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South West Herts Local Housing Needs Assessment Update

Appendices

Iceni Projects Limited on behalf of
SW Herts Local Authorities

March 2024

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ON BEHALF OF SW HERTS
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South West Herts Local Housing Needs
Assessment Update
APPENDICES

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A1. HOUSING MARKET GEOGRAPHY

A1.1 The Planning Practice Guidance (PPG) on 'Housing and economic needs assessment' sets out how housing market areas should be defined. Para 18 in the Plan Making Section (Reference ID: 61-018-20190315) states:

"A housing market area is a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work. These can be broadly defined by analysing:

- The relationship between housing demand and supply across different locations, using house prices and rates of change in house prices. This should identify areas which have clearly different price levels compared to surrounding areas.*
- Migration flow and housing search patterns. This can help identify the extent to which people move house within an area, in particular where a relatively high proportion of short household moves are contained, (due to connections to families, jobs, and schools).*
- Contextual data such as travel to work areas, retail and school catchment areas. These can provide information about the areas within which people move without changing other aspects of their lives (e.g. work or service use)."*

A1.2 As key inputs to defining housing needs, including household projections and affordability ratios, are published at a local authority level, it is common to consider housing market geographies based on the 'best fit' to local authority areas. This approach is supported by the Planning Advisory Service (PAS) Technical Advice Note on Objectively Assessed Need and Housing Targets¹.

Previous and Wider Evidence

A1.3 A South West Hertfordshire Housing Market Area (HMA) was defined in the 2016 South West Hertfordshire SHMA² as including the local authorities of Dacorum, Hertsmere, St Albans, Three Rivers and Watford. This was informed by a review of existing evidence at that time and analysis of house price, migration and commuting data.

A1.4 Icenote note that the Welwyn Hatfield SHMA Update 2017 defines a Welwyn Hatfield Housing Market Area which is focused on that District, but extends to include parts of most surrounding Hertfordshire authorities, including villages such as Letty Green and Birch Green in East Herts; Codicote and Knebworth in North Herts; Potters Bar in Hertsmere; and Colney Heath and London Colney in St

¹ <https://www.local.gov.uk/sites/default/files/documents/objectively-assessed-need-9fb.pdf>

²² <https://www.hertsmere.gov.uk/Documents/09-Planning--Building-Control/Planning-Policy/Local-Plan/SW-Herts-SHMA-Final-Report-Jan16.pdf>

Albans. These are defined by the Study as those areas with which Welwyn Hatfield shares the strongest relationship.

A1.5 The inter-relationship with Welwyn Hatfield was considered within the 2016 SW Herts SHMA. This found that although there were strong migration links with St Albans, that Welwyn Hatfield was in a different Travel to Work Area (TTWA), covering Stevenage and Welwyn Garden City, to the other authorities in the study area. Similarly other studies which it considered, including those from the University of Newcastle Centre for Urban and Regional Development Studies (CURDS), excluded Welwyn Hatfield from the South West Hertfordshire HMA³.

A1.6 The reality is that towards the edge of any housing market area there are likely to be some locally cross boundary flows with adjoining areas, and the situation here is no different. We turn next to undertake a high-level review of the housing market geography taking account of the latest evidence.

Commuting and Migration

A1.7 At the point of writing (Sept 2023) the 2011 Census remains the most up-to-date and comprehensive data on commuting and migration in the UK. Appendix A to the 2016 study⁴ drew from the 2011 Census to examine commuting and migration patterns in some detail. The equivalent matrices of commuting and migration moves from the 2021 Census which would allow consideration of self-containment levels has yet to be released. Furthermore commuting patterns shown by the 2021 Census will have been influenced by the timing of the 2021 Census when a large proportion of people were working from home.

A1.8 The 2016 SHMA identified that migration moves were influenced by the proximity to London, and it is important to recognise the influence of London on the housing market. But the Mayor of London has defined London as a separate Housing Market Area in its own right. Excluding migration to/from London, it found that the five SW Herts authorities had a commuting self-containment rate of between 77-84%, well in excess of the typical 70% threshold set out in the Guidance; whilst St Albans and Welwyn Hatfield treated separately did not. The migration analysis supported the definition of the SW Herts HMA.

A1.9 In relation to commuting the 2016 SHMA noted the significant influence of London but if movements to and from the capital are excluded then the commuting self-containment level for the five local authorities of Dacorum, Hertsmere, Three Rivers, St Albans and Watford as a whole is 76%. This

³ <https://www.ncl.ac.uk/curds/research/peopleplace/#nhpau>

⁴ <https://www.hertsmere.gov.uk/Documents/09-Planning--Building-Control/Planning-Policy/Local-Plan/SW-Herts-SHMA-Appendices.pdf>

exceeds the 75% threshold used by ONS for their Travel to Work Areas (TTWAs). It analysed the 2011 ONS TTWAs which showed a Luton-focused HMA extending to include Dacorum, St Albans and Watford; but with Hertsmere falling within a London TTWA; and Three Rivers falling across both the London and Luton TTWAs.

- A1.10 The commuting dynamics from the 2011 Census remain the only robust set of commuting data currently available. However, ONS do record more recent migration movements between local authorities drawing on data from NHS registrations. This data does not record intra-local authority moves, so it is not possible to calculate self-containment rates. The most recent edition of this data, known as the *Internal migration: matrices of moves by local authority and region (countries of the UK)*⁵, was published in June 2021 and covered the year to June 2020.
- A1.11 For each of the five local authorities in SW Herts, Icenii has examined their most notable relationships. This is measured in gross migration and averaged over the four years from 2017 to 2020. We have also weighted these figures to 1,000 per head of population between the two areas in question, as the expectation is that areas with a larger population will result in larger migratory patterns.
- A1.12 As shown in the table below, only St Albans has its strongest migration link with an area outside of the study area, i.e. Welwyn Hatfield - this was also the case in the 2016 report. St Albans' second and third strongest links are with Dacorum and Hertsmere respectively. However Welwyn Hatfield also has strong links with Stevenage (3.2) and Hertsmere (3.1).
- A1.13 All areas have at least three out of their five strongest migration relationships with another local authority in the study area. In all cases Watford is included within the strongest five relationships demonstrating the borough's centrality to the Housing Market Area. This analysis confirms that the previously defined HMA remains robust.

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<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/migrationwithintheuk/datasets/matricesofinternalmigrationmovesbetweenlocalauthoritiesandregionsincludingthecountriesofwalesscotlandandnorthernireland>

Table A1.1 Average Annual Gross Migration Per 1,000 Head of Population (2017-2020)

Dacorum		Hertsmere		St Albans		Three Rivers		Watford	
Three Rivers	3.4	Watford	4.3	Welwyn Hatfield	3.6	Watford	8.9	Three Rivers	8.9
Aylesbury Vale	3.4	Barnet	3.4	Dacorum	3.0	Dacorum	3.4	Hertsmere	4.3
Watford	3.2	Welwyn Hatfield	3.1	Hertsmere	2.5	Harrow	2.5	Dacorum	3.2
St Albans	3.0	St Albans	2.5	Central Bedfordshire	1.7	Hillingdon	1.8	Harrow	2.7
Central Bedfordshire	2.3	Harrow	2.4	North Hertfordshire	1.6	Hertsmere	1.8	St Albans	1.5
Hertsmere	1.4	Three Rivers	1.8	Watford	1.5	Chiltern	1.6	Brent	1.4

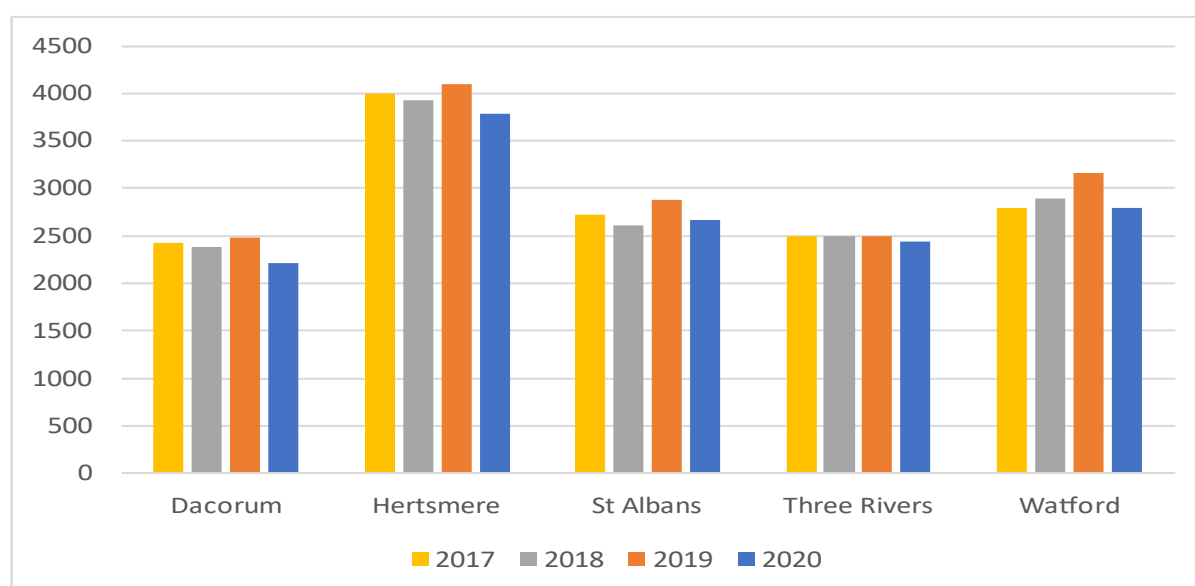
Source: ONS, Migration Matrices

Movement from London

A1.14 We have also looked specifically at the relationship between SW Herts and London, to examine whether net migration from the capital has increased post pandemic. Unfortunately the data currently available only picks up the first three or four months of the pandemic. We would expect migration to vary over time in line with the housing market cycle.

