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Housing Market Demand Analysis

Bold Forest Garden Village

Iceni Projects Limited on behalf of
St Helens Borough Council

September 2024

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ON BEHALF OF ST HELENS
BOROUGH COUNCIL

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Housing Market Demand Analysis
BOLD FOREST GARDEN VILLAGE

CONTENTS

1. EXECUTIVE SUMMARY 2

2. INTRODUCTION 8

3. POLICY FRAMEWORK 11

4. BASELINE ANALYSIS 27

5. MARKET HOUSING DEMAND 38

6. COMPARABLE SITES 52

7. NEW MARKET OPPORTUNITIES 57

8. AFFORDABLE HOUSING NEED 66

9. HOUSING MIX 78

10. LANDOWNER ASPIRATION 89

11. SPECIFIC MARKET SEGMENTS 97

12. SOFT MARKET TESTING ENGAGEMENT 103

13. PACE OF DELIVERY AND PHASING 107

1. EXECUTIVE SUMMARY

- 1.1 Iceni Projects and Justin Gardner Consulting (JGC) have been appointed by the St Helens Borough Council Planning Team to undertake a Housing Market Demand Analysis to inform the development of the Bold Forest Garden Village site (BFGV site) Masterplan Framework Supplementary Planning Document (SPD).
- 1.2 Through Policy LPA11 of the St Helens Borough Local Plan up to 2037, the BFGV site has been allocated for housing development, with an indicative site capacity of 2,988 dwellings, of which a minimum of 510 dwellings will be delivered during the Local Plan period.

Baseline

- 1.3 The population of the BFGV area (which is comprised of the Bold & Lea Green and Sutton South wards) is younger than the wider borough, with 71% of the population under 55 compared to 65.9% in St Helens Borough. The higher proportion of under 55's indicates more families with dependent children in the area and, therefore, indicates a need for dwellings suitable for families.
- 1.4 Around 30% of households in the BFGV area have dependent children, higher than the other comparator areas. Furthermore, the clear majority of dwellings in the BFGV area have 3 bedrooms (57.3%). Again this indicates the BFGV area's role as a location for families.
- 1.5 While there are more four+ bedroom properties in the BFGV area proportionally than in St Helens Borough, both areas see a lower percentage than the Housing Market Area and Region. This suggests an opportunity to grow this supply to align with the wider area and, in doing so, provide more aspirational housing within the Borough. This aligns with the Spatial Development Strategy which also identified a need for more aspirational housing.

Market Housing Demand

- 1.6 In 2013, house prices in the BFGV area were only slightly above the St Helens Borough median at £155,000 with both the North West and England Median being much higher.
- 1.7 House price heat map analysis shows a clear band of higher house prices along the M62 corridor and, given the BFGV site's proximity to the M62 Motorway, this would suggest (and is supported by stakeholder engagement) that the area could attract premium prices.

- 1.8 Further, new build values since 2020 indicate that in the BFGV area there is a significant uplift between new-build house prices and resale prices. This would suggest a strong market for newly built housing.

New Market Opportunities

- 1.9 As the BFGV area will be so large (with an indicative site capacity of 2,988 dwellings) it is likely that a new community will be formed, and demand for housing will be generated both locally and from outside of the Borough. Indeed, the BFGV site's strategic location adjacent to the M62 Motorway means that future residents could work in a very wide area, although at present most of the existing population in the locality of the BFGV Site work locally.
- 1.10 The number of people commuting out of the area will also be supported by improvements to public transport and active travel routes as well as the major new employment locations planned around St Helens. The analysis suggests that increased access to these employment centres will help increase earnings in the BFGV area and the BFGV site could support a greater retention of skills and higher-paid employment, particularly if aspirational housing is provided.

Affordable Housing Need

- 1.11 The analysis shows an estimated annual need for Social/Affordable rented housing of 386 dwellings in St Helens Borough. This is driven by relatively high increases in the cost of private rented accommodation and a substantial reduction in the number of relets becoming available each year.
- 1.12 The analysis clearly points to a greater need for rented forms of affordable housing rather than affordable home ownership in the Borough.
- 1.13 The analysis concludes that it is not recommended that the Local Planning Authority (LPA) seek to prioritise First Homes over the provision of social/affordable rented homes. However, there is some opportunity for shared ownership and Rent to Buy products.
- 1.14 It is important to note that the evidence does suggest that many households in St Helens are being excluded from the owner-occupied sector and it is likely that a key issue in the St Helens Borough is about access to capital (e.g. for deposits, stamp duty, legal costs) as well as potential mortgage restrictions (e.g. where employment is temporary) rather than simply the cost of housing to buy.
- 1.15 This again points to the need for the LPA to prioritise delivery of rented affordable housing where possible and potentially Shared Ownership and Rent to Buy due to their lower deposit levels where an intermediate product is required.

- 1.16 The private rental sector, including Build to Rent, will also have a role to play in meeting the needs of those that are unable to afford owner occupation or unwilling to enter it.

Housing Mix

- 1.17 A recommended housing mix for the BFGV site has been proposed taking into account a range of factors. In all sectors, the analysis points to a particular need for two- and three-bedroom accommodation and in the market sector 4+ bedroom aspirational housing. Table 1.1 below summarises our recommended housing mix for the BFGV site. For the market sector the need for 1 and 2 bedroom homes has been merged to provide flexibility in the provision of smaller homes as the market dictate.

Table 1.1 Recommended Housing Mix – Bold Forest Garden Village Site

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	25%	10%	15%	40%
2-bedrooms		50%	35%	60%
3-bedrooms	50%	35%	40%	
4+-bedrooms	25%	5%	10%	

- 1.18 The suggested mix has been informed by multiple factors, including:
- Recognition of the BFGV site as a suburban site that is likely to be more suitable for households rather than flatted development (including being attractive to family households).
 - A current pipeline of housing on nearby sites focuses on three+-bedroom homes. This observation points to a need to provide a wider range of dwelling sizes but does to some extent identify the current demand as seen by the development industry.
 - A likely particular need for a range of affordable homes on a site of this nature (i.e. not in a main urban area) but this needs to be balanced by the Housing Register showing the main need to be for smaller units.
 - The population of the BFGV area is typically younger, with slightly larger household sizes and a housing stock with slightly more bedrooms (on average) than the Borough as a whole.
 - Wider LCR ambitions relating to improving the housing stock across the LCR and reflecting the delivery of high-quality job opportunities in the LCR, reflecting the LCR Combined Authority's emerging and adopted plans and strategies.

Landowner Aspirations

- 1.19 There was a general consensus amongst the Landowners and Promoters of the BFGV site that the Site is capable of delivering a wide range of housing to address wider needs as well as local needs.
- 1.20 In particular, the Site would be suitable for the delivery of aspirational homes and given the strategic location adjacent to the M62, and access to green space (such as the site's location with the wider Bold Forest Park area, and within that, the site's proximity to Clock Face Country Park), it would be attractive to those seeking such homes.
- 1.21 The need for infrastructure such as a primary school, a GP surgery and a small retail centre was acknowledged by the Landowners and Promoters of the BFGV site, who understood that social infrastructure is required as per Local Plan Policy LPA11 (Bold Forest Garden Suburb). Whilst a mixture of Landowners and Promoters questioned the demand for some of these services on a site such as this, it was suggested that if there is evidence of demand for these services, the early delivery of social infrastructure would improve the attractiveness of the site for families and accelerate delivery.
- 1.22 It was suggested by all interviewees that most parcels could expect to be built out at a rate of 50-60 dwellings per annum and that the BFGV site could likely accommodate three to four sales outlets (three traditional housebuilders and one RP selling a range of affordable accommodation types) at any one time across the Site.
- 1.23 The forward sale of a proportion of a site to a Registered Provider or Build to Rent operator was noted to be an effective tool to speed up delivery of the BFGV site. Nevertheless, the exact distribution and phasing of affordable homes and the ability for Registered Providers to acquire these homes will be determined through the masterplanning process. The funding process by Homes England (crucial to the delivery of homes by RP's) is managed in accordance with the Government's Affordable Homes Programme which typically covers a five year period. The current programme covers the period between 2021-2026; details of funding arrangement after this period are not yet known. With regards to a Build to Rent product, it is noted that the Local Authority have the ability to implement safeguards such as minimum rental periods to ensure tenants have security of tenure. Controls such as this would need to be discussed with BtR providers to consider how they may effect the deliverability of private build to rent products on the BFGV Site.

Specific market segments

- 1.24 The report considered the suitability of the Site for Build to Rent (BtR), Older Persons Accommodation and Self and Custom Build Homes.

- 1.25 BtR has potential at the BFGV site as determined through Developer, Landowner and Promoter engagement. This type of development would be best suited to a parcel in the northern half of the site, closest to existing transport links and infrastructure and targeted to single-families seeking homes.¹
- 1.26 The BFGV site has the potential to prove popular for older persons' accommodation across a range of types and tenures. This is likely to cater more for the market and affordable rented accommodation with little appetite for shared ownership.
- 1.27 There is, and will continue to be, a need for specialist accommodation such as dementia care in the Borough that could be accommodated at the BFGV site.
- 1.28 The need for self and custom build homes at the site would appear limited based on the current data; there have been 24 registered expressions of interest in a serviced plot of land in St Helens (between 2016-2023)² and it can be assumed that not all individuals on the Register would wish to be located within the BFGV Site area. Furthermore, there was general uncertainty expressed from the Landowner and Promoter Group and developers about the attractiveness of the site for this market; they suggested that most self-builders wish to be located somewhere more rural, as opposed to being neighbours with a wider housing estate (which the BFGV Site would become in due course). Nevertheless, it is noted that there is a relatively small self build scheme directly adjacent to the southern boundary of the Site. There is no doubt that this typology would support broadening the housing mix on offer at the BFGV Site, however it is only likely to come forward where there is evidenced demand.

Soft market testing

- 1.29 Engagement with housebuilders was undertaken, which supplemented the interviews undertaken with the Council as Landowners and the other BFGV Landowners and Promoters.
- 1.30 These interviews provided a strong indication that there is, and will continue to be, a good level of interest in the site from a range of housebuilders.

¹ Build to Rent products specifically for families are typically houses and low-rise flats in suburban locations suitable for one family to occupy. Single Family BtR is a sub-sector of the BtR market which differs to the more urban Build to Rent product which is typically marketed at groups of people sharing e.g. young professionals.

² St Helens Borough, Self and Custom Housebuilding Register (2016-2023).

- 1.31 The stakeholders interviewed agreed with the Landowners and Promoters of the BFGV regarding the attractiveness of the Site and its suitability to deliver a range of housing products, from smaller two and three-bedroom dwellings to larger four-bedroom executive homes.
- 1.32 It was also agreed that the location of aspirational executive homes would be most suited to the southern edge of the Site, with smaller housing products better located to the north of the BFGV site.

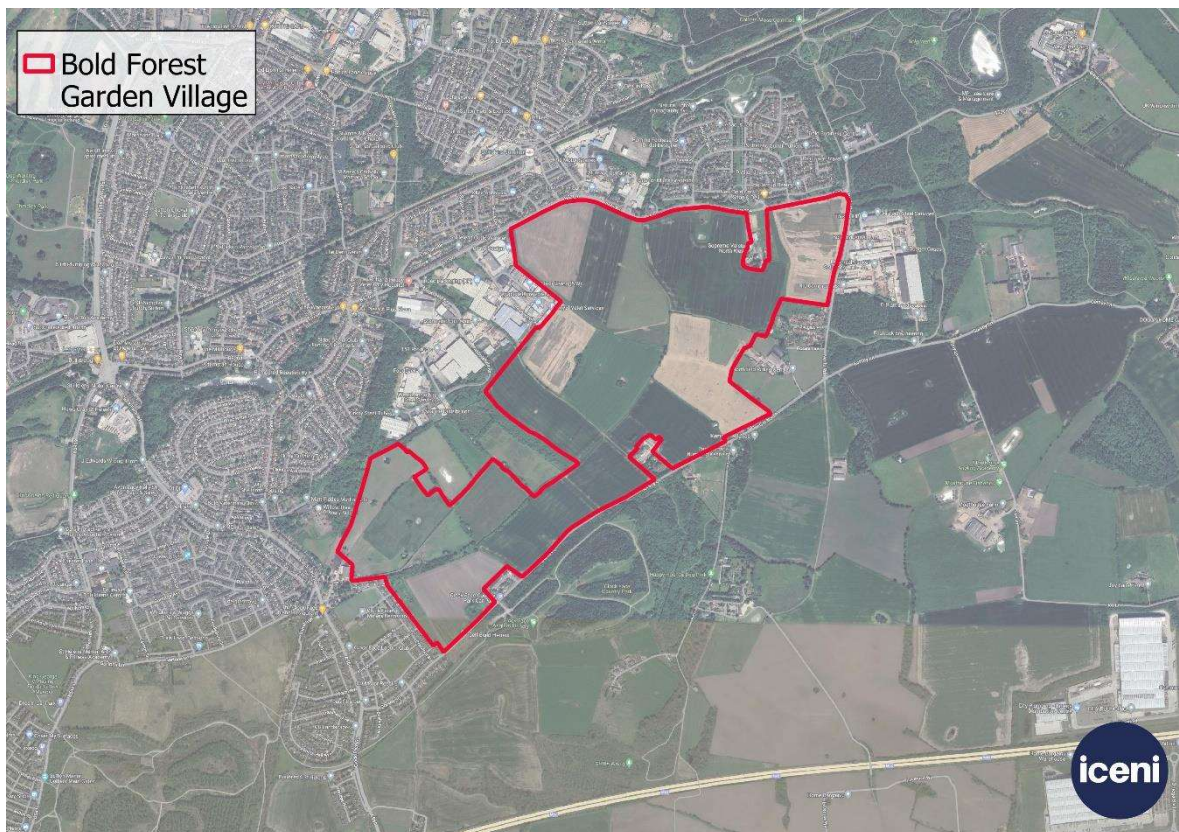
Pace of Delivery and Phasing

- 1.33 The consensus from the Landowner and Promoters of the BFGV site, and also from developer stakeholder engagement, suggested that delivering 60 dwellings per annum (50-70 was the typical range suggested), including affordable housing delivery, was achievable for most individual outlets.
- 1.34 Indeed, the consensus was that this rate of delivery could be achieved across three to four sales points on the Site at any one time, equating to 240 dwellings per annum at 4 sales points; a much faster delivery programme than the trajectory suggested in the Local Plan. This would equate to 12.5 years to complete 3,000 dwellings.
- 1.35 Considering the above, it is clear that the LPA have the opportunity to deploy a range of tools to improve the pace of delivery at the BFGV site to support the faster trajectory including through the following measures:
- Supporting the delivery of a wider range of products including low-cost home ownership and affordable rental properties. This would include shared ownership and Build to Rent housing for both smaller households and families. These tenures are less at the mercy of the traditional sales market and could feature earlier in the phasing of each parcel.
 - Differentiating products to cater for different segments of the market, including support for custom and self-build properties in line with evidenced need.
 - Delivering infrastructure, identified as needed to support the development, including a school, a GP surgery, community buildings and shops early in the phasing, to encourage more people to move to the area and thus increase sales and build-out rates.
 - Support housebuilders looking to utilise Modern Methods of Construction.
 - The LPA could look to use Planning Performance Agreements to encourage early pre-application engagement on the BFGV site and avoid unnecessary delays around design, scale, etc. when determining planning applications. A bespoke PPA fee schedule for landowners and developers with an interest specifically in the BFGV site could be devised, to encourage this engagement and ensure all developers engage more equally.

2. INTRODUCTION

- 2.1 This study has been prepared for St Helens Borough Council as the Local Planning Authority (Council LPA) and considers Housing Market Demand both locally and the wider opportunities that development at Bold Forest Garden Village site (BFGV site) can capture. The approach to the study uses both desktop analysis and engagement including eight landowners and promoters who have parcels within the BFGV site as well as initial market testing to inform the potential housing mix at the BFGV site.
- 2.2 The St Helens Borough Local Plan up to 2037 identifies the Bold Forest Garden Suburb (now known as the Bold Forest Garden Village (BFGV site)) as a significant site allocation (reference 4HA) encompassing 132.86 ha, with an indicative capacity of 2,988 dwellings. The Site is located in the south of St Helens Borough to the north of the M62 Motorway (as illustrated by the red line boundary shown in Figure 2.1). It is largely in agricultural use at present.

Figure 2.1 Bold Forest Garden Village site Location

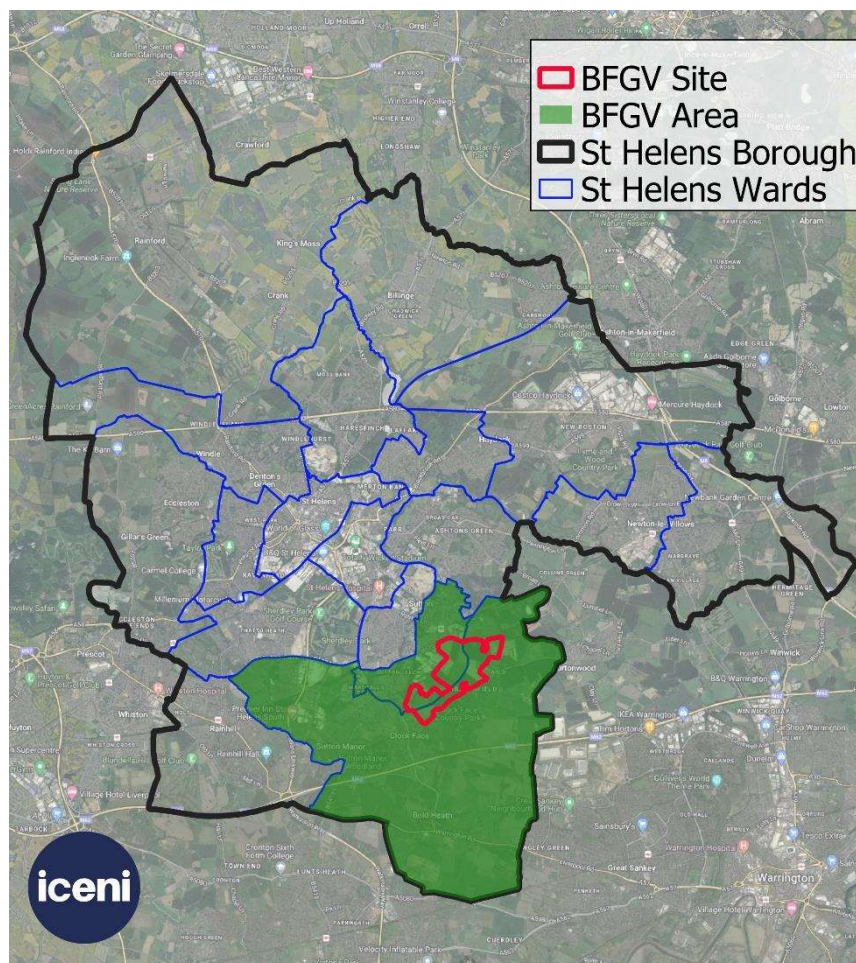


Source: St Helens Borough Council, Google

- 2.3 The site was released from the Green Belt to be allocated for development. It is the largest housing allocation not only in St Helens Borough but also in the Liverpool City Region. The site's scale and proximity to the M62 and St Helens Junction Rail Station means that it will also have a wider impact.

- 2.4 The analysis herein identifies the level and nature of housebuilder interest in the site, including the type of market demand.
- 2.5 In addition, the affordable housing requirements have been calculated as well as the need for the provision of specialist housing (for example, older persons, custom and self-build products).
- 2.6 The study also considers delivery phasing and implementation at the site and how delivery could potentially be accelerated, including through the use of product differentiation and other possible approaches.
- 2.7 Much of the analysis is provided at two geographic levels (see Figure 2.2), firstly at a St Helens Borough-wide level and for more local analysis also defined as Bold Forest Garden Village Area (BFGV Area) which is comprised of the Bold & Lea Green and Sutton South East wards. Where data allows the analysis also provides data for the Mid Mersey HMA (St Helens, Halton and Warrington), the North West Region and National figures for comparison purposes.

Figure 2.2 Areas of Analysis



Source: St Helens Borough Council, ONS and Google

Clarity of Terms

- 2.8 To avoid confusion between St Helens town and St Helens borough these are referred to as 'the Town' or 'the Borough' respectively throughout this report.
- 2.9 To avoid confusion between St Helens Borough Council as a landowner and St Helens Borough Council as the Local Planning Authority these are referred to as 'the Council' and 'the LPA' respectively throughout this report.
- 2.10 To avoid confusion between the Bold Forest Garden Village Site and the Bold Forest Garden Village Area these are referred to as 'the BFGV site' and 'the BFGV area' throughout.
- 2.11 The BFGV area is comprised of the wards of Bold & Lea Green and Sutton South East, however, in some cases it is comprised of a best fit of MSOAs due to the availability of data.

3. POLICY FRAMEWORK

- 3.1 This section of the report examines the national and local policy background in relation to housing development.

National Planning Policy Framework (December 2023)

- 3.2 The latest version of the National Planning Policy Framework (NPPF) was published by the Government on the 19th of December 2023. Paragraph 7 in the NPPF states that the purpose of planning is to contribute to the achievement of sustainable development. Paragraph 9 sets out that planning policies and decisions should play an active role in guiding development towards sustainable solutions, but in doing so should take local circumstances into account, to reflect the character, needs and opportunities of each area.
- 3.3 Development plans must include strategic policies to address each Local Planning Authority's priorities for the development and use of land in its area (paragraph 17). Plans and decisions should apply a presumption in favour of sustainable development (paragraph 11). This means that plans should promote a sustainable pattern of development that seeks to: meet the development needs of their area; align growth and infrastructure; improve the environment; mitigate climate change and adapt to its effects. Strategic policies should, as a minimum, provide for objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring authorities, where it is sustainable to do so.
- 3.4 Paragraph 63 goes on to set out that, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies including, but not limited to, those who require affordable housing, families with children, older people, students, people with disabilities, people who rent their homes and people wishing to commission or build their own homes.
- 3.5 Paragraphs 64-66 address affordable housing provision. Paragraph 64 sets out that where an affordable housing need is identified, planning policies should specify the type of affordable housing required and expect it to be met on-site unless off-site provision or a financial contribution in lieu can be robustly justified, or the agreed approach contributes to the objectives of creating mixed and balanced communities.
- 3.6 Paragraph 65 states provision of affordable housing should not be sought for residential developments that are not major developments, other than in designated rural areas.
- 3.7 Paragraph 66 sets out that where major development involving the provision of housing is proposed, planning policies and decisions should expect at least 10% of the total number of homes to be

available for affordable home ownership unless this would exceed the level of affordable housing required in the area, or significantly prejudice the ability to meet the identified affordable housing needs of specific groups. In addition, other exemptions to this 10% requirement include instances where a site or proposed development:

- provides solely for Build to Rent homes;
- provides specialist accommodation for a group of people with specific needs (such as purpose-built accommodation for the elderly or students);
- is proposed to be developed by people who wish to build or commission their own homes; or
- is exclusively for affordable housing, a community-led development exception site or a rural exception site.

3.8 The NPPF's Glossary (Annex 2) provides an updated definition of affordable housing; as well as definitions of Build to Rent development, local housing need, older people; and self-build and custom housebuilding.

3.9 In relation to economic growth, Chapter 6 sets out how the framework seeks to build a strong competitive economy. In Paragraph 85 this is explained as "Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt." It adds that the approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future."

Planning Policy Guidance

3.10 The Government's Planning Practice Guidance (PPG) includes several sections which are relevant to an assessment of this nature.

3.11 The section on Housing for Older and Disabled People³ describes the need to provide housing for older people as critical, as people are living longer, and the older population is increasing. It sets out that the health, lifestyle and housing needs of older people will differ greatly with housing needs ranging from accessible and adaptable general needs housing to specialist housing with high levels of care and support.

³ <https://www.gov.uk/guidance/housing-for-older-and-disabled-people>

- 3.12 Separate guidance sections have also been prepared which address Build to Rent⁴ and Self-Build and Custom Housebuilding⁵. The Build to Rent Guidance requires authorities to assess need, and where a need is identified to include a planning policy setting out the circumstances and locations where build-to-rent development will be encouraged.
- 3.13 The Self-Build Guidance sets out the requirements of the Self-Build and Custom Housebuilding Act 2015 (as amended), including the requirement for Councils to maintain a Register of those interested in self-build housing and to grant consent to meet the need shown. It also sets out that needs assessments can consider other secondary data sources.

Regional and Local Housing Policy Review

Mid-Mersey Strategic Housing Market Assessment

- 3.14 The Mid-Mersey SHMA was published in early 2016. The SHMA identified the objectively assessed housing need for the Local Authorities of St Helens Borough, Halton, and Warrington. It also provided an assessment of affordable housing need, the need for different sizes of homes, and the specialist housing needs for each of these authorities.
- 3.15 The Objectively Assessed Need for housing across the Housing Market Area ('HMA') was identified as 1,756 homes which was disaggregated on the following basis:
- Halton – 466 homes per annum;
 - St Helens Borough – 451 homes per annum; and
 - Warrington – 839 homes per annum.
- 3.16 In terms of size mix, the analysis (taking account of demographic trends and market evidence) concluded that Table 3.1 below represented an appropriate indicative mix of affordable and market homes at a HMA-wide level.

⁴ <https://www.gov.uk/guidance/build-to-rent>

⁵ <https://www.gov.uk/guidance/self-build-and-custom-housebuilding>

Table 3.1 Need for Different Sizes of Homes across Mid-Mersey (taken from Table 89 of the SHMA)

	1 – bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	5-10%	30-35%	45-50%	10-15%
Affordable	40-45%	25-30%	20-25%	5-10%
All dwellings	15%	30%	40%	10%

3.17 The mix identified above was recommended to inform strategic borough-wide policies and help to inform the ‘portfolio’ of sites that are considered and ultimately allocated through the Local Plan process for each Local Authority. The assessment of affordable housing needs indicated that in delivering affordable units, a HMA-wide mix target of 25% intermediate and 75% social or affordable rented homes would be appropriate.

3.18 The report also provided commentary on the need for older persons housing. The report noted that over the period to 2037, the population of older persons in the HMA is expected to grow, with the population aged over 65 expected to increase by 56%. It was identified that there was a need for 1,934 specialist units of housing for older people in St Helens Borough between 2014-37 including sheltered and extra care homes.

St Helens Borough SHMA Update

3.19 In January 2019, an update to the Mid-Mersey SHMA was published, specifically providing commentary on the St Helens Borough housing market. The report provided a selected update to the last full assessment of affordable housing needs (Mid-Mersey SHMA, Jan 2016) using new information where available. The net affordable housing need figure identified (117 dpa) was slightly higher than the figure identified in the earlier 2016 SHMA, which showed a net need for 96 dpa.

3.20 The report also provided commentary on the suggested housing mix for St Helens Borough, which was identified as the information presented in Table 3.2 below.

Table 3.2 Recommended Mix of Affordable and Market Dwellings (taken from Table 38 of the St Helens Borough SHMA Update)

	1 – bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	0-5%	25-30%	50-55%	15-20%
Affordable home ownership	10-15%	35-40%	40-45%	5-10%
Affordable housing (rented)	30-35%	30-35%	25-30%	5-10%

Source: St Helens Borough SHMA Update, 2019

- 3.21 The report also provided commentary on older persons' needs in the Borough and found that the data showed that in general, St Helens Borough has a higher level of disability when compared with the national position and that an ageing population means that the number of people with disabilities is expected to increase substantially in the future. The report suggested that there is a clear need to increase the supply of accessible and adaptable dwellings and wheelchair-user dwellings in the Borough, with the exact proportion of homes in categories M4(2) and M4(3) for the LPA to consider.

Liverpool City Region Strategic Housing & Employment Land Market Assessment ('SHELMA')

- 3.22 The Liverpool City Region SHELMA was published in March 2018. The report intended to provide an evidence base to inform the preparation of a statutory City Region Spatial Framework, which the Liverpool City Region Combined Authority Housing and Spatial Planning Board were charged with preparing.
- 3.23 The report reviewed and identified the Housing Market Area and Functional Economic Market Area geographies. The report also identified the Objectively Assessed Need for housing over the period 2012 - 2037 across the City Region and set out an approach to distribute the City Region OAN to each of the local authorities.
- 3.24 The analysis broadly confirmed the conclusions of the 2007 Liverpool City Region Housing Strategy as well as the 2016 Liverpool SHMA and 2016 Mid Mersey SHMA; that the migration and commuting patterns data indicates strong migration and commuting interrelationships between St Helens Borough, Halton and Warrington. Together, these Boroughs have a high self-containment rate and there is a strong case for the grouping of them in the same Housing Market Area.
- 3.25 The report set out conclusions for OAN for housing at the local authority and HMA level. St Helens Borough OAN was set at 416 dwellings per annum, with the Mid-Mersey HMA at 1,691 dwellings per annum. The report also suggested the need for older persons accommodation. For St Helens

Borough, a potential need for 82 dwellings per annum of specialist housing was identified, along with 33 units per annum of specialist residential care.

Liverpool City Region Strategic Housing & Economic Development Needs Assessment ('HEDNA')

- 3.26 In June 2023, Iceni published a final draft report of the Liverpool City Region ('LCR') Strategic Housing & Economic Development Needs Assessment (HEDNA). The report considered objective evidence on the need for housing, economic growth and employment land needs which provide an input to the preparation of a Spatial Development Strategy, for the LCR Combined Authority.
- 3.27 The Spatial Development Strategy is intended to set the spatial pattern for future development across the Liverpool City Region including identifying strategic areas of growth, associated strategic infrastructure, and policies addressing health inequalities and climate change. The HEDNA provided an analysis of the following:
- Housing and economic geographies and spatial interactions between areas;
 - Housing market dynamics;
 - Overall housing needs;
 - Economic development needs, including the need for different types of employment land;
 - The need for different types of homes; and
 - The housing needs for specific groups.
- 3.28 A summary of the pertinent points from the HEDNA has been highlighted below.
- 3.29 For St Helens Borough specifically, the report noted that according to 2021 Census Data, 6% of households in St Helens Borough live in one-bedroom accommodation, 26% live in two-bedroom accommodation, 55% in three-bedroom accommodation and 13% in four + bedroom accommodation. Like St Helens Borough, the rest of the City Region was identified as having a relatively small proportion of homes with four or more bedrooms (larger aspirational housing).
- 3.30 It was noted that this is an issue which has been identified in the City Region's Housing Investment Strategy as undermining the Combined Authority's objective of attracting and retaining economically active higher earners.
- 3.31 The Assessment provided an estimate for local housing need across each borough in the LCR (for the period 2021 -2040), including St Helens Borough. Using different methods of calculating housing need produces different estimates. For St Helens Borough, the estimated housing need under these scenarios ranged from 257 to 519 dwellings per annum. However, the figures presented in the different housing need scenarios did not represent requirements or targets to be taken forward in

Local Plans.

- 3.32 The analysis linked to long-term demographic change (2021-40) concluded that the information presented in Table 3.3 below represents an appropriate mix of affordable and market homes for new development across the City Region, which takes account of both household changes and the ageing of the population:

Table 3.3 Suggested Mix of Housing by Size and Tenure for the LCR.

