



Updated Housing Mix Evidence

Final Report

Iceni Projects Limited on behalf of Leicester &
Leicestershire Local Authorities

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Executive Summary

This report provides updated evidence on housing mix and the housing needs of older people and those with disabilities across the Leicester & Leicestershire Housing Market Area. It selectively updates the 2022 Housing & Economic Needs Assessment to reflect changes to national policy, most notably the revised Standard Method introduced in December 2024, and aligns with the Updated Housing Distribution Paper (November 2025). The evidence is intended to support emerging and reviewing local plans, particularly where plans are being prepared in the context of the revised Standard Method.

Two main housing growth scenarios are considered: the revised Standard Method and a Proposed Housing Distribution that redistributes unmet housing need from Leicester City. The report considers the demographic implications of these housing provision scenarios and what this means for housing mix and specialist housing needs.

Demographic Dynamics

Demographic modelling indicates that housing delivery aligned with the proposed housing distribution would support population growth of around 204,000 people across the HMA between 2024 and 2046. Growth is expected across most age groups, but the most significant proportional increase will be among older people, with those aged 65 and over accounting for around 37% of total population growth, driven by cohort effects and increased life expectancy. Growth in the working-age population is also projected, while changes in the number of children are more modest.

Need for Different Sizes and Types of Home

Analysis of household structures, tenure and occupancy patterns is undertaken; with the report then considering the implications of demographic changes over time. Owner-occupied stock is focused more towards larger homes, while rented sectors provide smaller dwellings. There is substantial under-occupation, particularly in the owner-occupied sector, alongside pockets of overcrowding, especially within rented housing.

Across Leicestershire, the modelling suggests that housing need will continue to be strongest for 3-bedroom homes in the market sector, while affordable home ownership shows greatest demand for 2- and 3-bedroom homes. For rented affordable housing (such as social rent or affordable rented homes), there is a stronger need for 1- and 2-bedroom properties, reflecting growth in older households; but equally a need for some family-sized homes with 3 or more bedrooms to provide for families and to address overcrowding. Adjustments to account for under-occupation and overcrowding marginally alter the profile but reinforce the need for a balanced mix of homes.

The report provides authority-specific outputs and recommended housing mix to support plan-making, development management and monitoring of housing delivery. However in applying the recommendations for each authority to individual development sites, decision-makers should have regard to site specific factors such as location and local market evidence.

Older Persons and those with Disabilities

The ageing population will drive a substantial increase in demand for accessible, adaptable and specialist housing. While the area currently has a slightly younger age profile than regional and national averages,

the number of older people, particularly those aged 75 and over, is projected to rise sharply over the period to 2046. Disability prevalence is closely linked to age, and a significant proportion of households already include someone with a disability.

The assessment identifies growing needs for housing with support, housing with care (including extra-care), residential and nursing care, and wheelchair-accessible homes. Although current provision meets some needs, the modelling indicates significant future shortfalls across most categories by 2046. Requirements vary by authority, reflecting differences in population growth, tenure profiles and existing supply.

The findings support the application of accessible and wheelchair standards (M4(2) and M4(3)), alongside a proactive approach to delivering specialist accommodation that supports independence, wellbeing and effective use of the housing stock.

1. Introduction

- 1.1 This report has been prepared to provide updated evidence regarding a) the mix of homes needed and b) the housing needs of older persons and those with disabilities for the Leicester & Leicestershire Housing Market Area (HMA). It selectively updates elements of the 2022 Housing & Economic Needs Assessment (HENA).
- 1.2 The report updates the previous evidence to take account of the revised Standard Method, as set out by Government in December 2024, and the associated Updated Housing Distribution Paper (November 2025) which IcenI has prepared to reflect this.
- 1.3 The evidence in this report is therefore of particular relevance to those local plans which are being prepared in the context of the revised Standard Method. This is local plans in Blaby, Hinckley & Bosworth, North West Leicestershire and Oadby & Wigston.**

Scenarios for Housing Provision

- 1.4 The modelling of needs herein takes account of two scenarios for housing growth:
- Standard method – the current standard method figures for different authorities as at November 2025; and
 - Proposed housing distribution – based on the apportionment figures for housing set out in the November 2025 Updated Housing Distribution Paper which IcenI has prepared.