A1.15 As shown in the Figure below, in-migration from London was broadly lower in 2020 in all areas in all previous years. This may be a reflection of house moves being constrained during the period from March to June 2020. The next iteration of this data was due in “Summer 2023” and may show a slightly different pattern again; but has yet to be published.

Table A1.2 In-Migration from London to study area authorities (2017-2020)



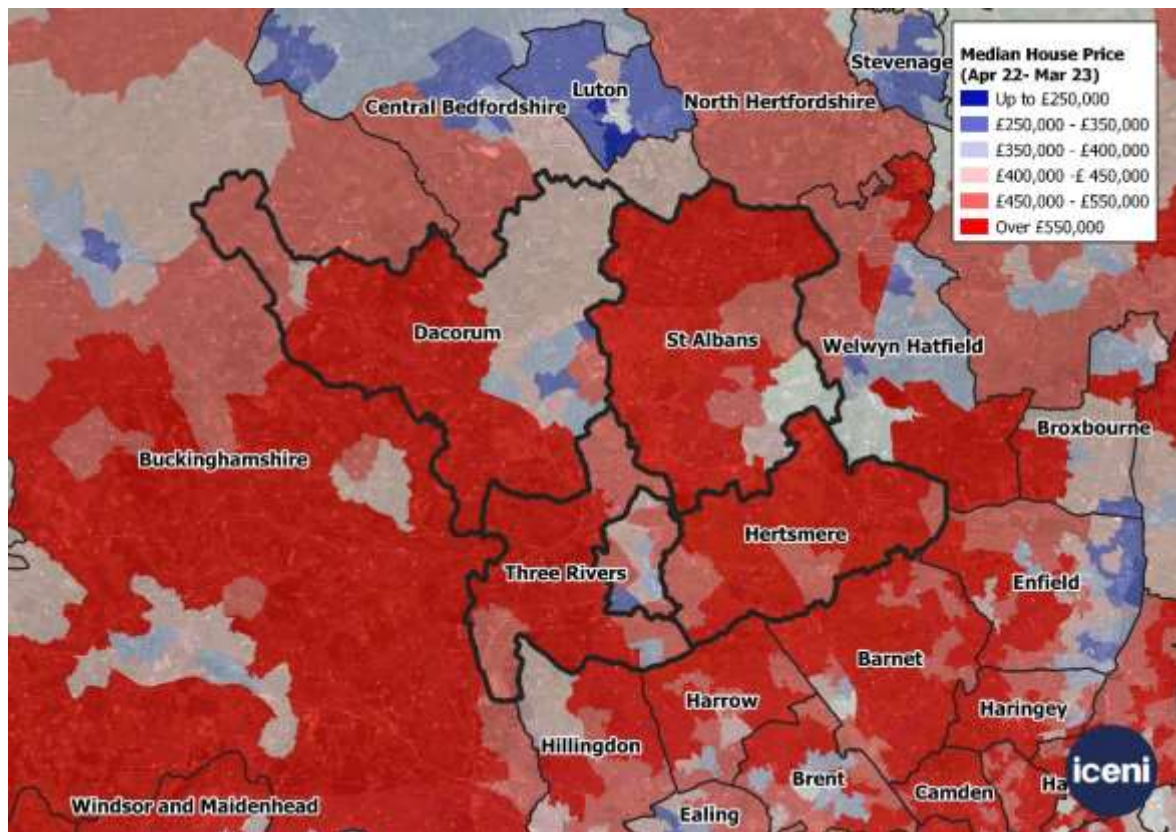
Source: ONS, Migration Matrices

House Price and House Price Change

A1.16 House price data is taken from ONS Small Area Statistics for the year to December 2022 which is the most recent data available. We have analysed the median price for a home for each middle super output area in the Country. As shown in the map below, there is a band of higher house prices across Hertfordshire and into Buckinghamshire but this does not extend northwards into Bedfordshire. These prices are also similar to those in Outer London Boroughs; but below those in Central London.

A1.17 Within this band there are pockets of lower cost housing and within the study areas this includes Watford and Hemel Hempstead. This is likely to reflect both the quality of place but also the mix of housing with urban areas typically seeing smaller, cheaper forms of housing such as flats than suburban and rural areas.

Table A1.3 Median House Price by MSOA (2022)

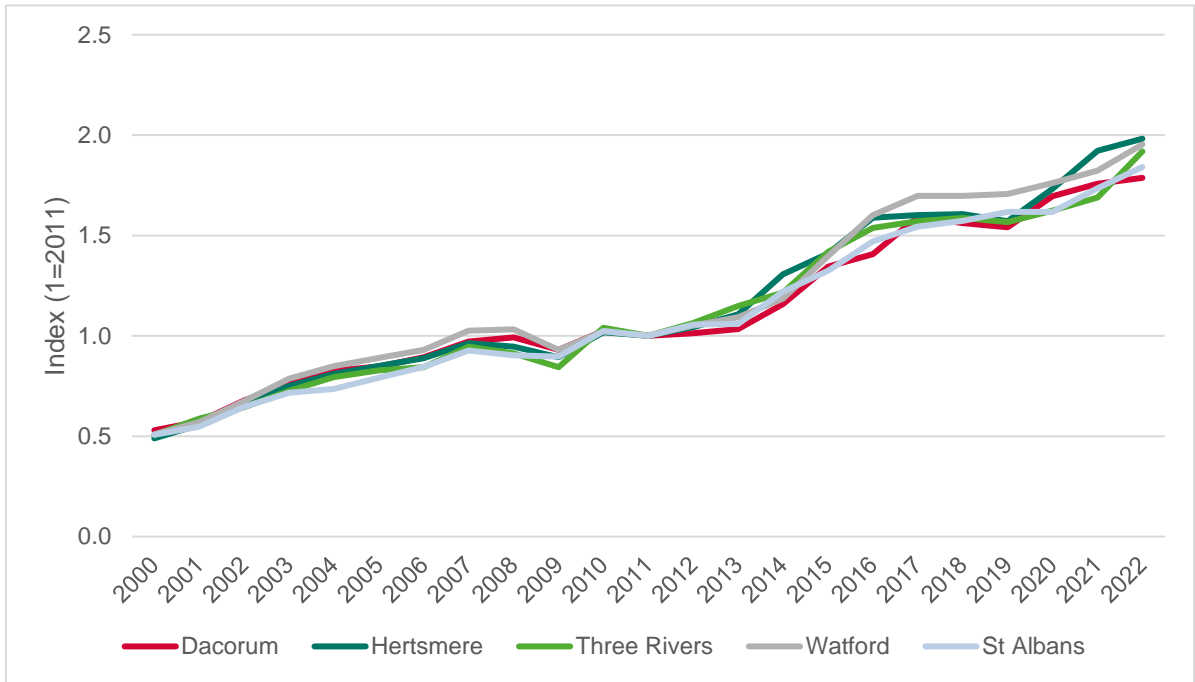


Source: ONS based on HMLR data, 2023

A1.18 These patterns are similar to those observed within the 2016 SHMA and therefore neither house prices, and due to its similarity, house price change, suggest a substantial shift in the housing market geography in South West Hertfordshire.

A1.19 This is confirmed by local authority data indexed to 2011 levels, as set out below. This shows that all areas have seen substantial growth over the period since 2000 and since 2011 but the indexed range is fairly narrow (1.79 in Dacorum to 1.98 Hertsmere) by 2022.

Table A1.4 Indexed House Price Growth (2000-2022) (1=2011)



Source: ONS based on HMLR data, 2023

A1.20 With the exception of Watford (which we know from migration patterns is central to the HMA) all areas had very similar growth between 2011 and 2019.

Conclusions on the Housing Market Geography

A1.21 Due to data availability, it is not entirely possible to fully review the HMA previously defined. However a review of the more recent data which is available continues to show a strong correlation between the five authorities in the study area. This includes continued strong migration between the local authorities within the Study Area and particularly with Watford from all areas. House prices patterns also remain broadly similar to those in 2016 and house price change has been reasonably consistent across the HMA.

A1.22 The evidence would thus justify the continued use of the South West Hertfordshire HMA and for the Councils continuing to cooperate on strategic matters including housing. The evidence also shows that there are cross-boundary inter-relationships with London and localised relationships with other areas, in particular between St Albans and Welwyn Hatfield.

A2. POPULATION AND WORKFORCE GROWTH SUPPORTED BY DEMOGRAPHIC PROJECTIONS & STANDARD METHOD

A2.1 This Appendix sets out the results of demographic modelling showing the population growth, and the growth in different age groups which would be supported by the housing provision in line with a) the standard method minimum local housing need figures and b) the scale of need shown by the 2014-based household projections which feed into the standard method. The intention of modelling both scenarios is to test the implications of lower housing provision on demographics, including the available workforce.

A2.2 A series of bespoke projections have been developed for each local authority linking to both the projected household growth and the Standard Method. Arguably, it would be possible to simply take the population data sitting behind the 2014-based projections (as this links to the household growth). However, as has been demonstrated there have been some notable changes in demographics since the 2014-based data was published – in particular reductions in natural change driven by reduced fertility and lower improvements to mortality. In addition, publication of 2021 Census data has helped to reset estimates of the population structure in 2021.