	1 – bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	10%	40%	40%	10%
Affordable home ownership	20%	45%	25%	10%
Affordable housing (rented)	40%	30%	25%	5%

Source: Table 1.7 of the HEDNA

- 3.33 Based on the evidence, the report suggested that each Local Authority in the LCR should expect the focus of new market housing provision to be on 2-bed and 3-bed properties for most areas. It was suggested that the delivery of larger, family-sized homes are expected to be focused towards the suburban authority areas (including St Helens Borough) to ensure that a balanced portfolio of homes is achieved across the City Region.
- 3.34 However, it was also noted that individual developments should seek to provide a range of property sizes to support mixed and balanced communities. Additionally, it was recommended that the LPAs in the LCR should consider the role of bungalows within the mix – such housing can be particularly attractive to older person households downsizing and may help to release larger (family-sized) accommodation back into the market.
- 3.35 The HEDNA provided some indicative targets for different sizes of homes (by tenure). Within St Helens Borough specifically, the targets shown in Table 3.4 were suggested:

Table 3.4 Suggested Mix of Housing by Size and Tenure for St Helens Borough

	1 – bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	10%	35%	40%	15%
Affordable home ownership	25%	40%	30%	5%
Social/Affordable Rented Housing	45%	30%	20%	5%

Source: Tables 11.20, 11.21 and 11.22 of the HEDNA

St Helens Our Borough Strategy 2021-2030

3.36 This document sets out the six key strategic priorities for the LPA and the borough and how the LPA will seek to achieve them. The six priorities are:

- Priority 1 - Ensure children and young people have a positive start in life.
- Priority 2 - Promote good health, independence and care across our communities.
- Priority 3 - Create safe and strong communities and neighbourhoods for all.
- Priority 4 - Support a strong, thriving, inclusive and well-connected local economy.
- Priority 5 - Create green and vibrant places that reflect our heritage and culture.
- Priority 6 - Be a responsible council.

3.37 The document is supported by a number of specific strategies, including the St Helens Borough Housing Strategy (2022-2027) that is designed to directly support all six of the above Borough Priorities. The St Helens Our Borough Strategy notes that almost a quarter of St Helens Borough residents live in the 10% most deprived neighbourhoods in the country, with the average house price being £141,000 against a national average of £262,000.

St Helens Borough Housing Strategy 2022-2027

3.38 The Housing Strategy which supports the St Helens Our Borough Strategy was approved in 2022 and sets out the vision and priorities for housing in St Helens Borough for the five years up to 2027 and the actions that will be taken to meet local need.

3.39 The Strategy has the overarching vision of 'Quality and Accessible Homes for All'. The document provides a picture of the local housing market in St Helens Borough, including average house prices and the demand for affordable housing. Within the Housing Strategy, there is an Implementation Plan, developed to capture the Key Actions within each of the thematic objectives of the Housing Strategy. The thematic objectives are:

- Move towards carbon net zero.
- Improve health and wellbeing.
- Deliver regeneration and growth.
- Creating communities.
- Supported and specialist housing.

St Helens Borough Local Plan Up To 2037

- 3.40 The St Helens Borough Development Plan is comprised of the St Helens Local Plan, adopted in July 2022, along with the Joint Merseyside and Halton Waste Plan, and the Bold Forest Area Action Plan (adopted in 2017).
- 3.41 The Local Plan document guides development up until 2037. Policy LPA01 (Spatial Strategy) sets out the overall approach to delivering the sustainable regeneration and growth of St Helens Borough. The policy notes that development will be focussed (as far as practicable, having regard to the availability of suitable sites) on the Key Settlements. The new development will be directed to sustainable locations that are appropriate to its scale and nature, and the re-use of suitable previously developed land in Key Settlements will remain a key priority.
- 3.42 As well as the re-use of land, the spatial strategy of the Borough also depends on the release of land from the Green Belt, to enable the needs for housing and employment development to be met in full over the Plan period up to 2037. Other land has also been removed from the Green Belt and safeguarded to allow for longer-term housing and/or employment needs to be met after the Plan period (in accordance with Policy LPA05 (Safeguarded Land).
- 3.43 Policy LPA02 (Development Principles) sets out eight principles that all types of new development in the Borough is required to support where relevant, including creating sustainable communities with a strong sense of place and contributing to inclusive communities by seeking to address the requirements of specific segments of the population.
- 3.44 A number of the Local Plan policies are specific to housing. Policy LPA04 (Meeting St Helens Borough's Housing Needs) sets out that across the Plan period, a minimum of 10,206 net additional dwellings should be provided in St Helens Borough, at an average of at least 486 dwellings per annum. The housing requirement will be met by a number of sources, including nine allocated development sites, which include the Bold Forest Garden Suburb (site reference 4HA).
- 3.45 Policy LPA04.1 (Strategic Housing Sites) states that the Bold Forest Garden Suburb will be one of six sites to be considered a strategic site. The Policy requires that any planning application for development within a Strategic Housing Site must be supported by a comprehensive masterplan

covering the whole site. Detailed development proposals within a Strategic Housing Site will be required, subject to compliance with Policy LPA07 (Infrastructure Delivery and Funding), to provide or make financial contributions to wider supporting infrastructure which will serve the needs of the development.

- 3.46 Policy LPA11 concerns the Bold Forest Garden Suburb. The Policy states that the site is allocated for housing development, with an indicative site capacity of 2,988 dwellings, of which a minimum of 510 dwellings will be delivered during the Local Plan period.
- 3.47 The Policy notes that the site will be required to deliver 30% of housing as affordable housing and the site is expected to provide an appropriate mix and standard of housing to meet local needs, in accordance with Policy LPC01 (Housing Mix).
- 3.48 The Policy also sets out design, highways and access requirements. Landscape, biodiversity, play, open space and green infrastructure requirements are also considered, along with expectations for delivering social infrastructure (such as primary & secondary school provision, a new GP surgery and a small local centre). These elements may be delivered via financial contributions or the provision of on-site infrastructure, to be determined in due course via the masterplanning process. Supporting text to the Policy provides further background information on the site and allocation, and notes that a build-out rate assumption of 60 units per annum has been used for the site.
- 3.49 Policy LPC01 (Housing Mix) sets out the expectations for the delivery of a range of dwelling types in the Borough. The Policy notes that new market and affordable housing should be well designed to address local housing need and include a range of types, tenures and sizes of homes, to be informed by up-to-date, relevant evidence including the Borough's latest Strategic Housing Market Assessment (SHMA).
- 3.50 The Policy sets out expectations concerning accessible and adaptable dwellings and also notes that the LPA will support the delivery of a range of housing types, including bungalows, and specialist and supported housing for elderly and vulnerable people, as well as self-build and custom-build schemes.
- 3.51 Policy LPC02 (Affordable Housing) sets out the LPA's requirements for the delivery of affordable housing across the Borough, which takes a zonal approach. The Policy stipulates that at least 10% of the overall number of affordable homes to be provided should be available for affordable home ownership, and any remaining proportion of the affordable housing to be provided should be for affordable rented accommodation. However, the Policy acknowledges that the provision of affordable housing may vary on a site-by-site basis taking into account evidence of local need and economic viability of a development. Affordable Housing is expected to be provided on-site in the first instance.

3.52 Policy LPD02 (Design and Layout of New Housing) sets out ten criteria that new residential development will be required to meet. These include:

- Using good architecture that respects and/or enhances the character of the surrounding area.
- Enhance local distinctiveness by reflecting good aspects of the character and environment of the local area.
- Provide appropriate landscaping, including tree-lined streets.
- Provide a safe, secure, attractive, permeable, legible and useable environment for all users.
- Promote safe living environments that encourage natural surveillance and reduce crime and fear.
- Ensure the conservation and enhancement of the Borough's heritage assets.
- Consider the Borough's environmental assets (including, but not limited to, biodiversity and associated habitats, landscapes, trees, woodland and hedgerows).
- Provide a satisfactory level of privacy, outlook and natural lighting for future residents.
- Incorporate waste storage and recycling facilities, public transport infrastructure and car parking.
- Ensure a layout and design which is inclusive and accessible to all.

Bold Forest Park Area Action Plan (2017)

3.53 The Bold Forest Area Action Plan (AAP) was adopted in July 2017. The document sets out the plan to transform an area of circa 1,800ha of land in the southern part of the Borough of St Helens into an economically diverse, prosperous and high-quality environment.

3.54 The Bold Forest Park is considered a sub-regional green space and is recognised as a landscape asset. It mostly comprises woodlands (transformed from former colliery sites), agricultural land, public open space, including golf courses, and some commercial areas (including Bold Industrial Estate).

3.55 The AAP is a statutory document which sets out the detailed policies and actions needed to develop and sustain the Forest Park. Whilst the AAP is clear that the Forest Park should provide a platform for economic growth and rural entrepreneurship, principally via the visitor economy and leisure opportunities, it also acknowledges that land within the Forest Park will also need to contribute to meeting the Borough's housing and employment needs. This stance was taken as the document was adopted in 2017, prior to the Local Plan process determining the final spatial distribution of residential and employment land in the Borough.

- 3.56 The AAP includes a number of policies specific to the enhancement and development of the Forest Park. These policies fall into the following categories:
- Strategic Development Policy
 - Developing the Forest Park Economy.
 - Delivering the Forest Park Infrastructure.
 - Meeting the Strategic Land-use Needs of the Borough.
 - Safeguarding and Enhancing the Environment.
 - Engaging the Community.
- 3.57 Policy BFP SN1 (Meeting the Development Needs of the Borough in a Manner Appropriate to the Forest Park) specifically concerns the delivery of housing and employment within the Bold Forest Park. The policy states that should land within the Forest Park area be required to meet housing or employment development needs, then that development should include measures to enhance connectivity between the urban area and the Forest Park. For example, through the creation of footpaths, cycleways and bridleways and the enhancement of them and their surroundings, the provision and improvement of public transport and associated facilities, and car route signage.
- 3.58 The Policy states that positive contributions to the area should be made. Positive contributions would be viewed as where design, massing and layout of buildings respect the landscape character of the Forest Park, where tree cover can be increased and where recreation hubs can be delivered.
- 3.59 The Policy also states that development should not result in the loss of critical infrastructure or prevent their implementation, including Recreation Hubs, Strategic Linking Routes (the Key Walking Routes, Cycle Way Network, Existing Bridleways and Proposed Bridleways) and Gateway Routes (Rail Station Links and Preferred Road Routes).
- 3.60 Policy BFP SN2 (Planning Obligations) states that new development in the Bold Forest Park will be expected to contribute to the infrastructure of the Forest Park. Such infrastructure will include the provision of, maintenance or improvements to, footpaths, bridleways, cycleways and car parks, improvements to signage and interpretative material and mitigation and enhancement for landscape conservation and biodiversity.
- 3.61 Where appropriate, instead of on-site provision of Public Open Space, a contribution to the Forest Park would be accepted instead. It is suggested that this funding would be ringfenced to be spent within the defined boundary of Bold Forest Park, where appropriate.
- 3.62 Ultimately, the AAP document provides detailed policies which put safeguards in place to ensure that any development allocated within the Forest Park has high design standards and positively contributes to the Forest Park.

- 3.63 The importance of the AAP is noted within Local Plan Policy LPA11 (Bold Forest Garden Suburb) where it is stated that the development of the garden suburb should be consistent with the vision, aims, objectives and policies of the Bold Forest Park Area Action Plan.

St Helens Borough Affordable Housing SPD (2010)

- 3.64 This SPD provides details on the LPA's expectations for affordable housing delivery across the Borough, including which sites it will be applied to; the target amount (as a % of the total capacity of all new residential development) and the tenure expected. The document also sets out where on-site provision of affordable housing is not considered appropriate or feasible, and when relaxations against the policy may be permitted.
- 3.65 The expectations for affordable housing at the BFGV site are specifically set out in the Local Plan at Policy LPA11, which states that at least 30% of homes to be delivered on-site should fall within the definition of 'affordable housing' in accordance with Policy LPC02, with the affordable housing mix reflecting Policy LPC02, part 3) unless up-to-date and robust evidence indicates otherwise.
- 3.66 This policy is broadly reflective of the Affordable Housing SPD in terms of the quantum of affordable housing to be requested on new developments (30%, on-site). However, the SPD's expectation of a mix (15% social rent and 15% intermediate housing) is superseded by Policy LPC02, which seeks to achieve 10% of the affordable homes for affordable home ownership, and the remaining 20% as affordable rented housing.
- 3.67 The SPD is clear in determining the expectations around alternative residential products. It states that 'The policy will be applied to all types of development where dwellings are proposed including retirement homes, extra care housing and sheltered housing but will not apply to institutions providing residential accommodation with care where units are not self-contained. On schemes for retirement homes, extra care housing and sheltered housing, the presumption will be for affordable housing to be provided off-site in lieu of on-site provision'.
- 3.68 It is important to note that this SPD was adopted in 2010, and is therefore relatively old now, evidenced by elements of it being superseded by more recently adopted Local Plan policy, as explained above, and it does not take account of more recent changes in national policy and guidance. Within this context, the Council has commenced work on preparing a new Affordable Housing SPD, which will, upon adoption, replace the Affordable Housing SPD (2010).

Design SPD (2024)

- 3.69 This SPD seeks to:
- Promote a better understanding of design
 - Identify examples of good design locally and nationally

- Promote a user-friendly process that identifies relevant design issues for consideration relative to a particular site and location
- Promote a structured approach to design, better dialogue with developers and a greater understanding of the design process by communities to encourage positive input
- Provide more certainty as regards to development outcomes and bringing forward appropriate development in a timely manner commensurate with achieving good design outcomes.

3.70 The SPD identifies three ‘tiers’ of design, namely, strategic, neighbourhood and streets & buildings, and these relate to the range of issues under consideration in the context of a development proposal, depending on its scale. The SPD also sets out five design ‘themes’, which operate at each of the tiers. These themes are cross referenced to the Borough’s priorities (as set out in the Our Borough Strategy’ section above. Checklists are provided for the different design tiers, which summarise the design variables, with the applicant needing to determine which of these apply to a proposed application, then undertake the required analysis and prepare an appropriate design response.

3.71 This Design SPD, upon its adoption, replaced the previous New Residential Development SPD (2011)

Neighbouring Borough’s Policy Review

3.72 Both Halton and Warrington Borough Councils are considered to be located within the same HMA as St Helens Borough and together form the Mid-Mersey Strategic Housing Market Area. Both Councils have recently adopted new Local Plans.

Halton Local Plan

3.73 Halton Borough Council adopted their Delivery and Allocations Local Plan in March 2022. The Plan sets out a target to deliver at least 8,050 net additional dwellings between 2014-2037 at an average of 350 dwellings (net) each year. Policy RD1 (Residential Development Allocations) allocates residential development sites and identifies eight ‘Strategic Residential Locations’ suitable for development. The Strategic Residential Locations and their indicative capacities are as follows:

- SRL1: Delph Lane West, Daresbury, Runcorn -300 dwellings (one site)
- SRL2: Central Housing Area, Daresbury, Runcorn -1,176 dwellings (across three sites)
- SRL3: Wharford Farm, Runcorn -657 dwellings (across two sites)
- SRL4: Sandymoor, Runcorn – 767 dwellings (across five sites)
- SRL5: Halton Lea, Runcorn – 146 dwellings (across four sites)
- SRL7: North East Widnes – 1,155 dwellings (across five sites)
- SRL8: North West Widnes – 432 dwellings (across two sites)
- SRL9: Halebank – 538 dwellings (across two sites)

- 3.74 Policy CS(R)12 (Housing Mix and Specialist Housing) notes that on sites of 10 or more dwellings, the mix of new property types delivered is encouraged to contribute to addressing identified needs (size of homes and specialist housing) as quantified in the most up to date Strategic Housing Market Assessment, unless precluded by site-specific constraints, economic viability or prevailing neighbourhood characteristics. Policy CS(R)13 (Affordable Homes) states that Strategic Housing Sites (those identified on the Policies Map as Strategic Housing Locations) are required to deliver a 20% affordable housing requirement.

Warrington Local Plan

- 3.75 Warrington Local Plan was adopted in December 2023 and covers the period from 2021/2022 to 2038/2039. Policy DEV1 (Housing Delivery) sets out that over the 18 year Plan period from 2021/22 to 2038/39, a minimum of 14,688 new homes will be delivered to meet Warrington's housing needs, which equates to an average of 816 homes per annum. The Plan notes that the majority of housing will be delivered within the existing main urban area of Warrington, the existing inset settlements and other sites identified in the LPA's Strategic Housing Land Availability Assessment. The Plan identifies sites for removal from the Green Belt, including three large strategic sites, known as:

- South East Warrington Urban Extension – minimum of 4,200 homes of which a minimum of 2,400 homes will be delivered in the Plan period.
- Land at Fiddlers Ferry – a minimum of 860 homes will be delivered in the Plan period as part of a wider mixed-use development.
- Thelwall Heys – a minimum of 310 homes will be delivered in the Plan period.

- 3.76 Policy DEV1 notes that the delivery of housing will be stepped; in the first five years of the plan, the target is to deliver 678 dwellings per annum, and in years 6-18,870 homes per annum are expected to be delivered.

- 3.77 Local Plan Policies for both the South East Warrington Urban Extension (Policy MD2) and Fiddlers Ferry (Policy MD3) note that both of these strategic development sites are expected to be developed in accordance with a comprehensive Development Framework, which needs to be prepared and agreed upon by the LPA and the principal landowners and developers for each site in advance of the first planning applications being submitted for each site. The development framework documents for each site are expected to include the following:

- A comprehensive spatial masterplan for the development.
- A comprehensive delivery strategy including a residential phasing plan and trajectory.

- An infrastructure delivery plan, with details on phasing, delivery triggers and delivery responsibilities.
- An allocation wide approach to infrastructure funding, including planning obligations.

3.78 Policy DEV2 sets out the affordable housing requirement for the Borough, which is 20% on sites within Inner Warrington, inclusive of the Town Centre and 30% elsewhere in the Borough and on all greenfield sites irrespective of their location. The policy also advises on the tenure mix for the Borough (In Inner Warrington, half of the units should be for affordable housing for rent and half should be for affordable home ownership. Elsewhere in the Borough, affordable home ownership should account for one-third of the total affordable housing units, with two-thirds being affordable housing for rent). Policy DEV2 also sets out the LPA's requirements for housing mix and the delivery of Building Regulation Standard M4(2) 'Accessible and Adaptable dwellings' and Building Regulation requirement M4(3) 'Wheelchair user dwellings'. The Policy also addresses housing for older people and self and custom build housing.

4. BASELINE ANALYSIS

- 4.1 The analysis below examines the population and housing stock in the Bold Forest Garden Village Area (BFGV area) (see Table 2.2 for definition). It uses the latest available data and benchmarks this to wider comparators of St Helens Borough, Mid-Mersey (St Helens Borough, Halton and Warrington), the North West Region and England.
- 4.2 Table 4.1 below shows the total population, number of households and average number of people per household in each area. The BFGV area sees an average of 2.35 people per household, matching that of the North West average and higher than the St Helens and HMA averages.

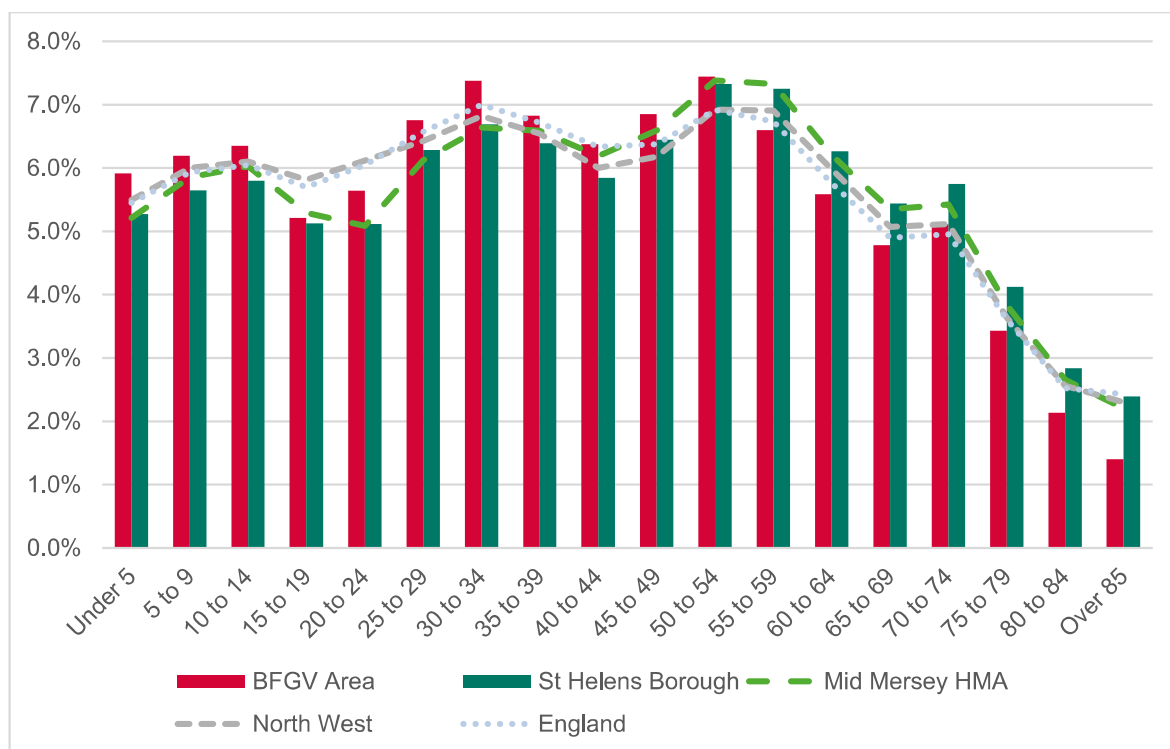
Table 4.1 Population and Households

	Bold Forest Garden Village Area	St Helens Borough	Mid- Mersey HMA	North West	England
Population	18,589	183,246	522,694	7,417,397	56,490,050
Households	7,920	81,009	227,509	3,153,408	23,436,087
Average people per household	2.35	2.26	2.30	2.35	2.41

Source: Census 2021

Age Profile

- 4.3 When compared to St Helens Borough the population in the BFGV area is younger, 71% of the population is under 55 compared to 65.9% in St Helens overall (see Figure 4.1). This is also less than in the HMA, Region and England. The higher proportion of under 55's indicates more families with dependent children in the area and therefore a need for dwellings suitable for families.

Figure 4.1 Population by Age (2021)

Source: Census 2021

- 4.4 Table 4,2 below shows the proportion of the population from the 2011 and 2021 censuses that were of working age (16-64 years old). Direct comparisons of the size of the working-age population in the BFGV area is not possible due to the changes in ward boundaries made between the two censuses, accordingly, such data for wards which comprise the BFGV area in 2011 is taken from the previous ward definitions⁶.
- 4.5 In all areas the working-age population comprises at least 60% of the total population, however, this has decreased in all areas by approx. 2%. In the BFGV area, the proportion of the working population decreased by 1.9%, which is less than that seen in St Helens overall and the wider areas but more than that of England overall.

⁶ E05000918 : Bold and E05000927 : Sutton

Table 4.2 Change in Working Age Population, 2011 to 2021

	Bold Forest Garden Village Area	St Helens	Mid-Mersey HMA	North West	England
2011	65.5%	63.9%	64.7%	64.6%	64.8%
2021	63.6%	61.6%	62.3%	62.5%	63.0%
% change	-1.9%	-2.2%	-2.4%	-2.1%	-1.7%

Source: Census 2011 and 2021

- 4.6 Reflecting the younger population, the BFGV area also has the highest proportion of the working age population which may also indicate a need for family dwellings.

Ethnicity

- 4.7 The areas examined are not particularly diverse with over 95% of the population in the BFGV area, St Helens Borough and the HMA being white (see Table 4.3 below). This compares to 85% in the North West and 81% nationally. The BFGV area sees a slightly higher proportion of the population being white than the other comparator areas.
- 4.8 The largest Black and Minority Ethnic (BAME) group in St Helens Borough is the Asian and Asian British Population which comprises just 1.4% of the population. This falls to 1.1% in the BFGV area, which also has a similar percentage in mixed and multi-ethnic groups.
- 4.9 This is important as a high percentage of BAME families can lead to higher demand for larger dwellings. This is a result of larger multi-generational households being more prevalent within certain groups particularly Asian families.

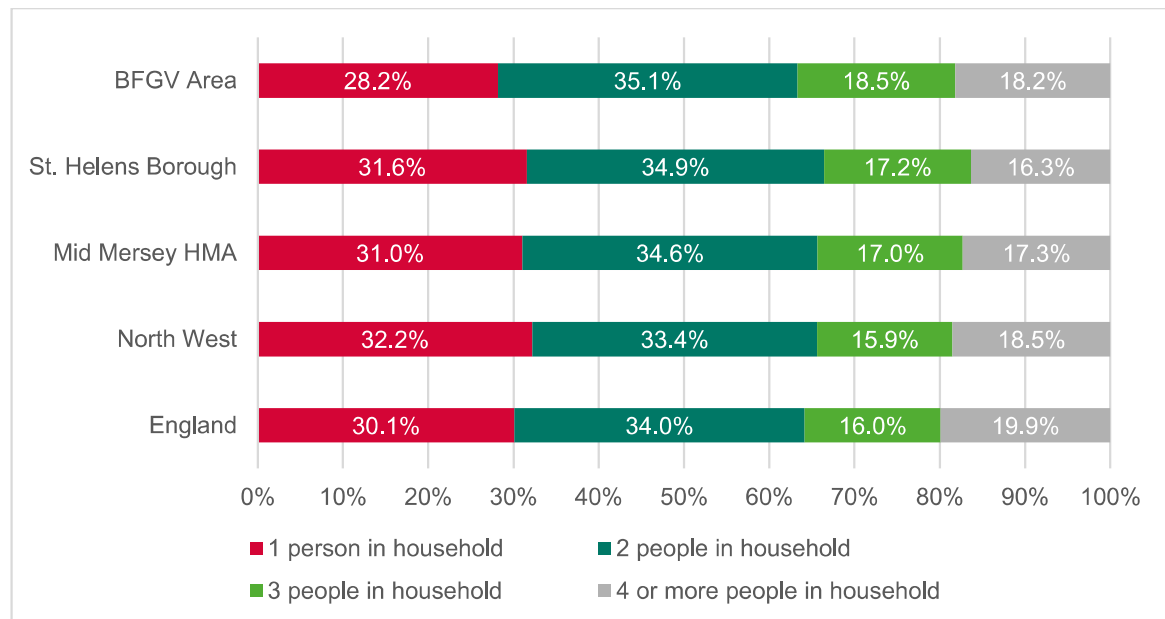
Table 4.3 Ethnicity

	Bold Garden Village Area	St Helens	Mid-Mersey HMA	North West	England
Asian, Asian British or Asian Welsh	1.1%	1.4%	2.1%	8.4%	9.6%
Black, Black British, Black Welsh, Caribbean or African	0.7%	0.4%	0.5%	2.3%	4.2%
Mixed or Multiple ethnic groups	1.1%	1.1%	1.4%	2.2%	3.0%
White	96.6%	96.5%	95.3%	85.6%	81.0%
White: English, Welsh, Scottish, Northern Irish or British	93.5%	93.6%	91.4%	81.2%	73.5%
White: Irish	0.5%	0.5%	0.6%	0.8%	0.9%
White: Gypsy or Irish Traveller, Roma or Other White	2.7%	2.4%	3.3%	3.6%	6.6%
Other ethnic group	0.4%	0.6%	0.7%	1.5%	2.2%

Source: Census 2021

Household Characteristics

- 4.10 As shown in Table 4.2 below, the most common household types in the BFGV area are 2-person households (35.1%) followed by single-person households (28.2%). Households in the BFGV area appear to be slightly larger than that seen in St Helens Borough overall with 2, 3 and 4-person households all more common in the BFGV area, with 36.7% of households in the BFGV area having at least 3 people, compared to 33.5% in St Helens Borough.

Figure 4.2 Household Size

Source: Census 2021

- 4.11 This would indicate that there is likely to be a higher need and demand for homes suitable for families within the BFGV area, the composition of households (see Table 4.4) also indicates this to be the case. In BFGV, 67.5% of all households are single-family units and this is the highest of all assessed areas. Furthermore, 30% of households in BFGV area have dependent children, this is higher than the overall St Helens proportion of 27% and the highest of all assessed areas.

Table 4.4 Household Composition (2021)

Household Composition	Bold Garden Village Area	St Helens	Mid-Mersey HMA	North West	England
One person only: All	28.2%	31.6%	31.0%	32.2%	30.1%
One person: Aged 66 and over	11.5%	13.9%	13.1%	13.3%	12.8%
One person: Other	16.7%	17.7%	17.9%	18.8%	17.3%
One family only: All	67.5%	64.6%	65.0%	62.2%	63.0%
One family: Aged 66 and over	8.4%	9.8%	9.4%	8.8%	9.2%
One family: Married/civil partnership	30.2%	28.5%	30.1%	28.7%	30.4%
One family: Cohabiting couple	14.6%	12.7%	12.5%	11.8%	11.6%
One family: Lone parent	13.6%	13.0%	12.3%	12.1%	11.1%
Other Single Family	0.6%	0.6%	0.6%	0.7%	0.8%
Other Household Types	4.3%	3.8%	4.0%	5.6%	6.9%
Other: With dependent children	2.2%	1.8%	1.8%	2.3%	2.7%
Other, including all FT students and all aged 66+	2.1%	2.1%	2.2%	3.3%	4.2%
With dependent children	30.5%	27.0%	28.0%	28.0%	28.5%

Source: Census 2021

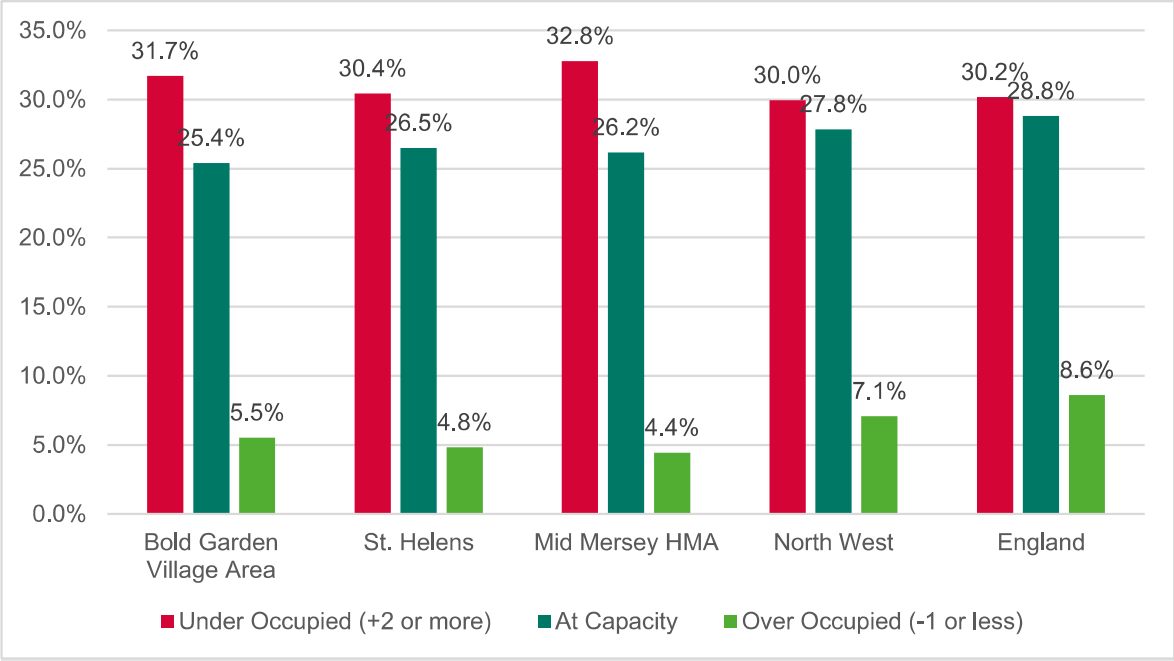
- 4.12 Only 8.4% of households are single-family units where all are aged over 66, while 11.5% are single-person households in the same age group. In both cases, this is the lowest of all assessed areas. This would suggest that demand for older persons accommodation is more limited although an attractive proposition could attract further interest.