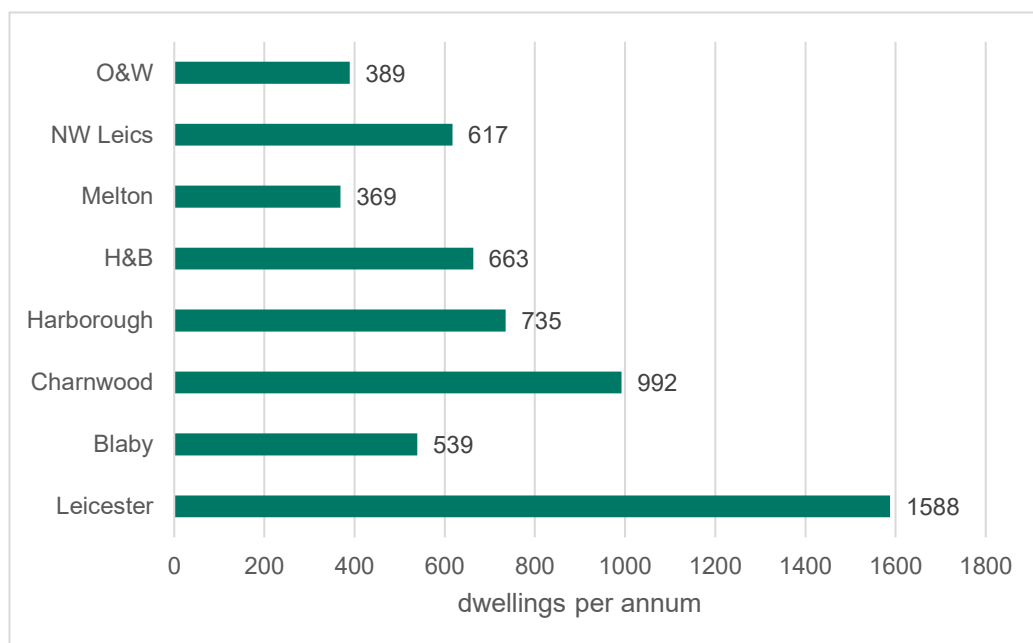
Standard Method

- 1.5 In December 2024 the Government revised the Standard Method alongside wider changes to the NPPF. The revised Standard Method is fundamentally different – and uses the current dwelling stock as a

baseline (rather than household projections), to provide greater consistency across England; with a higher affordability ratchet then applied.

1.6 This model takes the standard method figures for each local authority and applies this over the 2024-46 period. The standard method figures for individual local authorities at the time of writing are set out below.

Figure 1.1 Standard Method Local Housing Need (dpa)



Proposed Housing Distribution

1.7 This model takes account of work undertaken by the HMA local authorities and Icenl to apportion housing need across the HMA, taking account of the constrained land supply and resultant unmet need from Leicester City. It takes its lead from the Updated Housing Distribution Paper (Nov 2025). This resulted in an apportionment of housing need as set out in Table 1.1 below.

Table 1.1 Final Apportionment of Housing Need over relevant plan periods

	Plan period end point	Requirement over plan period: total dwellings	Requirement (dpa) over plan period
Blaby	2042	11,776	654
Charnwood	2046	24,935	1,133
Harborough	2046	17,528	797
H&B	2045	14,933	711
Leicester	2046	24,251	1,102
Melton	2046	8,529	388
NW Leics	2042	12,420	690
Oadby & Wigston	2042	7,002	389

2. Demographic Dynamics

2.1 A demographic model has been developed to look at the potential implications of housing delivery in line with the proposed apportionment of housing need, as set out in Table 1.1. The main analysis is based on the proposed distribution, based on applying the annualised figures to 2046, with a range of sensitivities for different housing numbers and time periods.

Projections Methodology

2.2 A dwelling-led projection is developed for each area. The modelling considers the levels of migration likely to be needed to fill homes and also the possibility of seeing higher levels of household formation in younger age groups (where there is evidence of a historical constraint in formation).

