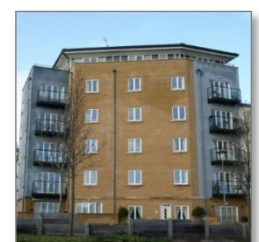
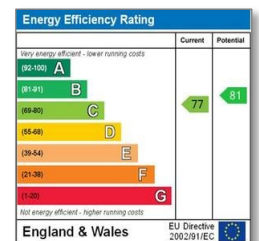




Buckinghamshire Local Housing Need Assessment

Executive Summary

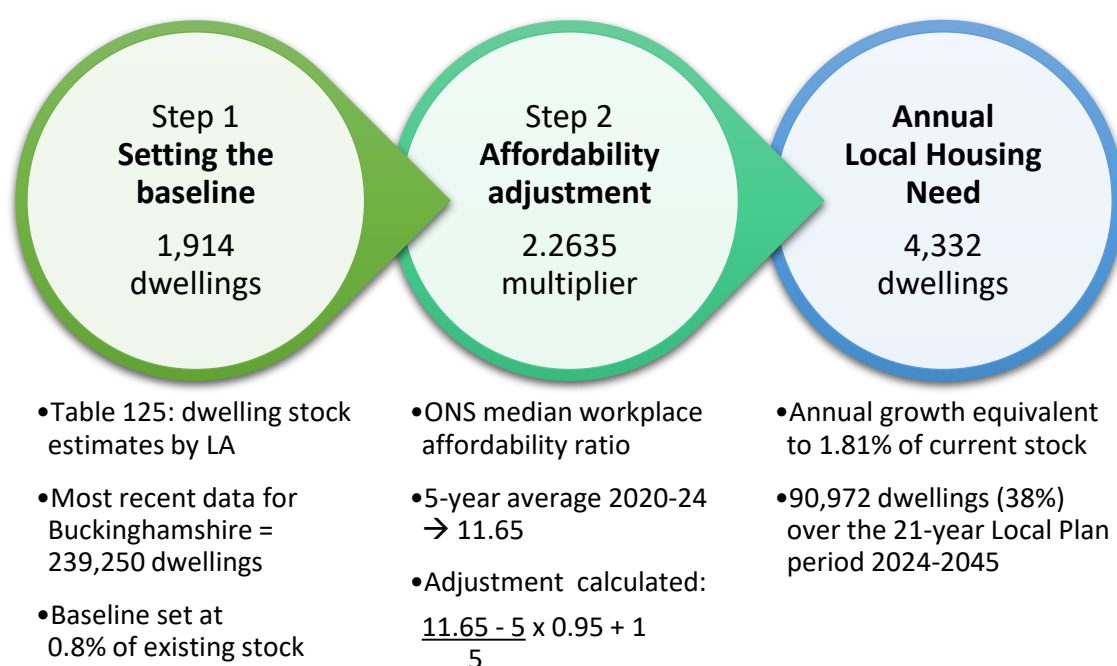
Consultation Draft: September 2025



Executive Summary

1. The National Planning Policy Framework (NPPF, December 2024) sets out the Government's objective of significantly boosting the supply of homes, with the aim of meeting each area's identified housing need with an appropriate mix of housing types for the local community. To determine the number of homes needed, the NPPF states that strategic policies should be informed by a local housing need assessment (LHNA) conducted using the standard method in national planning guidance.
2. Buckinghamshire Council commissioned Opinion Research Services (ORS) to prepare an LHNA to inform the Local Plan strategic policies as required by the NPPF. The standard method sets out a formulaic approach to determine the Local Housing Need (LHN) figure, using dwelling stock estimates to set the Step 1 baseline and the workplace-based house price to earnings ratio to calculate the Step 2 affordability adjustment (Figure 1).