A2.3 The method used to develop projections starts with the 2018-based subnational population projections (SNPP) as these are still the latest to be published by ONS (and these do reflect the changes in natural change). The analysis then draws on 2021 Census data to estimate the number of households and household age structure. The projections have been developed to cover the 2021-50 period with this report showing data for the period to 2041. The overall method can be summarised as:

- Start with a base population in 2021 based on ONS mid-year population estimates (which are based on the 2021 Census and rolled forward to a mid-year position);
- Use fertility, mortality and migration rates in the 2018-based projections applied to the 2021 start point;
- Apply data about household representative rates (HRRs) drawn from the Census. An HRR is essentially the chances of a person of a particular age and sex being considered as the ‘head of household’; and
- The migration data within the 2018-based SNPP is then adapted so that population growth as applied to each scenario drives the estimated household growth.

A2.4 As noted, two scenarios have been developed, the first looks at potential growth if the number of households grows in line with the 2014-based projections and the second is the same figure but with a 40% uplift applied. There are two difference between the projections summarised below:

- For the Standard Method based projection a small (3%) vacancy allowance has been included within figures – this is essentially expecting that at any point in time there will be a number of vacant homes (mainly due to households moving around within the housing system) – a 3% allowance has become fairly standard in assessments of this nature. This adjustment has only been applied to the Standard Method projection as this is a ‘housing need’ projection whereas the 2014-based figures are just for household growth; and
- The second difference is for the Standard Method projection we have assumed there to be some increase in HRRs in younger age groups. Data from the 2021 Census (see below) shows a decrease in HRRs – notably in younger age groups in the 2011-21 period and improving access to housing is one of the reasons given in the PPG as to why the method has an affordability uplift.

A2.5 The table below shows (for the whole of South West Herts) how HRRs are estimated to have changed in the 2011-21 period for a series of broad age groups – we would note that ONS is likely to use a more fine-grained analysis, but the table below reflects the data readily available at the time of writing. Generally, the data shows reductions in HRRs between the two Census points, and this could point to difficulties in some age groups being able to access housing in the HMA. For example, in 2011, it was shown that 42% of all people aged 25-34 were a ‘head of household’ but by 2021 only 38% were.

Table A2.1 Household Representative Rates by Age 2011 and 2021 – South West Herts

	2011	2021
16-24	8.6%	6.2%
25-34	42.0%	38.1%
35-49	57.2%	54.6%
50-64	61.6%	61.5%
65 and over	67.8%	66.2%

Source: Census (2011 and 2021)

Projection Outputs

A2.6 The tables below show projected population change in the 2021-41 period with the two projections. Linking to the 2014-based figures, it is projected the population of the HMA would increase by around 108,800 people, with the main group being those aged 16-64, although in proportional terms the population of older people is projected to increase by the greatest amount (45%). With the Standard Method based projection, population growth is projected to be stronger (increasing by 132,800 people) with also relatively stronger growth in the 16-64 age group and to a lesser extent the number

of children. The higher growth in these groups reflects the higher modelled levels of migration which tends to be focussed on people of working-age and their associated children.

Table A2.2 Projected population change 2021 to 2041 by broad age bands – South West Herts (linked to 2014-based household growth)

	2021	2041	Change in population	% change from 2021
Under 16	124,815	134,225	9,410	7.5%
16-64	381,463	439,044	57,581	15.1%
65 and over	102,088	150,086	47,998	47.0%
Total	608,366	723,356	114,990	18.9%

Source: Demographic Projections

Table A2.3 Projected population change 2021 to 2041 by broad age bands – South West Herts (linked to Standard Method)

	2021	2041	Change in population	% change from 2021
Under 16	124,815	139,788	14,973	12.0%
16-64	381,463	457,552	76,089	19.9%
65 and over	102,088	152,554	50,466	49.4%
Total	608,366	749,893	141,527	23.3%

Source: Demographic Projections

A2.7 The series of tables below show the same information for each local authority. This shows the strongest growth is projected to be in Watford with all areas projected to see an ageing of the population over time – Watford is projected to see the strongest growth in the 16-64 age group and also in the number of children.

Table A2.4 Projected population change 2021 to 2041 by broad age bands – Dacorum (linked to 2014-based household growth)

	2021	2041	Change in population	% change from 2021
Under 16	31,211	33,477	2,266	7.3%
16-64	96,889	110,077	13,188	13.6%
65 and over	27,117	39,632	12,515	46.2%
Total	155,217	183,186	27,969	18.0%

Source: Demographic Projections

Table A2.5 Projected population change 2021 to 2041 by broad age bands – Dacorum (linked to Standard Method)

	2021	2041	Change in population	% change from 2021
Under 16	31,211	34,790	3,579	11.5%
16-64	96,889	114,498	17,609	18.2%
65 and over	27,117	40,240	13,123	48.4%
Total	155,217	189,528	34,311	22.1%

Source: Demographic Projections

Table A2.6 Projected population change 2021 to 2041 by broad age bands – Hertsmere (linked to 2014-based household growth)

	2021	2041	Change in population	% change from 2021
Under 16	21,591	23,344	1,753	8.1%
16-64	67,229	76,836	9,607	14.3%
65 and over	19,285	28,787	9,502	49.3%
Total	108,105	128,967	20,862	19.3%

Source: Demographic Projections

Table A2.7 Projected population change 2021 to 2041 by broad age bands – Hertsmere (linked to Standard Method)

	2021	2041	Change in population	% change from 2021
Under 16	21,591	24,516	2,925	13.5%
16-64	67,229	80,453	13,224	19.7%
65 and over	19,285	29,357	10,072	52.2%
Total	108,105	134,326	26,221	24.3%

Source: Demographic Projections

Table A2.8 Projected population change 2021 to 2041 by broad age bands – St Albans (linked to 2014-based household growth)

	2021	2041	Change in population	% change from 2021
Under 16	31,952	33,284	1,332	4.2%
16-64	90,992	103,421	12,429	13.7%
65 and over	25,697	36,423	10,726	41.7%
Total	148,641	173,128	24,487	16.5%

Source: Demographic Projections

Table A2.9 Projected population change 2021 to 2041 by broad age bands – St Albans (linked to Standard Method)

	2021	2041	Change in population	% change from 2021
Under 16	31,952	34,249	2,297	7.2%
16-64	90,992	107,115	16,123	17.7%
65 and over	25,697	36,852	11,155	43.4%
Total	148,641	178,215	29,574	19.9%

Source: Demographic Projections

Table A2.10 Projected population change 2021 to 2041 by broad age bands – Three Rivers (linked to 2014-based household growth)

	2021	2041	Change in population	% change from 2021
Under 16	18,736	20,127	1,391	7.4%
16-64	58,209	66,733	8,524	14.6%
65 and over	17,007	25,028	8,021	47.2%
Total	93,952	111,888	17,936	19.1%

Source: Demographic Projections

Table A2.11 Projected population change 2021 to 2041 by broad age bands – Three Rivers (linked to Standard Method)

	2021	2041	Change in population	% change from 2021
Under 16	18,736	21,211	2,475	13.2%
16-64	58,209	70,189	11,980	20.6%
65 and over	17,007	25,566	8,559	50.3%
Total	93,952	116,966	23,014	24.5%

Source: Demographic Projections

Table A2.12 Projected population change 2021 to 2041 by broad age bands – Watford (linked to 2014-based household growth)

	2021	2041	Change in population	% change from 2021
Under 16	21,325	23,993	2,668	12.5%
16-64	68,144	81,978	13,834	20.3%
65 and over	12,982	20,217	7,235	55.7%
Total	102,451	126,188	23,737	23.2%

Source: Demographic Projections

Table A2.13 Projected population change 2021 to 2041 by broad age bands – Watford (linked to Standard Method)

	2021	2041	Change in population	% change from 2021
Under 16	21,325	25,021	3,696	17.3%
16-64	68,144	85,296	17,152	25.2%
65 and over	12,982	20,540	7,558	58.2%
Total	102,451	130,857	28,406	27.7%

Source: Demographic Projections

A2.8 The tables below show similar information but for households (by age of 'head of household'). This again highlights strong growth in older age groups but also notable increases in the youngest age group and the 35-49 age group when linking to the Standard Method. The high projected changes in younger age groups are linked to the method projecting increases in migration, which as noted above are concentrated on people of working age (and indeed younger people within this age group). For the Standard Method projection there is also an uplift due to building in an assumption of improving household formation from the 2021 position.

Table A2.14 Projected household change 2021 to 2041 by broad age bands – South West Herts (linked to 2014-based household growth)

	2021	2041	Change	% change from 2021
Under 35	31,720	38,599	6,879	21.7%
35-49	72,557	79,189	6,632	9.1%
50-64	71,961	83,898	11,937	16.6%
65 and over	65,745	98,117	32,372	49.2%
Total	241,983	299,803	57,819	23.9%

Source: Demographic Projections

Table A2.15 Projected household change 2021 to 2041 by broad age bands – South West Herts (linked to Standard Method)

	2021	2041	Change	% change from 2021
Under 35	31,720	47,254	15,534	49.0%
35-49	72,557	87,555	14,999	20.7%
50-64	71,961	85,656	13,695	19.0%
65 and over	65,745	99,443	33,698	51.3%
Total	241,983	319,909	77,925	32.2%

Source: Demographic Projections

A2.9 The tables below show the same information for local authorities. All districts are projected to experience broadly the same pattern of growth, including the differences between the two scenarios developed.