Occupancy Rating

- 4.13 Turning then to how homes are occupied, the Census bedroom occupancy rating standard indicates how adequate the size of a dwelling is to a household's need, a positive score of +1 or more indicates that a dwelling is under-occupied (it has one or more bedrooms than the household needs), 0 indicates a dwelling that is at capacity and -1 or less a dwelling that is over-occupied (it has at least 1 bedroom too few than the household needs).
- 4.14 For the purposes of this analysis, dwellings with a score of +1 have been discounted. This is to account for properties with spare bedrooms or bedrooms used as home offices. This is because in some circumstances people with one spare bedroom will not be under-occupied as they will need that room to house carers or children who are not in their primary dwelling.

- 4.15
- A shown in Figure 4.3 below, the BFGV area sees a relatively high proportion of under-occupied (+2 or more) dwellings, with 31.7% of households having more 2 or more bedrooms than they require. Typically this occurs in areas with an older population (due to empty nesters) and also rural and more affluent areas where homes are typically larger.

Figure 4.3 Occupancy Rating (bedroom)



Source: Census 2021

- 4.16
- In contrast, the BFGV area also has a higher proportion of dwellings that are over-occupied again indicating that there is a divide in this area between households that can have more spare rooms and households that are not able to live in dwellings that adequately suit their needs.
- 4.17
- Drilling down into the two wards that make up the BFGV area, the proportion of dwellings in each occupancy category is shown in Table 4.5 below. The Bold & Lea Green Ward has a much higher percentage of under-occupied dwellings than the Sutton South East ward, potentially a factor of its more rural nature and larger housing stock. The wards see very similar proportions of dwellings at capacity or over-occupied.

Table 4.5 Occupancy Rating by Ward (bedroom)

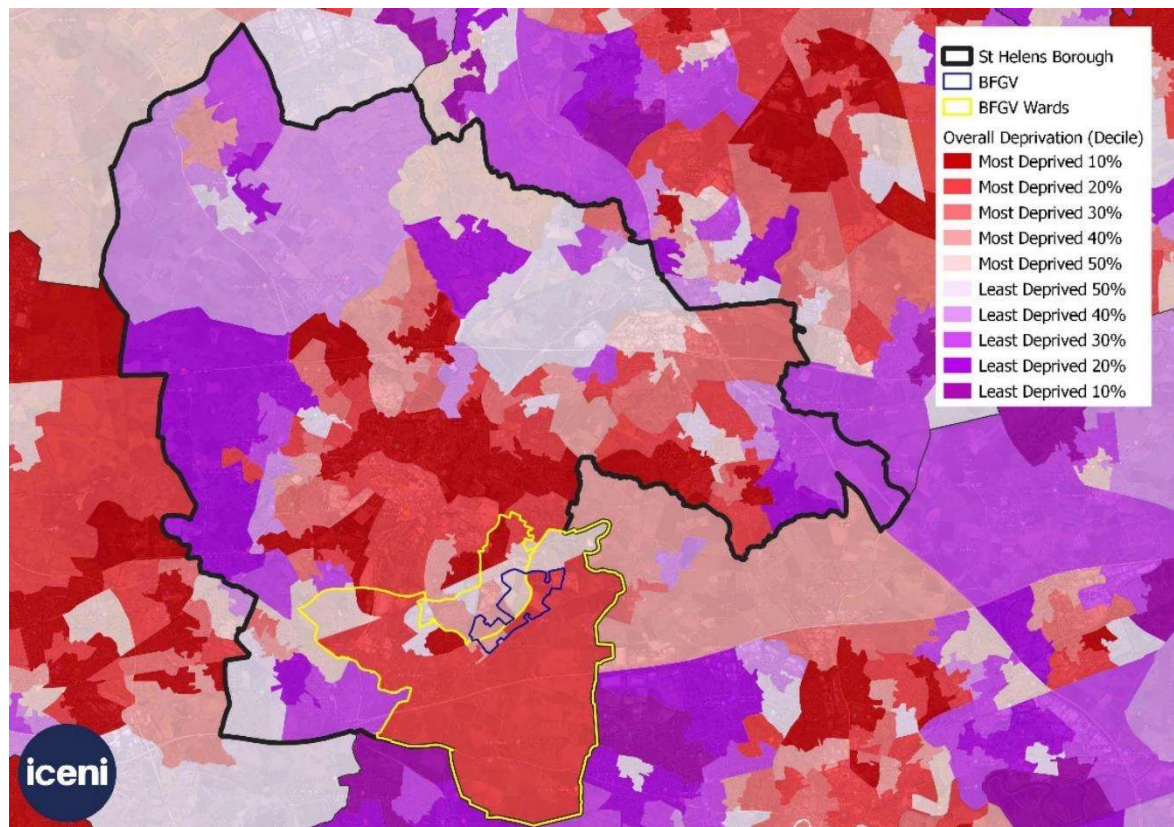
	Under Occupied (+2 or more)	At Capacity	Over Occupied (-1 or less)
Bold & Lea Green	33.6%	25.4%	5.4%
Sutton South East	28.2%	25.3%	5.8%

Source: Census 2021

Deprivation

- 4.18 In general, as indicated in Figure 4.4, the north and west of the Borough are less deprived than the south of the borough. The BFGV area in the South has some Lower Layer Super Output Areas⁷ (LSOAs) within the most deprived 30% or 20%, and one LSOA just to the west of the site lies in the most deprived 10%. There are a few LSOAs in the area which sit between the most and least deprived 50% categories.

Figure 4.4 Overall Deprivation (decile, 2019)



Source: DLUHC, IMD

Current Housing Offer

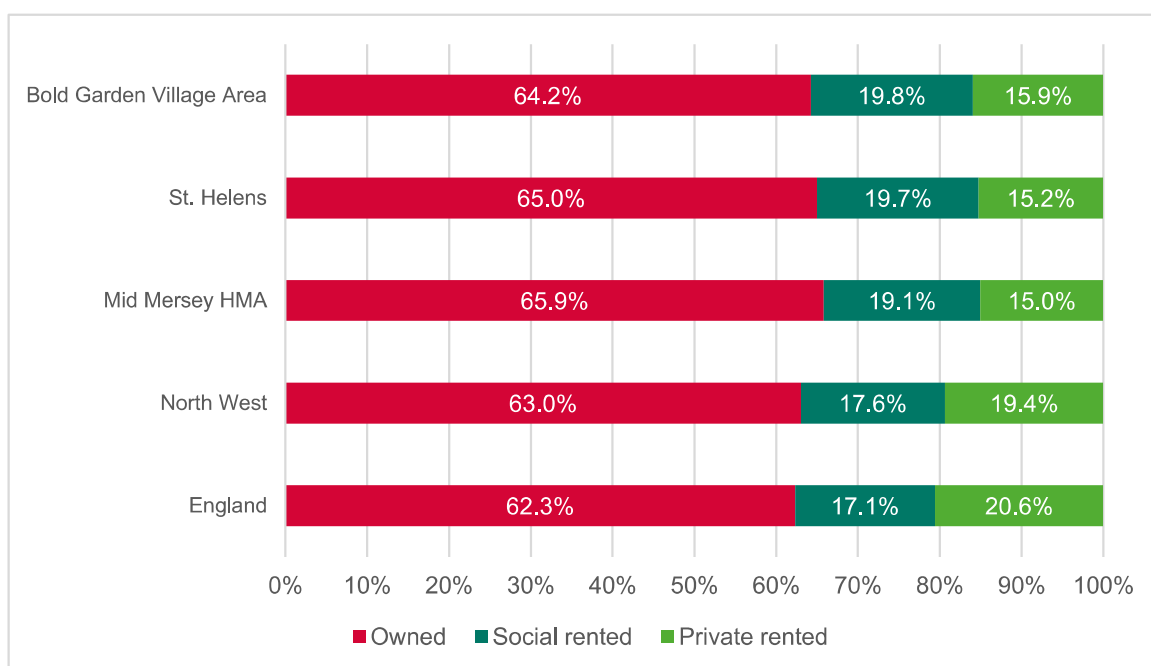
- 4.19 The tenure of households is also an important consideration when looking at existing dwellings. The split seen across the tenures in the BFGV area is largely similar to that seen in St Helens Borough overall, albeit with slightly less homeownership and slightly more renting in this location.

⁷ LSOA are a geography defined by ONS for the purposes of the Census.

4.20 This may indicate that there are more challenges in housing affordability in the BFGV area than in the wider Borough and the market data would suggest prices are higher, although both areas have greater levels of home ownership than the regional and national figures.

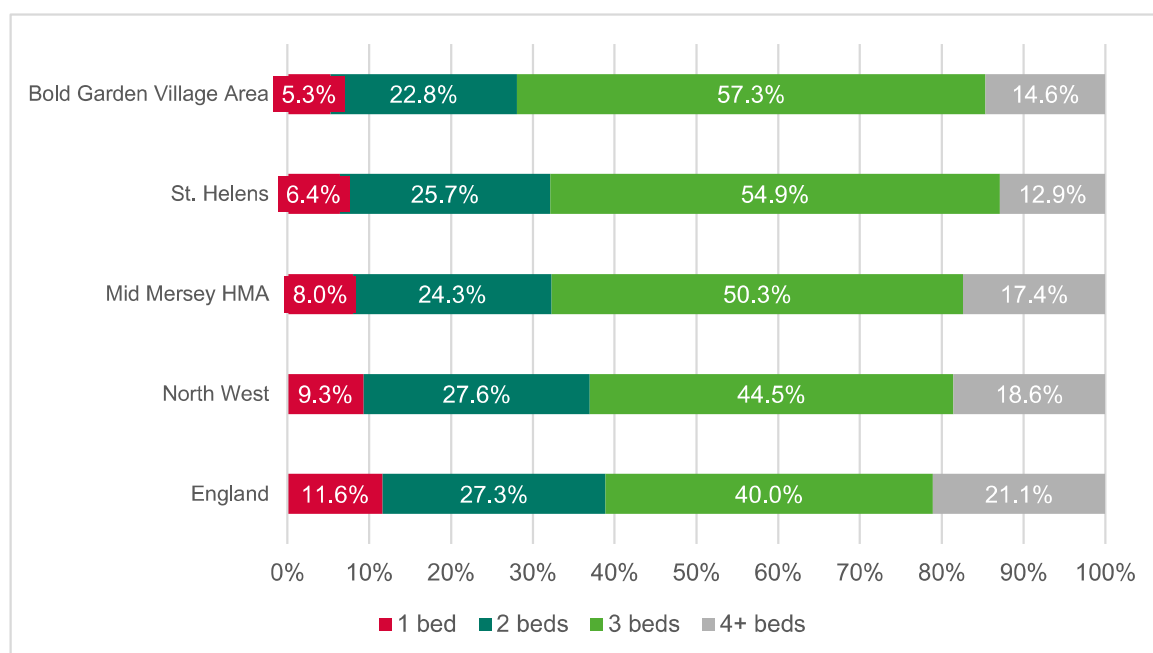
4.21 Across both St Helens Borough and the BFGV area, social renting (affordable and social rent) is more common than private (See Figure 4.5). This is also in contrast to the wider comparators and would indicate that there are particular challenges for current households to be able to afford market rental prices.

Figure 4.5 Tenure (2021)



Source: Census 2021

4.22 The clear majority of dwellings in the BFGV area have 3 bedrooms (57.3%), this is followed by 2 beds (22.8%) as shown in Figure 4.6 below. The proportion of 3-bed properties is the highest of all areas and is much higher than the HMA average as well as the region and England.

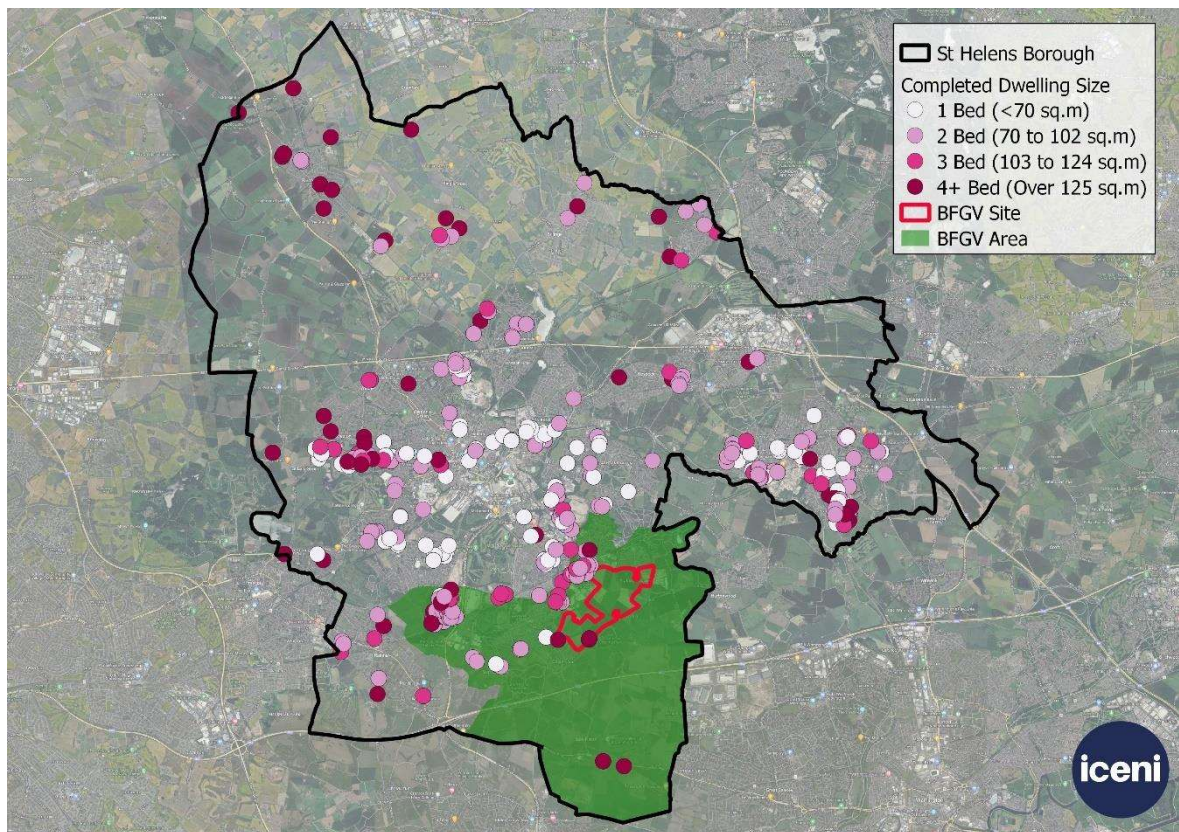
Figure 4.6 Dwelling size (bedrooms)

Source: Census 2021

- 4.23 Generally, 3-bed properties are more suited to family living which is linked to the number of households with dependent children in the BFGV area. Equally, there are more 4+ bedroom properties in the BFGV area proportionally than in St Helens Borough overall. However, both areas see fewer 4+ bedroom properties than the HMA and Region. This does suggest an opportunity to grow this supply to align with the wider area.

Completions

- 4.24 Figure 4.7 below shows the completions of newly built dwellings in St Helens Borough by size from 2013 to 2023. This is based on data from the issuing of Energy Performance Certificates to newly built dwellings.

Figure 4.7 Completions by Size (2013-2023)

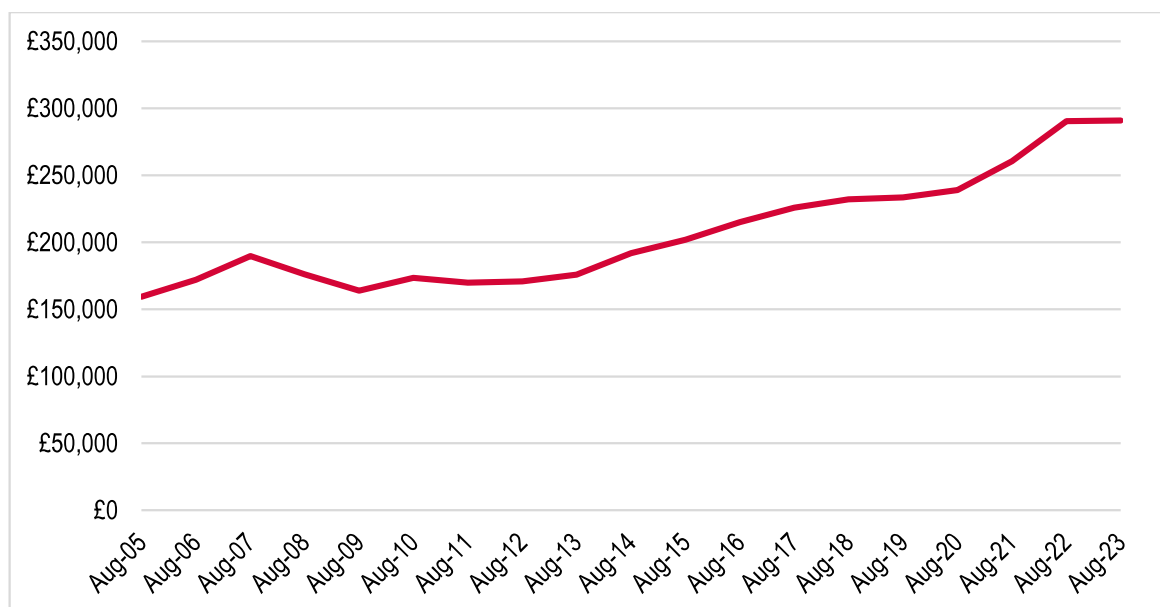
Source: Iceni analysis of EPC data, number of bedrooms estimated based on National Floorspace standards

- 4.25 A range of sizes have been delivered across the Borough, but it is clear to see that one-bed units are more common in the denser more urban areas of St Helens town itself and Newton-le-Willows. The north of the Borough sees no 1-bed properties with a majority of completed units being four-bedrooms and up.
- 4.26 New units surrounding Eccleston (in the west of the Borough) appear to show the largest range of sizes with all sizes of property in this location; less variety is seen around Sutton Heath (south of the Borough) which has no one-bedroom homes and Thatto Heath which is almost exclusively one-bedroom dwellings.
- 4.27 Completions surrounding the BFGV area are somewhat varied with areas to the north of the area primarily seeing 2-3 bedroom homes being delivered and the area to the south seeing some 4+ bed completions. This reflects the area's suburban location with denser areas to the north and rural areas to the south.
- 4.28 The 4+ bed dwelling completions include the self-build dwelling scheme situated to the south of the BFGV site at Frenchfields Crescent. This study has examined elsewhere in this report whether there is likely to be additional demand for self and custom build housing.

5. MARKET HOUSING DEMAND

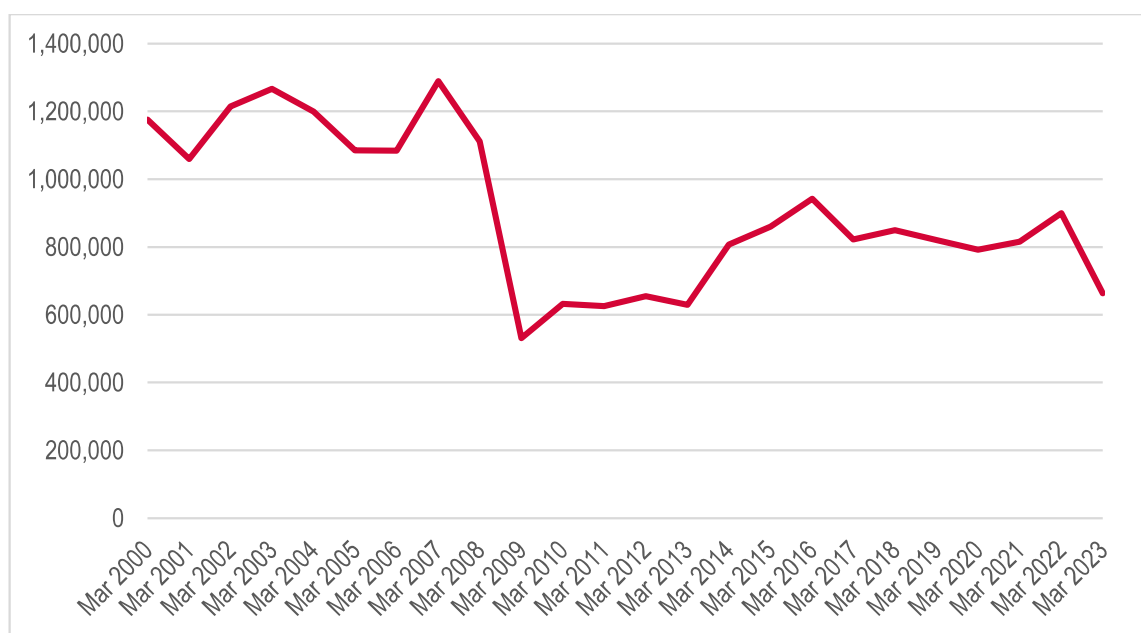
National Market Dynamics

- 5.1 The long-term trend in the housing market nationally (as shown in Figure 5.1) has been of rising housing prices and a persistent supply/demand imbalance with insufficient new-build development coming forward over a sustained period.
- 5.2 The market is cyclical, with house prices increasing relatively strongly through the 2000s to 200/09 when the credit crunch reduced mortgage availability dramatically and led to a cooling of market demand. Market demand picked up in 2013 with the Bank of England's Funding for Lending Scheme and the Government's Help-to-Buy scheme supporting demand, with supply being somewhat slower to respond. These factors, coupled with low interest rates which enabled households to afford relatively large mortgages, help to fuel house price growth.
- 5.3 In 2020 and 2021, the market was further fuelled by households re-evaluating their living circumstances as a result of Covid-19 (with associated growth in home and hybrid working) together with a Stamp Duty Holiday.
- 5.4 However, since early 2022 the war in Ukraine, rising energy prices and associated inflation have led the Bank of England to raise interest rates. Alongside this, market support from the Help-to-Buy Equity Loan scheme, which had enabled the new-build market to outperform other segments of the market, has come to an end. Coupled with a relatively weak economic backdrop since Autumn 2022, market conditions have weakened notably due to the cost of living crisis and the increased interest rates.

Figure 5.1 National Average House Price (August 2005-2023)

Source: HM Land Registry/ Iceni

- 5.5 Sales volumes nationally over the last decade have not matched those pre-2008 (see Figure 5.2 below), influenced by a range of issues including a growing older population who move less frequently; and higher housing costs which mean that the transactional costs of moving are greater.

Figure 5.2 Number of Residential Property Sales England (March 2000-23)

Source: ONS Residential Property Sales

- 5.6 The latest sales volumes at the time of writing (March 2023) have fallen to the lowest level seen for a decade. In the short term, this points to a weaker outlook for the new-build market and may impact housing delivery.

North West Market Dynamics

- 5.7 Research by advisory company Brabners⁸ suggests the North West housing market outlook for 2024 is cautiously optimistic despite an expected dip in the first half of the year. Mortgage rates are forecast to decrease, but new housing developments are scarce, and the buy-to-let market may shrink further.
- 5.8 Government support and manifesto promises could influence the market's confidence. However, challenges include rising build costs and land scarcity.
- 5.9 The RICS Residential Market Survey⁹ also suggests that in Q4 2023 the North West was the only UK region to post a positive figure for new buyer enquiries. The North West also had the highest number of agents reporting an increase in new vendor instructions.
- 5.10 This highlights the fact that people remain interested in both living and investing in the region, despite wider economic difficulties.

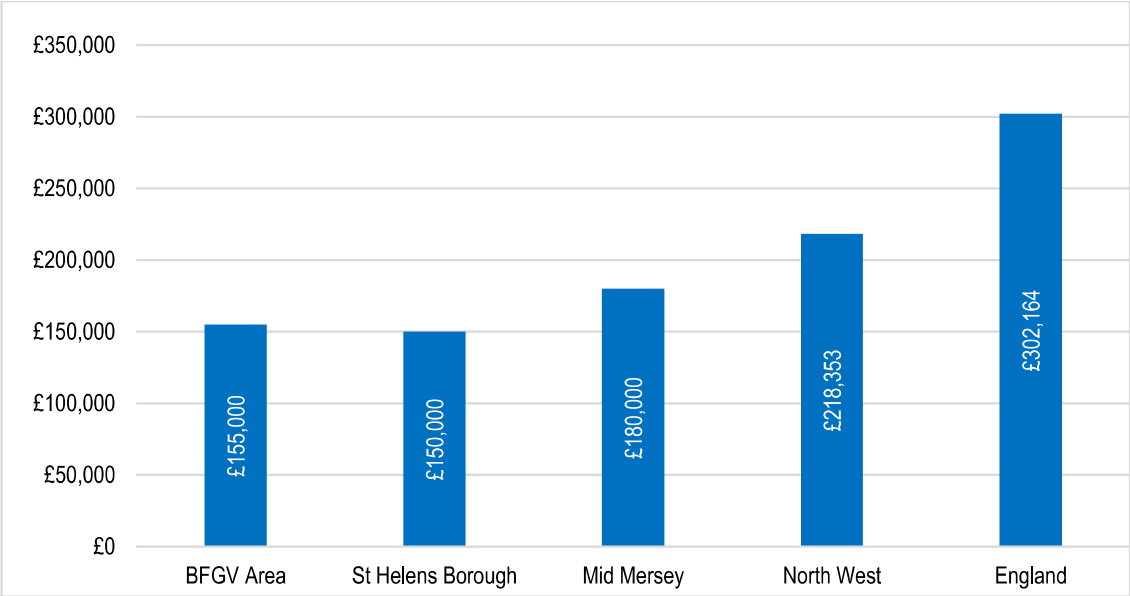
House Prices

- 5.11 In 2013, the median house price in St Helens Borough was £150,000 (see Figure 5.3), below the Mid Mersey median of £180,000. In comparison, median prices in the BFGV area (£155,000) were only slightly above the St Helens Borough median at £150,000 with both the North West and England Median being much higher.

⁸ <https://www.brabners.com/blogs/north-west-housing-market-outlook-cautious-optimism>

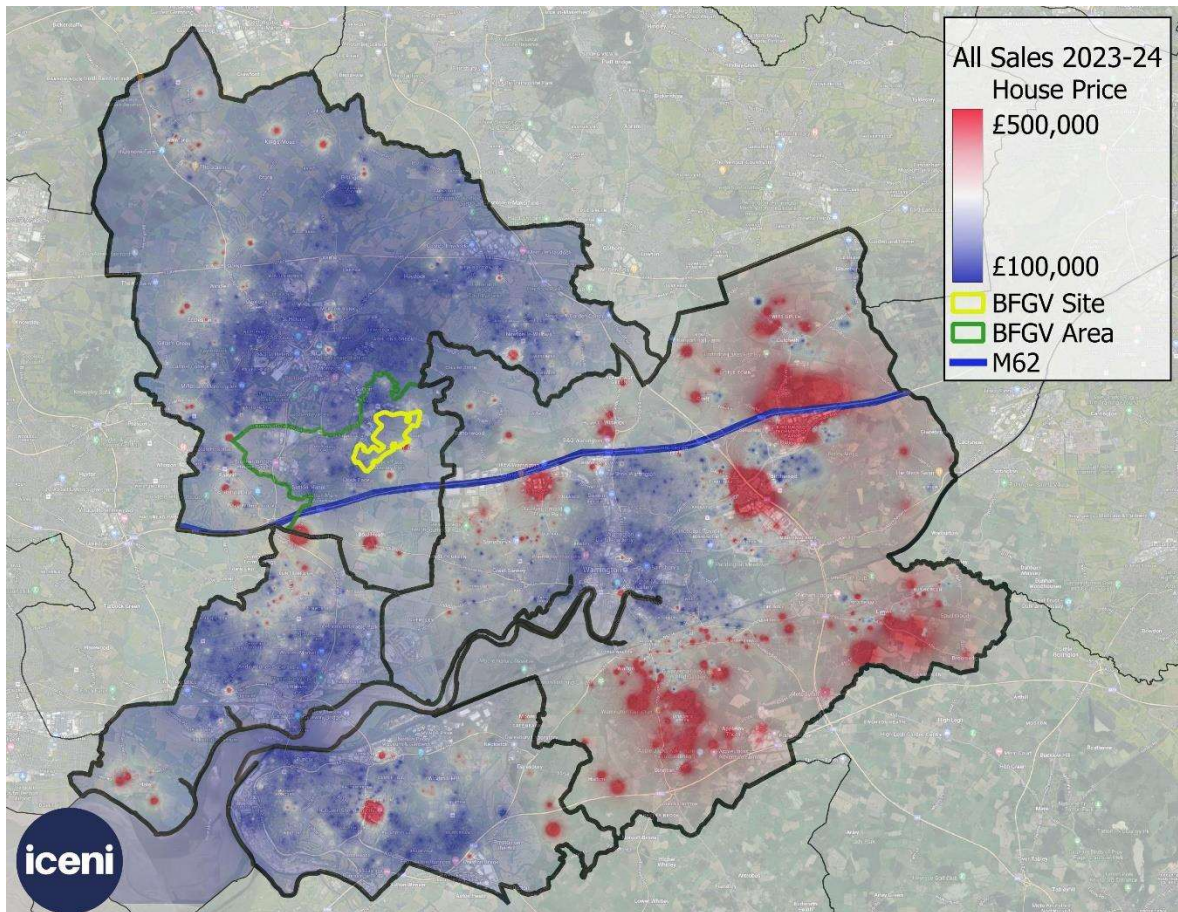
⁹ <https://www.rics.org/news-insights/market-surveys/uk-residential-market-survey>

Figure 5.3 Median House Price (Year to December 2023)



Source: HMLR, Price Paid Data 2024 (NW and England figures are Averages)

5.12 As illustrated in Figure 5.4 below, there are clear areas of high and low house prices in the Mid-Mersey area. The most expensive areas in the sub-region are the suburban and rural parts of Warrington and to a lesser degree the northern and western parts of St Helens Borough including Rainford, Rainhill, Windle and Eccleston. There are also pockets of higher house prices in Hale and the northern parts of Widnes around Lunts Heath.