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

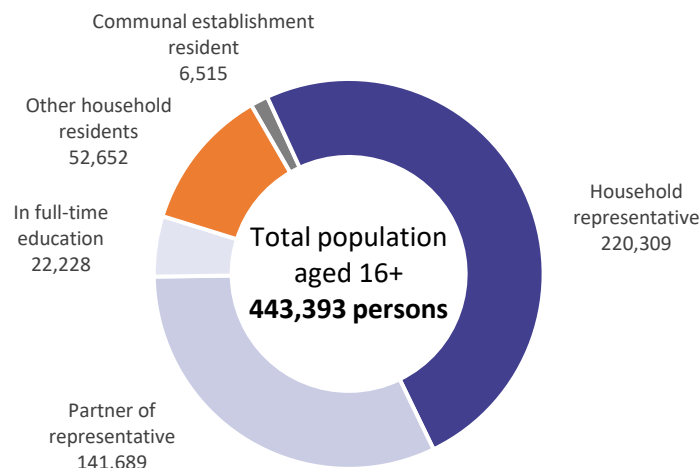


3. The standard method identifies that the LHN figure for Buckinghamshire is currently 4,332 dwellings per year, so the minimum amount of housing to be planned for over the 21-year period 2024-2045 is 90,972 dwellings. **The LHNA has been prepared on the basis that 90,972 dwellings will be planned for in Buckinghamshire over the 21-year Local Plan period 2024-2045.**
4. Housing supply in Buckinghamshire averaged 2,600 net additions per year based on Government data for the last 10 years (2014-15 to 2023-24). Given this context, there will need to be a step-change in future supply to respond to housing market pressures which may have suppressed migration and household formation. If the Council is unable to plan for sufficient housing to meet the identified housing need, it will be important for this to be discussed with neighbouring local authorities under the Duty to Co-operate. However, when determining the overall amount of housing to be planned for, the Council will also have to consider any needs that cannot be met within neighbouring areas.

Growth of the Local Community

5. The number of households in Buckinghamshire was 220,300 at the time of the 2021 Census, an increase of 19,600 (10%) over the period 2011 to 2021. Over the same period, the number of adult children living with their parents increased by 6,800 (19%) to a total of 43,400 in 2021, and the number of concealed families increased by 1,100 (41%) to a total of 3,700.
6. Figure 2 shows the 443,400 residents aged 16 or over on Census Day separated into different categories. “Other household residents” include adult children living with parents and concealed family representatives.

Figure 2: Segmentation of resident population aged 16 or over on Census Day 2021 (Source: Census data, ONS)



7. Whilst many “other household residents” would not plan to move, including some that have chosen to live in multi-generational households, data from the English Housing Survey (EHS) data suggests that two fifths would prefer to live independently, and the majority would be the reference person for the new household. Applying age-specific EHS rates to the Census data for Buckinghamshire identifies that 18,900 of the “other” residents would want to live independently forming 17,200 potential households.
8. Given this context, the LHNA has considered two scenarios for future population growth over the Local Plan period 2024-2045. Both scenarios are based on the 90,972 dwellings identified by the standard method and assume that the housing need will provide for natural growth and enable recent migration trends to continue, but the assumptions then diverge as follows:
 - » **Scenario A** is based on past household formation trends and assumes that the increase to housing supply will enable additional population growth (above recent migration trends). The number of people moving to the area is therefore increased until household growth aligns with the identified housing need
 - » **Scenario B** is based on increased household formation and assumes that the increase to housing supply will enable the 17,200 potential households identified who want to live independently to form separate households. This scenario also assumes additional population growth with the number of people moving to the area increased, but with a smaller uplift.
9. Both scenarios identify a faster rate of population growth than the sub-national population projections (which assume that recent migration trends continue) although the projected population in 2045 is much higher in Scenario A (758,000 persons) than in Scenario B (701,700). Based on Scenario A there is a projected growth of 189,600 persons, which is 42% more than the growth of 133,300 persons identified by Scenario B.

10. Figure 3 provides a summary of key outputs based on the projected growth, with baseline estimates set out alongside the Scenario A and Scenario B outputs for 2045 and the change from 2024-2045.

Figure 3: Population growth by resident type, household growth and average household size, 2024-2045 (Source: ORS Model)

	Baseline 2024	Scenario A 2045	Change 2024-2045	Scenario B 2045	Change 2024-2045
HOUSING NEED					
Total households	226,989	311,369	+84,381	311,518	+84,529
Unoccupied dwellings	11,426	16,556	+5,130	16,563	+5,137
Dwellings in Use Class C3	238,415	327,925	+89,510	328,081	+89,666
Additional communal establishment bedspaces in Use Class C2 (equivalised to dwellings)	-	-	+1,462	-	+1,306
TOTAL HOUSING NEED	-	-	90,972	-	90,972
RESIDENT POPULATION					
Household residents	560,863	747,842	+186,979	691,828	+130,965
<i>Average household size (persons)</i>	<i>2.471</i>	<i>2.402</i>	<i>-0.069</i>	<i>2.221</i>	<i>-0.250</i>
Communal establishment residents	7,541	10,184	+2,643	9,902	+2,361
TOTAL POPULATION	568,404	758,026	+189,623	701,730	+133,327

