of the underlying pressures in East Oxford showed a high level of a high level of multiple occupation and rate of conversions, a high quality of townscape and landscape character, and considerable parking pressures. The recent rate of new build of small units was however comparatively low.
- 6.77 Therefore according to the 'traffic light model' approach, East Oxford is shown to be within the category experiencing the greatest pressure. It is therefore considered to be a 'red' area.

## Lye Valley

- 6.78 The Lye Valley Neighbourhood Area comprises the Lye Valley ward.
- 6.79 The principal residential areas lie to the west of the Eastern Bypass. These include the interwar/post-war suburbs of the Slade to the north and Cowley residential suburb to the south. The Horspath Road area, in the centre, is predominantly post 1960 suburban development.
- 6.80 The age structure and type of households in Lye Valley are very well balanced, even though there are relatively few single people.
- 6.81 The tenure of housing is reasonably well balanced, although the proportion of private rented accommodation is particularly low. There is also a relative shortage of shared ownership. The mix of house types shows a good balance, with the level of bungalows just a little low. The dwelling size and number of bedrooms shows a good range of properties, with the only largest units being slightly under represented.

| Table 6.14 Lye Valley assessment of pressures |              |       |
|---|--------------|-------|
| Key indicator                                 | Assessment   | Score |
| Townscape/landscape character                 | Moderate/low | 2     |
| Recent rate of new build of small units       | Moderate     | 3     |
| Level of multiple occupation (HMOs)           | Medium       | 3     |
| Parking pressures (RPZ)                       | Low          | 2     |
| Recent rate of conversions                    | Moderate     | 3     |
| Total score                                   |              | 13    |

6.82 The assessment of the underlying pressures in Lye Valley showed a moderate rate of new build of small units, conversions and multiple occupation. The townscape /landscape character of the area and parking pressures were considered to comparatively low.

6.83 Therefore according to the ‘traffic light model’ approach, Lye Valley is shown to be experiencing considerable and growing pressure. It is therefore identified as being an ‘amber’ area.

### Rose Hill

6.84 The Rosehill Neighbourhood Area comprises two wards Rosehill and Cowley.

6.85 There are two historic cores within this area - Iffley village to the south west, and Church Cowley to the east. The remaining residential areas comprise interwar/post-war development, and include Rosehill, Florence Park and part of Cowley residential suburb

6.86 The age structure of Rosehill shows fewer young adults. This is reflected in the household types which has few students and single people. The proportion of elderly people does appear slightly high.

6.87 Housing tenure is reasonably well balanced. The mix of house types is also quite well balanced. In relation to dwelling size family housing is well represented, but there are relatively few of the smallest and largest size units. This position is reflected in the assessment of stock by number of bedrooms, which shows a significant lack of the largest 5+ bed units.

| Table 6.15 Rose Hill: assessment of pressures |               |       |
|---|---------------|-------|
| Key indicator                                 | Assessment    | Score |
| Townscape/landscape character                 | Moderate/high | 4     |
| Recent rate of new build of small units       | Very low      | 1     |
| Level of multiple occupation (HMOs)           | Medium        | 3     |
| Parking pressures (RPZ)                       | Very low      | 1     |
| Recent rate of conversions                    | Medium/high   | 4     |
| Total score                                   |               | 13    |

6.88 The assessment of underlying pressures in Rosehill showed a relatively high rate of conversions and high quality of townscape/landscape character. Whilst the level of multiple occupation is in the medium category the recent rate of new build of small units and parking pressures were comparatively low.

6.89 Therefore according to the ‘traffic light model’ approach, Rosehill is shown to be experiencing considerable and growing pressure. It is therefore identified as being an ‘amber’ area.

### Littlemore

6.90 The Littlemore Neighbourhood Area comprises Littlemore ward.

6.91 Littlemore village forms the historic village core. This is flanked by the interwar/post war suburbs of Littlemore, with part of the Cowley residential suburb to the north.

- 6.92 The age structure of Littlemore shows a low proportion of young adults. This position is reflected in the household types which shows almost no students. The proportion of elderly couples appears slightly high but overall the area is reasonably well balanced.
- 6.93 The housing tenure shows there to be little shared ownership but with quite a high proportion of private rented accommodation. The overall mix of housing types is reasonably well balanced. The stock of dwellings by size shows there are slightly fewer units in the smallest and largest groups, whether measured in floorspace or bedrooms terms. Family units appear well represented and there are few 5+ bed properties, but otherwise there is a reasonable mix.

**Table 6.16 Littlemore: assessment of pressures**

| Key indicator                           | Assessment    | Score |
|---|---------------|-------|
| Townscape/landscape character           | Moderate/high | 4     |
| Recent rate of new build of small units | Very Low      | 1     |
| Level of multiple occupation (HMOs)     | Very Low      | 1     |
| Parking pressures (RPZ)                 | Low           | 2     |
| Recent rate of conversions              | Low           | 2     |
| Total score                             |               | 10    |

- 6.94 The assessment of the underlying pressures in Littlemore showed a moderate rate of new build of small units, conversions and levels of multiple occupation. The townscape /landscape character and parking pressures were considered to be comparatively low.
- 6.95 Therefore according to the 'traffic light model' approach, Littlemore is shown to be experiencing considerable and growing pressure. It is therefore identified as being an 'amber' area.

## Blackbird Leys

- 6.96 The Blackbird Leys Neighbourhood Area comprises two wards, Blackbird Leys and Northfield Brook.
- 6.97 The townscape character of Blackbird Leys is defined by the residential suburbs of the post 1960s.
- 6.98 The age structure of Blackbird Leys has more children and fewer young adults than in Oxford as a whole. The household type groups show more families with children, and few students, but otherwise the area is reasonably well balanced.
- 6.99 The tenure of housing is very well balanced, the only exception being the relative lack of shared ownership. The mix of housing types includes a reasonable balance between houses and flats. The dwelling size shows slightly less units in the smallest and largest groups but otherwise the profile is comparatively balanced. Considered in terms of the number of bedrooms, only 4 bedrooms plus are under represented.

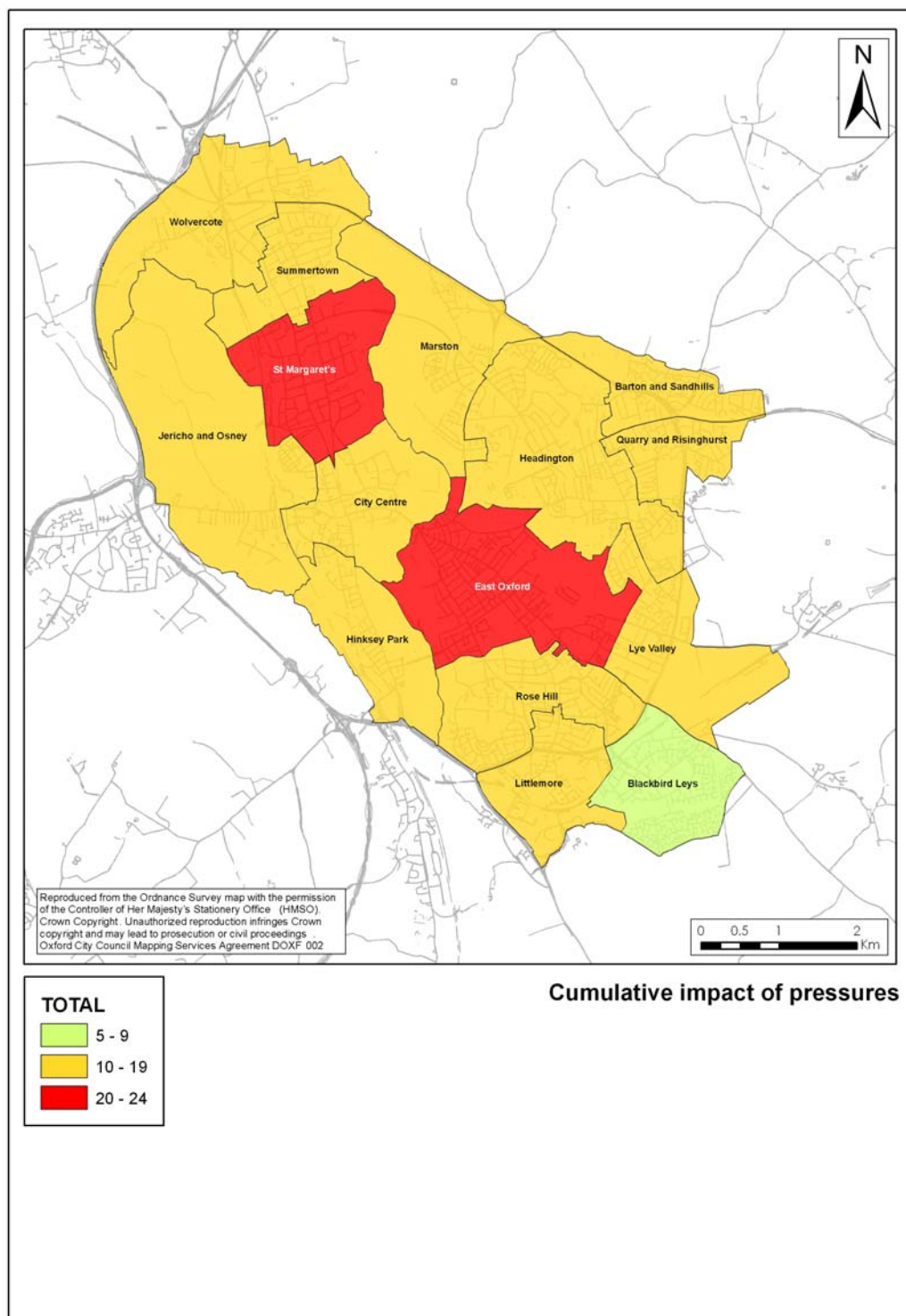
**Table 6.17 Blackbird Leys: assessment of pressures**

| Key indicator                           | Assessment | Score |
|---|------------|-------|
| Townscape/landscape character           | Moderate   | 3     |
| Recent rate of new build of small units | Very Low   | 1     |
| Level of multiple occupation (HMOs)     | Very Low   | 1     |
| Parking pressures (RPZ)                 | Low        | 2     |
| Recent rate of conversions              | Very Low   | 1     |
| Total score                             |            | 8     |

- 6.100 The assessment of the underlying pressures in Blackbird Leys showed a relatively moderate townscape /landscape character and low parking pressure. In comparison with other Neighbourhood areas the recent rates of new build of small units, conversions and levels of multiple occupation was very low.

- 6.101 Therefore according to the 'traffic light model' approach, Blackbird Leys is shown to be experiencing the least pressure. It is therefore identified as being a 'green' area.
- 6.102 Figure 6.1 The 'traffic light model approach' shows the cumulative impact of these underlying pressures on Oxford's Neighbourhood Areas.