Figure 5.4 House Price Heatmap (2023-2024)

Source: HMLR, Price Paid Data 2024

- 5.13 Interestingly, Figure 5.4 also shows a clear band of higher house prices along the M62 corridor. Given the BFGV site's proximity to the M62 motorway, this would suggest (and is supported by engagement) that the area could attract more premium prices.

New Build v Resale Prices

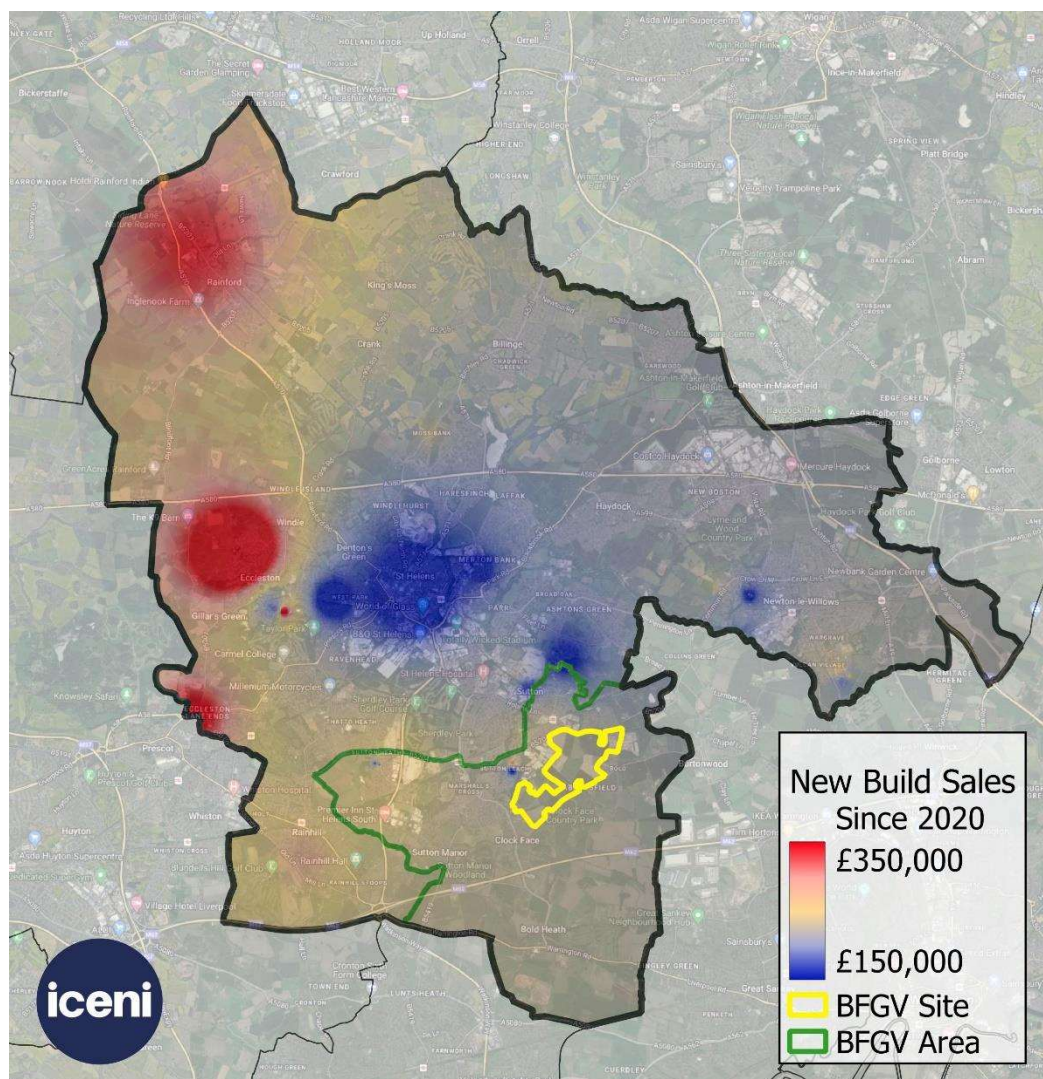
- 5.14 Due to a lack of recorded new build sales in the last year, this study considers new build values in the area since 2020 to generate a larger sample size. This data was not readily available for the North West and England.
- 5.15 As shown in Table 5.1 below across all areas there is a significant uplift between new-build house prices and resale prices. This is particularly the case in the BFGV area where the uplift is 64% compared to 54% across St Helens Borough and 58% in the Mid Mersey sub-region. This would suggest the market for newly built housing in BFGV would be strong.

Table 5.1 New Build Premium (Since 2020)

Since 2020	Overall Median	Resale Median	New Build Median	New Build Premium	% of sales New Build
Bold Forest	£165,000	£147,875	£242,995	64%	16.3%
St Helens Borough	£150,000	£145,000	£223,995	54%	5.2%
Mid-Mersey	£175,000	£170,000	£267,995	58%	5.8%

Source: HMLR, Price Paid Data 2024

- 5.16 Notably, the percentage of new build sales of the total in the BFGV Area is much higher than in the other areas. This included development at Abbotsfield immediately to the north of the BFGV site.
- 5.17 Figure 5.5 below illustrates the variation in new build sales across St Helens Borough. This shows that the sale prices in the BFGV area are middling compared to the higher new build prices achieved in the west of the Borough and the low prices in the Borough's urban core.

Figure 5.5 New Build Prices (Since 2020)

Source: HMLR, Price Paid Data 2024

House Price by Type

5.18 Although the BFGV area has a higher overall median in comparison to the wider Borough this is influenced by the mix of housing being delivered. This is evident by the fact that for each type of home, the values in the BFGV area are lower than those for the wider Borough (see Table 5.2).

Table 5.2 Median House Price By Type (2023)

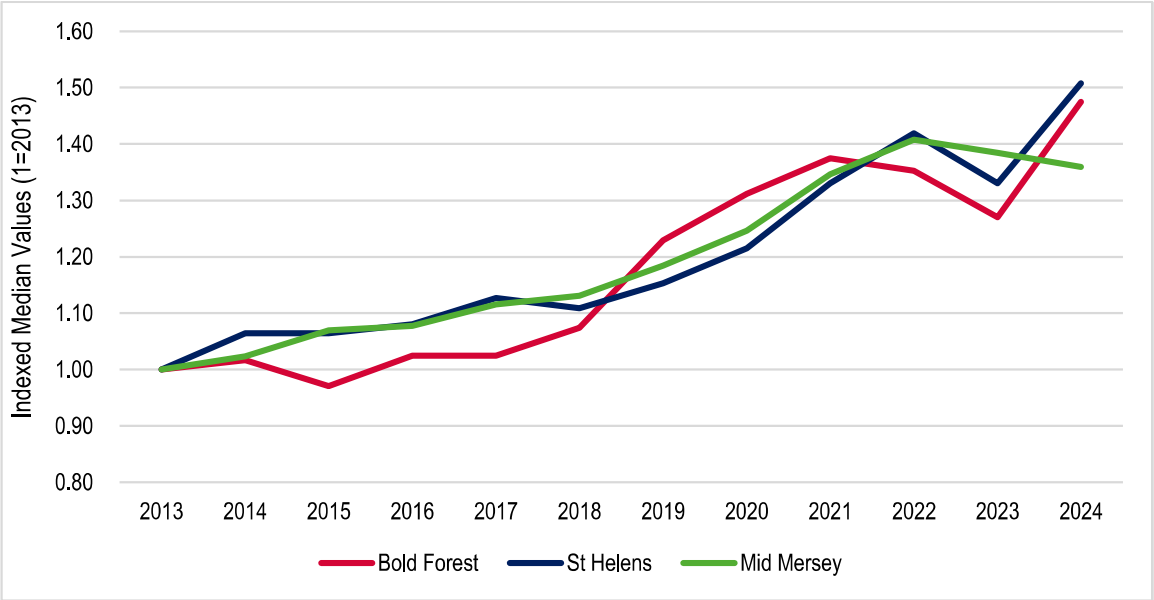
	Detached	Semi-Detached	Terrace	Flats	Overall
BFGV Area	£290,000	£175,000	£102,250	£80,000	£155,000
St Helens Borough	£310,000	£180,500	£112,500	£99,475	£150,000
Mid-Mersey	£358,000	£207,000	£128,777	£110,000	£180,000

Source: HMLR, Price Paid Data 2024

5.19 Specifically, 19% of sales in the BFGV area were detached homes and 3% were flats. In contrast, only 12% of homes sold in St Helens Borough were detached and 6% were flats. Hence the overall price is influenced by the higher value sales.

5.20 Since 2013 there has been a broad correlation in house price change across the three areas examined (see Figure 5.6). House prices in the BFGV area have increased by 48% in this time while across the wider Borough, they have increased by 51%. This is perhaps due to a lower base position.

Figure 5.6 House Price Change



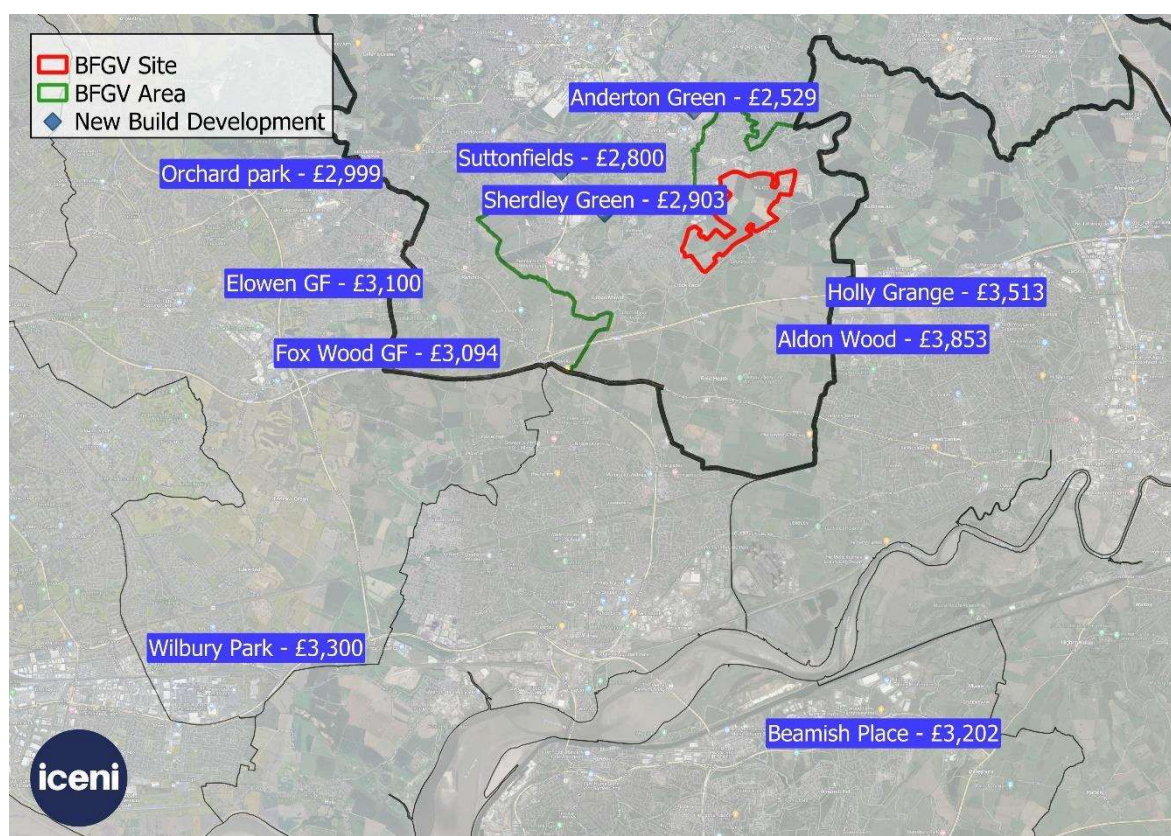
Source: HMLR, Price Paid Data 2024

5.21 However, there was a fall between 2021 and 2023 due to the ending of the stamp duty holiday and the cost of living crisis resulting in a lack of supply and fewer buyers. House prices have rebounded strongly in the early parts of this year, although admittedly the number of sales thus far is low.

New Build Sales Values

- 5.22 Research examining the values achieved in new build developments within the wider sub-region shows a range from £2,529 to £3,853 per square metre (£235 - £358 per sq ft). Both the top and bottom end of this range are Taylor Wimpey schemes, demonstrating a range of values even within a single developer. The median new build value is just under £3,100 per square metre (£288 per square ft).
- 5.23 Figure 5.7 below does suggest that the new build developments closest to the BFGV Site are some of the lowest in the area, however, Aldon Wood, which is just across the border in Warrington has the highest values although this is based on a very small sample. This would strongly suggest that an uplift in values is possible. There also appears to be some correlation between the highest values being achieved and proximity to the M62.

Figure 5.7 Price Per Square Metre at New Build Developments



Source: Iceni Projects and Data from Developer Websites.

- 5.24 Table 5.3 below summarises the information on the developers and provides the equivalent price per square foot.

Table 5.3 Values Achieved at New Build Developments

Development	Location	Developer	£ per sqm	£ per sqft
Anderton Green	St Helens Borough	Taylor Wimpey	£2,529	£235
Sutton Fields	St Helens Borough	Bloor	£2,800	£260
Sherdley Green	Lea Green	Taylor Wimpey	£2,903	£270
Orchard Park	Prescot	Taylor Wimpey	£2,999	£279
Fox Wood GF	Whiston	Taylor Wimpey	£3,094	£287
Elowen GF	Whiston	Bloor	£3,100	£288
Beamish Place	Kekwick (Runcorn)	Bloor	£3,202	£297
Wilbury Park	Halewood	Miller Homes	£3,300	£307
Holly Grange	Warrington	Bloor	£3,513	£326
Aldon Wood	Great Sankey	Taylor Wimpey	£3,853	£358

Source: Iceni Projects and Data from Developer Websites.

- 5.25 This study also aggregated this data to get a larger sample size and to understand values for different sizes and types of new build homes in the wider area (see Table 5.4). This shows a premium is received for detached over semi-detached homes but also that three bedroom homes have relatively higher values per sq ft than four-bedroom homes.

Table 5.4 Values Achieved by Type and Bedroom Number

	Per Square Metre		Per Square Foot	
	3 Bedrooms	4 Bedrooms	3 Bedrooms	4 Bedrooms
Detached	£3,492	£3,054	£324	£284
Semi	£3,368	£2,835	£313	£263

Source: Iceni Projects and Data from Developer Websites.

Mix on Adjacent Sites

- 5.26 Drawing on data from the LPA (see Table 5.6), the mix of the 673 dwellings on recent completions (2021-24) on sites with over 60 units adjacent to the BFGV site is focused on three-bedroom homes and detached homes. The singularly most common size and type of dwelling completed are three-bedroom semis at 222 followed by three-bedroom detached dwellings at 196.
- 5.27 Flats are the least common dwelling to be constructed with all these units being in affordable rented tenure. Of all dwellings completed 86 are affordable, which is around 12% of the total completions in the area.

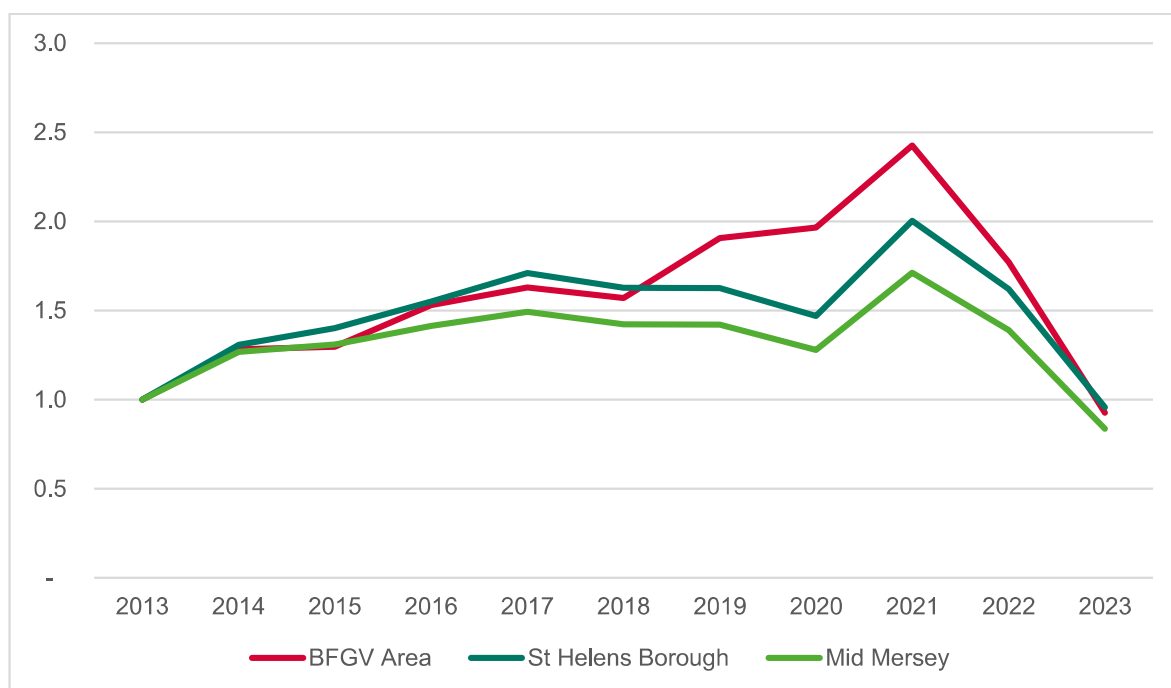
Table 5.5 Adjacent Site Completions on sites with 60+ units (2021-24)

	1 Bed	2 Beds	3 beds	4 beds	Total
Flats	24	6	-	-	30
Terrace	-	7	42	-	49
Semi-detached	-	44	222	22	288
Detached	-	-	196	110	306
Total	24	57	460	132	673

Source: Iceni analysis of Council data

Transactions

- 5.28 Since 2013, sales in the BFGV area averaged 318 per annum but in 2023 this was as low as 187 as shown in Figure 5.8. As with the sales prices, there has been a broad correlation in transactions since 2013 across the three areas examined. The significant fall in sales since 2021 is influenced by the end of the stamp duty holiday and help to buy and latterly interest rate rises that have restricted the number of buyers.

Figure 5.8 Indexed Sales (2013-2023)

Source: HMLR, Price Paid Data, 2024

Rental Values

- 5.29 As shown in Table 5.6, rental prices in the BFGV area are notably higher than those in St Helens Borough. However, this is influenced by the size of homes recorded (nothing below two bedrooms) and also the low volume being advertised (5 units). This would suggest that the rental market in the BFGV area is not mature.

Table 5.6 Median Rental Prices (2023/24)

	Overall
BFGV Area (Advertised March 2024)	£1,100
St Helens Borough (Advertised March 2024)	£710
St Helens Borough (ONS Year to Sept 2023)	£595
Halton (ONS Year to Sept 2023)	£620
Warrington (ONS Year to Sept 2023)	£695

Source: ONS and Rightmove, 2024

The recorded St Helens Borough values (see Table 5.7) are also much lower than the advertised values. This is because the recorded values include all rents including re-lets which tend to be lower than new leases. However, overall even the recorded values are lower than the neighbouring authorities although this is a result of the mix as for some sizes e.g. room rents and one- and three-bedrooms, values are higher than in Halton.

Table 5.7 Median Rents by Number of Rooms (2023/24)

	Room	Studio	1-Bed	2-Beds	3-Beds	4-Beds
BFGV Area (Advertised March 2024)	n/a	n/a	n/a	£713	£1,300	£2,500
St Helens Borough (Advertised March 2024)	£563	£524	£575	£725	£1,100	£1,600
St Helens Borough (ONS Year to Sept 2023)	£403	£415	£495	£575	£700	£975
Halton (ONS Year to Sept 2023)	£379	£488	£475	£575	£685	£1,050
Warrington (ONS Year to Sept 2023)	£447	£475	£551	£680	£878	£1,385

Source: ONS and Rightmove 2024

Engagement with Sales and Letting Agents

5.30 Targeted telephone engagement with local estate and letting agents took place in February 2024. The following section collates these views although it should be caveated that a limited number of views were obtained and not all views were universally held and they must be regarded as anecdotal. As such they may contradict each other, and data presented elsewhere in this report.

5.31 The agents spoken to were:

- Ashtons (sales & lettings) – Hardshaw Street, St Helens town
- John Brown (sales & lettings) – Cloughton Street, St Helens town
- Little Estate Agents (sales & lettings) – Bridge Street, St Helens town
- Entwistle Green (sales & lettings) – Hardshaw Street, St Helens town

Sales Market

- 5.32 All agents agreed that the profile of buyers in St Helens Borough is mixed, and includes young couples purchasing their first home, growing families, downsizers and a healthy amount of investors. It was suggested that investors tend to target central areas of the Borough including St Helens town centre. However, it was noted that there is ample stock of terraced properties so it is uncommon for investors to be competing with other segments of the market, such as first-time buyers, for properties.
- 5.33 All agents agreed that whilst most buyers are from within St Helens Borough itself, there is a growing demand for properties in the Borough from buyers relocating from Widnes, Warrington and Liverpool. It was noted that a buyer could easily purchase a property in the south of St Helens Borough and still comfortably commute into surrounding boroughs.
- 5.34 Reflecting this, when asked what makes the south of the Borough attractive, it was noted by all agents that the connectivity to the M62 motorway is highly attractive. It was also suggested that the south of the Borough, particularly the areas of Sutton and Clock Face are attractive due to their semi-rural location, on the fringe of the Borough. These areas are perceived to be quieter and popular with families and retirees.
- 5.35 Whilst agents could cite a few reasons why the south of the Borough was attractive, it was perceived that the most popular and desirable areas are located in the north-west of the Borough, and the following areas in particular were cited; Windle, Eccleston and Dentons Green.
- 5.36 One agent suggested that well-kept three-bedroom semi-detached properties 'fly off the market' consistently. It was noted that there is a limited stock of detached properties in the Borough, though this was not necessarily problematic as there was little appetite from the vast majority of buyers. Indeed, one agent said that it would be rare for buyers to be specifically looking at detached properties, with most buyers in the 'family' category typically exploring a range of mainly semi-detached properties.
- 5.37 All of the agents suggested that the south of the Borough has a reasonable supply of bungalows and noted that the semi-rural edges of the Borough, including Clock Face, were known to be popular with downsizers and retirees. However, it was suggested that there are never enough bungalows coming onto the market, and there is a constant list of interested buyers waiting specifically for bungalows.
- 5.38 When asked about the strength of the market at present, it was suggested that prices are stable and there is a good level of supply and demand, and this has been the case for the last 12 months. One agent suggested that demand in the last month had been 'absolutely crazy', and there has been an uptick in the overall numbers of sales per month in the Borough compared to this time last year.

- 5.39 Agents were reporting that properties were typically selling for between the asking price and 2% under asking. All agents noted that properties are being priced to sell with sellers acting on their encouragement to be realistic.
- 5.40 It was suggested that the expectation from sellers to achieve the values seen during COVID has now been tempered, recognising that demand has stabilised. Furthermore, it was suggested by one agent that there is a sense that a lot of 'COVID era' buyers remortgaging in the next 12 months will struggle in the face of increased interest rates. However, it was generally considered that sales are strong and expected to continue in this manner.
- 5.41 It was suggested that the typical budget for a first-time buyer looking to purchase a two-bedroom terraced property would be in the region of £100,000. A typical budget for a family looking for a three-bedroom semi-detached property would be around £160,000.
- 5.42 Agents thought that properties were typically on the market for 4-8 weeks. It was suggested that properties on newer housing estates being re-sold for the first time (e.g. 3-5-year-old properties) often generated a high amount of interest.
- 5.43 One agent suggested that there is a good amount of new build development, so buyers can view a mix of both off-plan properties and slightly older properties, with the selection coming down to the price and condition of the property rather than the age necessarily.

Rental Market

- 5.44 The rental market was reported by all agents to be very busy, and in some cases, 100 enquiries are received for some of the higher quality two and three-bedroom properties.
- 5.45 It was suggested demand is coming from a range of sources, including individuals, young couples and older people. However, it was noted by two agents that there has been a large increase in the demand for rental properties from families, particularly for three and four-bedroom properties.
- 5.46 This increase was noted to have occurred within the last twelve months and it was suggested that as soon as a family-sized rental property becomes available, it is 'snapped up'. One agent suggested that increasingly they are renting terraced properties to families even though the property is not suitably sized for the family occupying it.
- 5.47 Whilst family-sized rental properties were noted to be in particularly high demand, one agent commented that at present, all types of rental properties are proving popular, even one-bedroom flats.

- 5.48 It was noted by agents that average tenancy lengths seem to be increasing, and families in particular seem to be renting for longer (circa five years). It was noted that whilst historically lettings agents would have to attract renters with incentives such as the first months rent-free, that is no longer the case, and generally demand is outstripping supply.
- 5.49 Unlike the purchase market, this demand was seen to be coming from within St Helens Borough itself, rather than further afield. It was also suggested that both Whiston and St Helens Hospital recruitment drives rental demand at a local level.
- 5.50 One agent considered that a built to rent product offering in St Helens Borough would prove popular, and indeed, anything that increases the supply of rental properties in the Borough would have a market.

6. COMPARABLE SITES

- 6.1 This section examines the mix at comparable sites in and around St Helens Borough considering the location, mix and sales data on these sites. This information is drawn from a range of datasets including HM Land Registry Price Paid Data, planning applications and data drawn from desktop research.

Anderton Green

- 6.2 Taylor Wimpey's Anderton Green scheme is located off Sutton Road, on the southeast edge of St Helens Town Centre. The site is circa 3km north of the BFGV site. The site is part of a wider site known as Moss Nook, being developed by Harworth Estates.
- 6.3 The Taylor Wimpey site extends to approximately 6.45 hectares. It occupies the southern part of Moss Nook, fronting Sutton Road, but excluding the existing residential properties on Little Street and Morris Street.
- 6.4 Construction of the wider site's spine road, landscaping and associated infrastructure started in late 2019 by Harworth Estates. These works are now complete, which unlocked the first residential plot sale to Taylor Wimpey in 2021 to build out the first 258 homes.
- 6.5 The scheme is comprised of 60 detached dwellings, 176 semi-detached dwellings and 22 mews properties. The proposed dwellings are predominantly two storeys in height, with a number of dwellings located across the site comprising 2.5 storeys.
- 6.6 The properties are being marketed at £224,995 to £314,995, land registry and Rightmove are yet to record any sales on the site itself however new build sales in an adjacent site have sold for an average of £216,540 since 2021.

Sutton Fields

- 6.7 Bloor's Sutton Fields development is located in the Thatto Heath area of St Helens Borough and is positioned between Sherdley Road and the St Helens Linkway (the A570). The site is bounded by Elton Head Road to the south and The Score to the north. The site is located 3km northwest of the BFGV site.
- 6.8 The site is comprised of 294 dwellings, including 111no. three-bedroom properties and 183 no four-bedroom dwellings, across a mixture of semi-detached and detached house types. The dwellings

are predominantly two-storey in height, along with some 2.5-storey townhouse dwellings. The properties are being marketed at £259,995 to £342,500 with an average sales price of £262,190.

Sherdley Green

- 6.9 Sherdley Green is a scheme developed by Taylor Wimpey, located to the south of Elton Head Road, just 1km east of Bloor's Sutton Fields scheme in Thatto Heath. The scheme is also known as Elton Head. The site is bound by a railway line to the south, existing industrial premises to the west, dwellings off Covington Drive to the east, and Elton Head Road to the north.
- 6.10 The development is comprised of 180 dwellings. The housing mix consists of 24no. two-bedroom apartments, 97no. three-bed dwellings consisting of 9 detached, 50 semi-detached and 38 townhouses and 59 four-bed dwellings consisting of 47 detached and 12 semi-detached.
- 6.11 The scheme is being marketed at £279,995 to £339,995. The site is still in the very early stages of construction and as of yet, no sales have been recorded by land registry or Rightmove.

Orchard Park

- 6.12 Orchard Park is a Taylor Wimpey scheme situated in Prescot (Knowsley) offering 227 three & four-bedroom homes. The scheme is on the site of the former Whitakers Garden Centre, Liverpool Road, which is 8km west of the BFGV site.
- 6.13 To the south, the site is bounded by Liverpool Road with the Clock Face public house adjoining the site in the southeast corner. To the east, the site primarily adjoins the rear gardens of residential properties along Knowsley Park Lane and various boundary treatments are evident.
- 6.14 A small part of the site adjoins 3 Knowsley Park Lane and extends up to the highway boundary. To the north, the site adjoins playing fields and woodland with fencing and hedges forming the physical boundary. To the west, the site adjoins the A58, and Dye House is located to the southwest of the site.
- 6.15 The development comprises of 111no. three-bedroom properties and 116no. four-bedroom properties. The scheme includes a mixture of detached, semi-detached and mews properties, at 2 and 2.5 storeys.
- 6.16 The properties are being marketed at £244,995 to £379,995. The average sales price on the site is £283,195.

Fox Wood Garden Village

- 6.17 Foxwood Garden Village is a Taylor Wimpey scheme providing 350 three- and four-bedroom dwellings, located 8km west of the BFGV site, in Prescot (Knowsley). The site forms part of the Halsnead Garden Village which comprises two adjacent Sustainable Urban Extensions released from the Green Belt and allocated for development in the Knowsley Local Plan Core Strategy (January 2016). The site measures 16.2 Ha and is located to the south of Whiston and just north of the M62, with access from Fox's Bank Lane to the east.
- 6.18 The scheme comprises 189 three-bedroom and 161 four-bedroom dwellings with a mix of both semi-detached and detached family homes, across 10 different house types. The majority of the properties are 2-storey, with some 2.5-storey dwellings interspersed through the site.
- 6.19 The properties are being marketed at £254,995 to £454,995. The site is still in the very early stages of construction and as of yet, no sales have been recorded by land registry or RightMove.
- 6.20 Although also Taylor Wimpey Development the maximum asking price at Fox Wood Garden Village are in excess of both Alderton Green (£314,995) and Sherdley Green (£339,995). This may be due to the development being slightly larger than the other two and can thus offer a greater range of products some of which are at the higher end of the market.
- 6.21 It is also the case that garden villages which generally have access to a greater amount of green space can attract a premium. This particular development also has better access to the M62 which again is likely to attract a premium.

