JULY 2026

New Forest National Park Housing Needs Assessment

Sensitivity Report

ICENI PROJECTS LIMITED ON BEHALF OF NEW FOREST NATIONAL PARK AUTHORITY

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APPENDIX 1 - ENGLISH NATIONAL PARKS AND BROADS – HOUSING PRINCIPLES

EXECUTIVE SUMMARY

1.

1.1 This report considers the implications of the Standard Method for New Forest National Park. It considers alternative scenarios based on population change and economic activity – this is to support the ongoing review of the New Forest National Park Local Plan.

1.2 The analysis recognises that the Standard Method does not apply to National Parks, but an analysis of this has been included as a starting point.

1.3 This assessment of housing needs is 'policy off' – in that it does not take account of any environmental or other constraints. These matters will be considered when setting the housing 'requirement' (provision) figure through the Local Plan.

1.4 The Local Plan will also take account of the legal duty established through Section 245 of the Levelling Up & Regeneration Act 2023 to seek to further the statutory purposes of the National Park, which are:

1) To conserve and enhance the natural beauty, wildlife and cultural heritage of the area.

2) To promote opportunities for the understanding and enjoyment of the special qualities of the National Park by the public.

1.5 The report reflects the National Planning Policy Framework (December 2024) and revised Planning Practice Guidance, ensuring that the evidence base aligns with current policy requirements and best practice. The draft New Forest National Park Local Plan is due to be examined against the 2024 version of the Framework.

1.6 Following the stages of analysis for the Standard Method, it is estimated that the housing need for the National Park would be for 406 dwellings per annum (although alternative assumptions could have this as low as 257 dpa), which is around fourteen times the average level of delivery seen over the past six years and could be considered undeliverable given the purposes of the Park.

1.7 As a result of the Standard Method not applying, the nine English National Park Authorities and the Broads Authority have agreed a set of principles for alternative methods to assessing need in the National Parks, which are appended to this report and have informed its methodology. This approach is enabled within Planning Practice Guidance (PPG) on 'Housing and economic needs assessment'. This report:

- Develops alternative demographics – including past demographic trends, projecting no change to the overall population and considering levels of population growth required to maintain the economically active population. These population projections are translated into household projections by accounting for household formation rates.

- Sets out the implications of the Standard Method – calculating the 'top-down' housing need for the National Park based on the standard method, it examines the resultant population growth if this level of housing need were delivered and occupied.

1.8 The demographic analysis reveals that a continuation of recent population trends would result in a population decline of around 900 people over 18 years (2025-43). This would, however, translate into a positive household growth and housing need of 34 dwellings per annum once a vacancy rate is applied.

1.9 If the population of the Park were to remain at the same level in 2043 as it is estimated to be in 2025 (around 34,400 people), then a higher housing need is derived (for around 54 dwellings per annum).

1.10 However, this is based on very pessimistic fertility rates; a return to the 2018-based assumptions (as used in the Housing Needs Assessment (HNA)) and entirely possible given the long-term nature of the projections), would see a zero-population growth scenario requiring around 36 dpa.

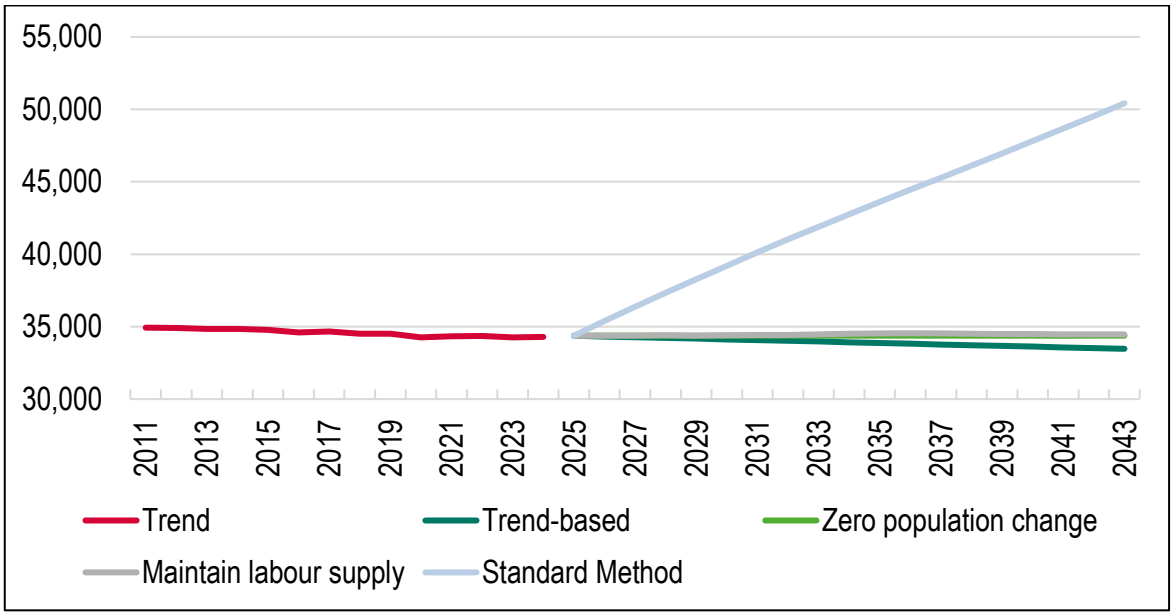
1.11 With all projections, there is an ageing of the population and some (modest) projected decline in the number of people who will be economically active. A final projection that holds the number of economically active people constant at 2025 levels (estimated at 15,400) would drive a housing need of 56 dwellings per annum.

1.12 Finally, with the delivery of 406 dwellings per annum (notionally the Standard Method, although this could also be as low as 257 dpa), a growth of 16,000 people is projected (47% increase from 2025 levels), which can be contrasted with a trend-based estimate of a reduction of 50 people per annum (900 over 18 years).

1.13 The figure below compares projected population growth under each of the scenarios developed. This fully emphasises that the delivery of the higher level of housing would drive a population growth that is entirely out of kilter with past trends seen back to at least 2011.

1.14 That said, for zero population growth and maintaining the economically active population, there would be a more positive population change when compared with past trends.

Figure 1.1: Past trends and projected population – New Forest National Park



Source: ONS and Iceni analysis

1.15 Our analysis suggests that delivery of between 36 and 56 dwellings per annum would be a reasonable target and would exceed recent demographic trends and stabilise population growth at the bottom end and maintain a local labour supply at the top end.