**Figure 6.1 'Traffic light model' approach showing the cumulative impact of the underlying pressures**



## Summary

- 6.103 Looking first at the locality profile, many of the neighbourhoods are really quite well balanced in terms of demography. All contain a mixture of household groups. Inevitably the balance varies to some extent, with some areas containing more young persons, and/or single persons, and some more older persons and households. The main exception is City Centre, which is much more unbalanced than any other locality. The distribution of students is very uneven; East Oxford contains almost three times the City wide proportion of students, whilst Blackbird Leys has only 12% of its share, and Littlemore and Barton/Sandhills have even less.
- 6.104 In respect of tenure, many or most areas contain a reasonable balance between owner occupied and social rented housing. The City Centre contains more social rented stock than anywhere else, but this is still only just over 50% more than its share, so it is still comparatively well balanced in terms of tenure. There is more variation in the private rented stock, with Summertown and Littlemore containing about twice their share. At 2001 the City's shared ownership stock was quite small. About half was concentrated in Risinghurst, and consequently all other localities except the City Centre provide rather less than the City proportion – in some cases, very much less. Shared ownership provision since then will help to even out the neighbourhood profiles to some degree.
- 6.105 In considering the policy implications, of course, we must recognise that the picture will have changed in various other respects since 2001 - both through new provision and conversion, and through movements between tenures – Right to Buy sales, and movements between owner occupation and the private rented sector.
- 6.106 We now turn to the assessment of pressures. A number of neighbourhoods face pressures in terms of parking, which any intensification of small units through new build and conversions will exacerbate. A number of areas also face pressures from HMOs. Although East Oxford shows this most clearly, with a much higher proportion of registered HMOs than anywhere else, such pressures in some areas are quite low. However most Neighbourhood Areas are clearly experiencing considerable pressures from one or more aspects, or moderate pressures from almost all of the key indicators assessed.
- 6.107 The neighbourhood assessments set out in this Section have allowed us, following the traffic light model approach, to classify the 15 Neighbourhoods Areas into 'red' 'amber' and 'green' groups. The great majority of Neighbourhoods fall into the 'amber' category – that is, they face considerable and growing pressures as a consequence of the numbers of small units produced through new build and/or conversions.



# 7 Trends in Housing Supply

## Introduction

7.1 In order to understand adequately the housing pressures in Oxford, it is helpful to look at trends in housing supply as revealed by planning applications for residential development. The City Council assembled a data base which could be examined in terms of permissions and completions, for the past five years 2001-06.

7.2 The total numbers of dwellings covered in this database are as shown in Table 5.1 below.

7.3 The database relating to permissions covers a significantly larger number of dwellings than completions – 4,522 (approx 900 pa) against 2,287 (approx 460 pa) – though these figures do not allow for dwellings lost through conversions or demolitions.

**Table 7.1 Planning applications database: overall trends 2001-06**

| Total gross dwellings in schemes | Market dwellings | Total dwellings | % market |
|----------------------------------|------------------|-----------------|----------|
| Completions:                     | 2,019            | 2,287           | 88.3%    |
| Permissions                      | 3,591            | 4,522           | 79.4%    |

Source: Oxford City Council database of permissions & completions

7.4 This suggests a rising trend; however, it is possible that some permissions might not be implemented. The proportion of market dwellings is lower for permissions, suggesting the progressive engagement of affordable housing targets upon the provision profile. However permissions implemented in 2001 could have gained planning permission as early as 1996.

7.5 After due consideration, we have focussed attention in what follows on the permissions database. Whilst a small proportion of permissions might never proceed, coverage in terms of the number of dwellings is significantly greater, and it clearly represents a more up to date account of trends in housing provision. In fact the two databases have broadly similar profiles.

## Database: scheme size

7.6 The database related to schemes receiving planning permission over the five year period 2001-06. It showed:

- the scheme size (total dwellings)
- brief description
- location
- the numbers of market units produced, by no of bedrooms, and
- the numbers lost (through demolition or conversion).

7.7 Whilst the schedule allowed for a gross total of 3,591 market units, some 440 market units were lost through demolition or conversion, giving a net addition of 3,151 market dwellings. In the further subsequent analysis of the database a small number of adjustments were made to the detailed figures.

7.8 To give a clearer picture of development patterns, and potentially to key into policy, the schemes were subdivided by total gross dwelling numbers, into four groups:

- 1-3 dwellings
- 4-9 dwellings
- 10-24 dwellings
- 25 plus dwellings.

7.9 We also looked at whether or not the scheme involved a loss of market dwellings, through demolition or conversion. In one or two cases there was some ambiguity, and in a few others the database was adjusted slightly.

| <b>Table 7.2 Overall impact on market housing nos</b> |   |   |             |            |  |
|---|---|---|-------------|------------|--|
| No of total dwgs gross in scheme                      | No of market dwellings resulting from schemes with:   |   |             |            |  |
|   | No loss of dwellings gross=net additional market dwgs | Units lost through demolition or conversion |             |            | All schemes net additional market dwgs |
|   |   | market gain                                 | market loss | market net |  |
| 1-3   | 462   | 556   | 272         | 284        | 746                                    |
| 4-9   | 306   | 413   | 93          | 320        | 626                                    |
| 10-24   | 324   | 247   | 33          | 214        | 538                                    |
| 25 plus   | 1,032   | 139   | 3           | 136        | 1,168                                  |

Source: Oxford City Council database of permissions

7.10 It is clear that all of the scheme size categories produce additional market housing in significant numbers. The largest size group produces the largest number in all. However, in this group fewer dwellings are lost through demolition or conversion, and there is really little point in distinguishing by dwelling loss, for this size category.

7.11 The 746 market dwellings added in the smallest size category involve a total of 603 separate developments. In contrast, the 1,168 dwellings in the largest size group result from only 22 schemes.

## Impact on dwelling size

7.12 The impact upon the dwelling size of market dwellings is demonstrated in Table 7.3.

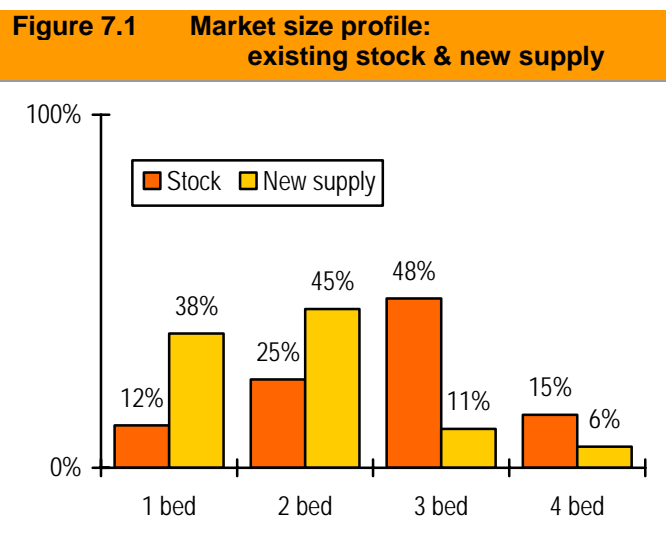
| <b>Table 7.3 Impact on size of market dwellings</b> |                            |       |       |       |       |
|---|----------------------------|-------|-------|-------|-------|
|   | Impact on market dwellings |       |       |       |       |
|   | 1 bed                      | 2 bed | 3 bed | 4 bed | Total |
| Gains   | 1,241                      | 1,470 | 554   | 326   | 3,591 |
| Losses  | -45                        | -47   | -207  | -131  | 430   |
| Net gain –no  | 1,196                      | 1,423 | 347   | 195   | 3,161 |
| Net gain - %  | 38%                        | 45%   | 11%   | 6%    | 100%  |

Source: Oxford City Council database of permissions

7.13 The table shows that whilst smaller (1 & 2 bed) dwellings represent a clear majority (75%) of all the gains in market dwellings, the majority of units lost (79%) are larger (3 & 4 bed) units, so that net of the losses, as many as 83% of the additional units produced are 1 & 2 bed dwellings. The 2 bed unit is the most common size of dwelling being produced, although 1 bed units are not far behind.

7.14 The profile of new build market dwellings can be compared with the figures for the private sector stock as a whole. It is clear from Fig 7.1 that the size profile of new completions is quite different from that for the existing stock.

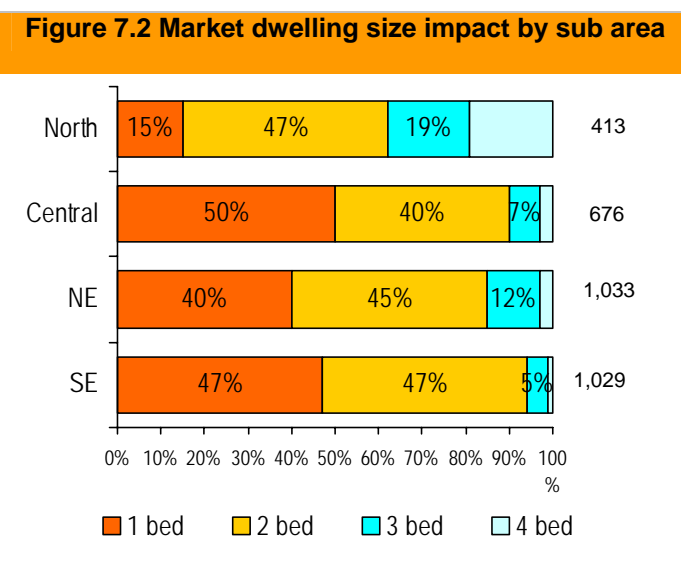
7.15 Many more of the new supply are smaller dwellings, with 1 bed units most 'over represented'. Three bedroom units are the most 'under represented'.



Sources: Oxford City Council database of permissions  
VOA data 2006

### Dwelling size by sub area

7.16 Figure 7.2, showing dwelling size impact by sub area, indicates that small units of 1 & 2 beds represent a significant majority of the total in every sub area. A higher proportion of small units is to be expected to some extent in the Central area. There is less emphasis on small units in North Oxford, with 38% of dwellings having 3+ bedrooms. However the SE emerges as the sub area where the least family sized market dwellings (6%) are being produced.

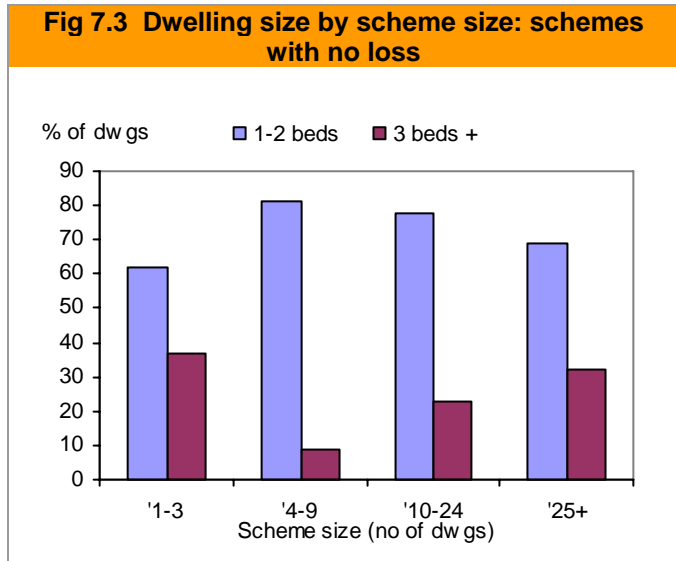


Source: Oxford City Council database of permissions

### Impact on dwelling size

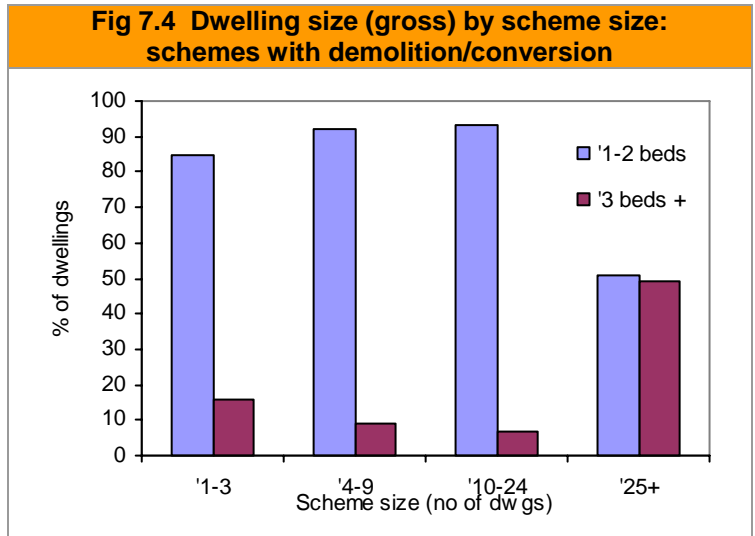
7.17 A key factor in determining the dwelling size impact is the scheme size. This is explored in Figure 7.3, which shows the balance of smaller and larger dwellings on schemes which do not involve a loss of market dwellings.