Table A2.16 Projected household change 2021 to 2041 by broad age bands – Dacorum (linked to 2014-based household growth)

	2021	2041	Change	% change from 2021
Under 35	8,805	10,280	1,475	16.7%
35-49	17,956	19,776	1,820	10.1%
50-64	18,911	21,451	2,540	13.4%
65 and over	17,771	26,477	8,706	49.0%
Total	63,443	77,984	14,540	22.9%

Source: Demographic Projections

Table A2.17 Projected household change 2021 to 2041 by broad age bands – Dacorum (linked to Standard Method)

	2021	2041	Change	% change from 2021
Under 35	8,805	12,536	3,731	42.4%
35-49	17,956	21,846	3,890	21.7%
50-64	18,911	21,929	3,018	16.0%
65 and over	17,771	26,880	9,109	51.3%
Total	63,443	83,191	19,748	31.1%

Source: Demographic Projections

Table A2.18 Projected household change 2021 to 2041 by broad age bands – Hertsmere (linked to 2014-based household growth)

	2021	2041	Change	% change from 2021
Under 35	5,070	6,203	1,133	22.4%
35-49	12,552	13,690	1,138	9.1%
50-64	12,769	14,477	1,709	13.4%
65 and over	12,426	18,826	6,400	51.5%
Total	42,816	53,196	10,380	24.2%

Source: Demographic Projections

Table A2.19 Projected household change 2021 to 2041 by broad age bands – Hertsmere (linked to Standard Method)

	2021	2041	Change	% change from 2021
Under 35	5,070	7,615	2,544	50.2%
35-49	12,552	15,219	2,667	21.2%
50-64	12,769	14,880	2,112	16.5%
65 and over	12,426	19,199	6,774	54.5%
Total	42,816	56,913	14,097	32.9%

Source: Demographic Projections

Table A2.20 Projected household change 2021 to 2041 by broad age bands – St Albans (linked to 2014-based household growth)

	2021	2041	Change	% change from 2021
Under 35	7,052	8,810	1,758	24.9%
35-49	17,815	18,952	1,137	6.4%
50-64	17,775	20,453	2,678	15.1%
65 and over	16,485	23,591	7,106	43.1%
Total	59,126	71,806	12,680	21.4%

Source: Demographic Projections

Table A2.21 Projected household change 2021 to 2041 by broad age bands – St Albans (linked to Standard Method)

	2021	2041	Change	% change from 2021
Under 35	7,052	10,848	3,797	53.8%
35-49	17,815	20,864	3,049	17.1%
50-64	17,775	20,770	2,995	16.9%
65 and over	16,485	23,867	7,382	44.8%
Total	59,126	76,349	17,223	29.1%

Source: Demographic Projections

Table A2.22 Projected household change 2021 to 2041 by broad age bands – Three Rivers (linked to 2014-based household growth)

	2021	2041	Change	% change from 2021
Under 35	3,880	4,788	907	23.4%
35-49	10,538	11,484	946	9.0%
50-64	11,594	13,404	1,810	15.6%
65 and over	10,869	16,306	5,436	50.0%
Total	36,882	45,982	9,100	24.7%

Source: Demographic Projections

Table A2.23 Projected household change 2021 to 2041 by broad age bands – Three Rivers (linked to Standard Method)

	2021	2041	Change	% change from 2021
Under 35	3,880	5,852	1,972	50.8%
35-49	10,538	12,758	2,219	21.1%
50-64	11,594	13,650	2,055	17.7%
65 and over	10,869	16,373	5,504	50.6%
Total	36,882	48,632	11,750	31.9%

Source: Demographic Projections

Table A2.24 Projected household change 2021 to 2041 by broad age bands – Watford (linked to 2014-based household growth)

	2021	2041	Change	% change from 2021
Under 35	6,913	8,517	1,605	23.2%
35-49	13,696	15,287	1,590	11.6%
50-64	10,912	14,113	3,200	29.3%
65 and over	8,195	12,918	4,724	57.6%
Total	39,716	50,835	11,120	28.0%

Source: Demographic Projections

Table A2.25 Projected household change 2021 to 2041 by broad age bands – Watford (linked to Standard Method)

	2021	2041	Change	% change from 2021
Under 35	6,913	10,403	3,490	50.5%
35-49	13,696	16,869	3,173	23.2%
50-64	10,912	14,427	3,514	32.2%
65 and over	8,195	13,124	4,930	60.2%
Total	39,716	54,823	15,107	38.0%

Source: Demographic Projections

A3. INFRASTRUCTURE PROJECTS IN SW HERTS

- A3.1 This Appendix reviews potential key infrastructure schemes in SW Herts and considers whether they could impact on housing need.

Hemel Garden Communities

- A3.2 This project spans the districts of Dacorum and St Albans; with plans to deliver 11,000 homes and 10,000 new jobs by 2050⁶. New jobs will be in the Hertfordshire Innovation Quarter (HIQ). The HIQ will provide 3 million sqft of commercial space. First stage of development is East Hemel Hempstead (within St Albans CDC) to commence within the next five years. This will include the HIQ. Infrastructure improvements include new and improved access to the M1 with delivery of Junction 8a, as well as localised investment to support sustainable travel in the local area. Improvements envisaged are principally focused on accommodating development and managing the impacts of it.

Hertfordshire Innovation Quarter

- A3.3 The HIQ is an Enterprise Zone- developed by a partnership team led by the Hertfordshire Local Enterprise Partnership (LEP), together with Hertfordshire County Council, St Albans City and District Council, Dacorum Borough Council, and innovation partners Rothamsted Research, Building Research Establishment (BRE) and the University of Hertfordshire. It is expected to deliver 3 million sqft commercial space.
- A3.4 Herts IQ has sites in Maylands Business Park in Hemel Hempstead, along with innovation/start-up space on campus at BRE in Watford and Rothamsted Research in Harpenden. It will support investment in these existing sites.
- A3.5 The focus of major new employment generation is anticipated to be the Crown Estate's 55 ha new business park which is anticipated to be delivered just off M1 Junction 8 near Hemel Hempstead, but falling within St Albans District. This is envisaged to come forward over the period to 2032.

Hertfordshire-Essex Rapid Transit (HERT)

- A3.6 HERT is a set of proposals for an east-west transit system connecting with north/south rail lines. HERT forms part of the County Council's A414 package of proposals designed to improve travel between the east and west of the county and reduce car dependency. As part of this, the HERT is

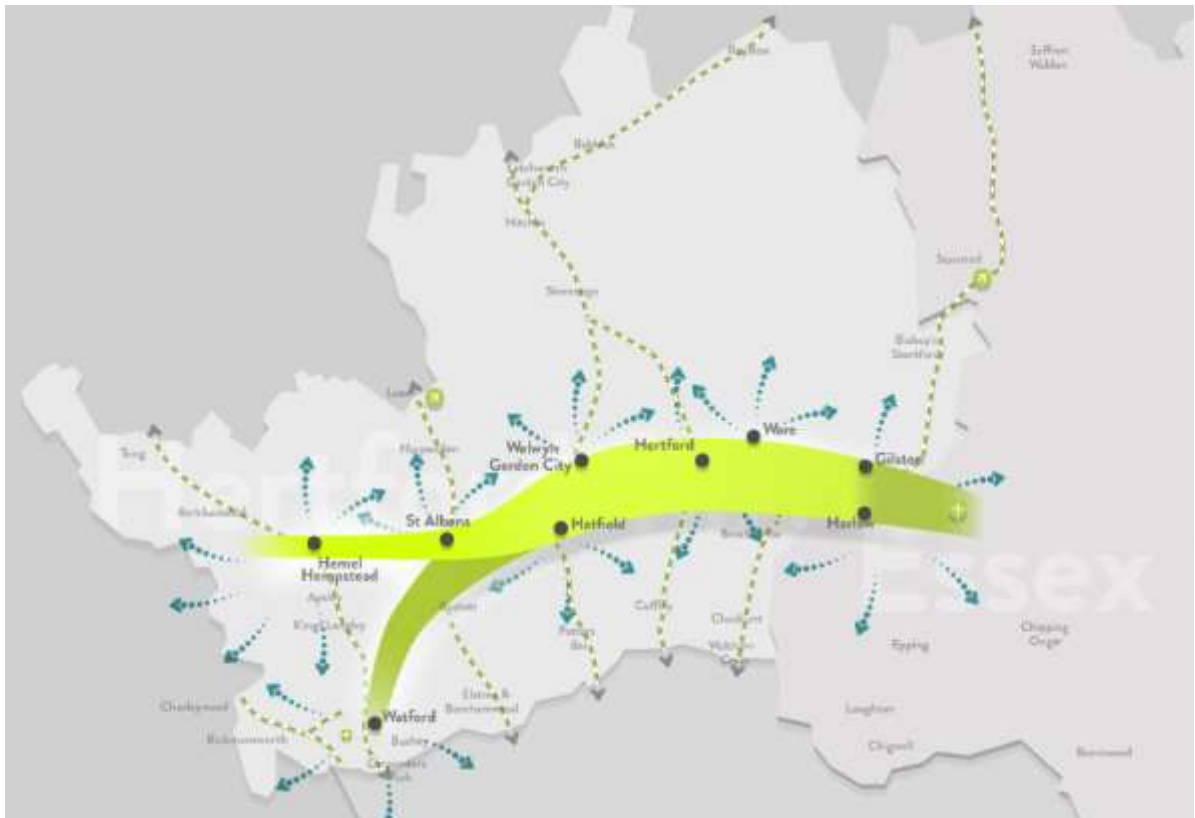
⁶ [Hemel Garden Communities \(dacorum.gov.uk\)](https://www.dacorum.gov.uk)

aligned with Hertfordshire's Bus Service Improvement Plan (BSIP) schemes, as well as the proposals for the Watford to Croxley Link.