1.16 The bottom end of this range is close to the current adopted Local Plan (2019) figure of 40 dwellings per annum while the upper end of the range would maintain the economically active population and encompass the need resulting from reduced fertility assumptions (from 2022-based ONS projections).

1.17 Provision at this level would support the duty of the National Park Authority, in carrying out its statutory purposes, to seek to foster the economic and social well-being of its local communities.

INTRODUCTION

Background

2. 2.1 The New Forest National Park Authority (NFNPA) is in the process of reviewing the New Forest National Park Local Plan, which was adopted in 2019. The Local Plan sets out the overarching planning policies for the New Forest National Park (NFNP).

2.2 To form part of the supporting evidence base feeding into the Local Plan Review, the NFNPA commissioned Iceni Projects and Justin Gardner Consulting to undertake this supplementary study examining the need for housing within the National Park.

2.3 This is supplementary to the work set out in the New Forest District and National Park Housing Needs Assessment (HNA) published in October 2025[1], which is a more detailed assessment, exploring the need for affordable housing and other tenures.

2.4 The PPG in relation to Housing and Economic Development Needs[2] is clear that the standard method should not necessarily be applied to National Parks. The updated PPG (Paragraph: 014 Reference ID: 2a-014-20241212) also provides guidance on assessing housing need for local planning authorities, such as National Parks, whose boundaries do not align with local authority boundaries, or where data is unavailable. It states:

"Such authorities may continue to identify a housing need figure using a method determined locally. In doing so, authorities should take into consideration the best available evidence on the amount of existing housing stock within their planning authority boundary, local house prices, earnings and housing affordability. In the absence of other robust affordability data, authorities should consider the implications of using the median workplace-based affordability ratio for the relevant wider local authority area(s)…"

[1] https://www.newforestnpa.gov.uk/document/new-forest-housing-needs-assessment/
[2] https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments

2.5 The guidance therefore suggests that there is scope for National Park Authorities to deviate from the framework of the standard method, i.e. they still need to consider using housing stock and affordability considerations, but that other evidence and sources may also be taken into consideration.

2.6 This is an approach several English National Park authorities have taken and it has recently been tested at the examination of the draft Yorkshire Dales National Park Local Plan – the Inspector's Report for which was published in June 2026 (see paragraph 2.38 onwards).

English National Parks and Broads – Housing Principles

2.7 In October 2025, the English National Park and Norfolk Broads Authorities published what equated to a memorandum of understanding on an agreed set out principles for housing delivery within the nationally protected landscapes. This "Housing Principles" document is set out in full in Appendix A1.

2.8 Principles 2 and 3 relate to housing need and the standard method and alternative approaches to housing need, respectively. Principle 2 recognises the Standard Method as the government's approach, but notes that "stock-based methodologies will exaggerate housing need when compared to population-based methodologies" due to the high volume of vacant and second homes.

2.9 It also added that in National Parks "affordability-based methodologies will significantly exaggerate housing need when compared to population-based methodologies" due to the high demand and low supply inflating affordability ratios.

2.10 Principle three states that in establishing a local plan for housing need in the National Park context, population, housing stock, affordability and community services must be taken into account. It also adds that "We cannot build homes at the volume that would be required to impact affordability without irreparable damage to the very purpose of designation".

2.11 It then goes on to note that National Park authorities and the Broads authority will plan for a prosperous rural economy and the homes that are needed to support this,

and that a sufficient range of homes can be provided to address the local needs of present and future generations.

2.12 The statement also notes that other evidence in relation to overall need may include: local affordable housing need; population and household projections (including dwelling-led scenarios); housing stock and its actual use, availability and affordability; and economic and social well-being.

New Forest Housing Needs Assessment (HNA)

2.13 Chapter 9 of the New Forest HNA addressed housing need for the district and the Plan Area. However, it was keen to stress "this does not mean the difference between the overall district need and the District Plan Area need (257 dpa) should be met in the National Park"

2.14 The assessment also added that the National Park extends beyond the district into small areas of southern Test Valley and Wiltshire and that those areas would generate a need of "20 units in total based on total households in National Park minus the sub-areas and New Forest District affordability ratio."

2.15 It should however be noted that while we have calculated a figure for those parts of the National Park in Wiltshire and particularly Test Valley, the PPG (Paragraph: 014 Reference ID: 2a-014-20241212) states that:

"For local authorities whose boundaries cross National Parks or Broads Authority areas, the proportion of the local authority area that falls within and outside the National Park or Broads Authority area should also be considered – for example where only a minimal proportion of the existing housing stock of a local authority falls within the National Park or Broads Authority area it may be appropriate to continue to use the local housing need figure derived by the standard method for the local authority area."

2.16 Given the relatively small number of homes in these areas, the PPG therefore allows this component of the National Park's need to be met outside of the National Park and within the host local authorities.

2.17 The remainder of the analysis in the HNA for the National Park was based on the adopted local plan requirement of 40 dwellings per annum. This was also seen to broadly reflect capacity within a nationally protected landscape with such high proportion of internationally designated habitats.

2.18 Table 9.23 of the HNA showed the outcome of a projection linked to the delivery of 40 dwellings per annum in the National Park in the 2023 to 2043 period. This analysis suggested the overall population would remain broadly stable, with continued ageing. This projection took key data (such as fertility and mortality rates) from the 2018-based ONS subnational population projections (SNPP).

Table 2.1 **Projected change in population by broad age group (2023-43) – New Forest National Park – delivery of 40 dpa**

	2023	2043	Change	% change
Under 16	4,166	3,599	-567	-13.6%
16-64	17,616	15,675	-1,940	-11.0%
65+	11,353	13,925	2,572	22.7%
TOTAL	33,135	33,199	64	0.2%

Source: Table 9.23 of Housing Needs Assessment

2.19 As a first step we have taken the projections developed in the HNA and remodelled a scenario where population growth over the period is equal to zero (rather than the modest increase shown above). This suggests a slightly lower housing need for 36 dwellings per annum.

Purpose

2.20 The purpose of this supplementary document is to provide an alternative housing need calculation to the standard method based on trend-based population projections for the National Park. These are then translated into household projections by accounting for household formation rates.