7.18 This figure suggests that on such sites impact is related to scheme size. In fact in this category the smallest and largest sized schemes are producing significant proportions of family sized units, though smaller units still comprise between 60-70% of the total. It is in fact the second smallest sized sites which produce least family sized units, and it may be that this size of site offers most opportunities to produce apartments.



Source: Oxford City Council database of permissions

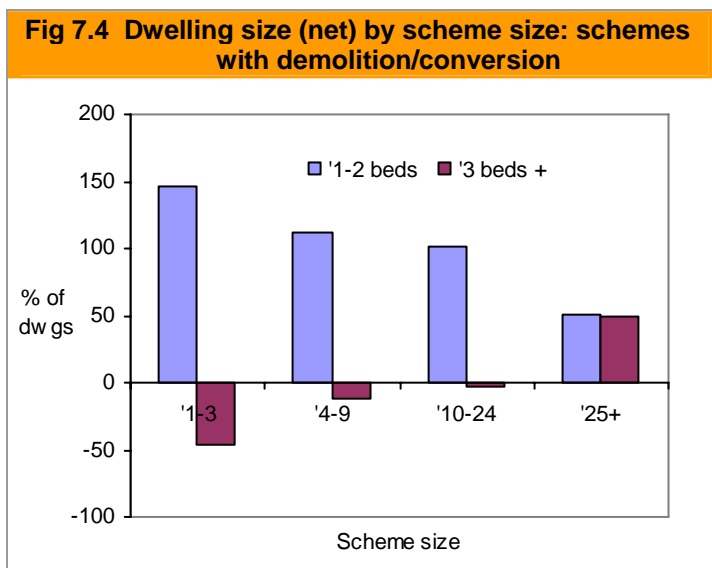
7.19 For schemes which involved demolitions or conversions of market dwellings, Figure 7.4 shows the size impact. These schemes show a similar pattern; in both cases it is the smallest, and largest, schemes which produce the largest proportions of the larger dwellings. Even so, if we compare the two graphs, it is clear that, except for the largest size group, schemes involving a loss of market dwellings generate significantly fewer large dwellings.



Source: Oxford City Council database of permissions

7.20 Since Figures 7.3 and 7.4 measure the gross impact only, this must reflect a difference in the nature of the schemes, reflecting perhaps the site characteristics, or the economics of development.

7.21 If for the schemes involving demolition or conversion, we look at the net impact, i.e. by deducting the profile of market dwellings lost, Figure 7.4 shows that the difference is even more clear-cut. Overall, for all schemes up to 25 dwellings in size which involve a loss of market units through conversion or demolition, development involves a net absolute loss of family dwellings. This finding remains true in all four sub areas except North Oxford and, only nominally for the 10-24 size group, in the NE sub area.



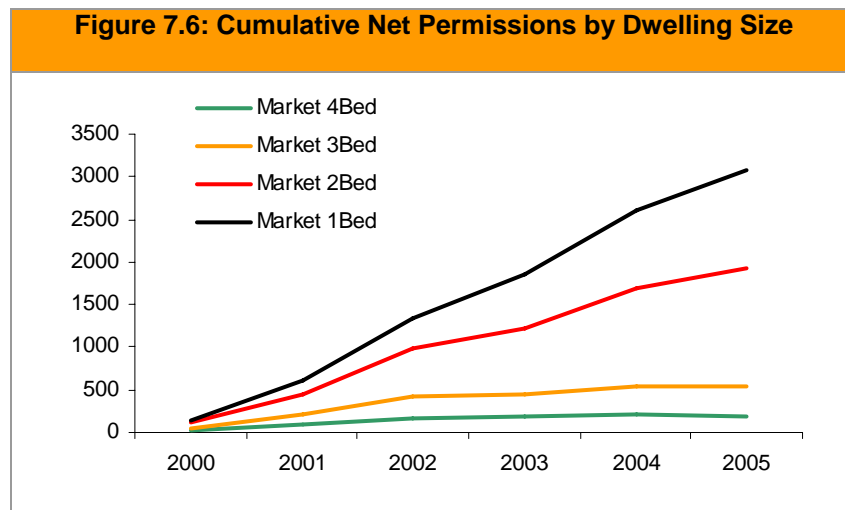
Source: Oxford City Council database of permissions

## Completion and Permission Trends

7.22 Looking at trends over time within the period, a clear pattern emerges regarding dwelling sizes. In terms of completions, 3 and 4 bedroom numbers have tapered off since 2001, while 1 and 2 bedroom completions have risen.

7.23 In 2004 and 2005 there was actually a net loss in completions for 3 and 4 bedroom units, i.e. more units were lost than were actually completed.

7.24 Permissions (Figure 7.5) also show the supply of 3 and 4 bedroom dwellings tapering off. Numbers of 3 bedroom units do not actually decline, as with completions; even so, this pattern will have implications for the supply of family units.



Source: Oxford City Council database of permissions

## Conversions by locality

7.25 The database also provided a picture of the level of conversion activity for the Neighbourhood Areas. The number of recent conversions for each Neighbourhood Area was assessed as a proportion of the total undertaken in Oxford as a whole. This showed that East Oxford and St. Margaret's had the highest level, whilst by comparison Blackbird Leys, City centre, Summertown and Wolvercote had the lowest levels of conversions.

## Summary

- 7.26 We looked at a database of some 952 development proposals which received planning permission in the period 2001-06. These dwellings would produce a total of 4,452 dwellings. Of these 3,591 would be market units, although after allowing for units lost through demolition or conversion, this number falls to 3,151.
- 7.27 The schemes were classified by size, and by whether they involved a loss of market dwellings. Of the schemes, which could be classified in this way, about three quarters involved the construction of between one and three dwellings; just under half involved a loss of market dwellings.
- 7.28 In terms of these developments' impact on dwelling size, 75% of the market units they generated were of 1 & 2 bedrooms, and if the dwelling losses are taken into account, this figure rises to 83%. By sub area, only North Oxford shows a more balanced profile, with 38% 3-4 bedroom dwellings, and SE Oxford emerges as the area where the highest proportion of smaller units (94%) is being produced.
- 7.29 If we look at the scheme size categories, the schemes of 25+ dwellings produce a much more balanced profile than those under 25. The smaller schemes produce fewer family units, and those schemes which involve a loss of market dwellings produce fewer still. In fact, if dwelling losses are taken into account, the smaller schemes with losses through conversion/demolition actually lead overall to a net loss of family units. This is true in each of the sub areas except North Oxford.
- 7.30 These findings have implications for plan policy. If the analysis in this report suggests targets are required to influence the balance of market dwellings' sizes, then it would seem sensible to consider separate policy levers or targets for schemes of less than 25 dwellings, and possibly to distinguish those smaller schemes which involve a loss of units, from those which do not.
- 7.31 Looking at trends over time, more and more permissions are being granted for the smaller unit types, and Oxford has actually seen zero net completions of 3 and 4 bed units in recent years.
- 7.32 The overall impact on size mix of market dwellings is summarised in the Table 7.5 below.

**Table 7.5 Overall impact on size profile of market dwellings**

|                              | Change in dwellings by size |       |       |       | Total |
|------------------------------|-----------------------------|-------|-------|-------|-------|
|                              | 1 bed                       | 2 bed | 3 bed | 4 bed |       |
| Increase in market dwellings | 1,241                       | 1,470 | 554   | 326   | 3,591 |
| Loss of market dwellings     | 45                          | 47    | 217   | 131   | 440   |
| Net change                   | 1,196                       | 1,423 | 337   | 195   | 3,151 |

Source: Oxford City Council database of permissions

- 7.33 It is clearly a matter of considerable concern if the pattern of completions in recent years continues. The stock of family sized market dwellings appears to be effectively static.
- 7.34 In order to decide whether this poses a problem for Oxford, we will have to consider what the requirements of the future population will be. This can be done by looking first at demographic trends in population and households, and then going on to suggest how the housing stock will need to change to meet their requirements. To do this we will draw further on the requirements identified in the Housing Requirements Study for households of different types.



## 8 Demographic trends

### Introduction

- 8.1 This section will look at expected changes to the population currently occupying Oxford's housing stock, which will impact upon its future housing requirements.
- 8.2 We will principally consider the demographic changes which are likely to impact upon the future housing market. However we also need to consider whether the numbers of students accommodated within Oxford's housing stock, as opposed to purpose built student accommodation, will change in the future as the two local universities grow and develop.

### Demographic trends

- 8.3 We first briefly consider the likely change in household numbers (and population structure) to make suggestions about the housing market in the longer-term.
- 8.4 A number of projections exist to estimate the future population size/structure and the number of households in Oxford. We concentrate on population projection data presented by the Office of National Statistics (ONS) and household projections produced by the Department of Communities and Local Government (CLG). In addition we have considered data published by Oxfordshire County Council, which provides information on population and household growth to 2011, down to ward level.

### Population projection data (ONS)

- 8.5 The most up to date nationally produced projections available are those provided by the Office of National Statistics (ONS). Projections are taken from a 2004 base (the mid 2004 population estimates) and projected through to 2028. They are available by detailed age group and sex. The method used by ONS are trend based; the projections show what the population will be if recent trends continue. Assumptions for future levels of births, deaths and, crucially, migration, are based on observed levels over the previous five years (2000 to 2004).
- 8.6 The projections are produced on a consistent basis across all local authorities in England. They do not take into account any future policy changes, or development policies that had not fully impacted on demographic patterns by 2004.

- 8.7 Table 8.1 shows population estimates for five year periods up to 2026 (from 2006). Incremental changes are also shown for each five year period. The table indicates a substantial increase in population over the period. Overall the population is projected to rise to 176,100 by 2026 - an increase of 17.3% over 20 years

**Table 8.1 Population change in Oxford City 2006-2026**

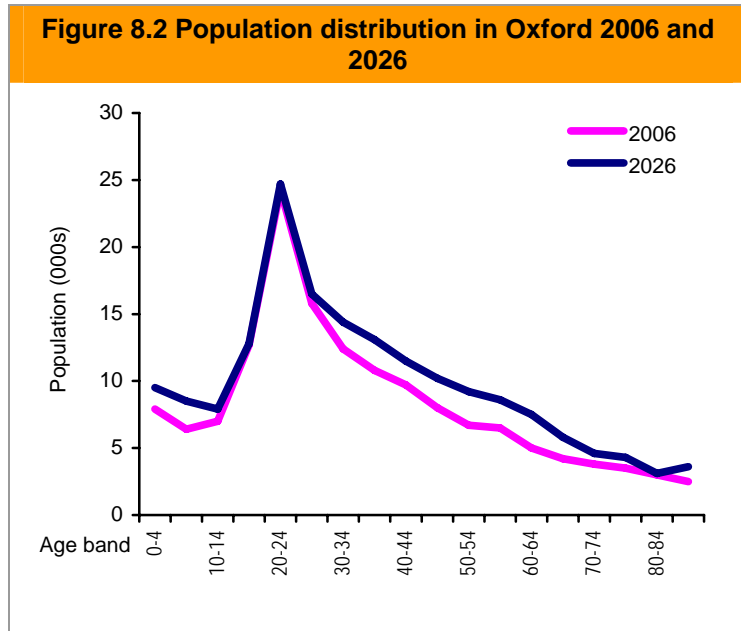
| Date  | Population | Change | % change |
|-------|------------|--------|----------|
| 2006  | 150,100    | -      | -        |
| 2011  | 159,000    | 8,900  | 5.9%     |
| 2016  | 165,400    | 6,400  | 4.0%     |
| 2021  | 170,600    | 5,200  | 3.1%     |
| 2026  | 176,100    | 5,500  | 3.2%     |
| TOTAL | -          | 26,000 | 17.3%    |

Source: Office of National Statistics – 2006

- 8.8 It is also worth looking at projected changes in age structure. Figure 8.2 below shows the above figures broken down into five year age bands.