Elowen Garden Village

- 6.22 Elowen Garden Village is located in Whiston, Knowsley. The site is located to the south of Whiston immediately north of the M62 motorway, within the first phase of the Halsnead Garden Village. The site is accessed via Windy Arbor Road. The site is located 8km west of the BFGV site.
- 6.23 The site is being delivered in phases; the first phase is for 123 dwellings which was granted full permission in 2020 with a later phase of 208 dwellings granted reserved matters permission in 2023.
- 6.24 Bloor is currently offering a mix of two-, three- and four-bedroom properties for sale. The first phase of development includes the following mix: 6no. two bedrooms properties, 50no. three bedroom dwellings and 67no. four-bedroom dwellings.
- 6.25 Only four-bedroom properties are currently being marketed at present, for between £329,995 to £372,500. However, the average sales price in the development has been lower than this at only £228,430 according to Rightmove data.

Beamish Place

- 6.26 Beamish Place is a Bloor Homes development located in Sandymoor, Runcorn (Halton). The site is located approximately 5.5 kilometres to the east of the centre of Runcorn and 16km south of the BFGV site.
- 6.27 The site is accessed via Wharford Lane and is bound to the north and south by undeveloped land, to the east by the West Coast Mainline spur to Liverpool and the west by the Sandymoor North development site. The predominant land use in the vicinity of the site is residential with areas of recreational open space.
- 6.28 The site offers 205 dwellings in total comprising 44 four-bedroom, 136 three-bedroom and 25 two-bedroom properties across a mix of detached, semi-detached and mews properties. Only one four-bedroom property is available, being marketed at £379,995. The average sales price in the development is lower at £262,150, reflective of the mixture of property sizes on site.

Wilbury Park

- 6.29 Wilbury Park is a Miller Homes development located off Baileys Lane and is positioned immediately north of Higher Road, the A562. The site is located within Knowsley Council's East of Halewood Sustainable Urban Extension (SUE) site which is approximately 12km southwest of the BFGV site.
- 6.30 The site is comprised of land and buildings formerly occupied by the Liverpool branch of the RSCPA. The site is rectangular, with Higher Road forming the long southern boundary. At this point, Higher Road is a dual carriageway and the road separates the site from undeveloped land to the south. It is adjacent to and bounded by the Everton FC training ground and agricultural use that is part of the wider Local Plan allocation and subject to a planning application by Bellway Homes.
- 6.31 The site offers 162 dwellings comprising 18 two-bedroom properties, 79 three-bedroom properties and 65 four-bedroom properties. The scheme includes a mixture of apartments and semi-detached and detached properties.
- 6.32 The three and four-bedroom dwellings currently being marketed by Miller Homes range from £261,495 to £414,995. The average price paid for properties on the site is £274,685.

Holly Grange

- 6.33 Holly Grange is a Bloor Homes development located off Burtonwood Road in Warrington, located 6km southeast of the BFGV site. The site is part of a large, phased development known as Omega South which is being delivered by a range of housebuilders, alongside employment space.

- 6.34 The Holly Grange site offers approximately 115 dwellings with a range of three and four-bedroom homes across a mixture of semi-detached and detached properties. Three and four-bedroom homes are currently being marketed for £319,995 to £464,995. The average price paid for properties on the site is £340,290.

Aldon Wood

- 6.35 Aldon Wood is a Taylor Wimpey scheme in Warrington, also part of the Omega South development. The site is located immediately south of the Bloor Homes Holly Grange scheme, with access off Stanhoe Drive, adjacent to Whittle Avenue. The site is located 6km southeast of the BFGV site.
- 6.36 The scheme comprises 180 homes, with a mixture of three and four-bedroom properties. There are only three remaining homes for sale, ranging in price from £309,995 to £319,995. The average price paid for properties on-site is £308,400.

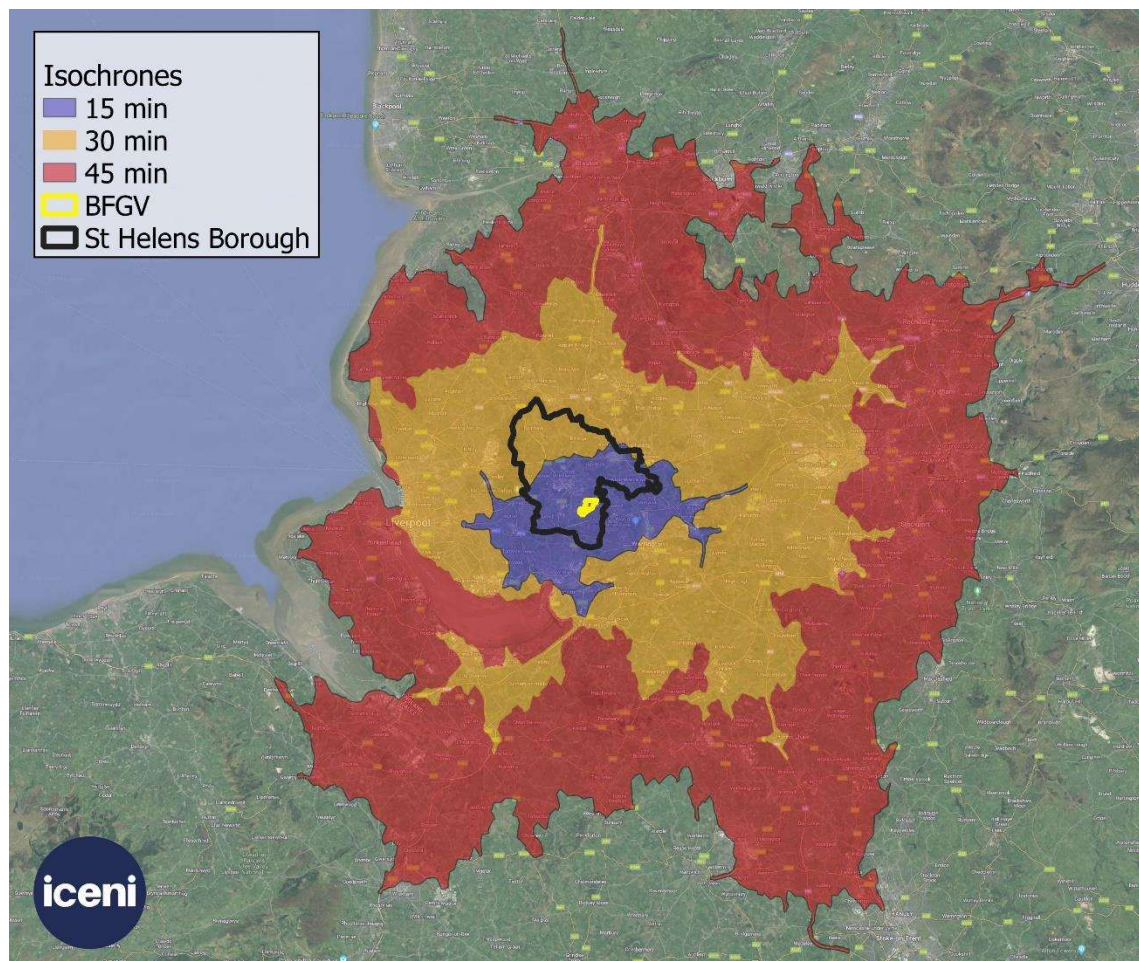
7. NEW MARKET OPPORTUNITIES

- 7.1 This section of the report examines new market opportunities at the Bold Forest Garden Village site. This will particularly relate to the site's accessibility to both the strategic road network and existing public transport infrastructure and employment growth opportunities.

Commuting Patterns

- 7.2 The site's strategic location adjacent to the M62 motorway means that it has a very wide commuter catchment. As Figure 7.1 below illustrates, within a 45-minute drive, residents could reach employment centres including Liverpool, Manchester, Chester, Preston, Crewe and everywhere in between.

Figure 7.1 Drivetimes from Bold Forest Garden Village Site



Source: Iceni Projects, 2024

- 7.3 Even within 15 minutes' drive the major employment centres in Warrington, Widnes, Runcorn, Birchwood, Haydock, Huyton and St Helens town itself can all be reached.

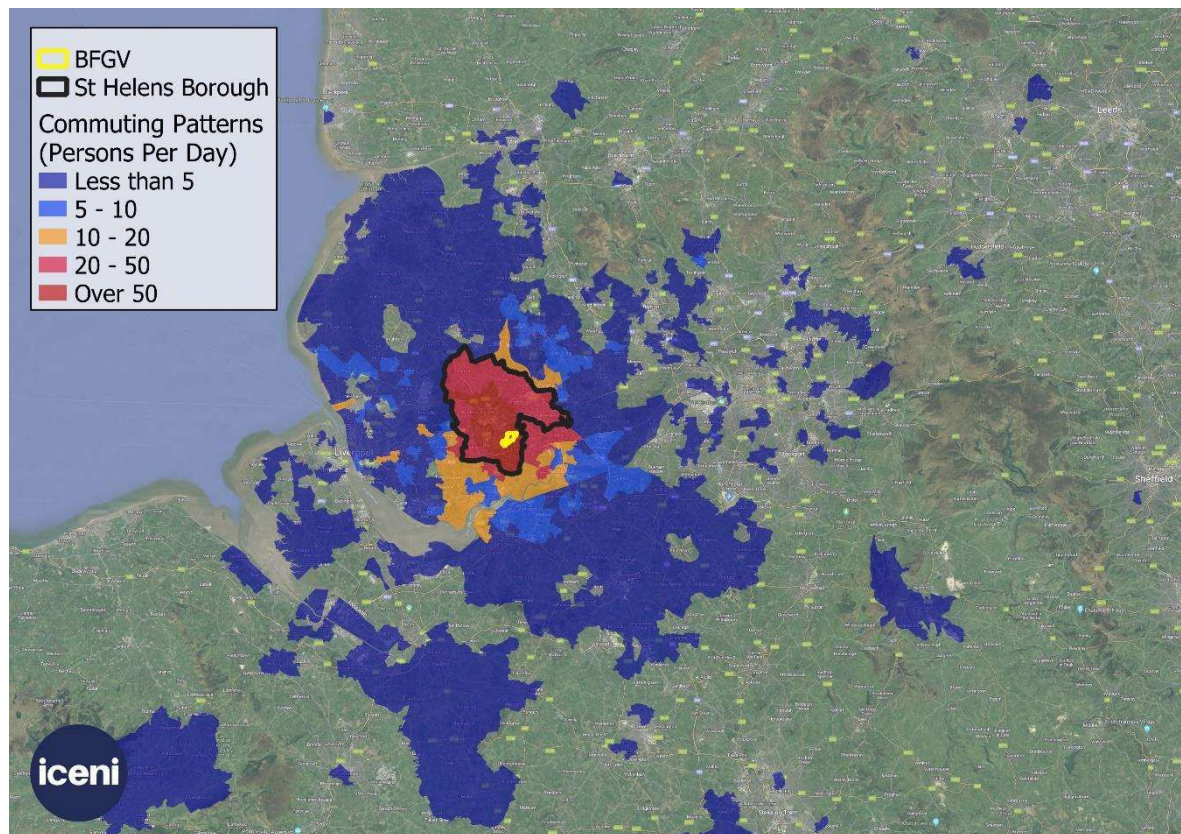
- 7.4 The site is also close to several public transport nodes including St Helens Junction railway station, which is a 5-minute walk from the edge of the site. The station provides a regular train (every 30 mins) to Manchester Piccadilly and Liverpool Lime Street both in around 30 minutes.
- 7.5 Lea Green Station is also a 20-minute walk from the edge of the BFGV site. The station provides an hourly service to Liverpool Lime Street in 15 minutes and Manchester Victoria in 25 Minutes. The proximity and accessibility of the train stations will be integral to the BFGV site's ability to attract people currently working in Liverpool and Manchester as well as Warrington and many other employment centres.
- 7.6 There are also bus routes which run close to the BFGV site. However, these are generally local bus routes serving St Helens, Rainhill, Earlestown and Newton Le Willows. A development of the scale of Bold Forest Garden Village would likely justify further bus provision.
- 7.7 Several proposed investments in the borough will improve Active Travel Routes in and around the Bold Forest Area. This includes the St Helens Borough Local Cycling and Walking Infrastructure Plan (LCWIP) which is the council's 10-year plan to improve the safety, comfort and attractiveness of walking and cycling in the borough.
- 7.8 The plan for cycling includes several strategic routes in south St Helens, predominantly radiating from the recently completed protected (Cyclops) junction at the former Bull and Dog roundabout. These routes include Clock Face Road, Chester Road, Elton Head Road and Mill Lane.
- 7.9 The Council's LCWIP is more focused on how the council prioritise funding rather than 'development opportunities'. However, given the scale of BFGV, it could potentially be changed to safeguard corridors through the scheme.
- 7.10 At present there is funding in place for several other corridors including those connecting St Helens to Widnes and Knowsley. Both routes have been developed to at least the feasibility level and in many sections to detail design. The Council are also considering a further corridor linking to Warrington, via Burtonwood.
- 7.11 Studies have also been undertaken for both Mill Lane and Clock Face Road to identify schemes and opportunities for active travel. The Clock Face Road study also includes possible short-term plans to make Omega accessible via Hall Lane and Gorsey Lane.
- 7.12 There are many Public Rights of Way both inside and outside the BFGV allocation and the improvement project for the Miners Way route, which runs from Clock Face Road to the Country Park, is almost finished.

- 7.13 In terms of public transport, discussions are ongoing with Merseytravel on potential services to provide enhanced connectivity to the Omega West site from St Helens with some of the route options running close to BFGV. More widely, the council are identifying options to provide either active travel or public transport connections on the disused rail line between St Helens Junction and St Helens Central.

Commuting Patterns

- 7.14 It can be seen from 2021 Commuting Data (Figure 7.2 below) that those currently living in the BFGV area predominantly work locally. The only areas outside St Helens Borough where over 20 people commute to are Whiston, Widnes, Omega Park and Westbrook. Although between 10 and 20 people do commute to Runcorn, Halewood, and Warrington Town Centre among other places.

Figure 7.2 Commuting from Bold Forest Garden Village Area (2021)



Source: Iceni Projects based on ONS, Census Data, 2021

Major New Employment Locations

- 7.15 These patterns may change again given the major new employment locations and as shown by the drivetime analysis many of these are within an easy commute. The major employment centres which are in the pipeline include Omega and Parkside.

Omega

- 7.16 This site is around 1km to the South East of the Bold Forest Garden Village Site and is allocated in the St Helens Borough Local Plan as the western extension to the existing Omega site in Warrington which is a very successful employment location.
- 7.17 The St Helens Borough Local Plan identifies two separate sites at Omega, one to the north and one to the south of the M62 motorway. The northern site is safeguarded for employment and the southern site is allocated for employment development. The southern site is 31Ha and is allocated for B2 and B8 uses while the northern site is 30Ha and will only be delivered following the adoption of a new Local Plan in the future which allocates the site should there be an identified need to do so based on the evidence at the time.
- 7.18 Within the Local Plan, it is noted that the development of this southern site provides the opportunity to improve sustainable transport links between St Helens town and the site, as well as the wider Omega employment area, improving access to jobs in this location for residents of St Helens Town and the wider borough.
- 7.19 The southern site is already being delivered and occupiers include Home Bargains who have 878,012 sq ft of predominantly B8 space. A further 1.4m sq ft is also being delivered across three separate units including one which will be occupied by Iceland which is again B8-led.
- 7.20 The LPA's Employment Land Needs Study¹⁰ suggests that the Omega South Western Extension could provide up to 1,240 FTE jobs.

Parkside

- 7.21 Parkside is located just over 5km from the BFGV site to the East of Newton le Willows and is a former colliery site. The site is comprised of two separate allocations straddling the M6, Parkside East (65 Ha)¹¹ and Parkside West (80 Ha). The site forms part of the LCR Liverpool Free Port and is its biggest Tax site.
- 7.22 Parkside East is allocated for a Strategic Rail Freight Interchange (SRFI) and is also considered suitable in principle for other forms of B2 and B8 employment use providing they bring significant

¹⁰

[https://www.omegawestdocuments.com/media/documents/CD%205%20Planning%20Application%20Documents%20\(Parkside%20Link%20Road\)/St%20Helens%20Employment%20Land%20Needs%20Study%20Addendum%202019.pdf](https://www.omegawestdocuments.com/media/documents/CD%205%20Planning%20Application%20Documents%20(Parkside%20Link%20Road)/St%20Helens%20Employment%20Land%20Needs%20Study%20Addendum%202019.pdf)

¹¹ The gross area of the Parkside East allocation is 124.55ha, but the allocation figure stated here discounts 60ha for the SRFI opportunity the site presents, which is noted separately in Local Plan Policy LPA09: Parkside East.

investment and job opportunities and be rail served or be of a layout and scale that would not prejudice the ability to deliver an effectively laid out SRFI or other rail-served employment development on at least 60ha of the site. Parkside West is allocated for employment development and is considered suitable for B2 and B8 uses.

- 7.23 The LPA's Employment Land Needs Study¹² suggest that the Parkside Allocation could provide up to 5,128 jobs FTE jobs.

Profile of Job Growth v Existing Jobs

- 7.24 It is difficult to be truly confident about the type of jobs that will be delivered on these sites as it will depend on the end occupiers. To gauge this, the report considers existing employment at the eastern part of the Omega site in Warrington. For Parkside, it examines employment at the Birch Coppice SRFI in North Warwickshire which is similar in scale and scope to Parkside.
- 7.25 The major employment sectors (+1000 jobs) in these comparable sites are illustrated in Table 7.1 below. Across both sites, Wholesale and Retail and Transportation and Storage employ more than 1,000 people while in Omega East this also applies to Professional Scientific and Technical and Administration and Support Sectors.

Table 7.1 Major Employment Sectors by Location (2022)

Industry	Omega East Jobs	Birch Coppice Jobs
Wholesale and retail	2,500	5,000
Transportation and storage	4,500	6,000
Professional, scientific and tech	1,000	75
Admin and Support	5,000	700

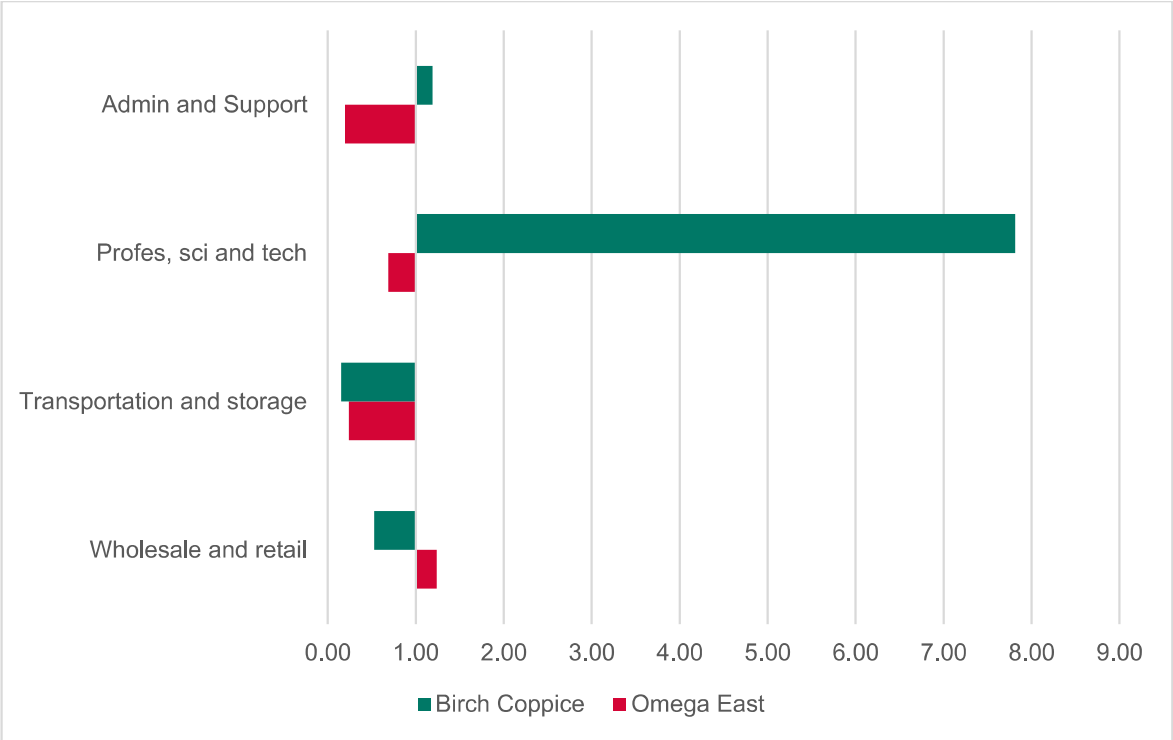
Source: BRES, 2023

- 7.26 Employment in those sectors on those sites has been compared using data from the Business Register and Employment Survey (BRES) against the industry of occupation for those living in the BFGV area taken from the 2021 Census. The Figure 7.3 below provides a location quotient for each major sector for the BFGV area residents against those in the target areas.

¹²

[https://www.omegawestdocuments.com/media/documents/CD%205%20Planning%20Application%20Documents%20\(Parkside%20Link%20Road\)/St%20Helens%20Employment%20Land%20Needs%20Study%20Addendum%202019.pdf](https://www.omegawestdocuments.com/media/documents/CD%205%20Planning%20Application%20Documents%20(Parkside%20Link%20Road)/St%20Helens%20Employment%20Land%20Needs%20Study%20Addendum%202019.pdf)

Figure 7.3 Location Quotient of Major Employment Sectors V Residents Jobs (2021)



Source: ONS, Census and BRES

- 7.27 As illustrated, residents in the BFGV area currently have fewer people working in Transportation and Storage compared to employment at either Omega East of Birch Cottage. Employment in Admin and Support, Professional, Scientific and Technical is also less common among the BFGV area residents than seen at Omega. The same can also be said for Birch Coppice for Wholesale and Retail.
- 7.28 Some of these sectors e.g. Retail (average earning of £21,580 per annum) and Admin and Support services (£30,212 pa) are typically below average earnings (£34,944 pa), while Wholesale (£41,178), Transportation and Storage (£35,457) and Professional, Scientific and Technical sectors (£51,196) are in some cases significantly above as shown in Table 7.2 below.

Table 7.2 Earnings by Selected Sector (Jan 2024)

	Wholesale	Retail	Transport and Storage	Professional, Scientific & Technical	Admin and Support Service	Whole Economy
Weekly	£792	£415	£682	£985	£581	£672
Annual	£41,178	£21,564	£35,457	£51,196	£30,213	£34,955

Source: ONS, Labour Market Statistics, 2024

- 7.29 Table 7.3 below shows the gross annual earnings in 2023 for residents in the BFGV area and St Helens Borough. This data suggests that the median gross annual earnings in the BFGV area in

2023 was around £33,827. This is already higher than the median seen in St Helens Borough and the North West.

Table 7.3 Modelled Gross Annual Earnings (Median)

	2023
Bold Forest Garden Village Area	£33,827*
St Helens Borough	£32,386
North West	£33,043
England	£35,100

Source: ONS *Data is not available at a ward level and as such ONS data relating to Middle layer Super Output Areas have been used

7.30 It should be noted that there were notable differences between the two Middle layer Super Output Areas (MSOAs) that cover the BFGV area. The more rural area St Helens 022 sees higher median earnings (+9%) than St Helens 020 which covers a smaller area at Sutton. This suggests a slight socio-economic divide between the two areas.

7.31 It also illustrates that earnings in the BFGV area could be enhanced through greater access to jobs in the Omega and Parkside proposals particularly the higher paying sectors of wholesale, transportation and storage and Professional, Scientific & Technical. However, it should be noted that the sector earnings are national figures.

Other Wider Opportunities

7.32 As well as those new employment sites close to the site, the railway stations at St Helens Junction and Lea Green present the opportunity to access the major employment centres of Liverpool and Manchester. Conversely, the site could also support those already working in these City Centres with higher quality, larger homes within commuting distance of their jobs.

7.33 The Liverpool Local Plan¹³ was adopted in January 2022 and sets out the Council's vision and objectives for the City Centre. These priorities include *“to encourage and facilitate further economic growth. Support will be given to the financial, business and professional services sector, life sciences sector, knowledge-based and creative and digital industries.”* These jobs will therefore be high quality and higher paying jobs than those typically seen in St Helens Borough.

¹³ <https://liverpool.gov.uk/media/1tkbedcv/01-liverpool-local-plan-main-document.pdf>

- 7.34 The recently adopted Place for Everyone Plan¹⁴ for Greater Manchester states that Manchester City Centre is the most significant economic centre outside London and that “*over the period 2022-2039, land to accommodate around 1,700,000 sqm of office floorspace... and minimal industry and warehousing (just under 38,000 sqm) has been identified within the City Centre.*”
- 7.35 Manchester City Centre therefore also presents a major and growing employment opportunity for potential BFGV site residents. Northern powerhouse rail will also improve connectivity to the City Centre from a range of locations. The general principle will remain that people will commute further for higher-paying jobs.

Housing Offer Response

- 7.36 It will be necessary to provide additional accommodation to ensure that the jobs in both Parkside, Omega and other major developments are filled. This will mean increasing migration to the area and migrants are typically younger people in their 20s and 30s. This group will in time require family accommodation although smaller more affordable accommodation might be their initial requirement.
- 7.37 The jobs at both Omega and Parkside will encompass a range of levels but to ensure the greatest retention of skills and higher-paid employment, the provisions of more aspirational homes will be required. The general perception of “aspirational homes” tends to be larger homes (4+ bedrooms) or very high-end flats (e.g. penthouse flats) although the latter is likely to be unsuitable for the BFGV site which is a suburban location and high-end flats tend to be located in City Centres.
- 7.38 The site's strategic location on the M62 motorway and access to St Helens Junction and Lea Green Rail Stations also means that it could attract a skilled workforce which could commute larger distances to better-paid employment opportunities surrounding St Helens Borough such as in Liverpool and Manchester. Once again this would only be possible if more aspirational homes are provided.
- 7.39 As identified earlier, both the BFGV area and St Helens Borough have fewer 4+ bedroom homes than the HMA and region. This suggests an opportunity to grow this supply to align with the wider area and to meet the demand for larger homes.
- 7.40 This would also address the City Region's Housing Investment Strategy which stated that the lack of 4+ bedroom homes is undermining the Combined Authority's objective of attracting and retaining economically active higher earners.

¹⁴ <https://www.greatermanchester-ca.gov.uk/media/9578/places-for-everyone-joint-development-plan-document.pdf>

- 7.41 However, the housing offer needs to be attractive to a range of potential residents and cover a range of sizes and price points. This will also ensure quicker delivery as the pool of buyers will also increase.

8. AFFORDABLE HOUSING NEED

- 8.0 This section provides an assessment of the need for affordable housing in St Helens Borough. It updates the analysis in the 2019 SHMA to take account of the latest data, including up-to-date information on housing costs and 2021 Census data. The analysis looks at needs across the whole Borough as it is expected a site of this size would be accommodating households from across the area.

Local House Prices, Rents, Incomes and Affordability

- 8.1 An important part of the affordable needs model is to establish the entry-level costs of housing to buy and rent (taken to be lower quartile costs). 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'.
- 8.2 Table 8.1 below shows estimated lower quartile prices and rents by dwelling size across St Helens. This shows house prices starting at around £70,000 for a one-bedroom home and rising to £270,000 for homes with 4 bedrooms. Private rental costs range from £450 to £1,125 per month. The overall (all sizes) lower quartile price to buy is £123,000 with a rent of £675.

Table 8.1 Estimated lower quartile cost of housing to buy and rent by size (existing dwellings)

	Lower quartile price	Lower Quartile rent, pcm
1-bedroom	£70,000	£450
2-bedrooms	£90,000	£695
3-bedrooms	£150,000	£850
4-bedrooms	£270,000	£1,125
All Dwellings	£123,000	£675

Source: Land Registry and Internet Price Search

- 8.3 Following on from the assessment of local prices and rents it is also important to understand local income levels 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 updated to a 2023 base using data from the Annual Survey of Hours and Earnings (ASHE). Additional data from the English Housing Survey (EHS) has been used to provide information about the distribution of incomes. Overall, the average (mean) income across the Borough is estimated to be around £46,000, with a median income of £36,000; the lower quartile income of all households is estimated to be £20,400.

- 8.4 The affordable housing needs modelling assumes that households will not spend more than 30% of gross income on rent. For assessing a household's ability to buy, it is assumed households will have a 10% deposit and can secure a mortgage for 3.5 times their income – these assumptions are considered to be broadly in line with typical lending practices although it is recognised that there will be differences on a case by case basis. On this basis, the minimum income required to access market housing in different size categories is shown in Table 8.2 below.
- 8.5 The 'income gap' column identifies the difference between the income estimated to be required to buy a home of a particular size and to privately rent. In the case of three-bedroom homes, it is estimated a household would need an income of around £38,600 to buy a home and a lower income (£34,000) to privately rent. This leads to a 'gap' of £4,600 and any household with an income between these two figures would be considered as able to rent a home but not buy. For two-bedroom homes the figures show a higher income needed to rent, this does not necessarily mean all those able to rent would be able to buy (as there will be other issues such as deposit requirements) but it does indicate market homes to buy are relatively affordable for this size category.

Table 8.2 Estimated Minimum Household Income Required to Buy and Privately Rent by size

	To buy	To rent (privately)	Income gap
1-bedroom	£18,000	£18,000	£0
2-bedrooms	£23,100	£27,800	–£4,700
3-bedrooms	£38,600	£34,000	£4,600
4-bedrooms	£69,400	£45,000	£24,400
TOTAL	£31,600	£27,000	£4,600

Source: Based on Housing Market Cost Analysis

Need for Rented Affordable Homes

- 8.6 Table 8.3 below shows the estimated need for affordable housing for those households who are unable to rent OR buy in the market without subsidy. Generally, it is considered this group would require rented forms of affordable housing and for the analysis below this group is labelled as a need for rented accommodation (i.e. social or affordable rents) although in reality, it is possible for a home ownership product to fit into the rented category (as long as the price is sufficiently low).
- 8.7 The method used follows that set out in Panning Practice Guidance and is virtually identical to that carried out in previous research for the LPA (including the 2019 update).
- 8.8 This analysis is annualised over a 30-year period, which at present is taken to be the potential build-out period, use of a different period, such as 10 years would have only a modest impact on the figures.

8.9 Overall, the analysis shows an annual need for 386 dwellings per annum if all needs were to be met. This is notably higher than previous assessments of need, and this looks to be driven by relatively high increases in the cost of private rented accommodation and a substantial reduction in the number of relets becoming available each year.

Table 8.3 Estimated Annual Need for Social/Affordable Rented Housing

	Current need	Newly forming house-holds	Existing house-holds falling into need	Total Gross Need	Relet Supply	Net Need
St Helens Borough	46	627	264	937	551	386

Source: Derived from a range of sources

8.10 The profile of the need for different types of rented affordable homes is shown in Table 8.4 below. A standardised average rent for each product has been used based on the proportion of stock in each size category. The table suggests that around 26% of households who cannot afford to rent privately could afford an affordable rent, with a further 9% being able to afford a social rent (but not an affordable one). A total of 66% of households would need some degree of benefit support (or spend more than 30% of income on housing) to be able to afford their housing (regardless of the tenure) – i.e. even a social rent would be unaffordable without additional financial support.