A3.7 The scheme is currently at an early stage; with precise timescales undefined but focused on a 10-15 year delivery period. It will run from Watford and Hemel Hempstead in the west to Harlow in the east. It may inform, in due course, the preparation of a SW Herts Joint Strategic Plan looking to 2050 – but the timeframes for integration of proposals with spatial planning and delivery extend beyond those for the current round of local plans in SW Herts.

A3.8 The scheme does have the prospect to enhance both the economic attractiveness of the area and labour market dynamics. It could potentially lead to increased integration between labour markets across the corridor and cross-commuting. There are potential agglomeration benefits associated with this which could enhance the area's attractiveness for economic investment: but the success of this could be influenced by the extent of any labour market constraints (in terms of both labour availability and skills).

Table A3.1 Proposed HERT Connectivity



2nd Terminal at London Luton Airport

A3.9 In 2023 London Luton Airport were granted permission to increase annual passenger numbers from 18 million to 19 million each year. There are further proposals to expand Terminal 1 and create a

new Terminal (2) at London Luton Airport to increase capacity from (the previous) 18 million to 32 million passengers per year by 2043. This would be delivered in stages – 1) expansion of T1 to facilitate 21.5 million passengers; 2) First element of T2 boosting capacity to 27 million per year and 3) further expansion of T2 to increase capacity to 32 million.

A3.10 A DCO application was accepted by the Planning Inspectorate (PINs) on 27 March 2023. The period for “relevant representations” to be submitted ran until 23 June 2023. The timescales moving forwards including c. 18 months to reach a decision; with construction to commence (if consent is granted) in early 2025. The construction period is 20 years.

A3.11 The development is anticipated to create 4,500 new jobs at the Airport; total new jobs created across the UK would be around 11,000 - £1.5bn into the economy. However these are spread over a wide area extending well beyond the immediate environs of the Airport.

Status of Above Projects

A3.12 None of the major infrastructure proposals, such as a new junction on the M1, Luton Airport Expansion, or the delivery of the HERT proposals have yet been approved or have funding in place for their delivery. Similarly Hemel Garden Communities are not included within adopted development plans, although it features as a strategic proposal in the emerging Dacorum and St Albans Local Plans.

A4. LOCAL PRICES, RENTS & INCOMES

- A4.1 An important part of the affordable needs model is to establish the entry-level costs of housing to buy and rent. The affordable housing needs assessment compares prices and rents with the incomes of households to establish what proportion of households can meet their needs in the market, and what proportion require support and are thus defined as having an ‘affordable housing need’. For the purposes of establishing affordable housing need, the analysis focuses on overall housing costs (for all dwelling types and sizes).
- A4.2 The analysis below considers the entry-level costs of housing to both buy and rent across the Study Area. The approach has been to analyse Land Registry and ONS data to establish lower quartile prices and rents. Using a lower quartile figure is consistent with the PPG and reflects the entry-level point into the market recognising that the very cheapest properties may be of sub-standard quality.
- A4.3 Data from the Land Registry for the year to September 2022 shows estimated lower quartile property prices by dwelling type. The data shows that entry-level costs to buy are estimated to start from about £205,000 for a second-hand flat in Dacorum and rising to £790,000 for a detached home in Hertsmere. Looking at the lower quartile price across all dwelling types, the analysis shows a lower quartile price ranging from £308,000 (Watford) to £423,000 (St Albans). The figures are all based on cost of existing homes in the market although newbuild prices are considered later in this section when looking at potential costs of affordable home ownership properties.

Table A4.1 Estimated lower quartile cost of housing to buy by type (existing dwellings) – year to September 2022 – South West Herts

	Dacorum	Hertsmere	St Albans	Three Rivers	Watford
Flat/maisonette	£205,000	£262,000	£260,000	£260,000	£214,000
Terraced	£357,000	£427,000	£468,000	£388,000	£378,000
Semi-detached	£440,000	£508,000	£590,000	£495,000	£475,000
Detached	£620,000	£790,000	£773,000	£768,000	£665,000
All dwellings	£332,000	£395,000	£423,000	£410,000	£308,000

Source: Land Registry

- A4.4 It is also useful to provide estimates of property prices by the number of bedrooms in a home. Analysis for this draws together Land Registry data with an internet search of prices of homes for sale (using sites such as Rightmove). The analysis suggests a lower quartile price of about £190,000 for a 1-bedroom home in Dacorum, rising to £795,000 for homes with 4-bedrooms in St Albans.

Table A4.2 Estimated lower quartile cost of housing to buy by size (existing dwellings) – year to September 2022 – South West Herts

	Dacorum	Hertsmere	St Albans	Three Rivers	Watford
1-bedroom	£190,000	£225,000	£250,000	£230,000	£220,000
2-bedrooms	£275,000	£315,000	£350,000	£325,000	£300,000
3-bedrooms	£400,000	£475,000	£565,000	£525,000	£450,000
4-bedrooms	£575,000	£640,000	£795,000	£690,000	£585,000
All dwellings	£332,000	£395,000	£423,000	£410,000	£308,000

Source: Land Registry and Internet Price Search

A4.5 A similar analysis has been carried out for private rents using ONS data – this covers a 12-month period to September 2022. For the rental data, information about dwelling sizes is provided (rather than types); the analysis shows an average lower quartile cost (across all dwelling sizes) of between £900 (Dacorum) and £1,075 (Three Rivers) per month.

Table A4.3 Lower Quartile Market Rents, year to September 2022 – South West Herts

	Dacorum	Hertsmere	St Albans	Three Rivers	Watford
Room only	£450	-	£490	-	£599
Studio	£675	£725	£695	£688	£750
1-bedroom	£825	£895	£850	£900	£900
2-bedrooms	£995	£1,175	£1,150	£1,125	£1,185
3-bedrooms	£1,300	£1,450	£1,500	£1,450	£1,400
4-bedrooms	£1,600	£1,850	£2,200	£1,950	£1,875
All properties	£900	£1,050	£1,000	£1,075	£1,000

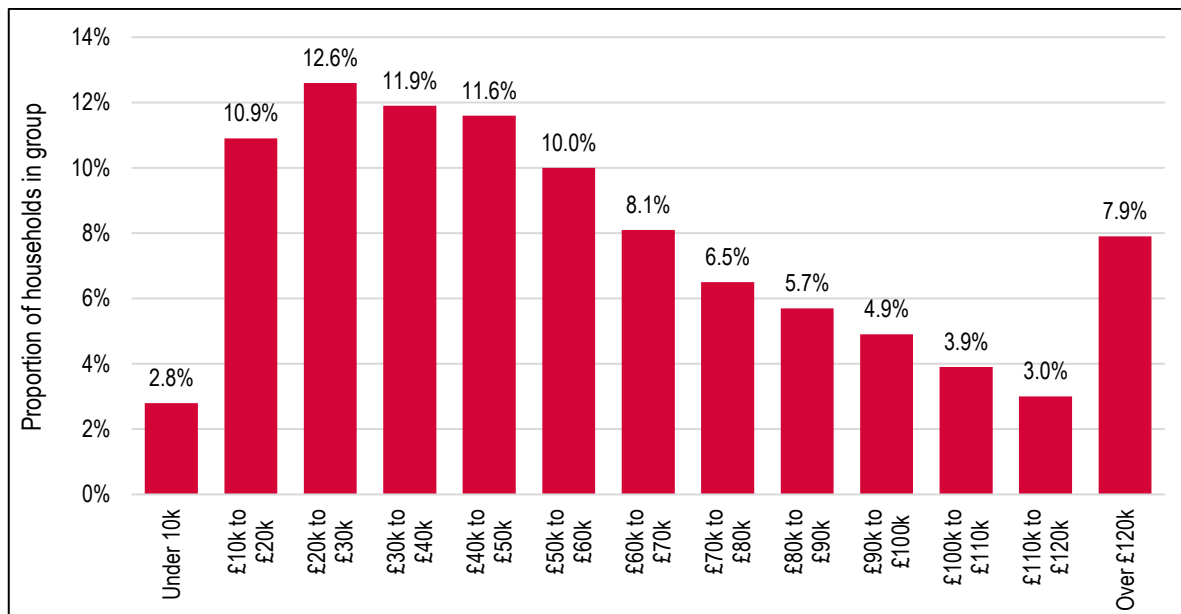
Source: ONS

Gross Household Incomes

A4.6 Local income levels are important as these (along with the price/rent data) will determine levels of affordability (i.e. the ability of a household to afford to buy or rent housing in the market without the need for some sort of subsidy). Data about total household income has been based on ONS modelled income estimates, with additional data from the English Housing Survey (EHS) being used to provide information about the distribution of incomes.

A4.7 Drawing this data together an income distribution for the whole study area has been constructed for 2022. The figure below shows that around a quarter of households have incomes below £30,000 with a further quarter in the range of £30,000 to £50,000. Overall, the average (mean) income is estimated to be around £58,900, with a median income of £50,100; the lower quartile income of all households is estimated to be £28,900.

Table A4.4 Distribution of household income (2022) – South West Herts



Source: Derived from range of data sources

A4.8 Analysis has also been undertaken to estimate how incomes vary by local authority, with the table below showing the estimated median household income in each location, the table also shows the variance in incomes from the study-area average. There is some variation in the estimated incomes by authority, ranging from £45,400 in Hertsmere, up to £57,500 in St Albans.

Table A4.5 Estimated average (median) household income by local authority (2022)

	Median income	As a % of study area average
Dacorum	£47,500	95%
Hertsmere	£45,400	91%
St Albans	£57,500	115%
Three Rivers	£52,700	105%
Watford	£46,900	94%
All households	£50,100	-

Source: Derived from a range of data

Income Thresholds to access different forms of Affordable Housing

A4.9 On the basis of a household not spending more than 30% of their gross income on housing, it is possible to use this data to look at the threshold incomes required to afford different types and sizes of rented housing. The income figures are shown in the series of tables below.