11. Both scenarios reflect the 90,972 dwellings identified by the standard method calculation for the Local Plan period 2024-2045, but population growth in Scenario A is higher than in Scenario B due to the lower average number of persons resident in each household. The average household size is projected to reduce over the Plan period in both scenarios due to the population ageing (as most older residents either live as couples without children or live alone) but Scenario B also reflects the assumed increase in household formation.
12. Whilst both scenarios identify an increase of around 84,000 additional households, far more young residents aged under 35 would form households under Scenario B than under Scenario A resulting in a larger number of younger one-person households and couples without children.
- » **Scenario A** identifies growth across all household types, with one-person households and couples without children having the largest increases (28,600 and 26,800 respectively), families with children increasing by 16,100 and other household types increasing by 12,900
 - » **Scenario B** identifies a larger growth of one-person households (45,700) and couples without children (27,600) but a lower growth of families with children (11,400) and a reduction in other household types due to fewer concealed families and adult children living with parents.
13. Having considered the two scenarios in detail, it is evident that Scenario B (i.e. providing the homes needed for local residents who want to form a separate household and live independently) better aligns with the Government's objectives of addressing the impact of past undersupply, but more Affordable Housing will need to be provided (as many potential households have not formed as they cannot afford suitable housing) which will need to be tested in the context of economic viability.
14. Scenario B also provides a more credible demographic projection (albeit still far higher than past trends) particularly in the context of jobs growth, which broadly aligns with the number of resident workers needed based on established commuting patterns. Therefore, the LHNA has assessed the size, type and tenure of housing needed for different groups in the community on the basis of Scenario B.

Affordable Housing Need

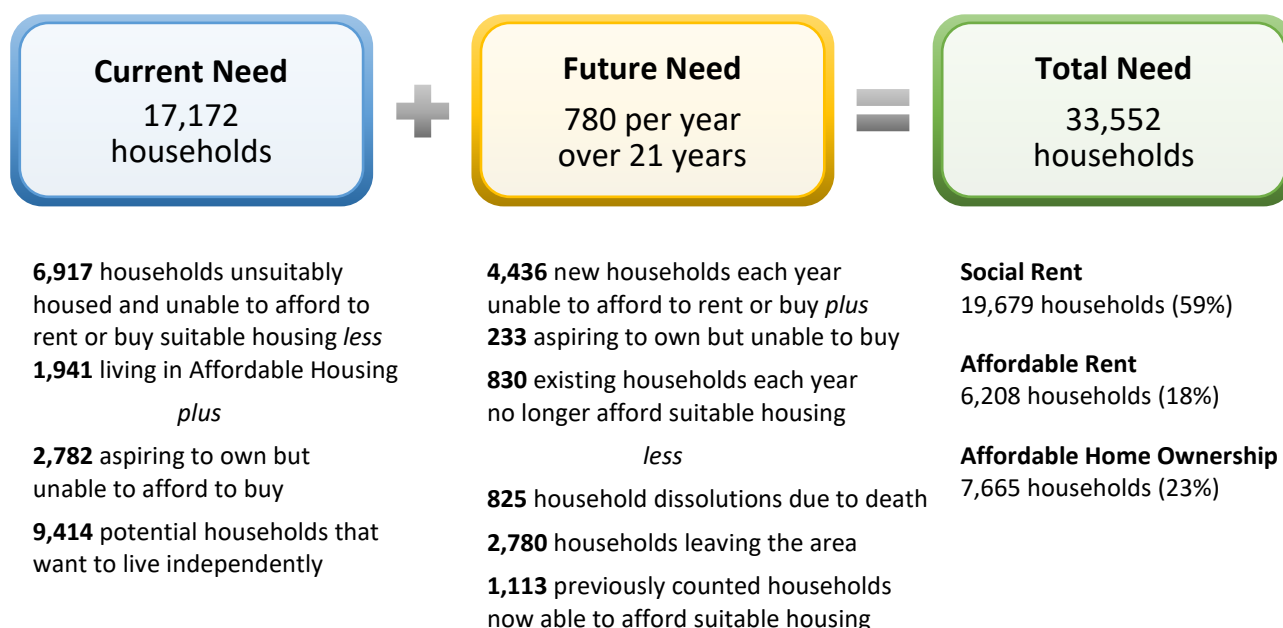
15. The NPPF states that those groups who require Affordable Housing should be identified when assessing need, and Planning Practice Guidance confirms that *“all households whose needs are not met by the market can be considered in affordable housing need”* and that *“strategic policy-making authorities will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market”*.
16. Household affordability is therefore a key consideration in determining both the need for Affordable Housing and the type and tenure of homes likely to be needed by households that are unable to afford. On this basis, Figure 4 shows the annual incomes identified by the LHNA to afford Market and Affordable Home Ownership, as well as Market Rent, Affordable Rent and Social Rent based on local house prices and rents.