2.3 The modelling essentially has two components, firstly a population projection is prepared and then converting this into household change estimates by applying data about the communal (institutional) population and household representative rates (HRRs) – essentially the chances of someone in a particular age group also being considered as the head of household.

2.4 A base population projection is developed first. Key assumptions in the modelling are:

- Taking the 2022-based subnational population projections (SNPP) as a start point – this includes data on birth and death rates as well as migration; and
- Updating this projection to take account of mid-year population data to 2024 (looking at more recent data about births, deaths and migration).

-
- 2.5 To develop household projections, data about the communal population is taken from the 2021 Census. Consistent with ONS projections' methodology, it is assumed actual numbers are held constant for age groups ages under 75; with the proportion of the population living in communal establishments being used for 75+ age groups. This means that some growth in absolute terms in those aged 75+ living in communal establishments is modelled. For Blaby a further adjustment to this data has been made to reflect the new Fosse Way prison, with information about the age/sex structure of the additional communal population being drawn from the mid-year estimates (MYE).
- 2.6 Projections of household growth are developed taking the projections of the household population (total population minus those in communal establishments) and applying household representative rates (HRRs) to this. HRRs are calculated at the time of the Census although consideration has also been given to data in the last three Census points (2001, 2011 and 2021). For most of the County there was very little evidence of any suppression in household formation for younger households, although in Leicester our analysis does suggest a fall in HRRs in age groups up to 45.
- 2.7 The analysis therefore builds in a part-return in household representative rates for those in the 25-44 age groups towards 2001 levels. In other words, levels of households formation as shown in the 2021 Census are assumed to move halfway back to the levels recorded in the 2001 Census. As noted, this only really has any impact for Leicester, but the approach has been applied consistently across the study area.
- 2.8 The analysis below looks at how the population and household structures might change if housing delivery were to be in line with the proposed housing distribution as set out in the November 2025 Updated Housing Distribution Paper. The modelling flexes migration to and from each local authority such that there is sufficient population for this level of additional homes to be filled each year.

2.9 Within the modelling, migration assumptions have been adjusted so that across each area the increase in households matches the housing need. It is assumed that around 3% of new stock will be vacant at any time (to allow for turnover/ movement within the stock). This means for 5,864 dpa it is assumed there would be household growth of approximately 5,693 per annum. Adjustments are made to both in- and out-migration (e.g. if in-migration is increased by 1% then out-migration is reduced by 1%).

2.10 The Planning Practice Guidance (PPG) was revised in December 2024, alongside the new Standard Method, and provides some indication of why the Government sees a need to increase housing delivery¹. Paragraph 006 (Reference ID: 2a-006-20241212) states:

‘Why is an affordability adjustment applied?’

An affordability adjustment is applied as housing stock on its own is insufficient as an indicator of future housing need because:

- *housing stock represents existing patterns of housing and means that all areas contribute to meeting housing needs. The affordability adjustment directs more homes to where they are most needed.*
- *people may want to live in an area in which they do not reside currently, for example to be near to work, but be unable to find appropriate accommodation that they can afford.*

The affordability adjustment is applied in order to ensure that the standard method for assessing local housing need responds to price signals and is consistent with the policy objective of significantly boosting the supply of homes. The specific adjustment in this guidance is set at a level to ensure that

¹ <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

minimum annual housing need starts to address the affordability of homes.'

- 2.11 The previous PPG also stated that an affordability uplift is required because *'household formation is constrained to the supply of available properties – new households cannot form if there is nowhere for them to live'*.
- 2.12 Essentially, the Government considers that by providing more homes there is the opportunity for increased migration to an area to fill the homes whilst equally, one of Government's core objectives in planning for the delivery of 370,000 homes a year nationally is to improve affordability. Increased housing supply and improved affordability should provide the opportunity for additional household formation (although the scope for this in areas other than Leicester looks to be limited).

Projection Outputs

- 2.13 The analysis indicates that housing delivery in line with the proposed housing distribution would support population growth across the Housing Market Area of around 204,000 people over the 2024-46 period. Growth is projected to be particularly strong in the 16-64 age group, although the highest proportionate change is projected in the 65 and over age group (37% of the growth is projected to be in age groups 65 and over, with this group increasing by 37%). There is also projected to be a small increase in the number of children.