8.9 Whilst the 0-14 age group shows an increase to 2026 of 21.6%, 15-29s increase by very much less (2.3%). This group is of interest as many new households will come from this segment of the population.

8.10 The 30-44s increase to 2026 by 18.5%, whilst the numbers aged 45-59 rise by 32.1%. Those aged 60-84 grow by 30%, with the oldest retirement group (aged 85 and over) increasing by some 44%.



Source: Office of National Statistics – 2006

8.11 These marked differences for the different age groups suggest a significant change in population structure over the next 20 years; there is a clear shift in emphasis towards the older age groups.

### Household projections (CLG)

8.12 In addition to the projections of population, it is important to look at the projected changes in households in Oxford over the next few years. The most up to date household projection data has been published by CLG and covers the period from a 2003 base to 2026.

8.13 The projections are based on updated projections of household formation, taking account of the 2001 Census and on the Office for National Statistics' sub national population projections and the Government Actuary's Department's national population projections (2004 based). The household projections are trend based, which means that they indicate what would happen if past demographic changes were to continue.

8.14 The table below shows the projected increase in households for Oxford, Oxfordshire, the South East and England from 2006 to 2026. The data shows that the number of households in Oxford is projected to increase by around 17,000 over the next 20 years (26.3%). This growth rate is rather above that for both Oxfordshire as a whole and the South East, and indeed the rate expected across the whole of England, all three of these being quite similar.

- 8.15 In annual terms the household growth shown by these projections is equivalent to 840 dwellings per annum, though the rate declines somewhat through the period. This figure is of course significantly in excess of the annual requirement of 433 dwellings pa prescribed for the period 2001-16 in the Oxford Local Plan.

**Table 8.2 Change in household numbers 2006-2026**  
(figures in 000s)

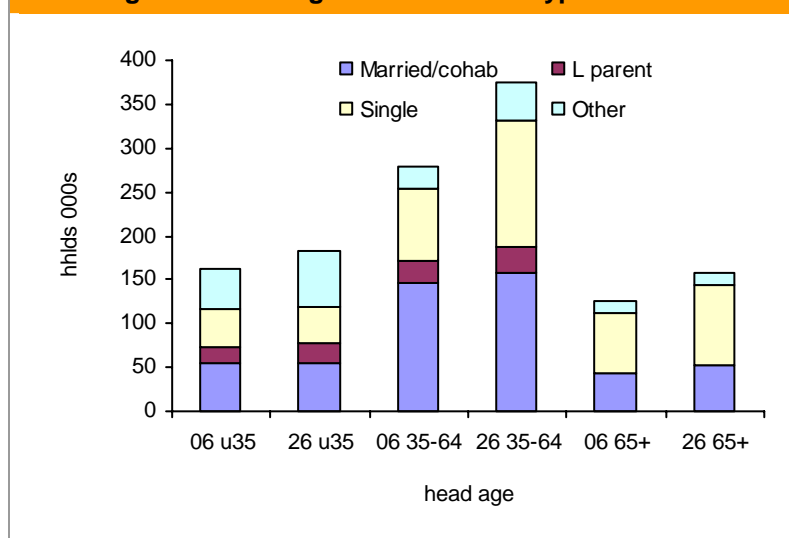
|                 | Oxford | Oxford shire | South East | England |
|-----------------|--------|--------------|------------|---------|
| 2006            | 57     | 254          | 3,435      | 21,519  |
| 2011            | 62     | 268          | 3,601      | 22,646  |
| 2016            | 66     | 282          | 3,783      | 23,837  |
| 2021            | 71     | 296          | 3,963      | 24,973  |
| 2026            | 74     | 309          | 4,125      | 25,975  |
| Change 2006-26: |        |              |            |         |
| no              | 17     | 55           | 690        | 4,456   |
| %               | 29.1%  | 21.7%        | 20.0%      | 20.7%   |

Source: Department of Communities & Local Government

- 8.16 We have obtained a detailed breakdown of the projections by household type for 2006 & 2026. The detailed structure has been grouped up into twelve type/age categories and these are shown in Figure 8.2 below.

- 8.17 It can be seen quite clearly from Figure 8.2 that the most significant increases are in one person households aged 35-64 & over 65 – the former grow quite dramatically - but also in younger and middle aged 'other' households. The elderly population also grows quite noticeably over the period.

**Figure 8.2 Changes in household types 2006-26**



Source: Department of Community and Local Government

- 8.18 The needs of these expanding groups will need to be reflected in the housing stock, through new provision and any other supply changes over the period.

## Household size

- 8.19 By combining the population and household projection data we are able to consider how average household sizes in Oxford are likely to change. Table 8.4 below shows this calculation up to 2026. It should be noted that the figures should be treated with some degree of caution as they combine data which technically has originated from two different sources.

- 8.20 As can be seen from Table 8.4, the average household size is expected

**Table 8.4 Change in average household size in Oxford 2006-2026**

to drop significantly, from 2.63 persons per h'hold to 2.38. This results partly but not wholly from the changes described above; falling child numbers also play some part.

| Date | Population | Households | Ave h'hold size |
|------|------------|------------|-----------------|
| 2006 | 150,100    | 57,000     | 2.63            |
| 2011 | 159,000    | 62,000     | 2.56            |
| 2016 | 165,400    | 67,000     | 2.47            |
| 2021 | 170,600    | 71,000     | 2.40            |
| 2026 | 176,100    | 74,000     | 2.38            |

Source: DCLG and ONS - 2006

## Oxfordshire County Council projections

8.21 Alongside the nationally produced projections from ONS and CLG, Oxfordshire County Council produce their own projections. These have the advantage of providing information down to ward level. However, the latest projections issued in June 2007 only project forward to 2016, and do not give a view of a full Plan period to 2026.

8.22 The general methodology can be summarised as utilising:

- Historical trends in population growth at county and district level (migration and mortality assumptions) for 2001-04;
- Actual births by ward 2001-2005 and 2002 based fertility projections;
- 2001 Census data on population by ward; and
- Actual and planned housing completions by ward.

8.23 It is the last of these elements, which sets the County projections aside from the national ones, which make no assumption about future housing completions, being simply based on recent demographic trends. This is not to suggest that one or other projection is 'better'. However it does allow us to compare what the natural growth in population and households might be, as against growth 'constrained' by expected build rates, or policy rates.

8.24 As a start point we can look at the expected growth in population and households from 2006 to 2016. This is shown in Table 8.5 below and compares Oxford with Oxfordshire.

8.25 The data suggests that over the ten year period the population of Oxford is expected to rise by 7,893 people, this represents an increase of 5.6%. For Oxfordshire as a whole the population growth is expected to be almost double the rate for Oxford (at 2.9%). In terms of households a similar trend is found with the number of households in Oxford expected to rise by 9.4% compared with a county average of 6.1%.

| <b>Table 8.5 Population and household change in Oxford &amp; Oxfordshire 2006-16</b> |         |             |
|--|---------|-------------|
|  | Oxford  | Oxfordshire |
| <b>Population</b>  |         |             |
| 2006   | 141,265 | 617,169     |
| 2016   | 149,158 | 635,101     |
| Change   | 7,893   | 17,932      |
| % change   | 5.6%    | 2.9%        |
| <b>Households</b>  |         |             |
| 2006   | 54,302  | 251,853     |
| 2016   | 59,389  | 267,245     |
| Change   | 5,087   | 15,392      |
| % change   | 9.4%    | 6.1%        |
| <b>Average household size</b>  |         |             |
| 2006   | 2.60    | 2.45        |
| 2016   | 2.51    | 2.38        |

Source: Oxfordshire County Council – 2007

8.27 The County Council projection data is also available at Ward level. The detailed Ward data has been grouped up to neighbourhood areas and is set out in Appendix 2. The data suggest that during the period 2006-16, household size will fall in almost every neighbourhood, mostly by a broadly similar amount to the Oxford total, i.e. between 0.05 and 0.13 persons per household over 2006-11. The main exceptions are St. Margaret's & City Centre (which fall more quickly); Barton & Sandhills, and Lye Valley, (where household size is actually expected to increase).

8.28 The Ward projections can also be grouped up to indicate expected future change over the next ten years in the four sub areas. These are set out below;

8.29 Table 8.6 suggests that all four areas will experience appreciable population growth over the period, though the South East grows fastest.

| <b>Table 8.6 Population change by ward 2006-16</b> |                |                |             |
|--|----------------|----------------|-------------|
|  | 2006           | 2016           | Change      |
| <i>North area</i>                                  | 23,432         | 25,147         | 7.3%        |
| <i>Central S &amp; W</i>                           | 21,756         | 22,270         | 2.4%        |
| <i>North East</i>                                  | 36,079         | 37,937         | 5.1%        |
| <i>South East</i>                                  | 59,999         | 63,804         | 6.3%        |
| <b>TOTAL</b>                                       | <b>141,265</b> | <b>149,158</b> | <b>5.6%</b> |

Source: Oxfordshire County Council – 2007

8.30 In terms of households, growth rates are higher, especially in the Central area.

| <b>Table 8.7 Household change by ward 2006-16</b> |               |               |             |
|---|---------------|---------------|-------------|
|   | 2006          | 2011          | change      |
| <i>North area</i>                                 | 9,175         | 10,391        | 11.3%       |
| <i>Central S &amp; W</i>                          | 7,304         | 8,165         | 11.8%       |
| <i>North East</i>                                 | 14,459        | 15,573        | 7.7%        |
| <i>South East</i>                                 | 23,365        | 25,261        | 8.1%        |
| <b>TOTAL</b>                                      | <b>54,302</b> | <b>59,389</b> | <b>9.4%</b> |

Source: Oxfordshire County Council – 2007

## Comparing the projections

8.31 The results from the two sets of projections, those produced nationally and those provided by the County Council are compared in the table below. This shows comparisons of population and household growth from 2006 to 2016, as well as how household size is expected to change.

8.32 There are clearly quite major differences between the two sets of projections, both in terms of absolute scale, and rates of change. Some differences are inevitable, since the national projections are trend based, whilst the County figures, as we have already seen, take into account anticipated numbers of housing completions. However, both point to an appreciable reduction in household size over the ten years to 2016.

| <b>Table 8.8 Comparing household and population projection data</b> |          |                      |                    |
|---|----------|----------------------|--------------------|
| Topic   | Measure  | National projections | County projections |
| Population  | 2006     | 150,100              | 141,265            |
|   | 2016     | 165,400              | 149,158            |
|   | Change   | 15,300               | 7,893              |
|   | % change | 10.2%                | 5.6%               |
| Households  | 2006     | 57,000               | 54,302             |
|   | 2016     | 67,000               | 59,389             |
|   | Change   | 10,000               | 5,087              |
|   | % change | 17.5%                | 9.4%               |
| Ave hhld size   | 2006     | 2.63                 | 2.60               |
|   | 2016     | 2.49                 | 2.51               |

Source: DCLG, ONS & Oxfordshire County Council - 2007

8.33 The County Council forecasts project only ten years forward. The 2016 end- date limits the usefulness of the County Council projections in providing a longer view of future trends, as the national projections do. However, they are keyed in to a more cautious view of future housing completions, and they also provide a basis for looking at smaller areas, which the national projections of course cannot do.