Table 8.4 Estimated need for affordable rented housing (% of households able to afford) – St Helens

	% of households able to afford
Afford affordable rent	26%
Afford social rent	9%
Need benefit support	66%
All unable to afford market	100%

Source: Affordability analysis

8.11 In setting policies for the different types of rented homes sought, the LPA will need to consider this alongside viability evidence and funding availability. Benefit-dependent households may be able to be accommodated in either social or affordable rented homes: higher provision at social rents may help support more households into the labour market; however, provision at affordable rents may help support stronger delivery.

Establishing a Need for Affordable Home Ownership

8.12 The Planning Practice Guidance confirms a widening definition of those to be considered as in affordable need; now including households ‘that cannot afford their own homes, either to rent, or to own, where that is their aspiration’. The need for affordable home ownership has been assessed

herein, again using a consistent methodology to the 2019 SHMA update. The analysis also considers the need for First Homes in a context whereby national policy now states that 25% of all affordable housing secured through developer contributions should be within this tenure.

- 8.13 The analysis suggests a gross need of 125 households a year for affordable home ownership but then considers different scenarios in terms of potential supply. The supply from affordable home ownership resales is 29 units per annum, however, some households are likely to be able to buy market homes at below-LQ prices.
- 8.14 Table 8.5 below shows the estimated net need from applying these three supply scenarios. Only including the resales of AHO shows a need for 96 dwellings per annum and this reduces to a surplus of 60 if 50% of lower quartile sales are included. If all lower quartile sales are included in the supply, then there is a notable surplus need for affordable home ownership shown.

Table 8.5 Estimated Net Need for Affordable Home Ownership (per annum)

	AHO resales only	AHO resales plus 50% of LQ sales	AHO resales plus 100% of LQ sales
Total gross need	125	125	125
LCHO supply	29	29	29
LQ market	0	155	311
Net need	96	-60	-215

Source: Derived from a range of sources

- 8.15 Overall the analysis clearly points to a greater need for rented forms of affordable housing rather than affordable home ownership (or housing priced for someone able to afford to rent but not buy).
- 8.16 The evidence would point to access to owner-occupation as being restricted by access to capital (e.g. for deposits, stamp duty, legal costs) as well as potentially some mortgage restrictions (e.g. where employment is temporary) rather than simply being due to the cost of housing to buy (although this will be a factor for some households).
- 8.17 The NPPF (as updated in July 2021) gives a clear direction that 10% of all new housing (on larger sites) should be for affordable home ownership - in other words, if 30% of homes were to be affordable then a third would be affordable home ownership.
- 8.18 The Government's Written Ministerial Statement (24th May 2021) indicated that at least 25% of affordable housing units secured through developer contributions should be First Homes, with Councils being able to specify the requirement for any remaining affordable housing (subject to at least 10% of all housing being for AHO).

- 8.19 Regarding the expectation of 10% delivery of affordable housing for affordable home ownership, it is not clear that this is the best solution for St Helens. The NPPF does provide some examples of where the 10% might not be required (paragraph 65), most notably that the 10% would be expected unless this would ‘*significantly prejudice the ability to meet the identified affordable housing needs of specific groups*’. In St Helens, the clear need for additional rented housing would arguably mean that providing the significant affordable home ownership provision would ‘prejudice the ability’ to meet the needs of the ‘specific group’ requiring rented accommodation.
- 8.20 Regarding the 25% of affordable housing as First Homes, it is not clear whether there is any scope to challenge the ‘minimum of 25%’, nor what role other tenures of affordable home ownership (such as shared ownership) might play. The provision of First Homes could possibly squeeze out other forms of LCHO such as shared ownership, although it is likely that there will still be a role for this type of housing given typically lower deposit requirements.
- 8.21 Whilst there are clearly households in the gap between renting and buying, they in some cases will be able to afford homes below lower quartile housing costs. However some households will have insufficient savings to be able to afford to buy a home on the open market (particularly in terms of the ability to afford a deposit), therefore low-cost home ownership homes – and shared ownership homes in particular – will continue to play a role in supporting some households.
- 8.22 The **evidence points to a clear and acute need for rented affordable housing for lower-income households**, and it is important that a supply of rented affordable housing is maintained to meet the needs of this group including those to which the authorities have a statutory housing duty. Such housing is notably cheaper than that available in the open market and can be accessed by many more households (some of whom may be supported by benefit payments).

Essential Local Workers

- 8.23 The First Homes guidance allows local authorities to set their own eligibility criteria including “Key workers providing essential services” (Reference ID: 70-008-20210524). We have examined what salaries are for the main essential services in St Helens. These are taken from the service providers websites as well as employment websites. In summary the following incomes apply:
- Merseyside Police - Constable starting salary - £28,551;
 - Merseyside Fire and Rescue - Firefighter salary after training - £25,198;
 - Nurses – The average nurses salary in Merseyside according to Indeed - £38,758; and
 - Teacher - The average teachers salary in Merseyside according to totaljobs.com - £33,786 (average from Totaljobs).

- 8.24 All of these salaries are above the required income to buy a 2-bedroom home (£23,100) in St Helens, although for both nurses and teachers the starting salary might be lower than that stated above. However, it is still likely to be above the £23,100 threshold.
- 8.25 There is therefore no imperative to include a local criteria test for low cost home ownership properties which supports key workers into such accommodation. That said, the Council may still wish to include such a criteria should it wish to do so.

How Much Should Affordable Home Ownership Homes Cost?

- 8.26 The analysis and discussion above suggest there are some households likely to fall under the PPG definition of needing affordable home ownership (including First Homes) – i.e. in the gap between renting and buying – but that the potential supply of low-cost housing to buy makes it difficult to fully quantify this need. The analysis below focusses on the cost of discounted market sale (which would include First Homes) to make them genuinely affordable before moving on to consider shared ownership (in this case suggestions are made about the equity shares likely to be affordable and whether these shares are likely to be offered).
- 8.27 It is considered that First Homes and shared ownership are likely to be the main affordable home ownership tenures moving forward although it is accepted that some delivery may be of other products. This section also provides some comments about Rent to Buy housing.
- 8.28 The reason for the analysis to follow is that it will be important for the LPA to ensure that any affordable home ownership is sold at a price that is genuinely affordable for the intended target group – e.g. there is no point in discounting a new market home by 30% if the price still remains above that for which a reasonable home can already be bought in the open market.

Discounted Market Sales Housing (including First Homes)

- 8.29 In May 2021, the Ministry of Housing, Communities and Local Government (MHCLG) published a new Planning Practice Guidance (PPG) regarding First Homes. These are discounted market sale homes that must be discounted by at least 30% against market value, with provision to ensure that the discount is maintained over time, with a sale price of no higher than £250,000, and be sold to eligible first-time buyers with a maximum income of £80,000. Councils can set higher percentage discounts (at 40% or 50%), lower income caps and eligibility criteria (such as a local connection test) where this is evidenced.
- 8.30 The problem with having a percentage discount is that it is possible in some locations or types of property that such a discount still means that the discounted housing is more expensive than that typically available in the open market. This is often the case as new build housing itself attracts a premium. The preferred approach in this report is to set out a series of purchase costs for different

sizes of accommodation which ensure these products are affordable for the intended group. These purchase costs are based on current lower quartile rental prices and also consideration of the income required to access the private rented sector and then estimating what property price this level of income might support (assuming a 10% deposit and a 4.5 times mortgage multiple). Below is an example of a calculation based on a three-bedroom home in St Helens:

- Previous analysis has shown that the lower quartile rent for a three-bedroom home in St Helens is £850 per month;
- Based on a household spending no more than 30% of their income on housing, a household would need a minimum income of around £2,800 per month to afford a three-bed First Home ($£850/0.3$) or £34,000 per annum; and
- With an income of £34,000, it is estimated that a household could afford to buy a home with a maximum house price of £132,200. This is based on assuming a 10% deposit (mortgage for 90% of value) and a 3.5 times mortgage multiple – calculated as $£34,000 \times 3.5/0.9$.

8.31 Therefore, £132,200 is currently suggested as a purchase price to make First Homes/discounted home ownership affordable for households in the rent/buy gap in St Helens (for a three-bedroom home). This figure is essentially the equivalent price that is affordable to a household who can just afford to rent privately. In reality, there will be a range of incomes in the rent/buy gap and so some households could afford a higher price; however, setting all homes at a higher price would mean that some households will still be unable to afford it.

8.32 On this basis, it is considered reasonable to look at the cost of First Homes as a range, from the equivalent private rent figure up to a midpoint of the cost of open market purchase and the relevant private rented figure (for a 3-bedroom home this is £150,000, giving a midpoint of £141,100). The use of a midpoint would mean that only around half of households in the rent/buy gap could afford it, and therefore any housing provided at such a cost would need to also be supplemented by an equivalent number at a lower cost (which might include other tenures such as shared ownership).

8.33 Table 8.6 below sets out a suggested purchase price for First Homes in St. Helens by size. The table also shows an estimated Open Market Value (OMV) if these prices were considered to be 70% of OMV.

8.34 Focussing on three-bedroom homes, it is suggested that an affordable price is between £132,200 and £141,500 and therefore the open market value of homes would need to be in the range of £188,900 and £201,600 (if discounted by 30%). For one- and two-bedroom homes there is no range provided as the analysis earlier showed there was no 'gap' in the incomes needed to buy and rent – the affordable price has therefore been set at the estimated cost to buy a lower quartile home in

these sizes (as anything higher would be more expensive than the price of homes already available and therefore could not be considered as affordable).

Table 8.6 Affordable home ownership prices – 2022/23 – St.Helens Borough

	LQ rent – equiv. purchase price	Midpoint purchase price	OMV required – PRS	OMV required - midpoint
1-bedroom	£70,000		£100,000	
2-bedrooms	£90,000		£128,600	
3-bedrooms	£132,200	£141,100	£188,900	£201,600
4+-bedrooms	£175,000	£222,500	£250,000	£317,900

Source: Derived from a range of sources

- 8.35 It is difficult to definitively analyse the cost of newbuild homes as these will vary from site-to-site and will be dependent on a range of factors such as location, built-form and plot size. , However, newbuild schemes currently advertised on Rightmove have been considered with Table 8.7 below providing a general summary of them.
- 8.36 This analysis is interesting as it shows the median newbuild price for all sizes of homes is above the top end of the OMV required to make homes affordable to those in the gap between buying and renting. That said, homes at the bottom end of the price range for some sizes could potentially be discounted by 30% and considered affordable.
- 8.37 This analysis shows how important it will be to know the OMV of housing before a discount to be able to determine if a product is going to be genuinely affordable in a local context – providing a discount of 30% will not automatically mean it becomes affordable housing.

Table 8.7 Estimated newbuild housing cost by size – St Helens

	No. of homes advertised	Range of prices	Median price
1-bedroom	0	-	-
2-bedrooms	2	£210,000	£210,000
3-bedrooms	18	£225,000-£320,000	£270,000
4+-bedrooms	13	£290,000-£565,000	£350,000

Source: Derived from a range of sources

Conclusions on First Homes

- 8.38 The housing needs evidence indicates that there would certainly be a case to seek a discount in excess of 30% for First Homes in St Helens - a higher discount will make homes cheaper and therefore potentially open up additional households as being able to afford. However, providing a higher discount may have an impact on viability, meaning the LPA will not be able to provide as many homes in other tenures (such as rented affordable housing which is likely to be needed by those with more acute needs and fewer choices in the housing market). The LPA could therefore investigate

higher discounts, but it is not recommended to seek a higher figure unless this can be proven to not impact on overall affordable delivery.

- 8.39 Table 8.6 above shows that all of the affordable prices (except for four-bedroom homes) sit well below the £250,000 cap and therefore there is evidence that a lower cap would be appropriate. First Home delivery is likely to be focused on 2- and 3-bed properties. A lower cap would help to ensure that homes are affordable even on schemes where the OMV is relatively high (although consideration about the viability and potential loss of other forms of affordable housing will also be a consideration).
- 8.40 Looking at the affordable prices (in Table 8.6), it is considered that a cap of around £150,000 might be appropriate (based on the highest three-bedroom figure). This could help to ensure that First Homes are only offered on properties where the initial OMV is not significantly above the affordable prices. There is also a clear case to have an income threshold below £80,000 (maybe something around the £45,000 mark).
- 8.41 Regardless of the need/demand, it is not recommended that the LPA seek to reduce the amount of social/affordable rented homes by prioritising First Homes. The evidence does not support the LPA in seeking more than 25% of affordable housing as First Homes. Indeed, based on the analysis in this section it is suggested the LPA should investigate seeking a lower proportion than the 25% (possibly seeking 0% and only allowing First Homes where they are needed to support viability).

Shared Ownership

- 8.42 Whilst the Government has a clear focus on First Homes, they also see a continued role for Shared Ownership, launching a '*New Model for Shared Ownership*' in early 2021 (following a 2020 consultation). This includes a number of proposals, with the main one for the purposes of this assessment being the reduction of the minimum initial share from 25% to 10%. A key advantage of shared ownership over other tenures is that a lower deposit is likely to be required than for full or discounted purchase. Additionally, the rental part of the cost will be subsidised by a Registered Provider which keeps monthly outgoings down.
- 8.43 For the analysis in this report it is considered that for shared ownership to be affordable, total outgoings should not exceed that needed to rent privately.
- 8.44 Because shared ownership is based on buying part of a property, it is the case that the sale will need to be at open market value. Where there is a large gap between the typical incomes required to buy or rent, it may be the case that lower equity shares are needed for homes to be affordable (at the level of renting privately). The analysis below looks at what the OMV would need to be with equity shares of 50% and 25% and uses the following key assumptions:

- 10% deposit on the equity share;

- Rent at 2.75% pa on unsold equity;
- Repayment mortgage over 25 years at 4% (this is based on typical longer-term interest rates and it is noted at the time of writing that such a figure is unlikely to be achieved); and
- It is also assumed that shared ownership would be priced for households towards the bottom end of the rent/buy gap and so the calculations assume that total outgoings should be no higher than the equivalent private rent (lower quartile) cost for that size of property.

8.45 Tables 8.8 and 8.9 below test the costs of a 50% equity share shared ownership and 25%. Focussing on three-bedroom homes this shows to be genuinely affordable the OMV would need to sit in the range of £241,000-£292,000. This does suggest there is more chance of making shared ownership affordable when compared with First Homes (given current estimates of newbuild costs). Shared ownership should be positively encouraged by the LPA (rather than other forms of housing such as First Homes).

Table 8.8 Estimated OMV of Shared Ownership with a 50% Equity Share by Size – St Helens Borough

	1-bedroom	2-bedrooms	3-bedrooms	4-bedrooms
Open Market Value	£127,800	£197,200	£241,300	£319,500
Share	50%	50%	50%	50%
Equity Bought	£63,900	£98,600	£120,650	£159,750
Mortgage Needed	£57,510	£88,740	£108,585	£143,775
Monthly Cost of Mortgage	£304	£469	£573	£759
Retained Equity	£63,900	£98,600	£120,650	£159,750
Monthly Rent on Retained Equity	£146	£226	£276	£366
Total Cost per month	£450	£695	£850	£1,125

Source: Data based on Housing Market Cost Analysis

Table 8.9 Estimated OMV of Shared Ownership with a 25% Equity Share by Size – St Helens Borough

	1-bedroom	2-bedrooms	3-bedrooms	4-bedrooms
Open Market Value	£154,700	£239,000	£292,300	£387,000
Share	25%	25%	25%	25%
Equity Bought	£38,675	£59,750	£73,075	£96,750
Mortgage Needed	£34,808	£53,775	£65,768	£87,075
Monthly Cost of Mortgage	£184	£284	£347	£460
Retained Equity	£116,025	£179,250	£219,225	£290,250
Monthly Rent on Retained Equity	£266	£411	£502	£665
Total Cost per month	£450	£695	£850	£1,125

Source: Data based on Housing Market Cost Analysis

Rent to Buy

- 8.46 A further affordable option is Rent to Buy; this is a Government scheme designed to ease the transition from renting to buying the same home. Initially (typically for five years) the newly built home will be provided at the equivalent of an affordable rent (approximately 20% below the market rate). The expectation is that the discount provided in the first five years is saved to put towards a deposit on the purchase of the same property. Rent to Buy can be advantageous for some households as it allows for a smaller 'step' to be taken on to the home ownership ladder.
- 8.47 At the end of the five years, depending on the scheme, the property is either sold as a shared ownership product or to be purchased outright as a full market property. If the occupant is not able to do either of these then the property is vacated.
- 8.48 To access this tenure, it effectively requires the same income threshold for the initial phase as a market rental property although the cost of accommodation will be that of affordable rent. The lower-than-market rent will allow the household to save for a deposit for the eventual shared ownership or market property. In considering the affordability of rent-to-buy schemes there is a direct read across to the income required to access affordable home ownership (including shared ownership). It should therefore be treated as part of the affordable home ownership products suggested by the NPPF.

Affordable Housing Need Summary

- 8.49 Analysis has been undertaken to estimate the annual need for affordable housing. The analysis is split between a need for social/affordable rented accommodation (based on households unable to buy or rent in the market) and the need for Affordable Home Ownership (AHO) – this includes housing for those who can afford to rent privately but cannot afford to buy a home.
- 8.50 When looking at needs from households unable to buy OR rent, the analysis suggests a need for 386 affordable homes per annum across the Borough. The analysis suggests there will be a need for both social and affordable rented housing – the latter will be suitable particularly for households who are close to being able to afford to rent privately and possibly also for some households who claim full Housing Benefit. It is however clear that social rents are more affordable and could benefit a wider range of households – social rents could therefore be prioritised where delivery does not prejudice the overall delivery of affordable homes.
- 8.51 The analysis is less conclusive about the scale of the affordable home ownership need, with the need very sensitive to assumptions on supply from cheaper market homes (below LQ values), although it is certainly much lower than the need for rented affordable housing. The evidence does suggest that many households in St Helens are being excluded from the owner-occupied sector (as evidenced by increases in the size of the private rented sector). A key issue in St Helens Borough is likely about access to capital (e.g. for deposits, stamp duty, legal costs) as well as potential mortgage restrictions

(e.g. where employment is temporary) rather than simply the cost of housing to buy (although this will be an important factor for many households).

- 8.52 The study also considers different types of AHO (notably First Homes and shared ownership) as each will have a role to play – shared ownership is likely to be suitable for households with more marginal affordability (those only just able to afford to privately rent) as it has the advantage of a lower deposit and subsidised rent. However, given the cost of newbuild housing locally, it may be difficult for some affordable home ownership products to be provided and be considered as ‘genuinely affordable’. This again points to the need for the LPA to prioritise the delivery of rented affordable housing where possible.
- 8.53 In deciding what types of affordable housing to provide, including a split between rented and home ownership products, the LPA will need to consider the relative levels of need and also viability issues (recognising for example that providing AHO may be more viable and may therefore allow more units to be delivered, but at the same time noting that households with a need for rented housing are likely to have more acute needs and fewer housing options).
- 8.54 As a starting point, and in order to help provide a range of products the Council should consider delivering 25% of affordable homes in the form affordable home ownership. Although this level of affordable home ownership will need to be viability tested.

9. HOUSING MIX

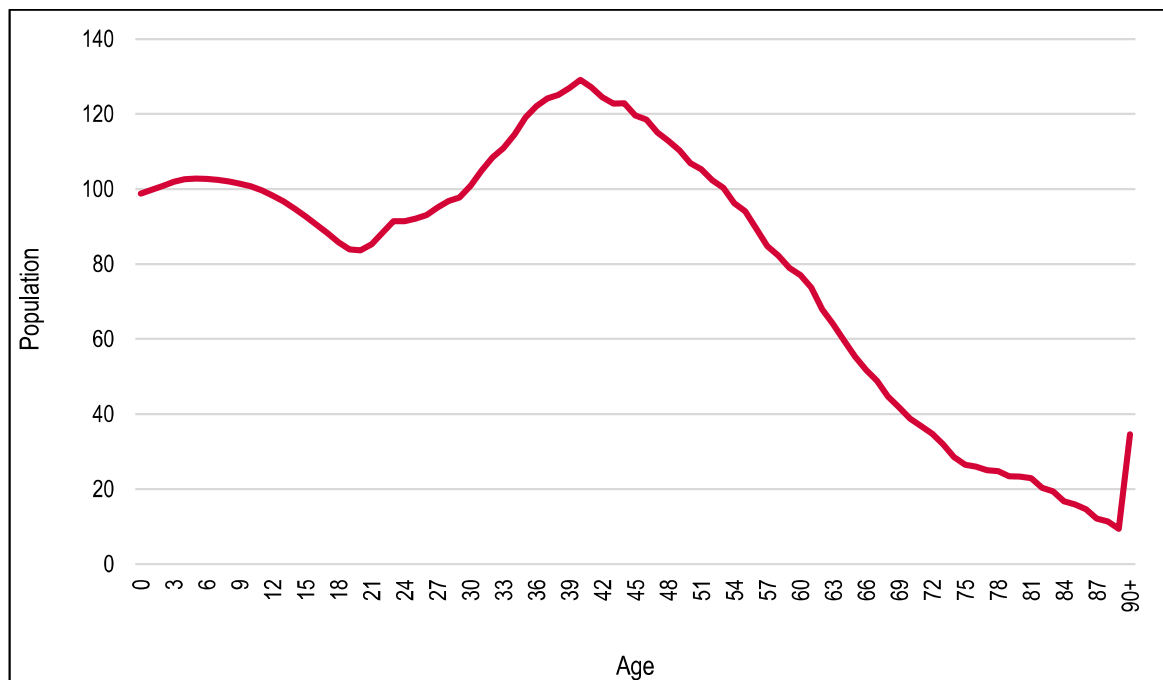
Introduction

- 9.0 This section considers the appropriate mix of housing on the Bold Garden Village site –with a particular focus on the sizes of homes required in different tenure groups. The section begins by considering what the demographic profile of the site might be given that growth will be driven by people migrating into the area.

Demographic Profile

- 9.1 This report seeks to model the implications of demographic changes on the profile of housing need. To do so, it models what demographic change would be implied by the delivery of Bold Forest Garden Village over 30 years (around 3,000 dwellings and an estimated 2,900 households (assuming a modest level of vacant homes at any point in time).
- 9.2 Figure 9.1 below shows the estimated population profile on the site once completed. Assuming 2,900 households over 30 years, it is estimated that the population would look like Figure 9.1 below with a key focus on people in their late 30s and 40s along with associated children.

Figure 9.1 Estimated population age profile of Bold Garden Village once development is complete



Source: Demographic projections

- 9.3 Table 9.1 below summarises the above information by assigning the population to three broad age groups (which can generally be described as a) children, b) working age and c) pensionable age). This shows a total population of 7,243 with around 22% being children and 10% aged 65 and over.

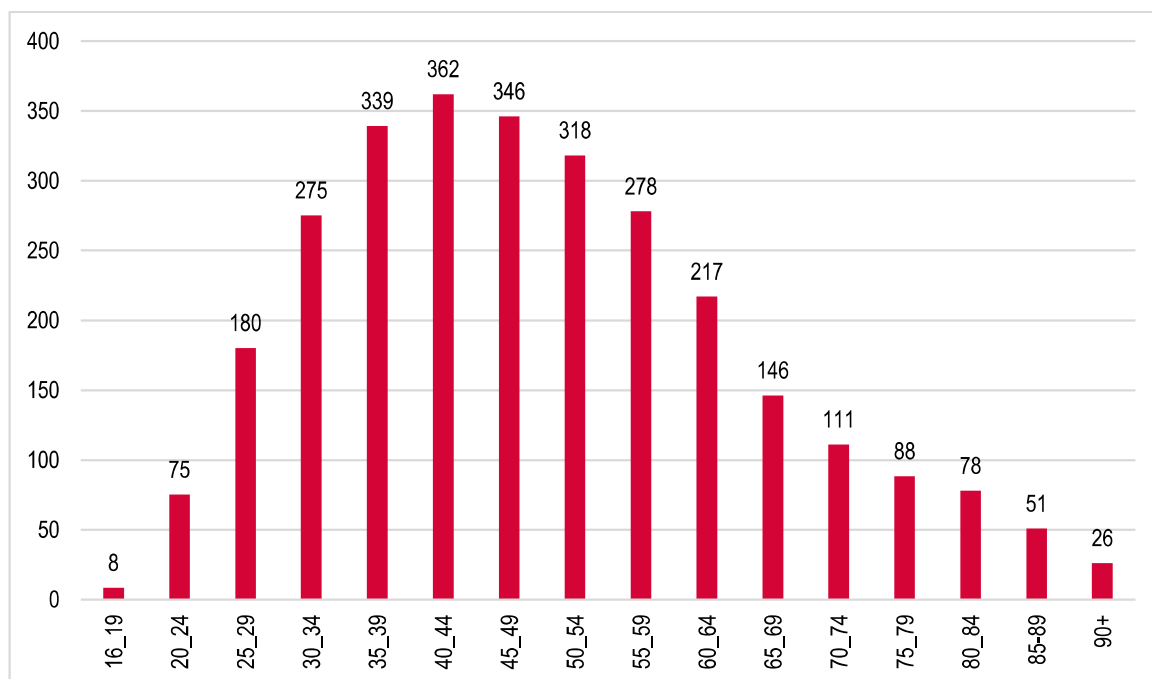
Table 9.1 Population age profile – Bold Garden Village – broad age bands

	Population	% of population
Under 15	1,598	22.1%
16-64	4,906	67.7%
65+	739	10.2%
TOTAL	7,243	100.0%

Source: Demographic projections

- 9.4 With a total population growth of 7,243 (and 2,900 households), the analysis points to an average household size of around 2.50. Figure 9.2 below shows the estimated age of household reference persons (head of household) – identifying a particular focus on people in their 30s, 40s, and 50s and relatively few older people. This latter point reflects the fact the typically older persons are less likely to move home and therefore potentially migrate to a new area.

Figure 9.2 The age profile of household reference person– Bold Garden Village



Source: Demographic projections

Housing Mix

- 9.5 This section considers the appropriate mix of housing across Bold Garden Village, with a particular focus on the sizes of homes required in different tenure groups.

- 9.6 A model has been developed that starts with the current profile of housing in terms of size (bedrooms) and tenure. Within the data, information is available about the age of households and the typical sizes of homes they occupy. By using demographic projections, it is possible to see which age groups are expected to change in number, and by how much.
- 9.7 On the assumption that occupancy patterns for each age group (within each tenure) are consistent with those seen across the Borough, it is possible to assess the profile of housing needed on the BFGV site over the assessment period (taken to be a 30-year build-out). The analysis links to occupancy patterns for the Borough as it is expected that this site will be drawing people in from a much wider area than the immediate vicinity. However, local factors are also considered when concluding a reasonable mix of housing.
- 9.8 The method looks at the ages of the Household Reference Persons and how these are projected to change over time. The sub-sections to follow describe some of the key analyses.

Understanding How Households Occupy Homes

- 9.9 Whilst the demographic projections provide a good indication of how the population and household structure will develop, it is not a simple task to convert the net increase in the number of households into a suggested profile for additional housing to be provided. The main reason for this is that in the market sector, households are able to buy or rent any size of property (subject to what they can afford) and therefore knowledge of the profile of households in an area does not directly transfer into the sizes of property to be provided.
- 9.10 The size of housing that households occupy relates more to their wealth and age than the number of people they contain. For example, there is no reason why a single person cannot buy (or choose to live in) a four-bedroom home as long as they can afford it, and hence projecting an increase in single-person households does not automatically translate into a need for smaller units.
- 9.11 That said, issues of supply can also impact occupancy patterns, e.g., it may be that a supply of additional smaller-level access homes would encourage older people to downsize but in the absence of such accommodation, these households remain living in their larger accommodation.
- 9.12 The issue of choice is less relevant in the affordable sector (particularly since the introduction of the social sector size criteria) where households are allocated properties which reflect the size of the household, although there will still be some level of under-occupation moving forward with regard to older person and working households who may be able to under-occupy housing (e.g. those who can afford to pay the spare room subsidy ('bedroom tax')).

9.13 The approach used is to interrogate information derived from the projections about the number of household reference persons (HRPs) in each age group and apply this to the profile of housing within these groups (data being drawn from the 2021 Census).

9.14 The analysis uses the existing occupancy patterns at a local level (taken to be St Helens Borough) as a start point and applies these to the projected changes in Household Reference Person by age discussed below. The analysis has been used to derive outputs for three broad categories. These are:

- **Market Housing** – which is taken to follow the occupancy profiles in the owner-occupied sector;
- **Affordable Home Ownership** – which is taken to follow the occupancy profile in the private rented sector (this is seen as reasonable as the Government's desired growth in home ownership looks to be largely driven by a wish to see households move out of private renting); and
- **Rented Affordable Housing** – which is taken to follow the occupancy profile in the social rented sector. The affordable sector in the analysis to follow would include social and affordable rented housing.

Initial Modelled Outputs

9.15 By following the methodology discussed above and drawing on the sources shown, a series of outputs have been derived to consider the likely size requirement of housing within each of the three broad tenures.

9.16 Table 9.2 below shows the modelled outputs of need by dwelling size in the three broad tenures for the BFGV site. Market housing focusses on three+-bedroom homes, affordable home ownership on two- and three-bedroom accommodation and rented affordable housing showing a slightly smaller profile again (although still a notable need for three+-bedroom homes).

Table 9.2 Initial Modelled Mix of Housing by Size and Tenure – Bold Forest Garden Village Site

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	1%	20%	56%	23%
Affordable home ownership	12%	44%	37%	7%
Affordable housing (rented)	22%	32%	42%	4%

Source: *Housing Market Model*

9.17 The analysis above sets out the potential need for housing if occupancy patterns remain the same as they were in 2021 (with differences from the current stock profile being driven by demographic

change). It is however worth also considering that the 2021 profile will have included households who are overcrowded (and therefore need a larger home than they actually live in) and also those who under-occupy (have more bedrooms than they need).

- 9.18 Whilst it would not be reasonable to expect to remove all under-occupancy (particularly in the market sector) it is the case that in seeking to make the most efficient use of land it would be prudent to look to reduce this over time. Indeed, in the future there may be a move away from current (2021) occupancy patterns due to affordability issues (or eligibility in social rented housing) as well as the type of stock likely to be provided (potentially a higher proportion of flats). Further adjustments to the modelled figures above have therefore been made to take account of overcrowding and under-occupancy (by tenure). For under-occupancy, these adjustments focus on a proportion (a quarter) of households under-occupying by 2 or more bedrooms only. High levels of under-occupancy are therefore modelled to continue but at a very slightly reduced level.
- 9.19 The adjustments for under-occupation and overcrowding lead to the suggested mix as set out in Table 9.3. It can be seen that this tends to suggest a smaller profile of homes as being needed (compared to the initial modelling) with the biggest change being in the market sector – which was the sector where under-occupation is currently most notable.