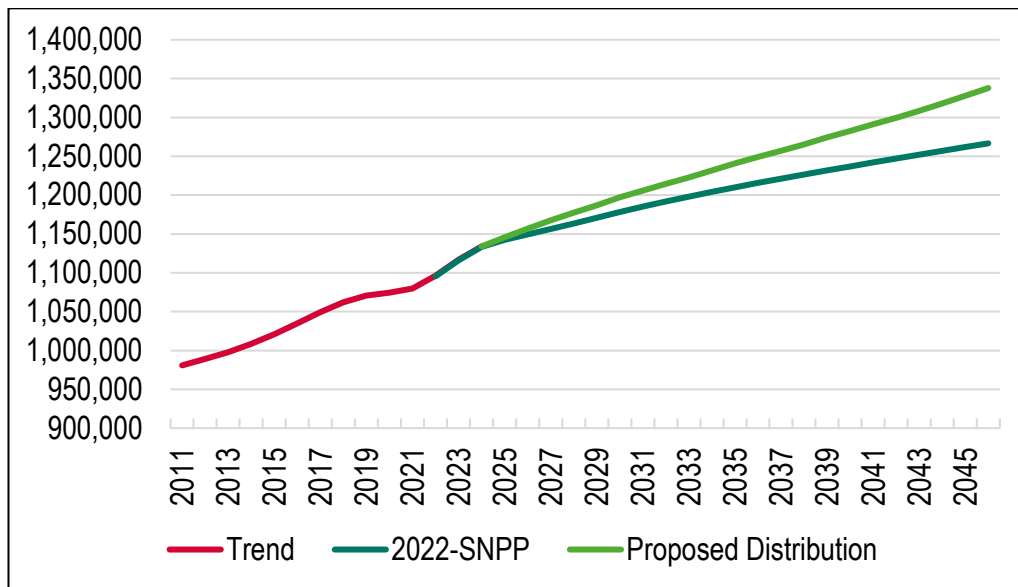
Table 2.1 Projected population change 2024 to 2046 by broad age bands – Leicester & Leicestershire

	2024	2046	Change in population	% change
Under 16	210,487	212,915	2,428	1.2%
16-64	719,462	844,943	125,481	17.4%
65 and over	203,972	280,024	76,052	37.3%
Total	1,133,921	1,337,882	203,961	18.0%

Source: IcenI analysis

- 2.14 Below are a series of charts showing past trends and projected population growth and key components of change for each projection linking to the proposed housing distribution. For comparison, data has also been provided from the 2022-based SNPP. The first figure looks at overall population growth, before considering natural change and net migration.
- 2.15 The analysis suggests the population of Leicester & Leicestershire could rise to 1,337,900 by 2046 (up from 1,133,900 in 2024) - an 18% increase, or 0.8% per annum. For comparison, between 2011 and 2024 the population increased by an average of around 1.2% per annum, with a similar figure if looking over the past 5 years. The analysis therefore suggests population growth could be slightly lower than seen in recent trends. However, the projected population change is notably higher than the latest (2022-based) ONS projections.