2.21 A secondary output of the work is to seek a better understanding of the implications of the Standard Method. Specifically, we examine the resultant population growth if

the calculated level of housing need were delivered and occupied. Specifically, this report:

1) **Develops alternative demographics** – including those based on past population growth trends, maintaining population levels and the level of growth needed to maintain the economically active population. These population projections are translated into household projections by taking account of household formation rates.

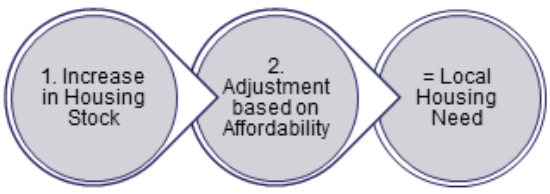
2) **Implications of the Standard Method** – Drawing on the analysis in the report below, which calculates the 'top-down' housing need for the National Park based on the standard method, we examine the resultant population growth if this level of housing need were delivered and occupied.

Standard Method

2.22 National park authorities do not receive a national Standard Method housing need figure, a fact acknowledged within national planning policy and guidance. Although not a requirement for National Parks, the NPPF specifies that the Standard Method should be used to calculate the local housing need, and that plans should aim to provide a sufficient supply of housing to meet this need where this is consistent with achieving sustainable development.

2.23 The two-step standard method for calculating housing need is defined and set out by the Government in Planning Practice Guidance (see illustration below). Later in this section, projections have been developed to consider the demographic implications of housing delivery in line with this number.

Table 2.2 **Overview of the Standard Method for calculating local housing need**



2.24 Step One seeks to grow the baseline level of housing by 0.8% per year. This is typically based on MHCLG Live Table 125. However, that does not cover National Parks, as while they are ‘local planning authorities’ they are not ‘local authorities’ and the Government’s data is only published for the latter.

2.25 We have therefore modelled the housing stock using the dwelling count from the 2021 census for those Output Areas whose population-weighted centroid falls within the New Forest National Park (including those in Wiltshire and Test Valley). This is then increased by the known dwelling completions data from 2021 to 2025.

2.26 In total, this approach calculates a dwelling stock of 15,605, which includes completions of 146 dwellings since 2021. If we were to take 0.8% of this figure, then the Step 1 housing need figure would be 125 dwellings per annum. While this is not an exact figure, it is, in our opinion, the best approach based on readily available data.

2.27 Step two is an affordability uplift which uses an average of the median workplace-based affordability ratio results over the last five years according to the formula below. However, this data is not published for National Parks.

2.28 We have therefore calculated the ratio based on the ONS-published median price paid by the national park for the year ending September 2025. This gives a median house price of £620,000. We have also modelled the data for the same period using price-paid data, which gives a slightly higher figure of £640,000. However, the latter approach is likely to pick up some sales in postcodes which span the National Park boundary and is therefore less accurate.

2.29 To get to an affordability ratio, this is then divided by the median gross annual earnings of full-time workers within the New Forest District. While this does not reflect employees in the Wiltshire and Test Valley parts of the National Park, it will capture the majority of those working in the National Park. In any case, the median workplace earnings for New Forest district are £36,792, which sits between the Wiltshire figure of £36,370 and the Test Valley figure of £38,978.

2.30 The New Forest District figure also picks up many workers who work in the district outside of the National Park, however, in correspondence with ONS they stated that *"Our own informal analysis…show that incomes vary less between national parks and neighbouring areas than house prices do, so we invite users to consider using the earnings for local authority areas against the house prices for national parks that we'll publish as a proxy for national park affordability."*

2.31 By the median house price figure and the median earnings figure, an affordability ratio of 16.85 is calculated. This is then used in the adjustment factor calculation set out below to get to an uplift of 325%,

$$\textbf{Adjustment Factor} = \frac{\textbf{Affordability Ratio} - 5}{5} \times 0.95 + 1$$

2.32 As a result of these two figures, the approximated Standard Method for the National Park shows a housing need of 406 dpa. How this figure is derived is set out in the table below.

Table 2.3 **Standard Method housing need calculation, New Forest National Park**

	New Forest National Park
Estimated Dwelling Stock 2021	15,459
Completions 2021-25	146
Dwelling Stock 2025	15,605
0.8% of Stock (Step 1)	125
Affordability Ratio	16.85
Affordability Uplift	325%
Housing Need	406

Source: Iceni analysis

2.33 This figure differs from the 257 dpa figure in the October 2025 New Forest HNA in several ways. Firstly, the 257 dpa figure was calculated as the difference between the district- and plan-area standard-method figures. As such, it did not pick up parts of the National Park in Wiltshire and Test Valley, whereas the above figure does.

2.34 Secondly, the 257 dpa figure is derived from applying the district affordability ratio for the District and Plan Area. The above calculation uses a bespoke affordability ratio based on known higher prices within the National Park.

2.35 It is this bespoke affordability ratio which is the main driver of the difference, as the National Park housing stock figure is only slightly higher (15,459 vs 14,308), whereas the uplift was 325% rather than 224%.

2.36 If we were to apply the District affordability ratio to the National Park (including those areas in Wiltshire and Test Valley), then the housing need would be 281 dwellings per annum.

2.37 Similarly, if we were to apply the National Park affordability ratio to just those parts in the New Forest District area of the National Park (given Paragraph 14 of the PPG) then the housing need would be 370 dpa.

2.38 However, these figures are all largely academic given the ability for National Parks to diverge from the Standard Method as set out in the PPG and agreed upon by the National Park authorities themselves.

2.39 The use of an alternative approach in a National Park has also recently been supported by the Planning Inspectorate through its “Report on the Examination of the Yorkshire Dales National Park Local Plan 2025-40” published in June 2026.

2.40 In that report, the Inspector stated that the Strategic Housing Market Assessment “credibly concludes that this level of new housing provision (50 dpa) would be likely to assist in reversing the projected decline in population in the National Park, resulting from out migration and a low birth rate in the period 2001 to 2021. Moreover, by enabling the delivery of a significant number of affordable homes, this target would be likely to attract and retain younger households, thereby helping to slow the trend towards a disproportionately aged population in the Park.”

2.41 The Inspector added that “although a standard method housing need figure has not been published for the National Park, an estimate of this figure of 175 dpa has been calculated. In accordance with the PPG this is an appropriate consideration in

determining the housing need figure for the Park" adding that "there is an identified annual need for around 157 affordable homes".