Table 9.3 Adjusted Modelled Mix of Housing by Size and Tenure

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Market	1%	28%	51%	20%
Affordable home ownership	13%	46%	34%	7%
Affordable housing (rented)	23%	34%	36%	7%

Source: *Housing Market Model (with adjustments)*

- 9.20 Across BFGV, the analysis points to around a quarter of the social/affordable housing need being for one-bed homes and it is of interest to see how much of this is due to older person households. In the future, household sizes are projected to drop whilst the population of older people will increase. Older-person households are more likely to occupy smaller dwellings. The impacts of older people on demand for smaller stock are outlined in the table below.
- 9.21 This table identifies households where the household reference person is aged under 65 and typically requires larger homes than households aged 65+ (see Table 9.4) – differences from the main modelling are however not substantial given the number of households aged 65+ is projected to be quite modest. This information can be used to inform the mix required for General Needs rather than Specialist Housing, because not all older people would be expected to live in homes with some form of care or support.

- 9.22 The two, three, and four+-bedroom categories have been merged for older persons as we would not generally expect many (if any) households in this category to need (or indeed be able to be allocated) more than two-bedrooms in the rented affordable housing sector.

Table 9.4 Adjusted Modelled Mix of Housing by Size and Age – affordable housing (rented)

Age of HRP	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Under 65	21%	35%	37%	7%
65 and over	38%	62%		
All affordable housing (rented)	23%	34%	36%	7%

Source: *Housing Market Model (with adjustments)*

- 9.23 A further analysis of the need for rented affordable housing is to compare the need with the supply (turnover) of different sizes of accommodation. This links back to estimates of need in the previous section (an annual need for 386 dwellings per annum) with additional data from CoRe about the sizes of homes let over the past three years.
- 9.24 Although in absolute terms the need for four-bedroom homes is low, this analysis is quite clear in showing that there is also a very low supply in the affordable rental sector where only around 26% of the need arising each year is met, whereas, for all other sizes, it is well over 50% of the need can be met. This would point to the provision of a larger proportion of four+-bedroom homes in the rented affordable sector than suggested by the modelling in Table 9.5.

Table 9.5 Need for rented affordable housing by number of bedrooms

	Gross Annual Need	Gross Annual Supply	Net Annual Need	As a % of total net annual need	Supply as a % of gross need
1-bedroom	241	161	80	20.8%	66.8%
2-bedrooms	344	209	136	35.2%	60.5%
3-bedrooms	313	171	142	36.7%	54.7%
4+-bedrooms	38	10	28	7.3%	26.0%
Total	937	551	386	100.0%	58.8%

Source: *Derived from a range of sources*

Indicative Targets for Different Sizes of Property by Tenure

- 9.25 Table 9.6 below provides some indicative targets for different sizes of homes (by tenure) for the BFGV site. The conclusions take account of a range of factors, including the modelled outputs and issues such as the flexibility of homes to accommodate changes to households (e.g. the lack of flexibility offered by a one-bedroom home for a couple looking to start a family).

9.26 The analysis also takes account of discussions with Council Housing Officers and the development industry (including consideration of the current pipeline supply of housing). To be locally specific, the analysis also recognises any key differences between the immediate wards in which the site sits and the Borough as a whole. Key points include:

- General recognition of this as a suburban site which is likely to be more suitable for households rather than flatted development (including being attractive to family households);
- Other considerations not reflected in the modelled mix included the need for aspirational housing across the City-Region, as per LCR level policies and strategies;
- A current pipeline of housing on nearby sites focuses on three+-bedroom homes (88% of the total pipeline). This observation points to a need to provide a wider range of dwelling sizes but does to some extent identify the current demand as seen by the development industry (although profit drivers will also be influencing the mix on current sites)
- Council Housing Officers highlight a likely particular need for three-bedroom homes on a site of this nature (i.e. not in a main urban area) but this needs to be balanced by the Housing Register showing the main need to be for smaller units; and
- The population of the BFGV area is typically younger, with slightly larger household sizes and a housing stock with slightly more bedrooms (on average) than the Borough as a whole.

9.27 Some size categories have been merged. For older persons, it has already been noted that delivery of homes with more than two-bedrooms would not be expected, but in addition, in the market sector, no significant delivery of one-bedroom accommodation is expected (partly due to the nature of the site) and so the one- and two-bedroom categories have been merged. Arguably a similar ‘merging’ could have been applied to the affordable home ownership sector although to conclude a modest figure for one-bedroom homes has been retained.

Table 9.6 Recommended Housing Mix – Bold Forest Garden Village Site

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	25%	10%	15%	40%
2-bedrooms		50%	35%	60%
3-bedrooms	50%	35%	40%	
4+-bedrooms	25%	5%	10%	

Source: Based on Housing Market Model

9.28 Given its suburban nature and geographical location, and in the context of a healthy stock of smaller size homes in close proximity to the site and conversely a lesser proportion of larger (4+ bed) homes

in the BFGV area than sub-regional, regional and national comparators, coupled with an identified regional need for aspirational homes, it would be expected that the mix of housing on the BFGV site specifically would have a focus towards three- and four- bedroom+ properties, particularly in the market sector.

9.29 Furthermore, suburban areas are typically low demand for younger single people who would prefer urban centres. Therefore if any one-bedroom developments are provided these should be to the north of the site if at all.

9.30 The scale of the site and its proximity to the M62 Motorway also means that the BFGV site would likely draw from a wider area than just St Helens Borough and meet some wider needs. The conclusions we draw here are therefore specific to the BFGV site and are not necessarily applicable to smaller sites elsewhere in the Borough.

Built-form

9.31 A final issue is a discussion of the need/demand for different built-forms of homes, all of which should strive for high quality design across the Site in accordance with the policies within the adopted Local Plan. In particular, this discussion focusses on bungalows and the need for flats vs. houses.

Bungalows

9.32 The sources used for analysis in this report make it difficult to quantify a need/demand for bungalows as Census data (which is used to look at occupancy profiles) does not separately identify this type of accommodation. Data from the Valuation Office Agency (VOA) does however provide estimates of the number of bungalows (by bedrooms) although no tenure split is available.

9.33 Table 9.7 below shows a proportion of homes in St Helens are bungalows (7% of all flats and houses). The majority of bungalows have two- or three-bedrooms bedrooms (79% of the total). A slightly higher proportion (9%) of homes across England are bungalows.

Table 9.7 Number of dwellings by property type and number of bedrooms (March 2020)

	Number of bedrooms					All
	1	2	3	4+	Not Known	
Bungalow	910	2,640	1,800	270	10	5,630
Flat/Maisonette	4,240	3,470	210	50	30	7,990
Terraced house	120	11,720	14,250	720	20	26,820
Semi-detached house	80	3,600	27,910	1,750	10	33,350
Detached house	10	310	4,450	5,250	50	10,070
All flats/houses	5,360	21,740	48,620	8,040	120	83,860
Annexe						20
Other						90
Unknown						250
All properties						84,220

Source: Valuation Office Agency

- 9.34 In general, discussions with local estate agents (discussions nationally) find that there is a demand for bungalows and in addition, analysis of survey data (in other locations) points to a high demand for bungalows (from people aged 65 and over in particular).
- 9.35 Bungalows are often the first choice for older people seeking suitable accommodation in later life and there is generally a high demand for such accommodation when it becomes available (this is different from specialist accommodation for older people which would have some degree of care or support).
- 9.36 As a new build option, bungalows are often not supported by house builders (due to potential plot sizes and their generally low densities). There may, however, be instances where bungalows are the most suitable house type for a particular site; for example, to overcome objections about dwellings overlooking existing dwellings or preserving sight lines.
- 9.37 There is also the possibility of a wider need/demand for retirement accommodation. Retirement apartments can prove very popular if they are well located in terms of access to facilities and services, and are environmentally attractive (e.g. have a good view). However, some potential purchasers may find high service charges unacceptable or unaffordable and new build units may not retain their value on re-sale.
- 9.38 The LPA express support for the provision of bungalows and specialist and supported housing for elderly and vulnerable people generally within Local Plan Policy LPC01 (Housing Mix), however the support is not quantified into a specific requirement. Overall, the LPA could consider the potential role of bungalows as part of the BFGV site. Such housing may be particularly attractive to older owner-occupiers (many of whom are equity-rich) which may assist in encouraging households to

downsize. However, the downside to providing bungalows is that they are relatively land intensive and this may limit development opportunities.

- 9.39 Bungalows are likely to see a particular need and demand in the market sector and also for rented affordable housing (for older people). Bungalows are likely to particularly focus on two-bedroom homes, including in the affordable sector where such housing may encourage households to move from larger 'family-sized' accommodation (with three+-bedrooms).

Flats versus Houses

- 9.40 Although there are some one-bedroom houses and three-bedroom flats, it is considered that the key discussion on built-form will be for two-bedroom accommodation, where it might be expected that there would be a combination of both flats and houses. At a national level, 82% of all one-bedroom homes are flats, 38% of two-bedroom homes and just 5% of homes with three-bedrooms.
- 9.41 Table 9.8 below shows the proportion of homes by tenure and size that are classified as a flat, maisonette or apartment. This shows a low proportion of flats in St Helens Borough (15% of all two-bedroom homes and would arguably point to the majority of two-bedroom homes in the future being houses. The analysis also shows a higher proportion of flats in the social and private rented sectors (although it is still the case that the majority of homes in these sectors are houses. Generally, the analysis would suggest the majority of homes on the BFGV site should be houses (or bungalows) rather than flats.

Table 9.8 The proportion of homes that are a flat, maisonette or apartment (by tenure and dwelling size)

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Owner-occupied	42%	6%	0%	0%
Social rented	74%	27%	1%	2%
Private rented	84%	20%	3%	10%
All	73%	15%	0%	1%

Source: 2021 Census

Summary

- 9.42 Analysis of the future mix of housing required takes account of demographic change, including potential changes to the number of family households and the age structure of the population as expected on the BFGV site once built out.
- 9.43 There are a range of factors which will influence demand for different sizes of homes, including demographic changes; future growth in real earnings and households' ability to save; economic performance and housing affordability. The analysis linked to future demographic change concludes that the following represents an appropriate mix of affordable and market homes. The analysis also

models for there to be a modest decrease in levels of under-occupancy (which is notable in the market sector).

- 9.44 In all sectors, the analysis points to a particular need for two-bedroom accommodation, with varying proportions of one-bedroom and three+-bedroom homes. For general need rented affordable housing, there is a clear need for a range of different sizes of homes, including 40% to have at least three bedrooms. Our recommended mix is set out below:

Table 9.9 Recommended Housing Mix – Bold Forest Garden Village Site

	Market	Affordable home ownership	Affordable housing (rented)	
			General needs	Older persons
1-bedroom	25%	10%	15%	40%
2-bedrooms		50%	35%	60%
3-bedrooms	50%	35%	40%	
4+-bedrooms	25%	5%	10%	

Source: Based on Housing Market Model

- 9.45 It would be expected that as a suburban location, the mix of housing at the BFGV Site would be focussed towards three- and four+ bedroom properties to a greater degree, particularly in the market sector. This conclusion is specific to the BFGV site owing to its scale and location and is not necessarily applicable to smaller sites elsewhere in the Borough.
- 9.46 The strategic conclusions in the affordable sector recognise the role that delivery of larger family homes can play in releasing a supply of smaller properties for other households. Also recognised is the limited flexibility which one-bedroom properties offer to changing household circumstances, which feed through into higher turnover and management issues.
- 9.47 Given the nature of the area and the needs identified, the analysis suggests that the majority of units should be houses rather than flats. There is potentially a demand for bungalows, although realistically significant delivery of this type of accommodation may be unlikely. It is however possible that delivery of some bungalows might be particularly attractive to older person households downsizing and may help to release larger (family-sized) accommodation back into family use.

10. LANDOWNER ASPIRATION

10.1 This section of the report sets out the findings of our consultation with landowners and promoters who have land interests within the BFGV site allocation, to understand their aspirations and the potential for development on the site in terms of housing mix and delivery rates.

Landowners and Promoters of the BFGV site

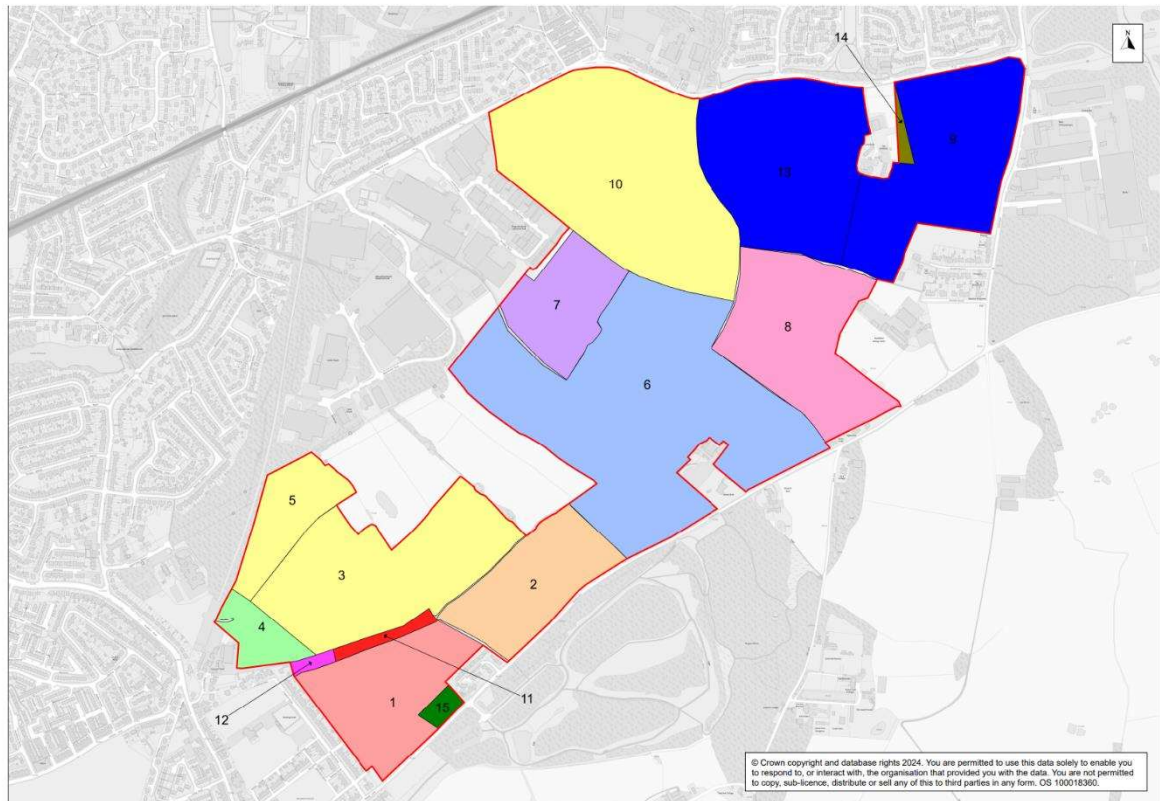
10.2 The project team have conducted video call interviews with St Helens Borough Council (Property & Economy) as a representative of the Council’s landholding interest, along with 7 representatives of the other Landowners and Promoters of the BFGV site, covering 11 parcels of land (as set out in Table 10.1 below).

Table 10.1 Summary of Landowners and Representatives Engaged

Landowner and Representation	Parcel number (See Map Below)
Developer	1
Land Promoter on behalf of a private landowner family	2
St Helens Council (Property and Economy)	3, 5, 10
Representatives of a private landowner family	6
Representatives of a private business landowner	7
Developer	8
Planning consultant on behalf of a private landowner family	9 & 13
Private business landowner	14

Source: Iceni Projects

10.3 The team sought to understand the interviewee’s views on market demand and aspirations for their (or their clients) landholding, as well as aspirations for the wider Garden Village site. Interviewees were also asked to share thoughts on their views on any constraints to delivery of the site, and the likely pace of delivery.

Figure 10.1 Map of BFGV Site Ownership

Source: St Helens Borough Council

- 10.4 Key themes emerged from these discussions, however, findings differed where conversations were with a landowner who is a developer/ housebuilder, or where we were speaking to a landowner -non – developer (e.g. a private individual/family with no development experience).

St Helens Borough Council (Property & Economy) – Aspirations as a Landowner

- 10.5 The Council's Property & Economy Team was clear that there was a twin goal of extracting as much social value and employment opportunities (via construction) out of the BFGV site. They reiterated the need to drive up the quality of the housing stock and the environment. They noted that there was no other site of this scale in the Borough which could meet their aspirations to do this.
- 10.6 The Council thought that the higher values seen in parts of the borough (Rainford, Windle, Eccleston, Newton-le-Willows and Rainhill) could also be achieved in the BFGV site. It was also thought that values in excess of the nearby New Bold development could be achieved. However, they recognised that it was difficult to tell exactly what could be achieved as it will be a new product but there needs to be a "leap of faith".
- 10.7 The quantum of development at the BFGV site also means that it could provide a range of values including intermediate products. The site's success would require it to be seen as a desirable place to live and as a better option than the more desirable parts of the borough at present.

- 10.8 Ultimately they felt that marketing would be the key to the BFGV site's success but other factors such as the Freeport and Omega will also present employment opportunities which will drive demand.
- 10.9 The council intends to provide a degree of larger family homes to capture latent demand from a wider catchment or households that maybe would otherwise leave the Borough to access larger houses, to support housing diversification and market absorption (delivery) rates, and to support a more balanced and sustainable community capturing an increase in spending power in the local economy and supporting local public services.
- 10.10 Concerning specific groups, there was a belief that self and custom build would be more desirable in a garden village setting and there was already a precedent at French Fields Crescent.
- 10.11 They also think that the site should have some early years provision and that this has the potential to be a commercial opportunity. Similarly, they thought the site could also accommodate a housing with support scheme (sheltered housing). In all cases, the Council thought that the northern part of the site would be the best location for additional services as this would better integrate the site into the existing community.
- 10.12 From a commercial side, the Council did not think that the BFGV site should have a significant local centre as this would detract from the two local centres at Sutton Village and Clock Face. They cited the former Bold Power Station as a development where the local centre did not work.
- 10.13 The Council also noted that a Rangers Centre within the Clock Face Country Park is a further commercial opportunity to the south of the BFGV site. This was also suggested in the AAP. It would likely provide bike hire facilities and a café and can also aid integration with the wider area.
- 10.14 The need for additional transport infrastructure was also highlighted, particularly the need to achieve better access to the train stations. The Council are actively looking at how they can improve links to both stations and the park and ride sites at them as well as improving bus services.
- 10.15 The subsequent section sets out the views of the other Landowners and Promoters of the BFGV site.

Market appeal

- 10.16 When asked about who they think the BFGV site should cater to, there was a general consensus amongst the Landowners and Promoters that the site is capable of delivering a wide range of housing to address wider needs as well as local needs, but in particular, would be highly suitable for the delivery of aspirational homes and offers a great appeal to this end of the market. Aspirational housing was described by the Landowners and Promoters as larger, three, four and five-bedroom properties that would be designed to attract more affluent residents to St Helens, and predominantly designed to cater for families.

- 10.17 However, it was also recognised by the group that the site's allocation policy within the Local Plan requires that 30% of housing should be classed as affordable homes. This requirement was acknowledged, with the housebuilder representatives accepting of this with none suggesting that it could not be achieved. Indeed, landowners as well as the housebuilders seemed acutely aware of the affordable housing needs of the Borough generally.
- 10.18 All interviewees recognised that the site is large enough to cater for a diverse range of needs across the Borough and suggested that the site would be attractive to both existing residents within the Borough of St Helens looking for a higher quality housing product than the second-hand market, as well as more affluent buyers from neighbouring boroughs such as Warrington.
- 10.19 It was noted by one interviewee that St Helens Borough Council as a local authority is ambitious in terms of its drive for economic growth and goal to retain and attract a highly skilled labour force in the Borough and recognised that this site will contribute to that attraction for skilled residents.
- 10.20 The BFGV site was deemed by most interviewees as capable of achieving higher average house prices than those in the wider area. The landowners also noted that the site's location near the M62 Motorway is the dominant reason for it being attractive, and highly suitable for aspirational housing.
- 10.21 The BFGV site was seen by one housebuilder as a 'drive in, drive out, self-serving site'. The site's suburban/ semi-rural, green edge was also considered appealing and in particular, the connectivity to Bold ForestCountry Park was noted to be popular with families.

Vision for the Bold Forest Garden Village Site

- 10.22 To appeal to aspirational buyers, there was no doubt from all of the developers and landowners spoken to that the site should strive to achieve a high-quality layout where open space and landscaping are prioritised. One land promoter suggested that the quality of the scheme should not just come from the housing but also from the materiality of the highways and footways and the inclusion of street furniture and landscaping.
- 10.23 References to improving the site's connectivity to St Helens Junction Rail Station through active travel routes, and prioritising cycleways and footways as opposed to large link roads through the site, were raised by a few representatives in the group, including a Planning Consultant and Representatives of a private landowner family
- 10.24 Furthermore, another Developer interviewee suggested that the LPA should be ambitious and pioneering with the site and look to strive for standards such as net zero carbon homes.

Infrastructure

- 10.25 The need for infrastructure such as a primary school, a GP surgery and a small retail centre was acknowledged, however, four out of seven interviewees (a mixture of developers and promoters) questioned the demand for some of these services on a site such as this. For example, it was suggested that before any of these elements of the scheme are proposed in detail, a detailed assessment of the need for them should be undertaken, because it has been found that in some cases, infrastructure such as this is not actually needed, or is best delivered through extensions to existing infrastructure.
- 10.26 The need for a local retail centre was questioned generally, with a handful of interviewees noting that it could create conflict with existing local centres. If any of these elements are to be delivered on-site, the consensus by the group was that they should be located on the Council-owned land to the north, due to the location; services could then be used by both new and existing residents in the Sutton and New Bold area. This view was shared by four out of seven of the Landowners and Promoters (excluding the Borough Council Property & Economy Team).
- 10.27 It was also suggested that the early delivery of social infrastructure and services would improve the attractiveness of the site for families, and it would give a chance for the infrastructure to 'bed into' the surroundings. This view was shared by all seven of the Landowners and Promoters.
- 10.28 It should be clarified that the masterplanning exercise will consider the need for infrastructure and where it is best located on the site, based on all the available evidence at the time.

Housing Mix

- 10.29 The mix and tenure that the site should achieve were discussed with all interviewees. There was a consensus from all interviewees that smaller two and three-bedroom properties should be delivered on-site to address a local need, alongside a mix of larger, three-, four- and five-bedroom homes to meet the needs of the wider area and also attract residents into the Borough from outside of St Helens.
- 10.30 It was suggested that whilst the site doesn't lend itself to flats, one-bedroom properties could be delivered as cottage flats (which appear as semi-detached properties from the outside) to help meet the housing needs of the wider area. It was suggested that these would be best located to the north of the site where a higher density could be more appropriate in design terms and where residents could benefit from proximity to infrastructure including bus stops, St Helens Junction Railway Station and existing employment opportunities.
- 10.31 In contrast, it was suggested by four interviewees that larger detached properties are more suited to the southern areas of the site, where developers could take advantage of a wide road frontage along Gorsey Lane and the more rural aspect of the site, with good access to Clock Face Country Park.

- 10.32 The design of affordable homes was referenced by some interviewees; all agreed that they should be tenure blind. One interviewee stated that affordable housing should be encouraged, supported and well-integrated, noting the reluctance of housebuilders to pepper-pot affordable dwellings within a scheme due to logistical challenges from a maintenance perspective
- 10.33 The site was seen by most interviewees as attractive to mid to upper-market housebuilders (references to Taylor Wimpey, Redrow, Persimmon and Bellway were made), where a good mix of products could be delivered.

Development Constraints

- 10.34 There were no major technical or environmental constraints that were raised but it was noted that most of the site is currently farmland, contains limited ecological value and is located in Flood Zone 1. The masterplanning process will consider the technical constraints in further detail.
- 10.35 Some developers had completed further due diligence on their land parcel and across the site, in terms of Phase I Site Investigation Reports, and reviews of potential access points. This level of due diligence had not raised any concerns.
- 10.36 It was recognised that some land parcels had electricity pylons which would need to be factored into the design of the masterplan. Furthermore, Biodiversity Net Gain was acknowledged as one technical consideration that all landowners would need to be mindful of, given the recently adopted national legislation on this point.
- 10.37 With few technical and environmental constraints identified, it was not suggested by any of the landowners and developers on the site that the delivery of affordable housing would be constrained.
- 10.38 However, nearly all interviewees thought that the development of the Masterplan Framework and Delivery Plan SPD could delay the delivery of housing due to the timescales involved in the Masterplan and Delivery SPD is being prepared by the Local Authority in accordance with Local Plan Policy LPA11 (Bold Forest Garden Suburb) which states that 'any planning application for development within the site will need to accord with a single comprehensive masterplan covering the whole of the Bold Forest Garden Suburb site and to be approved by the LPA.
- 10.39 Nevertheless, two interviewees (a Developer and a Land Promoter) were supportive of the masterplan approach, noting that it will provide guidance on design which will ensure the delivery of a cohesive scheme across the different land ownership parcels. It was also suggested that the presence of a masterplan will ensure that planning applications can be assessed against a specific set of parameters and therefore give more certainty to applicants that planning permission will be granted, provided they demonstrate that they are in accordance with the masterplan.

Delivery

- 10.40 When discussing expectations for their particular site, it was evident that some landowners and representatives had undertaken background work to understand the capacity and development potential of their site, whereas other representatives had not yet done so.
- 10.41 Nearly all landowners consider that their site is most suitable for the delivery of housing, as opposed to wider infrastructure. This seemed to be for two reasons; a) the Council's land to the north is seen as the most appropriate location for infrastructure and b) a residential development is perceived as the least risky and highest rewarding type of development and therefore favoured. It should be noted that the location of infrastructure will not be determined until the masterplanning process and evidence gathering has been undertaken.
- 10.42 It was suggested by all interviewees that most parcels could expect to be built out at a rate of 50-60 dwellings per annum. It was suggested that the forward sale of a proportion of a site to a Registered Provider will be an effective tool to speed up delivery of the BFGV site. This is because the housebuilder delivering the properties has an end-user secured and they are not at the 'mercy of the market'. The incentive is therefore in place to get the properties handed over to the RP as quickly as possible.
- 10.43 Another interviewee commented that the delivery of a Build to Rent product (provided it is located on an appropriate plot) can offer the same benefit; when a site is being handed over to a BtR operator, there is a strong incentive to get those plots delivered quickly, with the end user already secured.
- 10.44 It was noted by four interviewees that the overall BFGV site could most likely accommodate three to four sales outlets at any one time across the BFGV Site. It was suggested that this would most likely comprise three traditional housebuilders catering for the mid to upper-range market and a Registered Provider potentially selling shared ownership homes.
- 10.45 Four interviewees suggested that due to the number of access points around the entire BFGV Site development could commence across different areas of the site at the same time, and there is a limited need to wait for the delivery of connecting infrastructure.
- 10.46 One interviewee noted that where opportunities arise, the delivery of supporting infrastructure should be brought forward at an early stage in the masterplan, which would provide the opportunity for it to be integrated into the rest of the site
- 10.47 Furthermore, another interviewee commented that if the Council, as landowner, had a delivery partner to specifically deliver the supporting infrastructure (e.g. enabling works such as installation of spine roads, drainage & power sources etc) across the site at an early stage, this would speed up the delivery of the individual parcels.

- 10.48 Estimates were made by four interviewees regarding the timescales for delivery of the overall site. It was typically suggested that from starting on-site, it would take circa 8-10 years to deliver the entire BFGV site.
- 10.49 Whilst delivering 60 dwellings per annum across four sales points (240 dwellings per annum) would equate to 12.5 years to complete the 3,000 dwellings, efficiencies that can be made when scaling up to deliver larger sites will allow a quicker construction period.

Summary

- 10.50 Overall, engagement with the Landowners and Promoters of the BFGV allocation found that all parties recognised that the site can contribute to delivering a broad range of homes to address housing need at a local level, including affordable housing need, and can provide an opportunity to deliver more aspirational homes for the Borough.
- 10.51 All parties agreed that the site provides a blank canvas to deliver a high-quality Garden Village, where the masterplan can take the opportunity to promote and prioritise landscaping and open space in accordance with the Bold Forest Park Area Action Plan; create connectivity to existing infrastructure in the north of the site and deliver supporting social infrastructure, if there is a proven need.
- 10.52 The consensus is that the BFGV site is relatively constraint-free from a technical and environmental perspective. However, the risks to delivery include the lead in times for a planning application, owing to the need to develop a masterplan (as per Policy LPA11) and complete an equalisation process.

11. SPECIFIC MARKET SEGMENTS

- 11.1 Iceni has engaged with specialist housing developers and the Landowners and Promoters of the BFGV allocation to gauge market interest in the BFGV Site, the potential of the Site to offer more specialist/niche housing products and potential barriers to development.

Build to Rent

- 11.2 We were able to engage with two Build to Rent Operators who deliver products addressing the Single Family Housing (SFH) market. Single Family Housing is a suburban counter-offer to traditional Build-to-Rent (BtR) city centre apartments, aimed at a slightly older market including families.
- 11.3 Generally, taking the form of traditional low-density family houses, SFH offers many of the same benefits seen elsewhere in the BtR sector, such as access to local amenities and communal space, and high-quality management and specification.
- 11.4 One of the landowners on the site has a track record of delivering Build to Rent schemes for the Single Family market in the Borough (at Moss Nook). However, when interviewed, they suggested that the location of their site (parcel 8) is not conducive to a BtR scheme. This is because it is located on the periphery of the site, away from existing infrastructure and connections to St Helens Junction Rail Station. It was noted by the interviewee that BtR schemes are typically associated with lower levels of car ownership, therefore sustainable transport connections are of paramount importance.
- 11.5 They also suggested that if a BtR scheme came forward at the BFGV site, whilst it could come on stream at an early stage in the delivery of the site, the product may become more attractive to families when supporting infrastructure such as open space, playgrounds and/or a primary school is in place.
- 11.6 Speaking to Moda Living Group, who operate the Casa by Moda Brand, we were able to discern that other parcels within the BFGV site would be an attractive proposition to a BtR operator. Moda considers that the BFGV site is a very good location for a BtR product as when complete, it would be a densely populated area, located on the urban fringe with easy access to key employment locations such as Warrington, Liverpool and Manchester.
- 11.7 Moda typically looks at 'mid-market' locations for their Casa by Moda product and considers that St Helens Borough generally fits this criteria. Moda's product in suburban locations usually comprises a 150-200 dwelling plot and provides both affordable and market rental properties on a tenure blind basis.

- 11.8 Sites typically offer two and three-bedroom properties, which are terraced and semi-detached. Detached properties with garages are generally not sought by Moda as this moves beyond the 'mid-market' bracket they are seeking to attract. Apartments sometimes form part of the mix, however, in this location, it was deemed that traditional housing would be favoured over flats.
- 11.9 Typically, Moda's mix of dwellings comprises 70% three-bedroom properties, 20% two-bedroom properties and 10% four-bedroom properties. When looking at the BFGV site, it was suggested that a dense and compact plot in the north of the site, located near existing infrastructure, would work well for Moda's product.
- 11.10 Moda, and other BtR providers, typically operate by purchasing the first plot of a wider site developed and built out by a housebuilder. Partnering on large consortium sites has been found to speed up the pace of delivery as the housebuilder delivering the plots is 'massively incentivised' and Moda's interest in schemes can absorb the first phase of development quickly.
- 11.11 It was indicated that whilst the traditional sales market seeks to sell and hand over two plots a month, Moda would be looking at letting and handing over up to four plots a month on average.
- 11.12 When questioned about the ability of the BFGV site to accommodate multiple BtR operators, Moda suggested that this may work, but only if there was a significant time difference in the phasing between the operators, of circa 5 years. Although it was suggested that it would be unlikely that the site would attract more than one BtR operator at any one time.
- 11.13 Much of the insight shared by Moda was also shared by the landowner on the site with BtR experience and ultimately, BtR has potential at the BFGV site, but it would be best suited to a parcel in the northern half of the site.