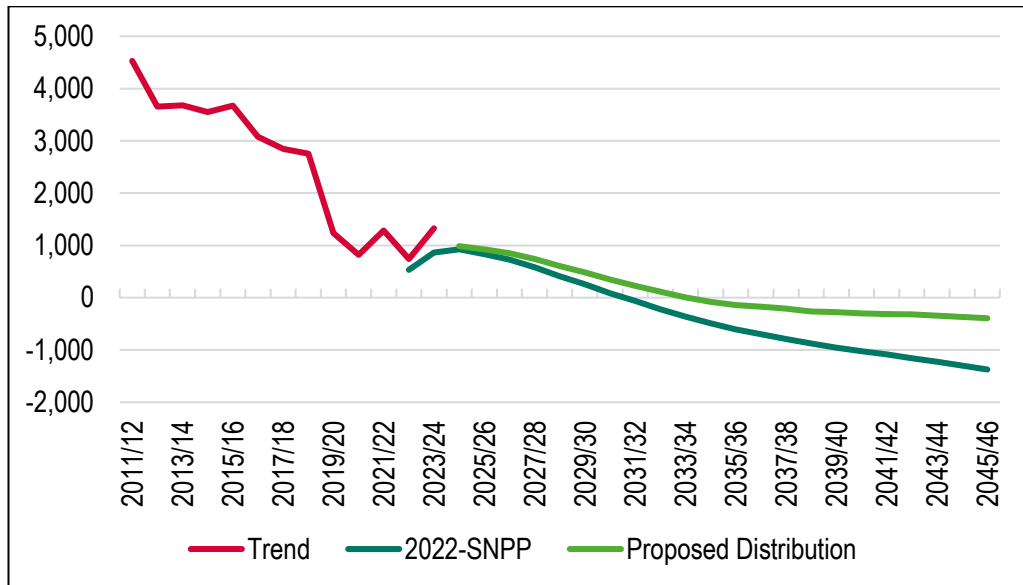
Figure 2.1 Past trends and projected population aligned to proposed housing distribution – Leicester & Leicestershire



Source: ONS and Icen analysis

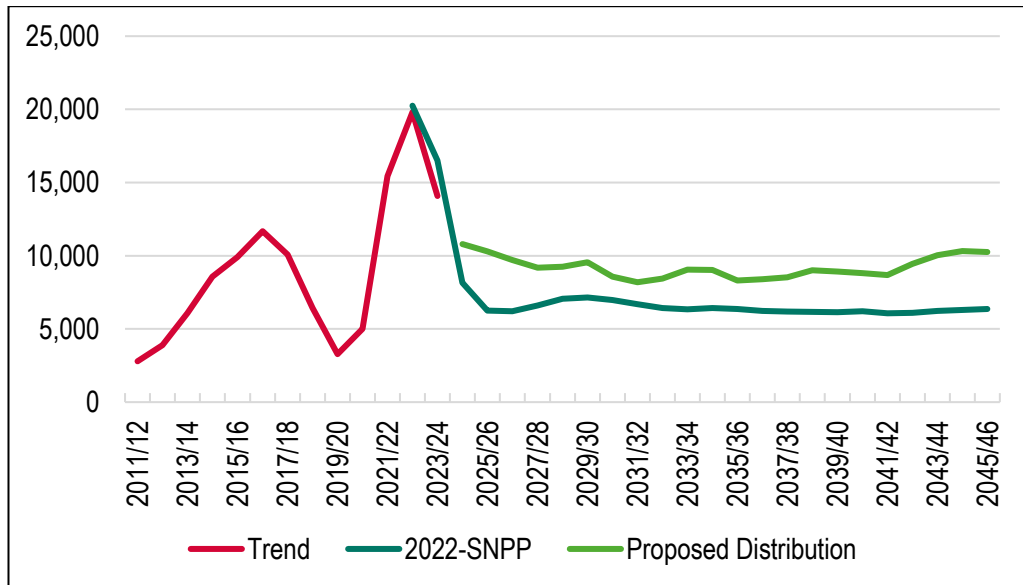
- 2.16 The figures below show projected natural change and net migration under the scenarios. Focussing on net migration, the analysis suggests that with delivery linked to the proposed housing distribution, net migration would average a net in-migration of 9,200 people per annum over the 2024-46 period – this is broadly similar to levels seen historically. Over the 2011-24 period net migration averaged around 9,000 people per annum, with a higher figure of 11,500 if looking over the past 5-years. Net migration is however projected to be higher than in the 2022-SNPP.
- 2.17 For natural change, the downward trend is projected to continue moving forward but at a slightly lesser rate.