2.42 However, the Inspector concluded that "it would not be feasible to deliver an average of 175 new dwellings a year without significantly compromising the conservation and enhancement of the Park's landscape and scenic beauty, contrary to the 1949 Act. Furthermore, I conclude that such a level of new housing development would not be limited in scale and extent as required by the NPPF. On this basis the 50 dpa target figure for new housing is justified"

2.43 Finally, the inspector noted that it "is necessary to make clear in policy CP3 that the 50 dwellings per year target is a minimum figure. However, given the fundamental importance of ensuring that great weight is given to conserving and enhancing the Park's landscape and scenic beauty and the threat to that which inappropriate housing development could cause, it would not be appropriate to set the plan's formal housing target figure higher than 50 dwellings per year. Moreover, for the plan to be justified, it is necessary for (local plan policy) **MM2** to make clear in the supporting text that the minimum housing target figure is not an unending requirement and that policies throughout the plan guard against a level of housing growth which would significantly conflict with National Park purposes."

ALTERNATIVE HOUSING NEED AND DEMOGRAPHICS

Introduction

3. 3.1 This section looks at up-to-date information about demographics (population/age structure) and then develops a series of projections based on different scenarios. For clarity, four scenarios have been developed:

- Based on past population change trends;
- Based on maintaining a stable population size;
- Based on maintaining the economically active population; and
- Based indicatively on the estimated Standard Method for the Park (406 dwellings per annum – the upper figure of the range identified)

3.2 The projections have been developed for the period 2025 - 2043, which is up to the end of the plan period for the draft Local Plan. It should be noted that the HNA looked at a slightly different period in its analysis (2023-43), but with the same end date.

3.3 A key difference between the analysis below and that in the HNA is use of a more up-to-date set of projections from ONS – 2022-based subnational population projections (SNPP). The latest projections are noteworthy for modelling much lower fertility rates than the 2018-based projections used in the HNA.

Background Demographic Data

3.4 ONS publishes population estimates for small areas, including National Parks, with the last being updated in November 2025, but showing the population as of mid-2024. The table below shows the estimated population of the National Park from 2011 to 2024.

3.5 This shows the population as estimated to be 34,931 in 2011, falling slightly to 34,296 in 2024, a decrease of 635 people or 1.8%. The table also shows that there are some years when the population of the National Park is estimated to have increased, although generally year-on-year changes are quite modest.

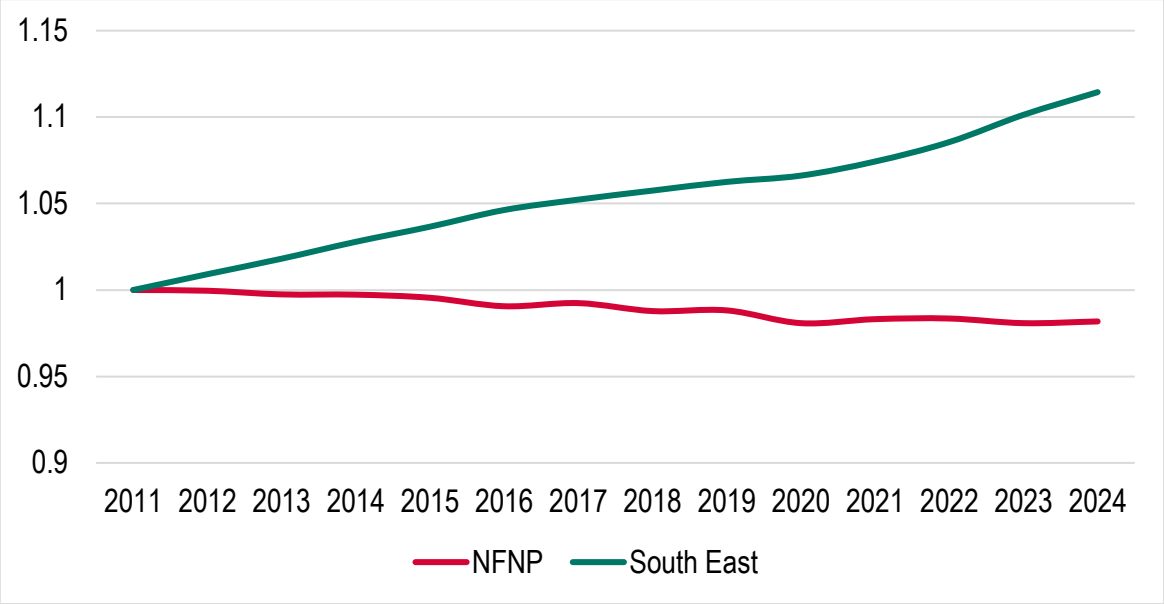
Table 3.1 **Estimated population of New Forest National Park (2011-24)**

Year	Population	Change from the previous year	Change from 2011
2011	34,931		
2012	34,916	0.0%	0.0%
2013	34,842	-0.2%	-0.3%
2014	34,837	0.0%	-0.3%
2015	34,774	-0.2%	-0.4%
2016	34,603	-0.5%	-0.9%
2017	34,666	0.2%	-0.8%
2018	34,505	-0.5%	-1.2%
2019	34,519	0.0%	-1.2%
2020	34,261	-0.7%	-1.9%
2021	34,342	0.2%	-1.7%
2022	34,355	0.0%	-1.6%
2023	34,261	-0.3%	-1.9%
2024	34,296	0.1%	-1.8%

Source: ONS

3.6 The figure below indexes this data (with 2011=1) and compares it with the South East region. This indicates significantly lower growth in the National Park compared to regional trends, over the 2011-24 period, the population of the South East increased by 11.4%, compared with the 1.8% decline in the Park.

Figure 3.1: Indexed population change since 2011 – New Forest National Park and South East



Source: ONS

3.7 The table below shows changes in the total population when looking at data for the past 5- and 10-year periods (2019-24 and 2014-24, respectively). This shows an average population decline of just under 50 people per annum over the past 5 years, rising to just over 50 per annum over the longer term.

Table 3.2 **Estimated population change over the past 5- and 10-year periods (New Forest National Park)**

	Start population	Population (2024)	Change	% change
2019-24	34,519	34,296	-223	-0.6%
2014-24	34,837	34,296	-541	-1.6%

Source: ONS

3.8 The tables below show how the age structure of the population is estimated to have changed over a 5- and 10-year period. Over both timeframes, the analysis shows an ageing population, with the number of people aged 65+ increasing notably, alongside declines in those aged 0-15 and 16-64.