8.34 The County Council projections might appear to have the greatest potential to provide a view of what balance of dwellings is required at local level. However, there is a danger of circularity in using the projections to indicate the required dwellings balance in sub areas or neighbourhoods of Oxford. Furthermore, the dwelling assumptions show much higher rates of provision in the first five years - presumably reflecting an assessment of permissions and other forthcoming completions. The numbers drop back to steady state levels, largely similar for each ward, in the second five year period, reflecting the lack of site specific information at this stage in the emerging LDF. As far as we could ascertain, the projections do not take account of the size mix profile of the dwellings to be provided in forthcoming schemes.

8.35 The national projections prove a forward look over the length of the emerging LDF's Plan period (to 2026). Taking into account this and the above issues, we concluded that the national projections formed a better basis for modelling the longer-term requirements of households in Oxford than the County forecasts would do.

## Students' housing requirements

8.36 As well as taking account of anticipated changes to the demographic profile of households in Oxford, we will need to consider how Oxford's housing requirements will be affected by future changes in the numbers of students seeking accommodation within the City's general housing stock.

8.37 In common with many other Higher Education institutions in Britain, the two Universities based in Oxford have been through a period of expansion, and may continue to expand in the future. This may well have significant impacts upon the need for housing arising from the student population. We therefore require guidance on future expectations from both the University of Oxford, and Oxford Brookes University. This would allow us to assess whether future requirements for accommodation within the City housing stock (as opposed to purpose built student accommodation; or living with parents at home in Oxford; or living outside the City boundary) might change.

8.38 Policies ED.6 (Oxford Brookes) and ED.8 (Oxford University) seeks to place a cap on the number of students not accommodated in purpose built accommodation, but living elsewhere in Oxford. The cap provides in each case for a ceiling of 3,500 students in academic years to 2008, and 3,000 thereafter. The cap operates on applications for additional teaching space at either University, suggesting that they would be refused if the numbers not in purpose built accommodation exceeded the target figure.

8.39 Both Universities are required to provide annual returns outlining the estimated numbers of students not in purpose built accommodation. We do not have information for the current year's return directly, or historic returns for previous years. However, the Annual Monitoring Report does provide an assessment of the return figures. It suggests that the numbers of students occupying homes in the City's residential stock are as set out below.

| <b>Table 8.9 Student numbers living in the residential housing stock</b> |  |
|--|--|
| University of Oxford   | 3,123 (Note 1)   |
| Oxford Brookes University  | 3,852 max (Note 2)   |
| Note 1   | Figure excludes part time students, and those away on field study work   |
| Note 2   | Figure includes some addresses outside the City, in postcode districts which straddle the boundary, and some living with family or friends |

8.40 Both Universities envisage that overall student numbers will rise only very slowly over the next few years. Even so, it appears that more student accommodation will be required in both cases if the ceiling of 3,000 is to be achieved by 2008.

8.41 We do not therefore have figures for the numbers of students who were living within the housing stock in Oxford at the time of the HRS. Numbers may have risen slightly since then, and have the potential to go on increasing. A cap will come into play in 2008 which is designed to reduce the numbers to 3,000 for each University.

8.42 On balance, we take the view that the numbers at the time of the HRS should be assumed to continue unchanged for the purpose of the present study. There is no basis for assuming a significant increase or as yet at any rate, a decrease.

## Summary

- 8.43 We have considered the available information on demographic trends in Oxford. This comes from two main sources – national and local. The national data consists of population forecasts from the Office of National Statistics, and household projections published by the Department of Communities and Local Government. Local data is provided by Oxfordshire County Council, similarly forecasting changes in the numbers and structure of population and households.
- 8.44 The national population forecasts show that age structure will change over the next 20 years, with an ageing population, and significant increases in those aged over 60. The household projections show households growing at an annual rate of 750 pa. Growth in single person households represents three quarters of the total.
- 8.45 The County Council projections are constrained by assumed housing provision rates, whilst the ONS/CLG assume the continuation of past trends. The County Council figures show growth of around 500 households per annum. However there are other differences between the two sets of projections.
- 8.46 The County figures only look ahead to 2011. However they are housing based, and are also available at ward level. The national projections are Oxford wide, and run to 2026. After careful consideration we concluded that the national figures should be used in our analysis of future household requirements.
- 8.47 We also considered the available information on student housing requirements. The Local Plan provides for a cap on the numbers of students from the University of Oxford and Oxford Brookes University who occupy accommodation within the City's housing stock. The cap will reduce slightly from 2008. The information available on annual numbers is not at this stage sufficiently robust for us to assume that the numbers housed at the present time will either rise, or fall to any significant degree.





## 9. Future household requirements

### Introduction

- 9.1 In this Section we take account of the changes described in the Section 8 to suggest what the future population's requirements imply for the balance of dwellings in Oxford at 2026. The approach we have taken will be explained further, but essentially modifies the City's current housing stock profile to take account of those changes previously described.
- 9.2 Before moving to that it is helpful to consider the supply side, i.e. how the current 2006 stock (as profiled in Section 5) will have altered by 2026, if current development trends (outlined in Section 7) continue unchanged.

### Projected supply

- 9.3 Using material put together on preparing the Core Strategy for the Local Development Framework, it is possible to form a view about the profile of housing that would be produced over the period 2006-26 if present development patterns continue. That view will involve a number of assumptions, mostly using currently relatively clear emerging proposals, but including some gaps requiring to be filled. Nevertheless it is felt possible to arrive at a broad strategic view, which will enable the study to move forward; even if those assumptions are subsequently revised, the broad indicative picture they provide is still of value.
- 9.4 It is assumed that some 11,000 net additional dwellings will be produced over the twenty years 2006-26, i.e. some 550 pa. These dwellings will be made up of various components, set out below.

| Table 9.1 Planned supply<br>net dwellings 2006-26 |                             |                 |
|---|-----------------------------|-----------------|
| Element   | Composition                 | Total dwellings |
| 1. Commitments                                    | Permitted not yet completed | 2,000           |
| 2. Small windfalls                                | < 10 dwellings              | 1,000           |
| 3. Large windfalls                                | 10 dwellings +              | 2,000           |
| 4. Allocated sites                                | 25+ dwellings               | 6,000           |
| Total   |                             | 11,000          |

Source: Oxford City Council Emerging LDF Core Strategy

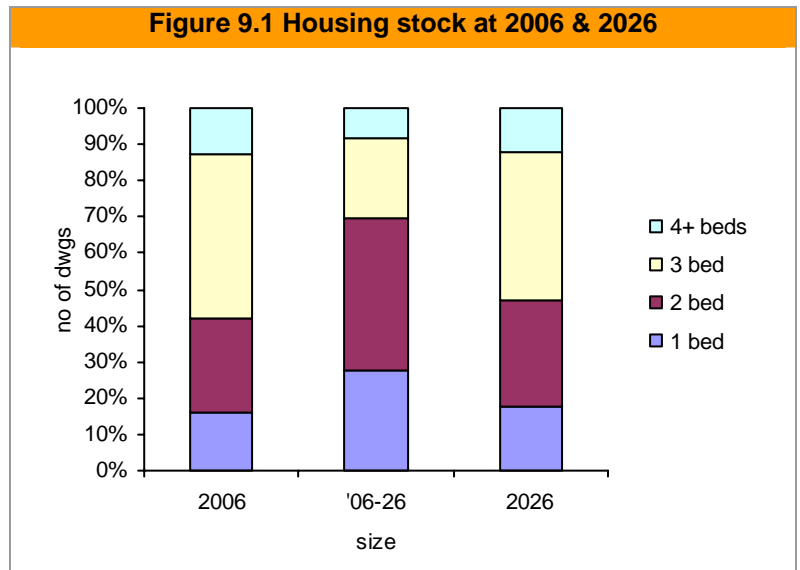
- 9.5 At this time the spatial location of elements (1) to (4) is unknown, and may or may not reflect past geographical patterns. However past patterns are useful in suggesting what sorts of dwellings sizes and types would be produced if current development patterns continue in the absence of Plan policy targets designed to influence the balance of dwellings in the stock.
- 9.6 The information on recent trends reported in Section 7 will enable us to inform a view about the profile of development for element 2 (sites 1-3 & 4-9 dwgs) and elements 3 & 4. In doing so we will take account of the current affordable housing target, which will yield less market housing (and conversely more affordable) than permissions 2001-06 would suggest. It will also be necessary to consider the mix of the affordable housing produced.
- 9.7 The current Affordable Housing SPD guidance provides helpful assistance here. We will assume that that the profile set out there (in Table 2, p12) is achieved. However this distinguishes between City Centre and suburban locations, and we do not have a breakdown at this time. Accordingly we have assumed a combination, reflecting the mix provided as a basis for financial contributions.

- 9.8 Achieving this mix on sites of 10-24 dwellings may entail some changes from past experience, with a built form that allows adequate numbers of larger units. Nevertheless the SPD is current policy guidance, and should be assumed to apply for the purpose of the exercise.
- 9.9 With this mix for affordable housing; with a mix of new market units, and a profile of lost market units, drawn from the Section 7 analysis, it is possible to arrive at a view of the likely future supply of additional units 2006-26 for each component of total supply. To do this we have assumed that on average 45% affordable housing will be achieved both on sites of 10-24 dwellings, and also on sites of 25+. (There are likely to be some sites on which, for reasons of viability, or other exceptional planning circumstances, it will not be possible to secure the full 50% target proportion).
- 9.10 The expected supply is set out in Table 9.2 below.

| <b>Table 9.2 Net provision 2006-16 by no of bedrooms</b> |       |       |       |       |        |
|--|-------|-------|-------|-------|--------|
|  | 1 bed | 2 bed | 3 bed | 4 bed | Total  |
| <b>Market net increase</b>                               |       |       |       |       |        |
| Commitments  | 545   | 739   | 160   | 56    | 1,500  |
| Small windfalls  | 531   | 308   | 52    | 45    | 936    |
| Large windfalls  | 625   | 417   | -36   | -43   | 963    |
| Allocations  | 596   | 1,624 | 683   | 385   | 3,289  |
| Total  | 2,298 | 3,088 | 860   | 443   | 6,688  |
| <b>Affordable</b>  |       |       |       |       |        |
| Commitments  | 175   | 216   | 85    | 25    | 501    |
| Small windfalls  | 10    | 22    | 24    | 8     | 64     |
| Large windfalls  | 156   | 363   | 394   | 124   | 1,037  |
| Allocations  | 407   | 949   | 1,030 | 325   | 2,711  |
| Total  | 747   | 1,550 | 1,534 | 482   | 4,313  |
| <b>Total net provision</b>                               |       |       |       |       |        |
| Commitments  | 720   | 955   | 245   | 482   | 2,001  |
| Small windfalls  | 540   | 330   | 77    | 53    | 1,000  |
| Large windfalls  | 781   | 780   | 358   | 81    | 2,000  |
| Allocations  | 1,003 | 2,573 | 1,714 | 711   | 6,000  |
| Total  | 3,044 | 4,638 | 2,394 | 925   | 11,000 |

- 9.11 It is clear that the provision of additional 3 bed units is crucially dependent on firstly allocated sites, and secondly, affordable housing; only 176 units (1.6% of total provision) would come from market units on sites under 25 units.
- 9.12 The anticipated supply of housing outlined in Table 9.2 would lead to a housing stock with a profile at 2026 as outlined in Figure 9.1.

- 9.13 The expected provision over 2006-26 because of its different profile, makes a marked difference to the total housing stock at 2026. The main impact is a reduction in the proportion of 3 bed dwellings, which falls from 45.0% to 41.2%. The numbers of smaller units rise in consequence.



- 9.14 We will now consider the question of whether this balance of dwellings is the appropriate one to meet Oxford's requirements as a whole in 2026.