Figure 2.2 Past trends and projected natural change aligned to proposed housing distribution – Leicester & Leicestershire



Source: ONS and Icen analysis

Figure 2.3 Past trends and projected net migration aligned to proposed housing distribution – Leicester & Leicestershire



Source: ONS and Icen analysis

Local Authority Population Projections

- 2.18 The series of tables below show projected population growth in each local authority in three broad age bands. For the purposes of comparison the tables below align with the longer 2024-2046 period. Modelling later in this report on housing mix and older persons housing needs are set out for relevant plan periods for different authorities.
- 2.19 Overall, the modelling shows a very different projected profile in Leicester when compared with all other areas (due to the impact of redistribution). For Leicester, population growth of just 3.7% (in total) is projected for the 2024-46 period compared to a range from 22.5% in Blaby, up to 32.4% in Harborough. Areas outside of Leicester also see strong growth in both 'younger' broad age groups.

Table 2.2 Projected population change 2024 to 2046 aligned to proposed housing distribution by broad age bands – Blaby

	2024	2046	Change in population	% change
Under 16	19,726	20,523	797	4.0%
16-64	66,179	81,609	15,430	23.3%
65 and over	22,260	30,338	8,078	36.3%
Total	108,165	132,469	24,304	22.5%

Source: Icen analysis

Table 2.3 Projected population change 2024 to 2046 aligned to proposed housing distribution by broad age bands – Charnwood

	2024	2046	Change in population	% change
Under 16	31,605	34,218	2,613	8.3%
16-64	120,197	149,208	29,011	24.1%
65 and over	36,583	49,921	13,338	36.5%
Total	188,385	233,347	44,962	23.9%

Source: Icen analysis

Table 2.4 Projected population change 2024 to 2046 aligned to proposed housing distribution by broad age bands – Harborough

	2024	2046	Change in population	% change
Under 16	18,247	21,911	3,664	20.1%
16-64	62,742	80,181	17,439	27.8%
65 and over	23,724	36,520	12,796	53.9%
Total	104,713	138,611	33,898	32.4%

Source: Icenis analysis

Table 2.5 Projected population change 2024 to 2046 aligned to proposed housing distribution by broad age bands – Hinckley & Bosworth

	2024	2046	Change in population	% change
Under 16	20,030	21,863	1,833	9.2%
16-64	70,031	87,788	17,757	25.4%
65 and over	26,621	35,345	8,724	32.8%
Total	116,682	144,996	28,314	24.3%

Source: Icenis analysis

Table 2.6 Projected population change 2024 to 2046 aligned to proposed housing distribution by broad age bands – Leicester

	2024	2046	Change in population	% change
Under 16	80,340	70,066	-10,274	-12.8%
16-64	261,385	272,906	11,521	4.4%
65 and over	46,623	59,884	13,261	28.4%
Total	388,348	402,855	14,507	3.7%

Source: Icenis analysis

Table 2.7 Projected population change 2024 to 2046 aligned to proposed housing distribution by broad age bands – Melton

	2024	2046	Change in population	% change
Under 16	9,164	10,250	1,086	11.8%
16-64	31,836	40,385	8,549	26.9%
65 and over	13,052	19,251	6,199	47.5%
Total	54,052	69,886	15,834	29.3%

Source: Icenis analysis

Table 2.8 Projected population change 2024 to 2046 by broad age bands – North West Leicestershire

	2024	2046	Change in population	% change
Under 16	19,677	21,088	1,411	7.2%
16-64	69,701	84,567	14,866	21.3%
65 and over	22,503	32,465	9,962	44.3%
Total	111,881	138,120	26,239	23.5%

Source: Icenis analysis

Table 2.9 Projected population change 2024 to 2046 by broad age bands – Oadby & Wigston²

	2024	2046	Change in population	% change
Under 16	11,698	12,997	1,299	11.1%
16-64	37,391	48,300	10,909	29.2%
65 and over	12,606	16,301	3,695	29.3%
Total	61,695	77,598	15,903	25.8%

Source: Icenis analysis

^{2 2} In line with the updated Housing Distribution Paper, the Standard Method figure was used for both Tables 2.9 and 2.17, therefore the projections shown in those tables are the same

Projections Linking to the Standard Method

- 2.20 As well as looking at projected population change under the proposed distribution of housing provision, a projection has been developed modelled against the Standard Method. The tables below show the same information for each local authority. The main differences is a higher level of projected population growth in Leicester and lower levels in most other authorities; albeit projected growth in the City is still below that projected for other areas (in percentage terms).
- 2.21 Overall, under the Standard Method, the population of Leicester is projected to see a 10.9% increase, compared to 3.7% with the proposed distribution – the main difference is a higher projected increase in those aged 16-64.