Table 3.3 **Change in population by broad age group – 5 Years (2019-24) – NFNP**

	2019	2024	Change	% change
Under 16	4,612	4,269	-343	-7.4%
16-64	18,680	18,044	-636	-3.4%
65+	11,227	11,983	756	6.7%
TOTAL	34,519	34,296	-223	-0.6%

Source: ONS

Table 3.4 **Change in population by broad age group – 10 Years (2014-24) – NFNP**

	2014	2024	Change	% change
Under 16	5,003	4,269	-734	-14.7%
16-64	19,322	18,044	-1,278	-6.6%
65+	10,512	11,983	1,471	14.0%
TOTAL	34,837	34,296	-541	-1.6%

Source: ONS

Trend-based projection

3.9 The data above (specifically regarding population change) have been used to develop a trend-based population and household projection. The methodology used to assess population and household growth is based on a standard population projection approach consistent with ONS's national population and household projections.

3.10 Essentially, the method establishes the current population and how this will change in the period from 2025 to 2043, by estimating the birth rate, the death rate and the number of people that will move into or out of the area. These are the principal components of population change and are used to construct our principal trend-based population projections.

3.11 The range of assumptions necessary to develop the projections, based on data availability, means that the projections should be treated with a degree of caution, albeit that they follow a logical approach which is consistent with the national

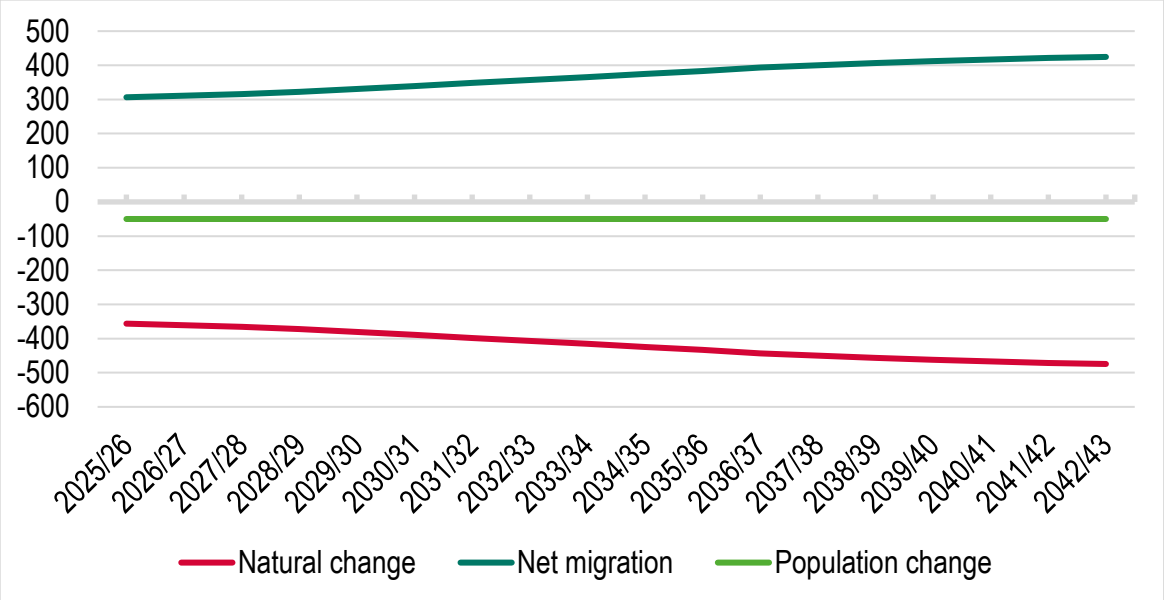
projections and thus can be considered to provide a reasonable estimate based on available information of housing need, leaving aside development constraints.

3.12 The key methodological approach is, however, to model for there to be a continued decrease of population at a rate of around 50 people per annum – consistent with the per annum decreases seen over the past 5- and 10-year periods (45 if looking over 5 years and 54 for the 2014-2024 period).

3.13 In modelling this, it is estimated there would be a negative natural change (i.e. more deaths than births) and a positive level of net migration. The figure below shows estimated natural change and net migration for the core projection period.

3.14 Over the 2024-44 period, natural change is projected to fall from a loss of around 350 people in 2024/25 down to approaching 500 people in 2042/43 – this is mainly due to the ageing population (older people having higher death rates and lower fertility rates) but also due to the latest ONS projections (2022-based) showing lower levels of fertility in all ages than has been seen historically. To offset a population decline of 50 people per annum, net migration is estimated to be around 300 at the start of the period, rising to over 400 by 2042/43.

Figure 3.2: Components of Projected Population Change (2025/26-2042/43)



Source: Iceni Projects, based on ONS data

3.15 With the projected population change, there is also projected to be a further ageing of the population, as shown in the table below. Over the 2025-43 period, a further population decrease of 900 people is projected, including an increase in the population aged 65 and over of around 2,200. Therefore, population losses are seen in both the 16-64 and 16 age groups, with the population of children experiencing a particularly sharp decline (24%).

Table 3.5 **Projected Population change by broad age group – NFNP (2025-2043) – trend-based**

	2025	2043	Change	% Change
Under 16	4,202	3,183	-1,019	-24.3%
16-64	18,003	15,937	-2,066	-11.5%
65+	12,167	14,352	2,185	18.0%
Total	34,372	33,472	-900	-2.6%

Source: Iceni Projects, based on ONS data

3.16 A second projection examines the potential change in the population structure if the population in 2043 remains at the level estimated for 2025. This is shown in the table below and again indicates an ageing population and reductions in the Under 16 and 16-64 age groups; however, the reductions in these groups are lower than projected under the past trend-based method.

Table 3.6 **Projected Population change by broad age group – NFNP (2025-2043) – zero population change**

	2025	2043	Change	% Change
Under 16	4,202	3,322	-880	-20.9%
16-64	18,003	16,492	-1,511	-8.4%
65+	12,167	14,557	2,390	19.6%
Total	34,372	34,372	0	0.0%

Source: Iceni Projects, based on ONS data

3.17 The finding that continuation of past trends or zero population growth results in a falling population aged 16-64 may have implications for the future size of the labour force. This issue is examined in more detail below.