Table A4.6 Annual income required to afford for different rented products – Dacorum

	1- bedroom	2- bedrooms	3- bedrooms	4- bedrooms	All
Social rent	£17,500	£20,500	£22,900	£24,500	£20,800
Affordable rent (AR)	£26,600	£32,400	£39,800	£45,400	£31,900
Lower quartile (LQ) market rent	£33,000	£39,800	£52,000	£64,000	£36,000
Median market rent	£35,000	£45,000	£56,000	£78,000	£44,000

Source: RSH, ONS and VOA

Table A4.7 Annual income required to afford for different rented products – Hertsmere

	1- bedroom	2- bedrooms	3- bedrooms	4- bedrooms	All
Social rent	£17,600	£20,900	£23,800	£26,100	£21,400
Affordable rent (AR)	£27,200	£34,600	£39,500	£39,700	£33,000
Lower quartile (LQ) market rent	£35,800	£47,000	£58,000	£74,000	£42,000
Median market rent	£38,000	£51,000	£62,200	£88,000	£52,000

Source: RSH, ONS and VOA

Table A4.8 Annual income required to afford for different rented products – St. Albans

	1- bedroom	2- bedrooms	3- bedrooms	4- bedrooms	All
Social rent	£18,200	£21,900	£24,900	£27,700	£21,600
Affordable rent (AR)	£28,400	£36,700	£45,300	£43,800	£35,500
Lower quartile (LQ) market rent	£34,000	£46,000	£60,000	£88,000	£40,000
Median market rent	£37,300	£52,000	£70,000	£106,800	£50,400

Source: RSH, ONS and VOA

Table A4.9 Annual income required to afford for different rented products – Three Rivers

	1- bedroom	2- bedrooms	3- bedrooms	4- bedrooms	All
Social rent	£16,600	£20,100	£22,600	£24,900	£20,200
Affordable rent (AR)	£24,500	£30,100	£34,000	£39,600	£29,900
Lower quartile (LQ) market rent	£36,000	£45,000	£58,000	£78,000	£43,000
Median market rent	£39,800	£50,000	£64,000	£90,000	£51,000

Source: RSH, ONS and VOA

Table A4.10 Annual income required to afford for different rented products – Watford

	1- bedroom	2- bedrooms	3- bedrooms	4- bedrooms	All
Social rent	£17,400	£19,800	£21,800	£24,400	£20,200
Affordable rent (AR)	£28,000	£35,200	£40,000	£44,100	£33,400
Lower quartile (LQ) market rent	£36,000	£47,400	£56,000	£75,000	£40,000
Median market rent	£39,800	£50,000	£62,500	£85,000	£48,000

Source: RSH, ONS and VOA

A5. KEY OUTPUTS TO 2040 AND 2050

A5.1 This Appendix provides key outputs from the LHNA to cover the period to 2040, as this is the end date for some local plans in the Sub-Region; and to 2050 to align with the timeframes for the SW Herts Joint Strategic Plan.

Population and household projections

A5.2 The tables below show equivalent data to that in Appendix A2 for projected change to population and households. The tables provide data for 2021 (start point), 2040, 2041 and 2050.

Table A5.1 Projected population by broad age bands – South West Herts (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 16	124,815	132,499	134,225	150,944
16-64	381,463	436,634	439,044	463,323
65 and over	102,088	148,076	150,086	171,232
Total	608,366	717,208	723,356	785,499

Source: Demographic Projections

Table A5.2 Projected population by broad age bands – Dacorum (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 16	31,211	33,094	33,477	37,636
16-64	96,889	109,413	110,077	116,500
65 and over	27,117	39,205	39,632	44,529
Total	155,217	181,712	183,186	198,665

Source: Demographic Projections

Table A5.3 Projected population by broad age bands – Hertsmere (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 16	21,591	23,035	23,344	26,215
16-64	67,229	76,443	76,836	80,817
65 and over	19,285	28,414	28,787	32,858
Total	108,105	127,892	128,967	139,889

Source: Demographic Projections

Table A5.4 Projected population by broad age bands – St Albans (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 16	31,952	32,859	33,284	37,402
16-64	90,992	102,989	103,421	108,738
65 and over	25,697	35,892	36,423	40,995
Total	148,641	171,740	173,128	187,136

Source: Demographic Projections

Table A5.5 Projected population by broad age bands – Three Rivers (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 16	18,736	19,873	20,127	22,744
16-64	58,209	66,372	66,733	70,201
65 and over	17,007	24,695	25,028	28,693
Total	93,952	110,940	111,888	121,638

Source: Demographic Projections

Table A5.6 Projected population by broad age bands – Watford (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 16	21,325	23,638	23,993	26,946
16-64	68,144	81,417	81,978	87,066
65 and over	12,982	19,870	20,217	24,157
Total	102,451	124,925	126,188	138,170

Source: Demographic Projections

Table A5.7 Projected population by broad age bands – South West Herts (linked to Standard Method)

	2021	2040	2041	2050
Under 16	124,815	137,375	139,788	163,471
16-64	381,463	453,533	457,552	495,326
65 and over	102,088	150,298	152,554	176,272
Total	608,366	741,205	749,893	835,069

Source: Demographic Projections

Table A5.8 Projected population by broad age bands – Dacorum (linked to Standard Method)

	2021	2040	2041	2050
Under 16	31,211	34,243	34,790	40,609
16-64	96,889	113,442	114,498	124,198
65 and over	27,117	39,749	40,240	45,794
Total	155,217	187,434	189,528	210,601

Source: Demographic Projections

Table A5.9 Projected population by broad age bands – Hertsmere (linked to Standard Method)

	2021	2040	2041	2050
Under 16	21,591	24,078	24,516	28,654
16-64	67,229	79,770	80,453	86,854
65 and over	19,285	28,931	29,357	33,958
Total	108,105	132,779	134,326	149,466

Source: Demographic Projections

Table A5.10 Projected population by broad age bands – St Albans (linked to Standard Method)

	2021	2040	2041	2050
Under 16	31,952	33,677	34,249	40,016
16-64	90,992	106,330	107,115	115,405
65 and over	25,697	36,273	36,852	41,919
Total	148,641	176,280	178,215	197,340

Source: Demographic Projections

Table A5.11 Projected population by broad age bands – Three Rivers (linked to Standard Method)

	2021	2040	2041	2050
Under 16	18,736	20,851	21,211	24,840
16-64	58,209	69,569	70,189	75,830
65 and over	17,007	25,187	25,566	29,722
Total	93,952	115,606	116,966	130,392

Source: Demographic Projections

Table A5.12 Projected population by broad age bands – Watford (linked to Standard Method)

	2021	2040	2041	2050
Under 16	21,325	24,527	25,021	29,352
16-64	68,144	84,422	85,296	93,039
65 and over	12,982	20,157	20,540	24,878
Total	102,451	129,107	130,857	147,269

Source: Demographic Projections

Table A5.13 Projected household numbers by broad age bands – South West Herts (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 35	31,720	38,269	38,599	38,597
35-49	72,557	78,862	79,189	87,331
50-64	71,961	83,137	83,898	87,138
65 and over	65,745	96,645	98,117	112,757
Total	241,983	296,913	299,803	325,823

Source: Demographic Projections

Table A5.14 Projected household numbers by broad age bands – Dacorum (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 35	8,805	10,175	10,280	10,389
35-49	17,956	19,728	19,776	21,938
50-64	18,911	21,208	21,451	22,305
65 and over	17,771	26,146	26,477	29,893
Total	63,443	77,257	77,984	84,526

Source: Demographic Projections

Table A5.15 Projected household numbers by broad age bands – Hertsmere (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 35	5,070	6,158	6,203	6,214
35-49	12,552	13,630	13,690	15,047
50-64	12,769	14,342	14,477	14,931
65 and over	12,426	18,547	18,826	21,676
Total	42,816	52,677	53,196	57,867

Source: Demographic Projections

Table A5.16 Projected household numbers by broad age bands – St Albans (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 35	7,052	8,748	8,810	8,653
35-49	17,815	18,868	18,952	20,796
50-64	17,775	20,334	20,453	21,230
65 and over	16,485	23,221	23,591	26,833
Total	59,126	71,172	71,806	77,512

Source: Demographic Projections

Table A5.17 Projected household numbers by broad age bands – Three Rivers (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 35	3,880	4,739	4,788	4,812
35-49	10,538	11,444	11,484	12,699
50-64	11,594	13,289	13,404	13,742
65 and over	10,869	16,055	16,306	18,824
Total	36,882	45,527	45,982	50,077

Source: Demographic Projections

Table A5.18 Projected household numbers by broad age bands – Watford (linked to 2014-based household growth)

	2021	2040	2041	2050
Under 35	6,913	8,449	8,517	8,529
35-49	13,696	15,191	15,287	16,850
50-64	10,912	13,964	14,113	14,931
65 and over	8,195	12,676	12,918	15,531
Total	39,716	50,280	50,835	55,840

Source: Demographic Projections

Table A5.19 Projected household numbers by broad age bands – South West Herts (linked to Standard Method)

	2021	2040	2041	2050
Under 35	31,720	46,736	47,340	48,285
35-49	72,557	86,929	87,653	100,305
50-64	71,961	84,843	85,809	91,214
65 and over	65,745	98,091	99,725	116,068
Total	241,983	316,599	320,527	355,872

Source: Demographic Projections

Table A5.20 Projected household numbers by broad age bands – Dacorum (linked to Standard Method)