## 2026 requirement: our approach

- 9.15 In Section 5, using VOA data, we established what the housing stock profile was at 2006. In Section 5 also, we utilised data from the Housing Requirements Study (HRS) to show:

- **(A)** the types of housing occupied by different types of household in 2003.

In Section 8 we showed:

- **(B)** how the structure of households in Oxford was expected to change by 2026, using the trend based national projections from ONS.

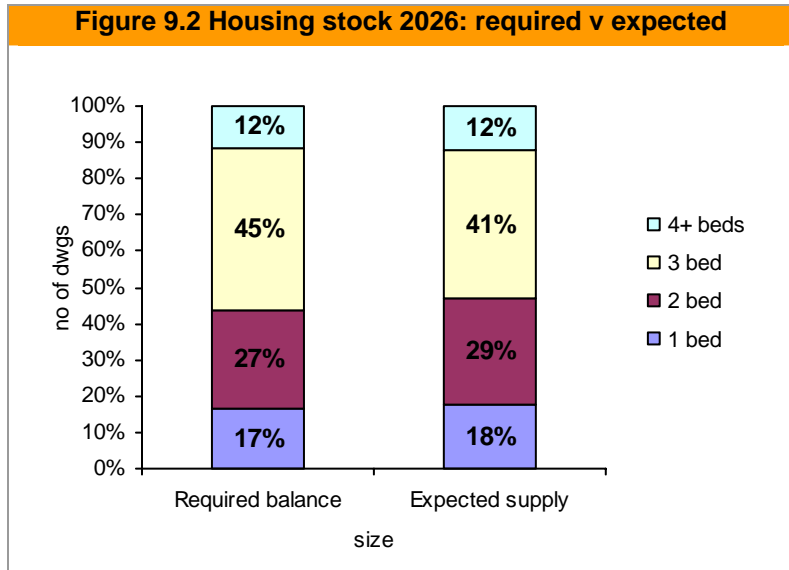
We also concluded there that the numbers of University students occupying homes within the general housing stock would remain at about its present level, so that we would not need to make any adjustment to take this into account.

- 9.16 That suggests that it should be possible to show how the current housing stock should change, to allow for the changes in household structure expected to ensue by 2026. The approach would be to apply requirements **(A)** to household profile **(B)**.
- 9.17 This is not completely straightforward, principally because the HRS household structure typology is not identical with the household projection categories (reflecting, in part, the limitations of what data can be collected in a voluntary household survey). However there is a close relationship between the two classifications and it is possible to develop a matrix allocating households between the two which enables the 2026 household projection to be expressed in terms of the eight HRS categories quite robustly. This provides a means to complete the approach.

## The approach implemented

- 9.18 Using the matrix approach, the 2026 household projection was transformed into the HRS categories. The dwelling/household requirements depicted in Figure 5.13 were applied to the resulting structure. This showed how the balance of the City housing stock at 2006 would need to change in order to accommodate the households projected to occupy it in 2026.

9.19 The results demonstrate that the expected supply will deliver more 2 bed units than required, and fewer family sized units. There are slightly too many 1 bed dwellings, and 4 beds are about right.



9.20 The exercise involves a number of assumptions. We believe that they are reasonable ones. In particular, the assumption that affordable housing delivers as many 3 & 4 bed units as sought in SPD is felt to be quite a conservative one; it is more likely that, on smaller sites especially, the emphasis on smaller market units would be reflected in the sizes of the affordable units which were forthcoming.

9.21 The results suggest that there are good reasons for seeking to influence the mix of dwelling sizes which are produced in Oxford over the period. In particular, if the heavy emphasis on 2 bedroom apartment units continues, the supply of 3 bedroom house in particular will be affected.

9.22 In the table below, we compare the profile of housing expected to results if current provision patterns continue unchecked, with what would be required to produce the 'right' dwelling balance for Oxford as a whole at 2026.

**Table 9.3 Supply profiles: expected & required**

| Size    | Projected supply 2006-26 | Provision required 2006-26 |
|---------|--------------------------|----------------------------|
| 1 bed   | 27.7%                    | 20.9%                      |
| 2 bed   | 42.2%                    | 29.6%                      |
| 3 bed   | 21.8%                    | 43.2%                      |
| 4+ beds | 8.4%                     | 6.3%                       |
| Total   | 100%                     | 100%                       |

9.23 The required profile contains twice as many 3 bed units as the profile of likely provision. It suggests two thirds as many 2 bed units and three quarters as many 1 beds as are likely to come forward. This serves to underline the view that intervention to influence the balance of provision is required.

9.24 The required profile is also, fortunately, quite well balanced in itself. Units of all sizes are required, and it therefore provides a reasonable basis from which to derive an appropriate policy target.

## Summary & next steps

- 9.25 We have considered the supply of dwellings of various sizes that would result if the pattern of provision observed over the last five years continued to 2026, with the emerging land LDF supply and current affordable housing policies. It shows that total net provision would comprise just over 20% 3 bed and 8% 4 bed units, with the former heavily dependent on allocated (25+ dwgs) sites, and with affordable provision in line with the target profile.
- 9.26 The resulting 2026 stock can be compared with what the 2006 stock's profile would need to be, to allow for the projected changes in household structure to 2026, and assuming that the numbers and types of homes required for students not living in specialist accommodation would remain unchanged. The projected supply and projected requirement differ in that significantly fewer 3 bed dwellings will be produced than appear to be required, and conversely significantly more 2 bedroom units. There is therefore a case for introducing planning policies to influence the balance of dwellings being produced at City level.
- 9.27 As we suggested earlier in the report, the City level profile is one of several spatial levels at which planning policies should seek to ensure a balance of dwellings in order to achieve the national aims for balanced and sustainable communities. However the City profile is particularly significant, in that to an extent it sets a framework for provision within which policies for the other levels must largely operate.
- 9.28 In the final Section we consider what form appropriate policy guidance should take.





# 10. Policy implications

## Introduction

- 10.1 This final Section considers the appropriate policy responses to the situation outlined in the first nine Sections. It provides a basis for policy wording in the forthcoming Supplementary Planning Document and, inform the emerging policies for the Local Development Framework.
- 10.2 Before turning to the policy implications it will be helpful to summarise the picture that has emerged so far in the study.

## The approach

- 10.3 The study has looked at the balance of dwellings in Oxford, in response to concerns that current development activity in Oxford may be delivering an unbalanced dwelling stock, and exacerbating or contributing to underlying problems within the local Neighbourhood Areas. The main concern is that a combination of new build development, redevelopment, and conversions, is producing large numbers of 1 & 2 bed units - almost all apartments - and contributing to a declining availability of family sized housing.
- 10.4 To investigate the issue, we have looked at current planning and policy guidance, the most recent of which (PPS3) only emerged during the course of the study. Fortunately, the PPS3 advice provides considerable support to the approach upon which we had embarked, in suggesting that such studies should consider the future needs of households of different types, and seek to ensure a range of housing provision that would accommodate all types.
- 10.5 Our approach relies on three main sources of data for either the existing housing stock, or the households who occupy it:
  - Census (2001)
  - Housing Requirements Study (2003)
  - Valuation Office Agency (2006)
- 10.6 Other supporting secondary data and assessments have been obtained from the City Council. We have also looked to the future, considering demographic forecasts, both from Government sources, and from the County Council; the future requirements from students for accommodation within the general housing stock (as opposed to specialist, purpose built residential units) have also been taken into account. We have analysed the pattern of recent development in Oxford, and considered what profile of housing would emerge in the future if that profile continued as at present.
- 10.7 The various data sources (and the three above named sources in particular) are somewhat disparate, in that they collect different information, for different time periods, and categorise households in different ways. Nevertheless the data has enabled us to paint a picture of the current housing stock, both overall and at local level. Furthermore we were able to use the data to develop a view about how the current housing stock would need to change to allow for the future demographic changes in the current population. It is recognised that, locally as nationally, the numbers of smaller households will grow, and it is important to ensure that that growth is fully taken into account. This cannot be done mechanically; even in an expensive and pressured housing market like Oxford's, there are many households who choose to occupy homes significantly larger than the minimum they might be said to need. Using HRS data, however, it was possible to overcome this issue.

- 10.8 In parallel to the analysis of data it is also necessary to consider what would be involved in producing a balanced and sustainable housing stock in an area like Oxford. We suggest that a balanced and sustainable community should contain a wide range of demographic groups. It should provide a range of housing types; households who contribute actively to their local community should, as far as is possible, be able to move within their locality as their housing needs change rather than having to move further afield. Observation suggests that the balance of a local community could in practice be improved more by following a 'build out' approach, than by seeking the provision of diametrically different housing types, which may encourage social polarisation. Stability may also be encouraged by avoiding concentrations of house types which can be expected to display significantly higher turnover.
- 10.9 We suggested that in principle there were four spatial levels at which a balance of dwellings could be sought:
- the City as a whole;
  - four sub areas, based on the geography of the City;
  - fifteen Neighbourhood Areas based on electoral wards or combinations of wards; and
  - the individual site.
- 10.10 A need to 'balance' the stock could arise at any of these levels. The degree of balance would reduce as one moved down this spatial hierarchy. At the same time the scope for argument about boundary issues would increase, reinforcing the need to be relatively less prescriptive.
- 10.11 Even so, a requirement for balance (i.e. justification for policy to influence dwelling mix) could arise at any level, and of course in principle requirements at the various levels could be in conflict.

## Results of analysis

- 10.12 In terms of these various spatial levels, the analysis firstly suggested an appropriate profile for the Oxford housing stock in 2026. If the pattern of development seen in recent years continued, it would lead to a housing stock which contained rather more 2 bed units, and rather fewer 3 bed units, than this profile would suggest are required.
- 10.13 At sub area level the stock of dwellings is reasonably well balanced. The main exception is the Central & South West sub area. The specialised nature of much past provision in the City Centre has produced an unbalanced profile, with a high proportion of smaller units and apartments. It is for the Council to consider the extent to which this can, or should be addressed through policies seeking a greater emphasis on family accommodation in future provision. However, there are practical and sustainability reasons why housing provision in the City Centre (and indeed other District centres) should be in the form of significantly higher density accommodation. It could also be argued that balance is slightly less critical in a mixed-use area (which could never operate as a full community) than in a predominantly residential neighbourhood. This is a matter we will need to return to. It is a key issue since a considerable amount of new provision is envisaged in the City Centre, and the nature of that provision could impact upon what is available from the City profile for provision elsewhere
- 10.14 For individual localities, City Centre aside, the stock is comparatively well balanced against the current City profile, at the coarser level we have argued would be appropriate. Some localities are really quite balanced in these terms. However many or most display a degree of imbalance in either population or housing terms.
- 10.15 Not all of these imbalances may require, or justify, corrective action. Some will be corrected to some extent over time. For instance, it looks as though any local shortage of smaller units might naturally be resolved to some degree through new development. The City's shared ownership stock was at 2001 considerably concentrated; however as new development complying with the City's affordable targets comes forward over time, considerable numbers of further shared ownership homes will be provided, covering most localities.