Household growth

3.18 Arguably, if looking at a trend-based projection, then household growth would also be fixed at levels observed in the past. Census data (which is the only reliable source on household estimates) shows the number of households in the Park fell from 14,536 in 2011 to 14,393 in 2021; a drop of 143 or around 14 per annum.

3.19 This fall in population has occurred despite the National Park delivering additional homes during this period. This implies the possibility of some degree of suppressed household formation within this period (and potentially prior to 2011) either through affordability and/or a lack of available stock some of which may be taken up by increasing number of homes being used for short-term lets.

3.20 Therefore, in the modelling, data has been taken from the 2021 Census about household representative rates (HRRs) and adjusted to specific local data around household estimates by age. In projecting forward, the rates calculated have been held constant (where in reality it is likely that the trend is downward (i.e. fewer (particularly younger) households forming).

3.21 The tables below show estimated population growth using these HRRs. It shows an estimated increase of around 600 households over 18 years (at a rate of 33 per annum) under the trend-based projection, rising to 52 per annum under zero population change. In both cases, all this increase is in age groups aged 65 and over.

Table 3.7 **Projected change in households – by age – NFNP – trend-based**

	House-holds 2025	House-holds 2043	Change in households	% change	Per annum
Under 25	72	59	-13	-17.4%	-1
25-34	597	564	-33	-5.6%	-2
35-49	2,227	2,141	-86	-3.9%	-5
50-64	4,701	4,039	-662	-14.1%	-37
65+	7,030	8,418	1,388	19.7%	77
TOTAL	14,627	15,221	594	4.1%	33

Source: Iceni analysis

Table 3.8 **Projected change in households – by age – NFNP – zero population change**

	House-holds 2025	House-holds 2043	Change in households	% change	Per annum
Under 25	72	62	-10	-13.6%	-1
25-34	597	600	3	0.5%	0
35-49	2,227	2,238	11	0.5%	1
50-64	4,701	4,128	-573	-12.2%	-32
65+	7,030	8,537	1,508	21.4%	84
TOTAL	14,627	15,566	939	6.4%	52

Source: Iceni analysis

3.22 Because the ageing population is the largest driver of additional households, it may well impact the type and size of homes being delivered. Although not examined in detail, such a trend typically results in a greater need for specialist accommodation and smaller homes to support downsizing.

3.23 Because of the need to ensure a level of vacancy within the existing stock, household growth is often translated into a need for dwellings by applying a vacancy rate. Typically, this rate is in the region of 3% and, when applied to projected household growth, would result in a housing need of 34-54 dwellings per annum.

3.24 It can be noted, when compared with the HNA, that these figures are higher – in the HNA, a projection linked to the delivery of 40 dwellings per annum showed fairly balanced population numbers, but the analysis above now puts this at a slightly higher range of up to 54 dwellings per annum. An update to the HNA (see section 2 above) suggested a need for 36 dwellings per annum to maintain a stable population size.

3.25 This difference (between 36 and 54) looks to be driven by the use of more up-to-date (2022-based) ONS projections within the modelling. These projections have notably lower fertility rates and hence show a greater projected reduction in the number of children.

3.26 When compensated by more adults (to get a balanced population number), the number of households increases; as with more adults, the number of 'household heads' would increase.

3.27 Arguably, the reduced fertility rates in the 2022-based SNPP are very pessimistic and result in a higher housing need set against zero population growth. If fertility rates return to the 2018-based assumptions, which is entirely possible given the long-term nature of the projections, then the zero-population growth scenario would require around 36 dpa.

Relationship Between Housing and Economic Growth

3.28 The analysis to follow considers the relationship between housing and economic growth, seeking to understand what changes to the local labour supply might be expected to happen based on population and age structure changes.

3.29 While there is nothing explicit within the PPG to suggest a need to align economic and housing growth, this is a typical approach undertaken by local authorities seeking to align their housing and economic policies and ensure there are no barriers to economic growth. National Park Authorities, in carrying out their statutory purposes, have a duty to seek to foster the economic and social well-being of their local communities.

3.30 It should also be noted that National Park authorities are not responsible for economic development and Section 11A of the National Parks & Access to the Countryside Act 1949 (as amended by Section 62 of the Environment Act 1995) confirms that National Park authorities:

"…shall seek to foster the economic and social well-being of local communities within the National Park, but without incurring significant expenditure in doing so, and shall for that purpose co-operate with local authorities and public bodies whose functions include the promotion of economic or social development within the area of the National Park."

3.31 It is important to recognise that the 'socio-economic duty' places on National Park authorities is not a third purpose, and the extant National Park Circular (2010) confirms that National Park authorities should continue to focus on the delivery of their two statutory purposes. This exercise is therefore somewhat academic but interesting, nevertheless.

3.32 The approach taken in this report is to derive a series of age-specific economic activity rates and use these to estimate how many people in the population will be economically active as projections develop.

3.33 This is a fairly typical approach, with the data drawn in this instance aligned with the Office for Budget Responsibility's (OBR's) March 2025 Economic and Fiscal Outlook.

3.34 The OBR data show changes in economic participation by age over time. The forecast incremental changes have been applied to the 2021 Census data on economic participation (by age) to project future changes for the area.

3.35 The OBR forecasting approach uses a cohort-based model to provide an initial baseline for how population participation rates could evolve over time and data on historical changes to economic participation for men and women from the ONS Labour Force Survey.

3.36 It additionally takes account of changes in State Pension Age, which may result in the timings of workforce exits as people leave the labour force, changing relative to historical behaviour; but models that the impacts of this will be greater for those cohorts which are further from retirement as the changes are implemented.

3.37 The result is a forecast for the participation rate which sits midway between assuming no state pension age changes and the full impact of state pension age changes on participation.[3] OBR then applies several sense checks when drawing conclusions, including considering trends in inactivity (such as long-term

[3] See https://articles.obr.uk/forecasting-participation-trends-the-cohort-model/index.html

sickness), which means, for instance, that its implied changes to participation rates for those aged 50-64 remain below its pre-pandemic forecasts. The figures also forecast higher numbers of women in the workforce linked to falling birth rates and policy measures to support childcare provision.

3.38 The table below shows the resultant assumptions on changes to economic participation by age for the National Park area. The analysis shows that the main changes to economic activity rates are projected to be in the 65-69 age group – this will, to a considerable degree, link to changes to pensionable age, as well as general trends in the number of older people working for longer (which in itself is linked to general reductions in pension provision).