	2021	2040	2041	2050
Under 35	8,805	12,358	12,536	12,904
35-49	17,956	21,704	21,846	25,111
50-64	18,911	21,634	21,929	23,325
65 and over	17,771	26,507	26,880	30,738
Total	63,443	82,203	83,191	92,077

Source: Demographic Projections

Table A5.21 Projected household numbers by broad age bands – Hertsmere (linked to Standard Method)

	2021	2040	2041	2050
Under 35	5,070	7,525	7,615	7,787
35-49	12,552	15,091	15,219	17,338
50-64	12,769	14,705	14,880	15,727
65 and over	12,426	18,887	19,199	22,405
Total	42,816	56,208	56,913	63,257

Source: Demographic Projections

Table A5.22 Projected household numbers by broad age bands – St Albans (linked to Standard Method)

	2021	2040	2041	2050
Under 35	7,052	10,717	10,848	10,905
35-49	17,815	20,691	20,864	23,778
50-64	17,775	20,614	20,770	21,983
65 and over	16,485	23,466	23,867	27,435
Total	59,126	75,488	76,349	84,100

Source: Demographic Projections

Table A5.23 Projected household numbers by broad age bands – Three Rivers (linked to Standard Method)

	2021	2040	2041	2050
Under 35	3,880	5,852	5,938	6,103
35-49	10,538	12,758	12,855	14,707
50-64	11,594	13,650	13,802	14,510
65 and over	10,869	16,373	16,655	19,496
Total	36,882	48,632	49,251	54,817

Source: Demographic Projections

Table A5.24 Projected household numbers by broad age bands – Watford (linked to Standard Method)

	2021	2040	2041	2050
Under 35	6,913	10,284	10,403	10,585
35-49	13,696	16,685	16,869	19,373
50-64	10,912	14,240	14,427	15,669
65 and over	8,195	12,858	13,124	15,994
Total	39,716	54,068	54,823	61,621

Source: Demographic Projections

Labour Supply and jobs supported

A5.3 The tables below the projected increase in the labour supply in the 2021-40 and 2021-50 periods for the two projection scenarios developed. Using the assumption about the proportion of people with more than one job (4.5%) the tables also show an estimate of the number of additional jobs that could be supported. Equivalent tables in Section 6 show the same data for the 2021-41 period.

Table A5.25 Jobs supported by demographic projections (2021-40) – linked to 2014-based household growth

	Total change in economically active	Allowance for double jobbing
Dacorum	14,318	14,993
Hertsmere	10,297	10,782
St Albans	13,804	14,454
Three Rivers	9,440	9,885
Watford	13,174	13,794
South West Herts	61,033	63,908

Source: JGC and Icení modelling

Table A5.26 Jobs supported by demographic projections (2021-40) – linked to Standard Method

	Total change in economically active	Allowance for double jobbing
Dacorum	17,756	18,593
Hertsmere	13,098	13,715
St Albans	16,698	17,484
Three Rivers	12,208	12,783
Watford	15,715	16,455
South West Herts	75,474	79,031

Source: JGC and Icení modelling

Table A5.27 Jobs supported by demographic projections (2021-50) – linked to 2014-based household growth

	Total change in economically active	Allowance for double jobbing
Dacorum	21,554	22,569
Hertsmere	14,915	15,618
St Albans	19,577	20,499
Three Rivers	13,652	14,295
Watford	18,678	19,558
South West Herts	88,375	92,539

Source: JGC and Icení modelling

Table A5.28 Jobs supported by demographic projections (2021-50) – linked to Standard Method

	Total change in economically active	Allowance for double jobbing
Dacorum	28,171	29,499
Hertsmere	20,049	20,993
St Albans	25,385	26,581
Three Rivers	18,557	19,431
Watford	23,744	24,862
South West Herts	115,905	121,367

Source: JGC and Icení modelling

Affordable Housing Need

A5.4 The tables below provide an annual estimate of the need for affordable housing (need for rented affordable and affordable home ownership separately) for the 2021-40 and 2021-50 periods. The figures in these tables are broadly the same as in the main affordable need section, except the current need is annualised over a different period.

Table A5.29 Estimated Need for Social/Affordable Rented Housing (per annum) – 2021-40

	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
Dacorum	89	566	175	830	331	499
Hertsmere	82	415	86	583	146	437
St. Albans	63	469	123	655	203	452
Three Rivers	56	350	48	454	88	366
Watford	126	440	71	637	113	524
SW Herts	417	2,241	502	3,160	881	2,279

Source: Affordable Housing Needs Modelling

Table A5.30 Estimated Need for Social/Affordable Rented Housing (per annum) – 2021-50

	Current need	Newly forming households	Existing households falling into need	Total Gross Need	Relet Supply	Net Need
Dacorum	58	566	175	799	331	468
Hertsmere	54	415	86	555	146	409
St. Albans	42	469	123	634	203	430
Three Rivers	37	350	48	435	88	347
Watford	83	440	71	594	113	481
SW Herts	273	2,241	502	3,016	881	2,135

Source: Affordable Housing Needs Modelling

Table A5.31 Estimated Need for Affordable Home Ownership by local authority (per annum) – 2021-40

	Total Gross Need	Supply	Net need
Dacorum	486	239	247
Hertsmere	302	142	160
St Albans	599	240	359
Three Rivers	290	125	166
Watford	281	127	154
SW Herts	1,957	872	1,085

Source: JGC/Iceni analysis derived from a range of sources

Table A5.32 Estimated Need for Affordable Home Ownership by local authority (per annum) – 2021-50

	Total Gross Need	Supply	Net need
Dacorum	457	239	218
Hertsmere	279	142	137
St Albans	560	240	320
Three Rivers	274	125	150
Watford	254	127	127
SW Herts	1,824	872	952

Source: JGC/Iceni analysis derived from a range of sources

Need for Different Types and Sizes of Homes

A5.5 The tables below provide a range of data from Section 8 of the report for the 2021-40 and 2021-50 periods. Some tables are for South West Herts as a whole, although final modelling outputs have been provided at a local authority level – these are the final set of tables provided and for the key tables from which conclusions have been drawn.

Table A5.33 Projected Change in Household by Age of HRP in South West Herts (linked to household growth)

	2021	2040	2041	2050
Under 25	3,331	4,037	3,999	4,279
25-34	28,388	34,232	34,600	34,318
35-49	72,557	78,862	79,189	87,331
50-64	71,961	83,137	83,898	87,138
65-74	30,870	40,869	40,885	44,756
75-84	23,743	36,890	37,941	42,490
85+	11,132	18,885	19,292	25,511
TOTAL	241,983	296,913	299,803	325,823

Source: Demographic Projections

Table A5.34 Projected Change in Household by Age of HRP in South West Herts (linked to Standard Method)

	2021	2040	2041	2050
Under 25	3,331	5,825	5,775	6,248
25-34	28,388	40,912	41,566	42,037
35-49	72,557	86,929	87,653	100,305
50-64	71,961	84,843	85,809	91,214
65-74	30,870	41,539	41,628	46,287
75-84	23,743	37,341	38,453	43,609
85+	11,132	19,210	19,645	26,171
TOTAL	241,983	316,599	320,527	355,872

Source: Demographic Projections

Table A5.35 Adjusted Modelled Mix of Housing by Size and Tenure – South West Herts (2021-40)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	21%	21%	47%
2-bedrooms	21%	39%	34%	53%
3-bedrooms	43%	28%	34%	
4+-bedrooms	32%	12%	11%	

Source: Housing Market Model (with adjustments)

Table A5.36 Adjusted Modelled Mix of Housing by Size and Tenure – Dacorum (2021-40)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	21%	20%	48%
2-bedrooms	21%	39%	37%	52%
3-bedrooms	43%	28%	35%	
4+-bedrooms	32%	11%	7%	

Source: Housing Market Model (with adjustments)

Table A5.37 Adjusted Modelled Mix of Housing by Size and Tenure – Hertsmere (2021-40)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	18%	23%	42%
2-bedrooms	24%	39%	33%	58%
3-bedrooms	43%	30%	34%	
4+-bedrooms	29%	13%	10%	

Source: Housing Market Model (with adjustments)

Table A5.38 Adjusted Modelled Mix of Housing by Size and Tenure – St Albans (2021-40)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	22%	20%	46%
2-bedrooms	21%	40%	33%	54%
3-bedrooms	41%	27%	32%	
4+-bedrooms	34%	11%	15%	

Source: Housing Market Model (with adjustments)

Table A5.39 Adjusted Modelled Mix of Housing by Size and Tenure – Three Rivers (2021-40)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	19%	20%	53%
2-bedrooms	21%	39%	32%	47%
3-bedrooms	42%	30%	35%	
4+-bedrooms	32%	13%	13%	

Source: Housing Market Model (with adjustments)

Table A5.40 Adjusted Modelled Mix of Housing by Size and Tenure – Watford (2021-40)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	5%	22%	18%	44%
2-bedrooms	21%	37%	33%	56%
3-bedrooms	44%	29%	34%	
4+-bedrooms	30%	13%	15%	

Source: Housing Market Model (with adjustments)

Table A5.41 Adjusted Modelled Mix of Housing by Size and Tenure – South West Herts (2021-50)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	20%	21%	47%
2-bedrooms	21%	39%	34%	53%
3-bedrooms	43%	29%	35%	
4+-bedrooms	32%	12%	10%	

Source: Housing Market Model (with adjustments)

Table A5.42 Adjusted Modelled Mix of Housing by Size and Tenure – Dacorum (2021-50)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	20%	20%	48%
2-bedrooms	20%	39%	37%	52%
3-bedrooms	43%	29%	36%	
4+-bedrooms	33%	12%	8%	

Source: Housing Market Model (with adjustments)