Older Persons Accommodation

- 11.14 Torus Developments is the main registered provider in St Helens Borough. They were interviewed as part of the soft market testing exercise and among other things, they were able to provide commentary on the potential for the site to deliver affordable Older Persons Accommodation.
- 11.15 Torus noted that they have worked closely with the Local Authority historically on the delivery of Older Persons Accommodation, including Foundry Wharf. This scheme offers an 'Extra Care' product on an Affordable Rent basis, providing 109 one-bedroom apartments and 21 two-bedroom apartments. The development was constructed in 2021 and is located on the edge of the town centre.
- 11.16 It was suggested by Torus that they were unsure if there is a large appetite for further affordable Extra Care; this is the only scheme of this type that they have completed in the Borough. However,

it was acknowledged that there could be a strong demand for private older persons accommodation on site, but Torus were not able to fully comment on this.

- 11.17 Torus also suggested that bungalows are a product always in demand by tenants, and this would help to fulfil older persons accommodation needs. However, it was recognised that they are a relatively inefficient use of land to deliver older persons accommodation.
- 11.18 Speaking to care home provider Exemplar Health Care provided an insight into the requirements of care home providers when considering new development locations. Exemplar offers nurse-led care home environments for adults living with complex needs arising from dementia, learning disabilities, neuro-disabilities including brain injuries, mental health conditions and physical disabilities.
- 11.19 These developments are classed as C2 use class sites and bed spaces are funded by the local health authority as opposed to being paid for by the service user. Due to their specialist nature, Exemplar and other care homes that operate on a similar model will accept service users from a wide radius, beyond the boundary of the Borough they operate in.
- 11.20 Exemplar has existing sites in Merseyside and Greater Manchester and typically delivers care homes on sites of 1 acre or more, offering circa 40-bed spaces. They advised that this differs from more traditional care home providers who seek to offer larger schemes of typically 60-bed spaces. Exemplar's development footprint is also larger (60sq.m per service user) than traditional care home providers (50sq.m per service user).
- 11.21 Exemplar suggests that the BFGV site could be an attractive location for them in the future. They noted that to successfully attract affordable care home providers, development sites should be located near densely populated urban and suburban areas where a large workforce can be drawn upon and where that workforce can access the site via public transport.
- 11.22 It was noted that more specialist care homes will typically require circa 100 staff (a mixture of part-time and full-time), with circa 35 staff on-site at any one time. They are therefore able to offer a high number of employment opportunities across a range of roles, albeit wages are typically set at the National Living Minimum Wage level.
- 11.23 It was noted that from Exemplar's experience, seeking to locate more specialist types of residential care on housing sites with a high proportion of aspirational, market homes, can prove difficult during the planning process. However, due to the nature of the service users' conditions, Exemplar suggested that smaller, specialist care homes generally attract lower numbers of visitors and therefore limited vehicle movements, so they can be seen as a 'good neighbour'.

- 11.24 When speaking to the Landowners and Promoters of the BFGV site, it was noted by three interviewees that the site is likely to be attractive to different older persons accommodation products, however, none of the interviewees professed to have a detailed understanding of the site's suitability for this or the likely level of demand.
- 11.25 Indeed, one interviewee suggested that at nearby Halshead Garden Village (in Knowsley), their client at that site had struggled to attract elderly living operators and cautioned that the same response from operators could be found here.
- 11.26 Engagement with a local care provider, who is also a landowner at the BFGV site gave further insight into the potential for Older Person Accommodation within the BFGV site. The landowner has a portion of its land within the BFGV site as well as an adjoining land parcel outside of the allocation. This parcel is occupied by the landowner but also offers 8 units of self-contained supporting living accommodation.
- 11.27 Having a background in the delivery of adult social care, the landowner is of the view that their land within the allocation could be used to support the delivery of C2 products and has noted that they have had interest in the site from a range of care home operators.
- 11.28 It was suggested that they would not look to deliver the site themselves but instead may sell the land to a larger operator, to design and build a C2 Older Persons Accommodation offer. They suggested that the specific site and the BFGV site more generally have the potential to support a wide range of service users, including traditional retirement living/over 55's, to more specialist and palliative offerings.

Self and Custom Build

- 11.29 As of 1st April 2016, and in line with the 2015 Act and the Right to Build, relevant authorities in England are required to have established and publicised a self-build and custom housebuilding register which records those seeking to acquire serviced plots of land in the authority's area to build their own self-build and custom houses.
- 11.30 The St Helens Borough Self-Build and Custom Housebuilding Register was introduced on the 1st of April 2016 and there have now been eight and a half base periods¹⁵ up to 30th October 2023. It does

¹⁵ A base period is a period of typically 12 months in which demand for custom and self-build is recorded. However, the first base period began on the day on which the register (which meets the requirement of the 2015 Act) was established and ended on 30 October 2016. Each subsequent base period is the period of 12 months beginning immediately after the end of the previous base period. Subsequent base periods will therefore run from 31 October to 30 October each year.

not have any eligibility criteria for entry to the self and custom build housing register and therefore it is only in one part.

11.31 The LPA is required to grant sufficient planning permissions to meet the demand identified on the Register as per the 2015 Act (as amended) within 3 years of the end of each base period. However, there is no reporting mechanism to know if self-build homes have actually been delivered or if the people on the register have secured a plot.

11.32 Table 12.1 below provides a base period breakdown of those individuals who have expressed demand for serviced plots of land in the Borough.

Table 11.1 St Helens Borough, Self and Custom Housebuilding Register (2016-2023)

Base Period	Annual Entries
Base Period 1 (1 st April 2016 to 30 th October 2016)	1
Base Period 2 (31 st October 2016 to 30 th October 2017)	4
Base Period 3 (31 st October 2017 to 30 th October 2018)	3
Base Period 4 (31 st October 2018 to 30 th October 2019)	4
Base Period 5 (31 st October 2019 to 30 th October 2020)	7
Base Period 6 (31 st October 2020 to 30 th October 2021)	3
Base Period 7 (31 st October 2021 to 30 th October 2022)	2
Total	24
Average	4

11.33 If assessed over the seven-and-half base periods that registration information is available for, there has been a total of 24 registered expressions of interest in a serviced plot of land in St Helens Borough. This is an average of 4 plots per annum.

11.34 If the development is to be delivered over 10 years then it would need to provide 40 units should this level of demand continue. This represents approximately 1.5% of the total site capacity which could either be delivered as a single area or as smaller areas across different parcels. However as previously noted, it isn't necessarily the case that all entrants on the register would wish to be located within the BFGV Site, therefore the requirement to deliver even 40 units is unlikely.

Landowner & Promoter Perspective

11.35 There was uncertainty from the landowners and promoters of the BFGV site about the likely uptake of self and custom-built homes at the BFGV site. The uncertainty around this product's popularity was for two reasons; a) would individuals looking to own a self or custom build home want to be located on a garden village site which is akin to a typical residential estate? and b) is there enough financial support in place to drive demand for these products in this location, when it is widely

acknowledged that they can be an expensive route to purchasing a home? Nevertheless, it is acknowledged that there is an existing (though recent) self-build development adjacent to the boundary of the BFGV site allocation, known as Frenchfields Crescent which secured permission for 19 units, and is now drawing to completion. Indeed, the landowner for this site also owns the land adjacent to the existing development that falls within the site boundary. Subject to demand, there may be an opportunity for further self- and custom-build development in this location to be considered as part of the masterplanning process.

- 11.36 It was suggested by two interviewees that the difference between custom and self-build homes should be clearly understood before promoting the inclusion of these uses; custom build still involves a developer throughout the build process and they still manage and control the development of the scheme, whereas self-build requires developers to hand over serviced plots to individuals, which can be a costly exercise.
- 11.37 It was suggested by multiple developers that it will be of the utmost importance to ensure that if there is an appetite from the Local Planning Authority to promote self and custom-build homes in the masterplan, the demand is properly evidenced and no more land than is necessary is given over to this type of product.
- 11.38 It was also suggested by a few interviewees that if they are required to advertise a proportion of their land parcel for custom or self-build products, a restriction on the length of time they are required to do this is put in place. For example, a 12-month marketing period before the plots can be taken back if there is no take-up.

12. SOFT MARKET TESTING ENGAGEMENT

- 12.1 Iceni has engaged with residential developers who already operate in the Borough to gauge market interest in the BFGV site, the potential of the site to offer different products and potential barriers to development.

Torus Developments

- 12.2 Torus provided a view of the affordable housing potential of the BFGV site. Torus have a very good understanding of the local market, currently managing around 15,000 properties in the Borough, making them the largest Registered Provider operating in St Helens Borough.
- 12.3 Torus has existing stock in the south of the Borough, including in Clock Face and Four Acre, which mostly comprise terraced and semi-detached two and three-bedroom properties. This area is noted to have a well-settled second and third-generation community living in these RP homes, as they are historic stock from when Torus acquired Helena Housing.
- 12.4 Torus is also bringing forward new affordable schemes in partnership with housebuilders in the Borough such as Countryside and Taylor Wimpey, as well as SME builders. Torus is a developer who fully engages with the pre-application and planning process when delivering new sites. They can work with their delivery partners to design schemes which are tenure blind, matching brickwork and the overall style of home to the market homes as closely as possible.
- 12.5 At present, Torus consider that the highest demand for affordable housing products in St Helens Borough is for one, two and three-bedroom properties, predominantly catering for individuals and young families.
- 12.6 Torus' existing new build schemes in the Borough and data from the Neighbourhoods Team suggest that affordable rent properties are in the most demand, but they would also offer properties for Rent to Buy and Shared Ownership. Shared Ownership is seen as a popular pathway to purchase a home in the Borough, due to the constraint on wages in this area, limiting people's ability to save for a healthy deposit.
- 12.7 Torus recognises that with the BFGV site, the Council's preference may be to deliver more Shared Ownership properties, which they would support, but they would also promote the inclusion of a range of tenures, including Affordable Rent and Rent to Buy
- 12.8 It was noted by Torus that demand in the Borough for affordable properties is extremely high and as such, there is very rarely a lag between the completion of properties and move-in by tenants; waiting lists are long and the high demand is sustained.

- 12.9 Torus considers that partnering with a housebuilder to deliver affordable housing products is the most efficient way to deliver housing quickly; the housebuilder is incentivised to deliver, and Torus have no qualms that they can let the properties immediately.
- 12.10 Torus' experience in the Borough suggests that housebuilders can make efficiencies when scaling up, and as a result, they would expect that whilst a scheme of 20 units would take 12 months (less than 2 dwellings per month) to deliver, a scheme of 200 units could be delivered in 3.5 years (circa 5 dwellings per month).
- 12.11 Torus would envisage an affordable housing scheme at the BFGV site to be well integrated into market sale homes and would include a range of one, two and three-bedroom properties. Torus notes that one-bedroom walk-up flats (cottage flats) could be preferable over a flatted development, as they suggest that the majority of the BFGV site lends itself to semi-detached and detached properties, rather than higher-density apartments.
- 12.12 It was noted that one-bedroom cottage flats prove to be extremely popular and are an efficient way of delivering one-bedroom homes.
- 12.13 Torus noted that whilst they offer some four-bedroom affordable properties, there is very little demand for five-bedroom affordable properties. It was noted that four-bedroom affordable properties work best when they are pepper-potted across the site, this distributes families throughout the estate, which promotes a family-friendly environment across the whole site.
- 12.14 Torus suggests that Shared Ownership and Affordable Rent properties work best when they are separated from each other, to avoid a concentration of affordable housing in one area, but still integrated into the wider scheme.
- 12.15 Torus considers that there is no preference for where affordable housing could be delivered on-site, recognising that a range of tenures should be delivered across the site. However, in the first instance, it may be logical for them to locate some stock near the western edge, near to existing Torus stock in Clock Face.

Castle Green Homes

- 12.16 Castle Green Homes is a Northwest-based developer that delivers housing sites across a range of plot sizes, from 20 to 400 dwellings. They are considered to cater for the upper end of the housing market, with schemes typically offering three-, four- and five-bedroom detached properties suited to families.

- 12.17 Castle Green considers that the BFGV site would be an ideal site to deliver ‘aspirational housing’ and that their housing product would be highly suited to this site. They envisage that houses would range from 650 sq. ft to 1,800 sq. ft.
- 12.18 Castle Green envisages that their product would be most suited to the southern part of the site, benefitting from the Gorsey Lane frontage and the rural edge of the site perimeter. It was suggested by Castle Green that delivering social infrastructure at an early stage in the project, particularly a primary school, would promote the site’s attractiveness to families, and widen the appeal of the site.
- 12.19 Castle Green’s build-out rate would be based on an average of three sales per month, and the site has the capacity for three to four housebuilders at any one time, delivering at a similar rate. It was suggested by Castle Green that the site would be suited to a range of mid-market to premium housebuilders offering varying product sizes and styles (references were made to Redrow, Bellway and Persimmon as being suitable candidates).
- 12.20 Castle Green suggested that the site is capable of driving values in the area generally and noted that to encourage strong uptake from housebuilders, the Masterplan Framework and Delivery Plan SPD should not be overly prescriptive on the housing mix and tenures required; suggesting that developers can adequately address market demand and don’t need this dictated to them.
- 12.21 When asked about the potential for self and custom build homes at the BFGV site, Castle Green was highly sceptical of the appeal of the site for this product, suggesting that most individuals who have an aspiration to purchase a self- or custom-build home will not want to be located on part of a wider traditional housing estate.
- 12.22 The incentive for housebuilders to provide serviced plots was also questioned, noting that housebuilders will typically seek to sell those plots for typical residential land values plus the likely profit they would have made had the site come forward for standard housing.
- 12.23 It was therefore suggested that the 12-month marketing exercise that is typically associated with the sale of serviced self-build plots can become a pointless exercise, as it is highly unlikely that they will sell in the timeframe.

Morris Homes

- 12.24 Morris Homes is one of the country’s largest independently owned housebuilders. The company is, based in Cheshire but they deliver schemes across the North-West, Midlands and the South of England.

- 12.25 Engagement with Morris Homes indicated that the BFGV site would appeal to them as a potential development site, though they cautioned that they hadn't completed any formal due diligence on the site at present.
- 12.26 Morris already has sites within the Borough, including Waterside Village (Lowfield Lane) and Victoria Gardens (City Road) and noted that these have performed well in recent years.
- 12.27 Morris suggested that they would envisage taking a plot large enough to deliver circa 100 homes at a minimum. Whilst Morris agreed that the site could be delivered with aspirational housing in mind, they were not as confident as some of the other housebuilders interviewed that the site is suitable for predominantly larger, more spacious three-, four and five-bedroom properties.
- 12.28 They suggested that there is a 'ceiling on the attractiveness of the site and location' and would expect the housing mix to be geared towards predominantly two and three-bedroom properties, with only a 'couple of larger units' which max out at 1,500sq.ft.
- 12.29 Morris suggested that the southern boundary of the site is most appealing, specifically referencing the proximity to Clock Face Country Park as an attractive aspect of the site. It was noted that pylons located in the northern areas of the site would be a detracting factor for them, as would locating in the middle of the site. The ability to directly access the site from the existing highway such as Gorsey Lane, was noted by Morris Homes to be of importance.
- 12.30 Morris looks to deliver market housing and partner with an RP to take the affordable housing plots. They did not indicate any concern with delivering affordable housing at this site, though cautioned that they have not looked into viability in any detail.
- 12.31 Morris indicated that they would typically look to deliver circa 40 units per annum (including the affordable housing, and pepper potted throughout the site), which is a slower pace of delivery than some of the other housebuilders interviewed.
- 12.32 Morris considers that the overall BFGV site is capable of accommodating around three sales points (including an RP) and suggested that a range of mid to upper-market housebuilders would be well suited to the site, including the likes of Storey Homes and David Wilson Homes (part of the Barratt Group).

13. PACE OF DELIVERY AND PHASING

- 13.1 This section of the report brings together a view of what could be delivered at the BFGV site over different delivery periods. General recommendations have been provided to the Local Planning Authority on increasing the rate of delivery at the BFGV site.

Developer View

- 13.2 Paragraph 4.39.8 of the Local Plan notes that 'A build-out rate assumption of 60 units per annum has been used for the BFGS, reflecting a cautious approach due to uncertainties in relation to uncertainty on the economic impacts of the Covid-19 pandemic and the supporting infrastructure required to deliver the site. Actual build-out rates will depend on the number of housebuilders and sale centres that are operational at any one time on the site.'
- 13.3 In contrast to this perspective, the consensus from the landowner and developer engagement was that delivering **60 dwellings per annum** (50-70 was the typical range suggested) including affordable housing delivery was achievable for most individual outlets.
- 13.4 Indeed, the consensus was that this rate of delivery could be achieved across three to four sales points on the site at any one time, equating to 240 dwellings per annum at 4 sales points; a much faster delivery programme than the trajectory suggested in the Local Plan. **This would equate to 12.5 years to complete 3,000 dwellings.**
- 13.5 Considering the above, it is clear that the LPA have the opportunity to consider deploying a range of tools to improve the pace of delivery at the BFGV site to support the faster trajectory that stakeholders consider is possible (240 dpa as opposed to 60dpa).
- 13.6 Firstly, delivering the infrastructure required to support the development, including schools, GP surgery, community buildings and shops, early in the phasing would encourage more people to move to the area and thus increase sales and build-out rates.
- 13.7 Setting a clear strategy for the delivery of enabling infrastructure across the site within the Delivery Plan SPD (e.g. expectations regarding delivery of utilities) would also provide clarity and confidence to allow developers to progress at pace with a planning application.
- 13.8 There is also an opportunity to accelerate delivery by building low-cost home ownership properties, including shared ownership, as well as Build to Rent family housing. These tenures are less at the mercy of the traditional sales market and could feature earlier in the phasing of each parcel. This is touched upon later in this section.

- 13.9 Whilst custom and self-build homes could widen the appeal of the site, the data does not suggest that there is a large appetite for this type of product and therefore it would not, in our view, provide an early win.
- 13.10 There is certainly a view from landowners that delivery could be brought forward by streamlining the Framework Masterplan and Delivery Plan SPD process as much as possible, and ensuring the adopted documents encourage and support a wide range of housing typologies and products.

Delivering Large Sites

- 13.11 Sir Oliver Letwin's Independent Review of Build Out¹⁶ has explained and reported on ways in which the build-out rate on large sites can be improved. The report found that:
- “if either the major house builders themselves, or others, were to offer much more housing of varying types, designs and tenures including a high proportion of affordable housing, and if more distinctive settings, landscapes and streetscapes were provided on the large sites, and if the resulting variety matched appropriately the differing desires and financial capacities of the people wanting to live in each particular area of high housing demand, then the overall absorption rates – and hence the overall build out rates – could be substantially accelerated.”
- 13.12 A key conclusion drawn from the Review was a need to increase diversity in the products delivered on large sites, and diversity in those who are building homes. Housing diversity is described as housing of differing type, size, style, design, and tenure mix; and includes housing sold/let to specific groups such as older persons housing, students, and self/custom-build homes. Letwin recommended that each phase of the development should be subject to housing diversity requirements – including different housing products, types, tenures and styles.
- 13.13 Iceni's view is that the principle set out in the Letwin Review of diversity in the overall scheme, and where appropriate by phase, is right and will help to support build-out rates. As part of the master planning process of the BFGV site, the following issues should be considered:
- Sales outlets – the potential to support multiple sales outlets at different locations within the development scheme, as part of each phase. The LPA should look to encourage at least two access points (e.g. from the North and South) and three plus sales points from an early point in the scheme's delivery. Indeed, this was the number of sales points typically suggested that could

¹⁶ <https://www.gov.uk/government/publications/independent-review-of-build-out-final-report>

be accommodated on-site by the landowners and developers interviewed, potentially increasing by another sales point if an RP or BtR developer is involved.

- Product differentiation – ensuring that these sales outlets can offer a level of differentiation between the market housing ‘product’ being offered to limit competition and boost sales rates. The range of landowners and developers we spoke to gives us a good level of confidence that the site could support housebuilders that offer products to suit a broad range of the housing market, from affordable, smaller products, to larger aspirational homes.
- Integrated affordable housing – integrating affordable housing within development phases, as this is catering for a different market/target group from the ‘for sale’ housing. The 30% affordable housing policy requirement for the BFGV site should help in these terms to support the build-out rate.
- Catering for Different Market Segments – with elements of the scheme catering to different specialist market segments, such as build-to-rent; older persons accommodation and self and custom-build development. There would be a benefit to designing the scheme such that the potential of these markets can be tested within earlier phases, providing market evidence that then supports further investment in later phases of the scheme.

- 13.14 Iceni considers that these issues need to inform and be embedded within the development of the Masterplan Framework and Delivery Plan SPD, and there needs to be clear planning policies addressing product diversity within the relevant planning document which apply not just to outline planning applications; but which inform and guide delivery thereafter.

Delivering Infrastructure Upfront

- 13.15 Infrastructure delivery will also support the build-out rate. Fundamentally people want to live in a place, rather than a building site and thus early delivery of a local centre, a primary school and other social infrastructure can help to improve sales rates. Whilst all landowners interviewed agreed with this, this view was also shared by the BtR developers we engaged with, and they were slightly more vocal about the benefits to be drawn from supporting infrastructure in attracting renters to an area such as this.
- 13.16 Similarly, the accessibility of the site and the quality of public transport links can help to increase its attractiveness as a place to live. Investments in key infrastructure such as this, and placemaking more generally, which helps to make the site a more attractive place to live; and to give people a clearer impression of the place, will help to increase market sales rates and thus the build-out of the scheme. It will be important to ensure that there is a clear road hierarchy as part of the masterplan; multiple developers referenced the importance of pedestrian connectivity and cycleways, which they

suggested should be prioritised over the inclusion of large estate roads within the site, particularly as the site has a good number of existing access points from all angles.

- 13.17 There is a potential role for public funding in helping to support the early delivery of infrastructure which can have benefits both in terms of increasing sales volumes and supporting market values (and thus the viability of the scheme).
- 13.18 A report by Savills on the Value of Placemaking¹⁷ has shown that upfront “placemaking investment” – including through bringing forward the delivery of social and community infrastructure – makes the development more appealing and has a positive effect on both the pace of sales/delivery and residential values (and thus ultimately the residual land value). In the theoretical example given, an increased infrastructure investment upfront of £15,000 per unit supports a 50% increase in sales rates and a 20% increase in sales values.
- 13.19 The report however demonstrates that to support this upfront investment requires ‘patient capital’ whereby essentially land is paid for over time rather than upfront creating more financial capital to invest in place.
- 13.20 The delivery of infrastructure within early phases of development can also help to create place and underpin demand. Savills research shows that investment in schools is particularly important as they can provide an immediate draw to the development attracting potential buyers, but also help to create footfall. Retail shops, services and local community facilities also need to be delivered hand-in-hand with the development of large sites.
- 13.21 The LPA might wish to consider how it leverages its resources to contribute to early infrastructure delivery to support the creation and success of new development schemes.

Modern Methods of Construction

- 13.22 Modern Methods of Construction (‘MMC’) relate to homes built using a high proportion of components which are produced using modern and technologically driven methods of manufacture, with this production often taking place offsite and the components then assembled on-site.
- 13.23 Through using a high proportion of precision-manufactured components, materials and manufacturing systems, housing delivered in this way can be of a superior quality to that delivered through traditional construction methods. It can also achieve better energy performance; can reduce the effects of site deliveries, noise and pollution by shortening the construction period and thus
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¹⁷ <https://pdf.euro.savills.co.uk/uk/residential---other/spotlight-the-value-of-placemaking-2016.pdf>

reducing disruption to local communities; and can require lower levels of workers, helping to mitigate and manage the potential effects of construction skills shortages.

- 13.24 To a degree, there has historically been a level of stigma associated with ‘prefab’ homes with the perception being influenced by the perceptions of the 150,000 homes delivered as part of post-war reconstruction through the Emergency Factory Made Homes Programme. However, in other countries, the situation is quite different – in Sweden for instance it is estimated that up to 90% of homes are factory-built, and factory-built homes have a reputation for higher quality, efficiency and sustainability. BoKlok – a joint venture between Skanska and Inter Ikea has delivered 10,000 high-quality but affordable homes.
- 13.25 In the UK, there are a range of bodies which have recently set up factories to deliver modular construction. This includes Berkeley Homes, which has built a 160,000 sq. ft factory in Kent, which can deliver 1,000 homes a year. Legal and General, which owns housebuilders such as CALA, has a modular division and has opened a factory near Leeds, which is capable of producing 3,000 homes a year. A key issue for these companies is maintaining a pipeline of work as the volume of delivery is an important component of the efficiencies which can be achieved by the model.
- 13.26 Whilst modern methods of construction could be supported and encouraged through the BFGV Masterplan Framework and Delivery Plan SPD, it is worth noting that whilst not explicitly questioned about it, none of the landowners or developers we engaged with suggested that they would look to deliver their parcels via modern methods or deploy these methods at existing development sites. Nevertheless, there may be interest in the site from MMC developers which could be tested and explored.

Utilising Delivery Tools

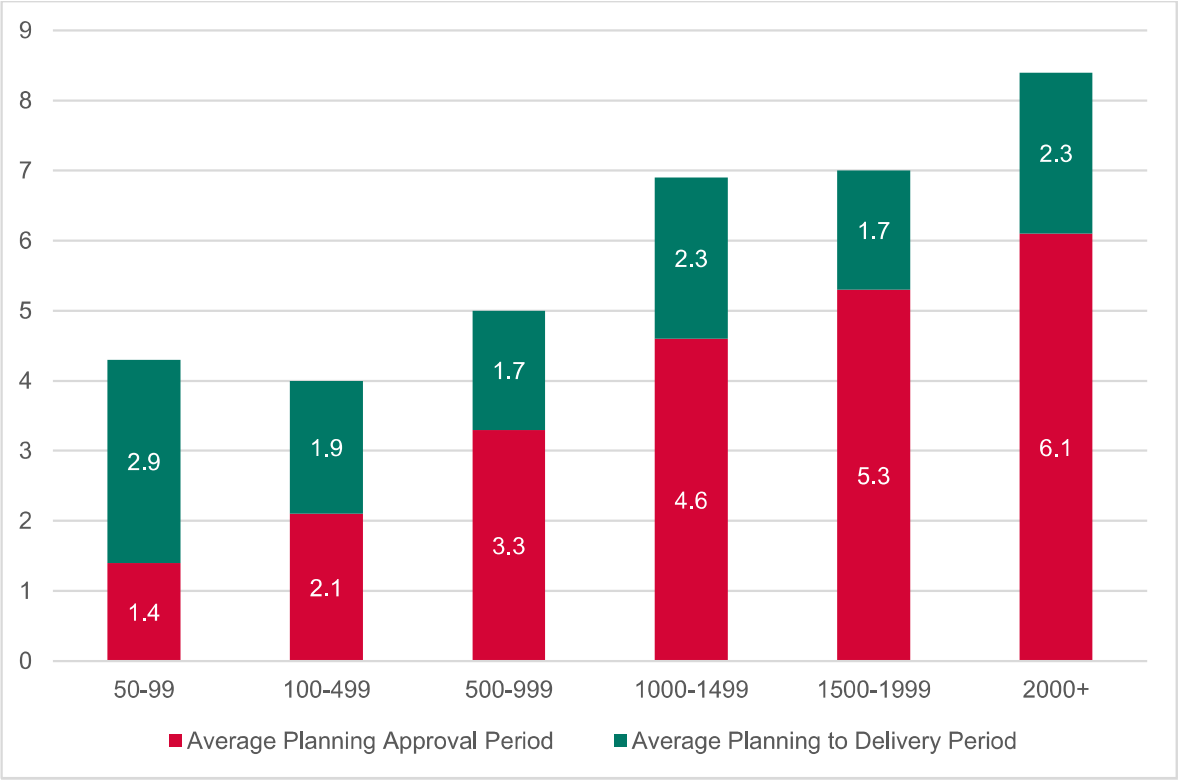
- 13.27 The LPA also has the potential to utilise several ‘planning tools’ which could be used to bring forward development at the BFGV site at a faster pace.
- 13.28 The LPA could look to use Planning Performance Agreements (“PPA”) to encourage early pre-application engagement on the BFGV site and avoid unnecessary delays around design, scale, etc. when determining applications. This would also ensure that individual reserved matters applications are determined in a timely fashion and the Local Planning Authority could use regular meetings aligned with the PPA to co-ordinate the submission of applications on smaller parcels, which could in turn deliver quicker.
- 13.29 A bespoke PPA fee schedule for landowners and developers with an interest specifically in the BFGV site could be devised, to encourage this engagement and ensure all developers engage more equally.

13.30 Further, it will be sensible for the LPA to carefully consider what pre-commencement conditions will be necessary to attach to outline planning permissions, limiting it to those which are required; and ensure that the process of discharging conditions is adequately resourced by the LPA to support the timely delivery of the BFGV site.

Large Site Delivery Assumptions

13.31 Iceni has reviewed Lichfields’ Start to Finish research¹⁸ to provide context around realistic lead-in times and reproduced the analysis on average timeframes from validation of the first application to completion of the first home in Figure X below. The Lichfields research is a national study which has considered the typical lead-in time and build-out rate for different sizes of sites across England.

Figure 13.1 Average Timeframe from Validation of Application to First Completions



Source: Lichfields Start to Finish, Figure 4

13.32 As is clear, the average time from validation of an outline planning application to the delivery of the first home for large sites of 500+ homes ranges from 5 to around 8.5 years depending on the size of the site. This shows the significant length of time it can take to get larger sites delivering. For sites of 100-500 homes, the average lead-in time is 4 years.

¹⁸ Start to Finish, Lichfields (February 2020)

- 13.33 The LPA should consider the lead-in time of the Bold Forest Garden Village site with this national research borne in mind, but also through detailed one-to-one discussions with landowners and developers. Invariably, local evidence and site-specific assumptions will be preferable over national research; however, any assumptions should be sense-checked using Start to Finish.

A Direct Role for the Council

- 13.34 The Council should consider its role as a landowner within the BFGV site. It was suggested by nearly all interviewees (excluding the Council as landowner) that the delivery of infrastructure such as a primary school, GP surgery and local retail centre would be supported provided it was based on robust evidence.
- 13.35 However, it was suggested that this type of infrastructure would be best located to the north of the site (which is largely council-owned), to benefit from the existing population of Sutton. It is recommended that the masterplan considers the role and location of the Council's landownership with respect to contributing to the delivery of infrastructure for the site to support its development.