Figure 4: Annual household income thresholds for housing options in Buckinghamshire by number of bedrooms

Annual Household Income Affordability Thresholds	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
ANNUAL INCOME TO AFFORD TO OWN <i>based on 10% deposit and 3.5x mortgage multiplier</i>				
Market Home Ownership	£49,441	£72,685	£98,883	£169,142
Affordable Home Ownership	£32,641	£47,364	£51,338	£72,284
ANNUAL INCOME TO AFFORD TO RENT <i>based on 35% of gross income (without housing benefit)</i>				
Market Rent	£29,968	£36,665	£45,106	£63,003
Affordable Rent	£23,221	£28,293	£33,472	£41,655
Social Rent	£16,111	£18,491	£20,862	£23,720

17. Figure 5 summarises the LHNA analysis, which identifies a need to provide Affordable Housing for a total of 33,600 households over the 21-year Local Plan period 2024-2045, an average of around 1,600 per year.

Figure 5: Current need and future need from households needing Affordable Housing in Buckinghamshire 2024-2045
(Source: ORS Model. Note: Figures may not sum due to rounding)



Future Housing Mix

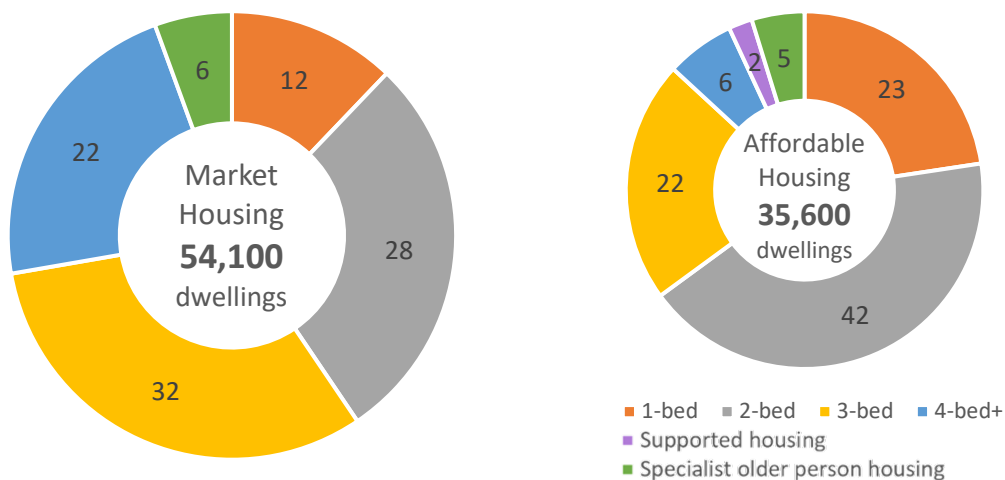
18. Figure 6 sets out the overall housing need identified for Market Housing and Affordable Housing in terms of the future housing mix based on the current inputs to the standard method calculation for Buckinghamshire over the 21-year period 2024-2045. The outputs identify the mix of general needs housing based on the number of bedrooms and the specialist older person housing need based on the type of housing.

Figure 6: Overall Market Housing and Affordable Housing need by property type and number of bedrooms 2024-2045
(Source: ORS Model. Note: Figures may not sum due to rounding)

Local Housing Need 2024-2045		Market Housing	Affordable Housing	TOTAL
General Needs Housing	1 bedroom	6,565	8,047	14,612
	2 bedrooms	15,358	15,065	30,422
	3 bedrooms	17,159	7,803	24,962
	4+ bedrooms	11,977	2,209	14,186
Supported Housing		-	764	764
Specialist Older Person Housing		3,018	1,701	4,719
Dwellings in Use Class C3		54,077	35,589	89,666
Bedspaces in Use Class C2 (equivalised to dwellings)				1,306
TOTAL HOUSING NEED				90,972

19. The LHNA has identified a need for 54,100 homes for market sale or rent (60% of the total dwellings) and 35,600 affordable homes (40%). This includes an identified need for 800 units of supported housing and 4,700 specialist older person housing units, comprising both Housing with Care and Housing with Support. There is also an identified need for additional bedspaces in residential care or nursing homes.
20. Figure 7 summarises the percentage mix of the identified need for Market Housing and Affordable Housing.

Figure 7: Percentage mix of Market Housing and Affordable Housing need by property type and size (Source: ORS Model)



21. Whilst the LHNA forms an important part of the wider evidence base to inform the development of housing and planning policies, it is important to recognise that these findings should not be considered in isolation. The LHNA does not seek to determine rigid policy conclusions but instead provides a key component of the evidence required to develop and support a sound policy framework.