Table A5.43 Adjusted Modelled Mix of Housing by Size and Tenure – Hertsmere (2021-50)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	17%	23%	42%
2-bedrooms	23%	39%	33%	58%
3-bedrooms	43%	31%	34%	
4+-bedrooms	29%	13%	10%	

Source: Housing Market Model (with adjustments)

Table A5.44 Adjusted Modelled Mix of Housing by Size and Tenure – St Albans (2021-50)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	21%	20%	47%
2-bedrooms	20%	40%	32%	53%
3-bedrooms	41%	28%	33%	
4+-bedrooms	35%	11%	14%	

Source: Housing Market Model (with adjustments)

Table A5.45 Adjusted Modelled Mix of Housing by Size and Tenure – Three Rivers (2021-50)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	4%	18%	21%	53%
2-bedrooms	21%	39%	32%	47%
3-bedrooms	43%	30%	35%	
4+-bedrooms	32%	13%	12%	

Source: Housing Market Model (with adjustments)

Table A5.46 Adjusted Modelled Mix of Housing by Size and Tenure – Watford (2021-50)

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	5%	21%	19%	44%
2-bedrooms	21%	37%	33%	56%
3-bedrooms	45%	29%	34%	
4+-bedrooms	30%	13%	14%	

Source: Housing Market Model (with adjustments)

Housing for Older and Disabled People

Table A5.47 Projected Change in Population of Older Persons – South West Herts

	2021	2040	2041	2050
Under 65	506,278	569,133	573,270	614,267
65-74	52,931	69,832	69,856	76,457
75-84	33,728	52,168	53,602	59,676
85+	15,429	26,075	26,628	35,099
Total	608,366	717,208	723,356	785,499
Total 65+	102,088	148,076	150,086	171,232
Total 75+	49,157	78,243	80,230	94,775

Source: Demographic projections

Table A5.48 Projected Changes to Population with a Range of Disabilities – South West Herts

Disability	Age Range	2021	2040	2041	2050
Dementia	65+	6,665	10,598	10,822	13,096
Mobility problems	65+	17,287	26,319	26,808	31,887
Autistic Spectrum Disorders	18-64	2,772	3,189	3,208	3,391
	65+	843	1,239	1,256	1,440
Learning Disabilities	15-64	7,317	8,363	8,408	8,888
	65+	1,902	2,744	2,780	3,159
Impaired mobility	16-64	15,810	17,959	18,102	19,214

Source: POPPI/PANSI and Demographic Projections

Table A5.49 Projected Changes to Population with a Range of Disabilities – Dacorum

Disability	Age Range	2021	2040	2041	2050
Dementia	65+	1,778	2,830	2,888	3,434
Mobility problems	65+	4,627	7,046	7,171	8,381
Autistic Spectrum Disorders	18-64	801	906	911	966
	65+	229	335	339	381
Learning Disabilities	15-64	2,090	2,361	2,375	2,516
	65+	514	738	745	833
Impaired mobility	16-64	4,595	5,110	5,157	5,507

Source: POPPI/PANSI and Demographic Projections

Table A5.50 Projected Changes to Population with a Range of Disabilities – Hertsmere

Disability	Age Range	2021	2040	2041	2050
Dementia	65+	1,275	2,084	2,129	2,584
Mobility problems	65+	3,285	5,128	5,223	6,230
Autistic Spectrum Disorders	18-64	484	554	557	587
	65+	155	230	233	268
Learning Disabilities	15-64	1,297	1,475	1,482	1,562
	65+	356	521	527	598
Impaired mobility	16-64	2,825	3,151	3,177	3,349

Source: POPPI/PANSI and Demographic Projections

Table A5.51 Projected Changes to Population with a Range of Disabilities – St Albans

Disability	Age Range	2021	2040	2041	2050
Dementia	65+	1,644	2,492	2,541	3,037
Mobility problems	65+	4,226	6,158	6,270	7,371
Autistic Spectrum Disorders	18-64	604	688	691	728
	65+	204	286	290	327
Learning Disabilities	15-64	1,606	1,813	1,820	1,917
	65+	458	637	646	724
Impaired mobility	16-64	3,554	4,011	4,030	4,264

Source: POPPI/PANSI and Demographic Projections

Table A5.52 Projected Changes to Population with a Range of Disabilities – Three Rivers

Disability	Age Range	2021	2040	2041	2050
Dementia	65+	1,064	1,710	1,747	2,134
Mobility problems	65+	2,778	4,241	4,318	5,174
Autistic Spectrum Disorders	18-64	400	460	462	488
	65+	137	204	207	239
Learning Disabilities	15-64	1,061	1,208	1,214	1,279
	65+	308	444	450	514
Impaired mobility	16-64	2,378	2,695	2,714	2,853

Source: POPPI/PANSI and Demographic Projections

Table A5.53 Projected Changes to Population with a Range of Disabilities – Watford

Disability	Age Range	2021	2040	2041	2050
Dementia	65+	906	1,482	1,517	1,907
Mobility problems	65+	2,370	3,746	3,825	4,731
Autistic Spectrum Disorders	18-64	483	582	586	622
	65+	118	184	188	226
Learning Disabilities	15-64	1,263	1,507	1,517	1,614
	65+	266	405	412	490
Impaired mobility	16-64	2,458	2,992	3,024	3,241

Source: POPPI/PANSI and Demographic Projections

Table A5.54 Need Net for Specialist Housing to 2040 – SHOP@ Scenario

	Balance 2040	Dacorum	Hertsmere	St Albans	Three Rivers	Watford	SW Herts
Housing With Support	Affordable	- 1,296	-189	107	-289	-296	-1,962
	Market	1,466	1,102	1,201	942	416	5,127
	Total	170	913	1,308	653	121	3,164
Housing with Care	Affordable	228	7	11	106	34	386
	Market	397	428	669	462	-214	1,742
	Total	625	435	680	568	-179	2,129
Care/Nursing Home Bedspaces	Nursing	665	114	489	265	53	1,586
	Residential	704	253	580	378	181	2,097
	Total	1,369	368	1,069	643	234	3,683

Table A5.55 Need Net for Specialist Housing to 2050 – SHOP@ Scenario

	Balance 2050	Dacorum	Hertsmere	St Albans	Three Rivers	Watford	SW Herts
Housing With Support	Affordable	- 1,184	-105	181	-226	-219	-1,553
	Market	1,814	1,430	1,636	1,229	674	6,784
	Total	630	1,325	1,817	1,003	456	5,231
Housing with Care	Affordable	268	37	38	129	62	534
	Market	523	546	826	565	-121	2,339
	Total	791	584	864	694	-59	2,873
Care/Nursing Home Bedspaces	Nursing	831	263	673	391	173	2,330
	Residential	943	467	845	560	356	3,171
	Total	1,773	730	1,518	951	529	5,501

Table A5.56 Need Net for Specialist Housing to 2040 – Enhanced Extra Care Scenario

	Balance 2040	Dacorum	Hertsmere	St Albans	Three Rivers	Watford	SW Herts
Housing With Support	Affordable	-889	-158	134	-265	-273	-1,451
	Market	1,624	1,225	1,362	1,049	492	5,753
	Total	735	1,068	1,497	784	219	4,303
Housing with Care	Affordable	329	70	66	153	80	698
	Market	714	674	992	676	-61	2,996
	Total	1,044	744	1,058	829	18	3,694
Care/Nursing Home Bedspaces	Nursing	665	114	489	265	53	1,586
	Residential	-238	-442	-270	-210	-263	-1,424
	Total	427	-328	219	54	-211	162

Table A5.57 Need Net for Specialist Housing to 2050 – Enhanced Extra Care Scenario

	Balance 2050	Dacorum	Hertsmere	St Albans	Three Rivers	Watford	SW Herts
Housing With Support	Affordable	-769	-67	215	-197	-190	-1,008
	Market	2,001	1,580	1,832	1,359	771	7,543
	Total	1,232	1,513	2,047	1,162	581	6,535
Housing with Care	Affordable	387	113	105	186	120	911
	Market	896	845	1,218	825	73	3,857
	Total	1,283	958	1,323	1,011	193	4,768
Care/Nursing Home Bedspaces	Nursing	831	263	673	391	173	2,330
	Residential	-165	-376	-189	-154	-210	-1,094
	Total	666	-114	484	236	-36	1,236

Table A5.58 Estimated need for wheelchair user homes, 2021-40

		Current need	Projected need (2021-40)	Total current and future need
Dacorum	Total	429	555	984
	@ 25% of projection	429	139	568
Hertsmere	Total	296	402	698
	@ 25% of projection	296	101	397
St Albans	Total	321	395	716
	@ 25% of projection	321	99	420
Three Rivers	Total	235	333	567
	@ 25% of projection	235	83	318
Watford	Total	241	383	624
	@ 25% of projection	241	96	337
South West Herts	Total	1,522	2,068	3,590
	@ 25% of projection	1,522	517	2,039

Source: English Housing Survey; 2021 Census and demographic projections

Table A5.59 Estimated need for wheelchair user homes, 2021-50

		Current need	Projected need (2021-50)	Total current and future need
Dacorum	Total	429	821	1,250
	@ 25% of projection	429	205	634
Hertsmere	Total	296	610	906
	@ 25% of projection	296	153	449
St Albans	Total	321	607	928
	@ 25% of projection	321	152	473
Three Rivers	Total	235	507	742
	@ 25% of projection	235	127	361
Watford	Total	241	610	851
	@ 25% of projection	241	152	393
South West Herts	Total	1,522	3,155	4,677
	@ 25% of projection	1,522	789	2,310

Source: English Housing Survey; 2021 Census and demographic projections