- 10.16 Areas which have large numbers of middle aged but fewer elderly may 'self-correct', as the population ages, though it will be important that the housing stock adequately provides for their future needs.
- 10.17 Some imbalances may be felt not to justify action .For example, some areas have considerable concentrations of bungalows. However bungalows are scarce; few are being built, and the existing supply will probably become more sought after as the population grows older, we believe the Council would wish to maximise the numbers provided in future. It might not be sensible to discourage further provision of bungalows in any locality, merely because the (quite small) proportion of bungalows there happens to be somewhat higher than in Oxford as a whole.
- 10.18 The smallest and largest floor area categories - below 30 sq m (325 sq ft) and above 160 sq m (1,720 sq ft) – involve really quite exceptional dwelling units, which are normally only occupied by exceptional households. It may not be felt necessary to seek a wide and even availability of such units across all localities in order to achieve balanced and sustainable communities in Oxford. It is not immediately clear that the smallest category would or should be built on any scale. Whilst it could be held to be desirable to secure a reasonably even distribution of larger (110-160 sq m/1,185-1,720 sq ft) dwellings across all localities, it may be less critical to achieve this for the very largest sized units. Whilst we have no direct figures, older dwellings in this size category will also be more subject to redevelopment and conversion pressures.
- 10.19 There is, again, an issue about the distribution of the student population, which is quite concentrated in specific localities. There are arguments for spreading the student population more widely. However it is dependent upon the availability of certain specific types and sizes of property, which are similarly concentrated, and the impact of policies on new development may in reality be limited. Policies specifically targeted at conversions might help to achieve a degree of dispersal.
- 10.20 Nevertheless there are some imbalances in particular localities which the Council should seek to address though Plan policies in respect of housing mix. For instance Jericho & Osney, and Summertown were identified as areas with a high proportions of flats in the housing stock. Summertown emerged as having relatively few 3 bed units, and all the Northern Neighbourhoods Areas appear to have high proportions of 4 or 5+ bedroom units.
- 10.21 In the next section we set out our proposals for policies to address the imbalance issues, which we believe warrant corrective action.

## Policy proposals

- 10.22 Policy proposals for the balance of dwellings in Oxford involve the inter relationship of City wide and locality considerations. In our view the City wide requirement is central and paramount, and locality considerations follow.
- 10.23 We propose to consider the issues in the following order
- what gets provided at City level
  - how this would be distributed in aggregate between sectors (Centre v suburban; smaller sites/conversions v larger sites)
  - what this suggests should be the policy for individual sites
  - how this should be modified or augmented to reflect locality considerations

## City wide profile

- 10.24 At Table 9.3 we set out a profile for the desired size mix of housing provision in total over 2006-2026. The profile is split evenly between 1 & 2 bed dwellings, and those with 3+ bedrooms.
- 10.25 We propose that this profile is adopted as a City wide target. Table 10.1 expresses the profile in % and dwelling terms.

| <b>Table 10.1 Required City dwelling size profile</b> |                            |            |
|---|----------------------------|------------|
| Size  | Required provision 2006-26 |            |
|   | %                          | no of dwgs |
| 1 bed   | 20.9%                      | 2,300      |
| 2 bed   | 29.6%                      | 3,250      |
| 3 bed   | 43.2%                      | 4,750      |
| 4+ beds   | 6.3%                       | 700        |
| Total   | 100%                       | 11,000     |

## Sectoral distribution

10.26 The city wide target will be achieved by a combination of smaller, and larger windfall sites, and allocated sites. Some of these allocated sites will be in the City Centre, and others in other district centres. The profile of type, dwelling type and size there will reflect the central location, accessibility to public transport links, and the scope for encouraging car free development. The remaining balance will be available to be achieved on allocated sites in other non-central locations. There it will be achieved through a combination of affordable housing target profile for the affordable housing, and market mix profile for the remaining dwellings.

## Individual strategic sites

10.27 The above target profiles provide a basis from which to develop targets for individual sites. The degree to which individual sites can achieve a full balance will vary with their size. It would be reasonable to expect a site for 250 dwellings, say, to produce a more even balance than a scheme of 25. Sites even larger than that, especially if comparatively isolated from adjoining residential development, will to a considerable degree have to provide their own balance.

10.28 If that is to resemble Oxford's required 2026 profile, it will need to provide rather more of the larger (3 beds+) dwellings, and fewer small (1-2 beds) dwellings, than the profile outlined above would suggest. As previously pointed out, such very large sites might also have to meet needs normally only met by certain cheaper older housing within the established stock. In that respect the PPS3 proposal in respect of low cost market housing – cheaper housing priced below what is normally produced within the market sector – offers potential, and should be given serious consideration.

10.29 Guidance targets for allocated sites of 25+ dwellings are suggested in the Table below.

| <b>Table 10.2 Site target profiles: strategic &amp; major allocations</b> |             |                       |                           |             |           |
|---|-------------|-----------------------|---------------------------|-------------|-----------|
| Size  | City Centre | District centre sites | Allocated sites elsewhere |             |           |
|   |             |                       | 25-74 dwgs                | 75-249 dwgs | 250+ dwgs |
| 1 bed   | 15-25%      | 15-25%                | 0-20%                     | 6-16%       | 10-15%    |
| 2 bed   | 40-50%      | 35-50%                | 10-35%                    | 20-30%      | 25-30%    |
| 3 bed   | 20-25%      | 20-30%                | 25-65%                    | 35-65%      | 40-55%    |
| 4+ beds   | 10-18%      | 10-20%                | 5-20%                     | 6-17%       | 10-15%    |

## Smaller sites and neighbourhood issues

10.30 For smaller sites it is not practical to provide quite such prescriptive targets as for the larger strategic allocations. As site size becomes smaller the nature of the site and surroundings may considerably constrain what can practicably be produced on the site. However these smaller sites have a big impact on overall provision, and as Section 7 showed produce the most small dwellings. Targets are clearly needed to influence what is provided.

- 10.31 The smaller sites have been divided into three size groups and separate size policy target considered for each. However smaller sites are those where local neighbourhood pressures will become quite a crucial consideration. Accordingly distinct policy positions have been developed for the red, amber, and green neighbourhoods identified from the locality analysis in Section 6.
- 10.32 The largest size group relates to schemes of 10-24 dwellings – those to which an affordable requirement would normally apply. For these, a size profile to significantly constrain the production of small dwelling units remains appropriate. For the middle size group, 4-9 dwellings, a size profile target, more broadly cast, is also proposed. For the smallest group (1-3 dwellings) guidance would be confined to avoiding the loss of a family unit as a net result of the development.
- 10.33 For the small and medium size groups i.e. 1-9 dwellings, it must be recognised that there are older larger properties, bigger than a family would normally need to occupy, which may not provide efficient living accommodation to modern standards, and that planning policy should not seek to retain them at all costs. Accordingly it is proposed that conversions of dwellings above a certain size limit should be permitted so long as the resulting accommodation replaced the lost accommodation with a 3 bedroom family unit, situated on the ground floor and preferably with access to private garden space.
- 10.34 The detailed policy targets proposed for red, amber and green areas are considered in turn below.

### Red areas

- 10.35 Two Neighbourhood Areas, East Oxford and St Margaret's – were identified as falling into the 'red' light category. In these areas there is particular concern to safeguard family dwellings and seek to achieve a higher proportion of new family dwellings as part of the mix for new developments.
- 10.36 The following mix of dwellings types is therefore proposed.

| <b>Table 10.3 Smaller site targets; RED areas</b> |            |          |                             |
|---|------------|----------|-----------------------------|
|   | 10-24 dwgs | 4-9 dwgs | 1-3 dwgs                    |
| 1 bed   | 0-15%      | 0-30%    |                             |
| 2 bed   | 5-30%      | 0-50%    | No net loss of family units |
| 3 bed   | 35-75%     | 45-100%  |                             |
| 4+ beds   | 10-35%     | 0-50%    |                             |

### Amber areas

- 10.37 The majority of the Neighbourhood Areas were identified as within the 'amber' light category. These areas are experiencing considerable and growing pressures. It therefore requires an approach to safeguard family dwellings and achieve a reasonable proportion of new family dwellings as part of the mix for new developments.
- 10.38 The following mix if therefore proposed:

| <b>Table 10.4 Smaller site targets; AMBER areas</b> |            |          |                             |
|---|------------|----------|-----------------------------|
|   | 10-24 dwgs | 4-9 dwgs | 1-3 dwgs                    |
| 1 bed   | 0-20%      | 0-30%    |                             |
| 2 bed   | 10-35%     | 0-50%    | No net loss of family units |
| 3 bed   | 30-75%     | 30-100%  |                             |
| 4+ beds   | 0-35%      | 0-50%    |                             |

## Green areas

10.39 The Blackbird Leys Neighbourhood Area was identified as a 'green' area. The pressures arising from a loss of family units appear less serious, and a more relaxed policy position was considered appropriate – although it would still be necessary to exercise some influence over what was produced, in order to support the city wide policy target.

10.40 The following mix is therefore proposed:

| <b>Table 10.3 Smaller site targets; GREEN areas</b> |            |          |                    |
|---|------------|----------|--------------------|
|   | 10-24 dwgs | 4-9 dwgs | 1-3 dwgs           |
| 1 bed   | 0-25%      | 0-30%    |                    |
| 2 bed   | 15-40%     | 0-50%    | No specific target |
| 3 bed   | 25-75%     | 25-80%   |                    |
| 4+ beds   | 0-35%      | 0-40%    |                    |

# APPENDICES



# Appendix 1 VOA data headings

| Table A1.1 Data topics |  |                            |
|------------------------|--|----------------------------|
| Heading                | Detail of topic coverage               | No of categories in Oxford |
| Group                  | General description of dwelling nature | 47                         |
| Type                   | House type                             | 30                         |
| Age profile            | Date of construction                   | 11                         |
| No of rooms            | No of rooms                            | 20                         |
| No of bedrooms         | No of bedrooms                         | 20                         |
| No of floors           | No of floors                           | 6                          |
| Lowest floor level     | Lowest floor level (incl basement)     | 18                         |
| Parking                | Nature of car parking provision        | 12                         |
| Band                   | Council tax band                       | 8                          |
| Floor area             | Floorspace groups Sq m                 | 6                          |



## Appendix 2: County forecasts to 2016 by Neighbourhood Areas

| Table A2.1 Population by neighbourhood in Oxford 2006-2016 |                          |                |              |             |
|--|--------------------------|----------------|--------------|-------------|
|  | Population no of persons |                |              |             |
|  | 2006                     | 2016           | inc          | %           |
| Wolvercote   | 5,638                    | 6,048          | 410          | 7.3%        |
| Summertown   | 7,159                    | 7,564          | 405          | 5.7%        |
| St Margarets   | 10,635                   | 11,535         | 901          | 8.5%        |
| City Centre  | 9,263                    | 9,757          | 495          | 5.3%        |
| Jericho & Osney  | 6,343                    | 6,237          | -106         | -1.7%       |
| Hinksey Park   | 6,150                    | 6,275          | 125          | 2.0%        |
| Marston  | 6,224                    | 6,470          | 246          | 4.0%        |
| Greater Headington   | 17,069                   | 17,655         | 586          | 3.4%        |
| Barton & Sandhills   | 6,588                    | 7,430          | 842          | 12.8%       |
| Quarry & Risinghurst                                       | 6,198                    | 6,381          | 184          | 3.0%        |
| East Oxford  | 22,764                   | 24,274         | 1,510        | 6.6%        |
| Lye Valley   | 6,546                    | 6,967          | 420          | 6.4%        |
| Rose Hill  | 11,751                   | 12,036         | 285          | 2.4%        |
| Littlemore   | 5,837                    | 6,335          | 497          | 8.5%        |
| Blackbird Leys   | 13,101                   | 14,193         | 1,092        | 8.3%        |
| <b>OXFORD CITY</b>   | <b>141,265</b>           | <b>149,158</b> | <b>7,893</b> | <b>5.6%</b> |