Table 3.9 **Projected changes to economic activity rates (2025 and 2042) – NFNP**

	2025	2043	Change
16-19	44.7%	44.7%	0.0%
20-24	82.3%	80.8%	-1.5%
25-29	85.7%	84.6%	-1.1%
30-34	88.1%	86.4%	-1.7%
35-39	87.0%	86.1%	-0.9%
40-44	87.4%	88.2%	0.7%
45-49	89.2%	89.8%	0.6%
50-54	85.1%	87.8%	2.6%
55-59	76.9%	80.5%	3.6%
60-64	62.2%	67.7%	5.4%
65-69	30.7%	42.6%	11.9%
70-74	11.7%	18.3%	6.6%
75+	3.9%	4.9%	0.9%

Source: Based on OBR and Census (2021) data

3.39 Working through an analysis of age and sex specific economic activity rates, it is possible to estimate the overall change in the number of economically active people in the National Park – this is set out in the table below.

3.40 The analysis shows that the projection linked to the trend-based projection (-50 people per annum) decreases the economically active population by 541 people –

a 3.5% decrease; whilst with zero population change, a more modest decline is projected (a loss of 50 people (0.3%).

Table 3.10 **Estimated change to the economically active population (2024-44) – NFNP**

	Economically active (2025)	Economically active (2043)	Total change in the economically active	% change
Trend-based	15,362	14,821	-541	-3.5%
Zero pop. change	15,362	15,311	-50	-0.3%

Source: Iceni analysis

3.41 A final analysis is to consider the level of household growth that might be projected to maintain a constant economically active population – i.e. the economically active population is the same at the start of the projection period as at the end – this zero change to labour supply has been modelled for the 2025-43 period to be consistent with previous demographic projections and is presented below.

3.42 The table below shows that maintaining the economically active population at 2025 levels by 2043 would require household growth of around 961 over the 18 years – this is 54 per annum and is very similar to the figure calculated with zero population growth.

Table 3.11 **Projected change in households – by age – zero change to economically active population**

	House-holds 2025	House-holds 2043	Change in households	% change	Per annum
Under 25	72	62	-10	-13.6%	-1
25-34	597	603	6	1.0%	0
35-49	2,227	2,252	25	1.1%	1
50-64	4,701	4,137	-564	-12.0%	-31
65+	7,030	8,551	1,521	21.6%	85
TOTAL	14,627	15,605	978	6.7%	54

Source: Iceni analysis

3.43 Again, if we were to apply a 3% vacancy rate to the household growth, it would result in a housing need of 56 dwellings per annum.

Standard Method

3.44 The final projection developed examines the implications on population growth of delivery in line with the 'top-down' housing need calculation, which apportions the Standard Method. This was set out in the previous section and points to a 'need' for 406 dwellings per annum at the upper end of the range identified. This is a 'policy off' calculation that does not factor in capacity or national policy and legislation relating to National Parks.

3.45 The method used is to take the base demographic model and then flex the levels of migration so there is a sufficient population for the required number of homes to be filled (minus a standard 3% allowance for vacant homes to allow for movement in the market).

3.46 The table below shows that the 'top down' housing need figure would result in projected growth of 16,000 people within the National Park by 2043 (47%), which can be contrasted with a trend-based estimate of a reduction of 50 people per annum (900 over 18 years).

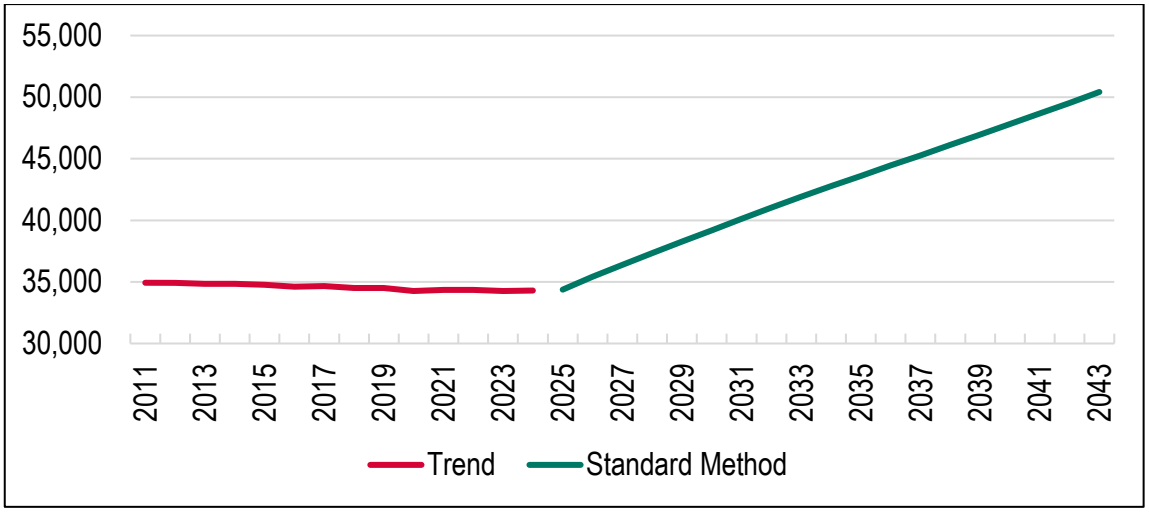
Table 3.12 **Projected population growth under estimated Standard Method – NFNP (2025-43)**

	Population 2025	Population 2043	Change	% change
406 dpa	34,372	50,420	16,048	46.7%

Source: Iceni analysis

3.47 The projected growth for this scenario is shown on the chart below. This fully emphasises that the delivery of this higher level of housing would drive a population growth that is entirely out of kilter with past trends seen back to at least 2011.

Figure 4.1: Past trends and projected population – NFNP



Source: ONS and Iceni analysis

3.48 Compared with the trend-based position, this projection would also show a notably different age structure. Whilst there would continue to be growth in the number of older people, there would also be notable increases in younger age groups (both children and those aged 16-64).

3.49 This finding arises as the modelling increases net migration, and younger people are typically more likely to be migrants (including people of working age and their associated children). Indeed, the main growth is projected to be in the 16-64 age group.