Source: Oxfordshire County Council – 2007

| Table A2.2 Households by neighbourhood in Oxford 2006-2016 |                  |               |              |             |
|--|------------------|---------------|--------------|-------------|
|  | No of households |               |              |             |
|  | 2006             | 2016          | inc          | %           |
| Wolvercote   | 2,569            | 2,869         | 300          | 11.7%       |
| Summertown   | 2,908            | 3,184         | 276          | 9.5%        |
| St Margarets   | 3,699            | 4,339         | 640          | 17.3%       |
| City Centre  | 1,637            | 2,185         | 548          | 33.5%       |
| Jericho & Osney  | 2,982            | 3,175         | 193          | 6.5%        |
| Hinksey Park   | 2,685            | 2,805         | 120          | 4.5%        |
| Marston  | 2,614            | 2,871         | 257          | 9.8%        |
| Greater Headington   | 6,551            | 7,089         | 538          | 8.2%        |
| Barton & Sandhills   | 2,663            | 2,824         | 161          | 6.0%        |
| Quarry & Risinghurst                                       | 2,631            | 2,789         | 158          | 6.0%        |
| East Oxford  | 8,614            | 9,324         | 710          | 8.2%        |
| Lye Valley   | 2,463            | 2,578         | 115          | 4.7%        |
| Rose Hill  | 4,800            | 5,202         | 402          | 8.4%        |
| Littlemore   | 2,513            | 2,842         | 329          | 13.1%       |
| Blackbird Leys   | 4,975            | 5,315         | 340          | 6.8%        |
| <b>OXFORD CITY</b>   | <b>54,302</b>    | <b>59,389</b> | <b>5,087</b> | <b>9.4%</b> |

Source: Oxfordshire County Council - 2007

| Table A2.3 Household size by neighbourhood in Oxford 2006-2016 |                            |      |       |        |
|--|----------------------------|------|-------|--------|
|  | N of persons per household |      |       |        |
|  | 2006                       | 2016 | inc   | %      |
| Wolvercote   | 2.20                       | 2.11 | -0.09 | -4.0%  |
| Summertown   | 2.46                       | 2.38 | -0.09 | -3.5%  |
| St Margarets   | 2.88                       | 2.66 | -0.22 | -7.5%  |
| City Centre  | 5.66                       | 4.47 | -1.19 | -21.1% |
| Jericho & Osney  | 2.13                       | 1.96 | -0.16 | -7.6%  |
| Hinksey Park   | 2.29                       | 2.24 | -0.05 | -2.3%  |
| Marston  | 2.38                       | 2.25 | -0.13 | -5.3%  |
| Greater Headington   | 2.61                       | 2.49 | -0.12 | -4.4%  |

|                      |             |             |              |              |
|----------------------|-------------|-------------|--------------|--------------|
| Barton & Sandhills   | 2.47        | 2.63        | 0.16         | 6.3%         |
| Quarry & Risinghurst | 2.36        | 2.29        | -0.07        | -2.9%        |
| East Oxford          | 2.64        | 2.60        | -0.04        | -1.5%        |
| Lye Valley           | 2.66        | 2.70        | 0.04         | 1.7%         |
| Rose Hill            | 2.45        | 2.31        | -0.13        | -5.5%        |
| Littlemore           | 2.32        | 2.23        | -0.09        | -4.0%        |
| Blackbird Leys       | 2.63        | 2.67        | 0.04         | 1.4%         |
| <b>OXFORD CITY</b>   | <b>2.60</b> | <b>2.51</b> | <b>-0.09</b> | <b>-3.5%</b> |

Source: Oxfordshire County Council – 2007

NOTE Calculated household size for City Centre may be distorted by student accommodation (i.e. not living in households)

# Appendix 3 Study Brief

## Project brief: Balance of dwellings study

### Introduction

1. Oxford City Council has decided to commission Consultants to undertake research into the balance between the supply of dwellings by size and type in Oxford and the demographic need for the different sizes and types of dwellings. This will consider Oxford as a whole, and split down within local areas of the City.
2. The background to the requirement is to produce an analysis of the balance of dwelling types and sizes is based upon the need to:
  - provide an objective evidence base to evaluate and review the implementation of policy which could lead to the production of further guidelines in the form of a Supplementary Planning Document;
  - monitor the implementation and effectiveness of Policy HS.8 (balance of dwellings) in the Oxford Local Plan;
  - review recent planning permissions for conversions, redevelopment and new residential development within Oxford and areas of identified pressure; and
  - ensure that new residential developments achieve an appropriate mix of dwelling types and sizes to provide sustainable communities within the City.

### Background

3. The policies in the adopted Oxford Local Plan 2001-2016 seek to provide the right number of dwellings within Oxford to ensure that the dwellings, which are provided, will meet the housing needs of local people. Oxford's Housing Requirements Study 2004 provides evidence of need in terms of type, affordability, and tenure of dwellings.
4. Oxford experiences extremely high house prices, problems of finding suitable accommodation to meet the needs of a range of people wishing to live or relocate within the City.
5. Local Plan policies seek to ensure that the most pressing of the housing needs in Oxford are met through a range of policies, which seek to increase the supply of housing available to those in most need. In this context policies aim to protect the housing stock and to set criteria for the consideration of planning applications for particular types of housing.
6. Policy HS.8 seeks to positively influence the local distribution of dwelling types to achieve a balanced sustainable distribution of dwelling types both within individual sites and in the local area. This policy approach aims to maintain and strengthen sustainable communities in Oxford through ensuring a mix of dwelling types in order to promote social inclusion. The City Council consider that housing policy should reflect the needs of the whole community and that there should be no policy barrier against any size, tenure or specialist occupation of a dwelling in any locality.

### Development Plan Framework

7. The Balance of Dwellings study should take into account current Central Government advice as set out in **Planning Policy Guidance and emerging Statements**. The following documents being of particular relevance:
- Planning Policy Statement 1: Delivering Sustainable Development (2005);
  - Planning Policy Guidance Note No.3 Housing (2000);
  - Consultation Paper on a New Planning Policy Statement (PPS3) Housing;
  - Consultation Paper on a Proposed Change to Planning Policy Guidance Note 3 Housing Supporting the delivery of new housing (July 2003) and Influencing the size, type and affordability of housing (July 2003);
  - Consultation Paper on a Proposed Change to PPG3: Housing Planning for mixed communities (Jan 2005); and
  - Planning for Housing Provision a Consultation Paper (July 2005).
8. **Regional Planning Guidance** for the South East is set out in RPG9, adopted in March 2001 and provides regional planning advice for Oxford.
9. **South East Plan** has been published as a Draft for public consultation in January 2005. It sets out emerging policies for the regional spatial strategy for the South East and provides a context for the preparation of Local Development Documents.
10. The City Council has been actively involved in the preparation of a sub-regional strategy for Central Oxfordshire, which was commissioned by SEERA and prepared by the County Council as the principal lead authority. The views of the City Council in response to the South East Plan and the Central Oxfordshire sub-region are set out in a report to the Executive Board on 4<sup>th</sup> April 2005.
11. More recently the City Council have responded to the County Council consultation on new housing distribution in Oxfordshire to 2026 under the South East Plan. The City Council resolved (October 2005) not to support Option 1 (focus on Bicester and Didcot) or Option 2 (focus on south of the county). Support was given to the promotion of the alternative site on land south of Grenoble Road. This urban extension to Oxford is considered to be the most sustainable location for new housing in central Oxfordshire. A comprehensive review of Oxford's Green Belt was recommended with an aim to create a new and enduring boundary that meets all the needs of the City.
12. **Oxfordshire Structure Plan 2016** was adopted in October 2005. The general strategy is set out in Policy G1, which provides the framework for sustaining economic prosperity and meeting housing requirements. It seeks to deliver the level of development required to meet the objectives of the Plan, concentrate development in sustainable locations principally the larger urban areas ie. Oxford, and make the best use of previously developed land. Policy G2 aims to ensure that all development is "of a scale and type appropriate to its site and surroundings, and not cause harm to the character of the area." In terms of housing allocations Policy H1 requires Oxford to accommodate 6,500 additional dwellings between April 2001 and March 2016. Development being focused within important urban areas such as Oxford, with an emphasis on the development of previously developed land. Policy H3 relates to the need for high density development within urban areas.
13. **Oxford Local Plan 2016** adopted on 11<sup>th</sup> November 2005. Policy approach referred to in detail earlier in this document (background).

#### **Principal objectives of the study**

14. The principal objectives of the balance of dwellings study is to:
- provide a robust evidence base to evaluate and review the implementation of policy which could lead to the production of further guidelines in the form of a Supplementary Planning Document;
  - review recent planning permissions for conversions, redevelopment and new residential development within Oxford;

- monitor the implementation and effectiveness of Local Plan policy to influence the balance of dwelling types;
- to assess the present and future demographic profile of the City and identified local areas and determine how these patterns of need relate to the balance of dwelling types and sizes that make up the supply of residential accommodation in Oxford.

## Methodology

15. The methodology should comprise the following principal stages:

### Stage 1: Taking stock of the existing situation

- collect and assess the present stock of residential accommodation in Oxford by dwelling size and type;
- collate data on residential developments completed, through planning permissions implemented for conversions, redevelopments and new development over agreed time period to establish current trends;
- highlight the position within Oxford as a whole and identify those areas of the City under greatest pressure, and or lacking a reasonable range of accommodation available;
- use demographic data (Census) to provide evidence of the distribution of the population within the city according to number and age;
- use background information from the Housing Requirements Study to provide a context for assessing the balance of dwellings;
- use any other relevant sources of information such as the Electoral registration document, to provide evidence of the breakdown and distribution of the population;
- make reference to the national and local policy background and the importance of planning for mixed communities and the need to influence the size and type of housing available in Oxford.

### Stage 2: Identify current and projected trends

- Using information from research undertaken to establish current trends;
- To identify from the evidence local areas of greatest pressure for change and the possible key market drivers influencing change;
- Assess the relationship between current trends and housing need and the effect on the existing housing stock;
- Evaluate the effect of the current trend continuing and the ensuing problems that would result;
- Assess the effectiveness of Policy HS.8 in providing a balance of dwellings in Oxford; and
- Set out the problems caused by the allowing the present situation to continue.

### Stage 3: Policy implications

- Set out the policy approach that should be taken to achieve an appropriate mix of dwellings in Oxford and within identified local areas;
- Propose clear guidance on the implications of making no policy change;
- Suggest appropriate changes to policy to positively influence the mix of dwellings to achieve a balanced distribution, maintain and strengthen the existing stock to ensure that a range of residential accommodation is available to meet identified housing need both now and in the future.
- Set out a suggested approach to be taken forward as a new Supplementary Planning Document guidance.

## Deliverables

16. The completed study should provide a robust evidence base to identify the range of dwelling sizes available in Oxford, and within sub areas. This should include a breakdown of numbers, type and distribution throughout the City. Identify demographic needs for dwellings of different sizes and types in Oxford.

17. It should provide a sound assessment of the existing situation, identify current trends and projected trends, evaluate the implications and propose options for the implementation of future policy.
18. The consultant must provide 10 copies of the full research study report and 20 copies for wider distribution. The City Council should be provided with an unbound 'top copy', and an electronic version on CD from which copies can be made available to the public. Any proceeds belong to the City Council. The City Council should be provided with the background information collected from any survey work undertaken (to enable updating in the future).
19. The consultant will be required to attend an Executive Board Committee / or other meeting to present their findings and to answer relevant questions.
20. The study will be co-ordinated by a project group of Officers from within the City Council. Proposals should allow for one meeting to discuss the draft findings of the study, which should be made available three weeks prior to completion date.
21. Day to day client liason will be through a nominated Project Officer. Detailed working arrangements will be agreed in the light of the appointed consultants' proposal.

#### **Timetable**

22. It is intended that the consultant will be appointed in January 2006.
23. The report should be produced in a draft form within six weeks of the commissioning and the study completed by the end of March 2006.

#### **Tender**

24. You are invited to tender for the above works. Please note the timescale for completion of the various stages of the work.
25. Please submit your fee bid for this work (excluding VAT) inclusive of expenses and disbursements (eg. travelling, copying charges, subsistence).