3.50 This analysis illustrates the scale of the challenge associated with the Standard Method if it were ever to be implemented in the New Forest National Park. Although, there are various planning policy reasons why this level of growth is not deliverable.

Table 3.13 **Projected population change 2025 to 2043 by broad age bands – 406 dpa – NFNP**

	2025	2043	Change in population	% change from 2025
Under 16	4,202	5,836	1,634	38.9%
16-64	18,003	26,373	8,370	46.5%
65 and over	12,167	18,211	6,044	49.7%
Total	34,372	50,420	16,048	46.7%

Source: Iceni analysis

A1. ENGLISH NATIONAL PARKS AND BROADS – HOUSING PRINCIPLES

Principle One: National Parks and The Broads Purposes.

A1.1 National Parks and The Broads are treasured, beautiful landscapes, rich in cultural heritage and wildlife for all to enjoy. They were born of a post-war consensus that holds true today – that our countryside is much loved and needs conservation and enhancement. Purposes established at that time remain hugely relevant for the country's new challenges: our health and well-being, clean air and water, and the nature and climate that all our futures depend on.

- The *Land Use Framework* consultation documents set out that protected landscapes have a role in delivering objectives for nature, water, rural housing and climate.[4]
- Protected landscapes are key in the delivery of the 10 *Environmental Improvement Plan* goals.[5]
- The Government recognises that National Parks are not suitable locations for unrestricted housing and does not therefore provide general housing targets for them. The expectation is that new housing will be focused on meeting affordable housing requirements, supporting local employment opportunities and key services.[6] This is in line with our socio-economic duty and the need to ensure a vibrant local community.
- The National Planning Policy Framework says that the landscape and scenic beauty in National Parks and The Broads have the highest status of protection, major development should not take place except in exceptional circumstances and the scale and extent of development should also be limited.[7]

Principle Two: Housing Need Standard Method

A1.2 The standard method is a starting point for assessing housing need and plan-making.

[4] Land Use Consultation.pdf p24
[5] Environmental Improvement Plan
[6] National Parks Circular para 67 and paras 76-79
[7] National Planning Policy Framework - GOV.UK

- Housing need in a protected area is part of the overall housing need of the relevant constituent authority.
- We recognise that under the Government's standard methodology housing need inside and outside the boundary of nationally protected landscapes is broadly based on the proportion of stock. For context, only 0.7% of England's dwelling stock is within National Parks.[8]
- In protected areas, stock-based methodologies will exaggerate housing need when compared to population-based methodologies. This is because in protected areas, compared to the national average, significantly more homes are under-occupied or used as holiday or second homes. Evidence also shows a tendency toward smaller households and a higher percentage of older / retirement age households. 29.5% of the population of England's National Parks is over the age of 65 compared to 18.4% nationally. The majority of households (51.2%) have two more spare bedrooms compared to England's figure of 35.6%[9]
- In protected areas, affordability-based methodologies will significantly exaggerate housing need when compared to population-based methodologies. This is because demand is high (the areas are attractive places to live and/or earn income from short-term lets) and supply (by design) is low. This combines to increase prices so that relative to local incomes, houses are less affordable.
- National policy confirms that housing need is not the housing requirement.[10] Housing need does not take into account environmental or other policy constraints.[11]

Principle Three: elements of an alternative approach to need and assessment.

A1.3 In establishing a local plan housing need and from there a subsequent provision, Authorities will set out their objectives having regard to our statutory purposes and duty. In seeking to understand housing need in a National Park/The Broads context, we will look at population, housing stock, affordability and community services.

A1.4 An understanding of development capacity is a key part of this process. We cannot build homes at the volume that would be required to impact on affordability without irreparable damage to the very purpose of designation.

[8] 2011 Census statistics for National Parks and the Broads Table KS401EW. Stock figures for 2021 are not available.
[9] ONS 2021 Census Tables TS007 and TS052.
[10] NPPG Housing and Economic Needs Assessments, paragraph 002, ID: 2a-002-202412
[11] For example flood risk, landscape, habitats, cultural heritage or other Special Qualities.

- Housing objectives will be positively framed and aligned to Authorities' socio-economic duty and the sustainable development social objective set out in the National Planning Policy Framework (paragraph 8b). We will plan for a prosperous rural economy and the homes that are needed to support this.
- Housing objectives will support strong, vibrant and healthy communities, by ensuring that a sufficient range of homes can be provided to address the local needs of present and future generations.
- Other evidence in relation to overall need may include: local affordable housing need; population and household projections (including dwelling-led scenarios); housing stock and its actual use, availability and affordability and economic and social well-being.
- Through call for sites and other detailed work[12] we will seek to understand the extent to which housing need, however derived, can be met within environmental constraints and the first purpose of a national park, in accordance with paragraph 11b of the NPPF.

Principle Four: Policy and plan-making.

A1.5 Authorities will develop positively framed policy to meet their housing provision and objectives. We will work with partners collaboratively to achieve solutions. Whether through the duty to co-operate or any subsequent arrangements, through our own mechanisms and groups, this is to deliver a sound Local Plan and supply of dwellings. We are aware of Devolution and emerging Spatial Development Strategies and will work pro-actively to contribute to such plans.

- National Park and Broads Authorities have an important role as planning authorities but are neither housing authorities nor housing providers.
- We will share evidence and develop policies which seek to maintain a steady pipeline of sites for locally needed affordable homes that is balanced with our long-term conservation outcomes, as required in the National Parks Circular and NPPF (previously cited).
- Policies and arrangements that bring forward rural exception sites delivery are particularly significant for National Parks and The Broads.

[12] For example, through holistic (not just site-based) capacity assessments that consider the potential for development through impact on landscape, cultural heritage and special qualities.

Principle Five: Delivery

A1.6 Authorities will collaborate and build partnerships to encourage best practice in delivery.

- Through our National Park Management Plans and other work, we will forge strong partnerships and working practices to get homes delivered on the ground and protected in perpetuity.
- We will collaborate on local housing strategies that align with spatial planning policies to demonstrate a broad partnership commitment. This will maximise the potential for funding, enable appropriate delivery vehicles (for example S106 agreements, Rural Providers and Community Land Trusts) and bring confidence to the development industry.
- We will also work in creative ways to deliver locally needed housing. For example with Housing Associations and Community land Trusts to purchase existing homes, estates and other large landowners to deliver bespoke local affordable housing. We may also on occasion build our own affordable homes.