Table 2.10 Projected population change 2024 to 2046 by broad age bands – Blaby – Standard Method

	2024	2046	Change in population	% change
Under 16	19,726	19,164	-562	-2.8%
16-64	66,179	77,229	11,050	16.7%
65 and over	22,260	29,651	7,391	33.2%
Total	108,165	126,044	17,879	16.5%

Source: Icenis analysis

Table 2.11 Projected population change 2024 to 2046 by broad age bands – Charnwood – Standard Method

	2024	2046	Change in population	% change
Under 16	31,605	32,646	1,041	3.3%
16-64	120,197	143,600	23,403	19.5%
65 and over	36,583	49,495	12,912	35.3%
Total	188,385	225,740	37,355	19.8%

Source: Icenis analysis

Table 2.12 Projected population change 2024 to 2046 by broad age bands – Harborough – Standard Method

	2024	2046	Change in population	% change
Under 16	18,247	21,231	2,984	16.4%
16-64	62,742	77,934	15,192	24.2%
65 and over	23,724	36,063	12,339	52.0%
Total	104,713	135,228	30,515	29.1%

Source: Icenis analysis

Table 2.13 Projected population change 2024 to 2046 by broad age bands – Hinckley & Bosworth – Standard Method

	2024	2046	Change in population	% change
Under 16	20,030	21,356	1,326	6.6%
16-64	70,031	86,057	16,026	22.9%
65 and over	26,621	35,035	8,414	31.6%
Total	116,682	142,448	25,766	22.1%

Source: Icenis analysis

Table 2.14 Projected population change 2024 to 2046 by broad age bands – Leicester – Standard Method

	2024	2046	Change in population	% change
Under 16	80,340	76,723	-3,617	-4.5%
16-64	261,385	293,103	31,718	12.1%
65 and over	46,623	61,042	14,419	30.9%
Total	388,348	430,869	42,521	10.9%

Source: Icenis analysis

Table 2.15 Projected population change 2024 to 2046 by broad age bands – Melton – Standard Method

	2024	2046	Change in population	% change
Under 16	9,164	10,051	887	9.7%
16-64	31,836	39,735	7,899	24.8%
65 and over	13,052	19,099	6,047	46.3%
Total	54,052	68,885	14,833	27.4%

Source: Icenis analysis

Table 2.16 Projected population change 2024 to 2046 by broad age bands – North West Leicestershire – Standard Method

	2024	2046	Change in population	% change
Under 16	19,677	20,283	606	3.1%
16-64	69,701	81,887	12,186	17.5%
65 and over	22,503	32,029	9,526	42.3%
Total	111,881	134,199	22,318	19.9%

Source: Icenis analysis

Table 2.17 Projected population change 2024 to 2046 by broad age bands – Oadby & Wigston – Standard Method³

	2024	2046	Change in population	% change
Under 16	11,698	12,997	1,299	11.1%
16-64	37,391	48,300	10,909	29.2%
65 and over	12,606	16,301	3,695	29.3%
Total	61,695	77,598	15,903	25.8%

Source: Icenis analysis

³ The Standard Method figure was concluded as the appropriate level of housing growth in the previous housing distribution paper, therefore the projections shown in tables 2.9 and 2.17 are the same

3. Need for Different Sizes and Types of Homes

- 3.1 This section considers the appropriate mix of housing across different Leicester and Leicestershire local authorities. The analysis considers how the number of households in different age groups are projected to change moving forward and the mix of housing needed to meet this demographic change in different tenure groups.
- 3.2 Much of the data presented and the methodology is for the whole study area, with key data and outputs being provided for each local authority. The main analysis looks at the proposed housing distribution (for the 2024-46 period).

Background data

- 3.3 The following set of tables show the number of family households (defined for the purpose of this assessment as any household which contains at least one dependent child).
- 3.4 The number of families in Leicester & Leicestershire totalled 127,800 as of the 2021 Census, accounting for 30% of households; this proportion is slightly higher than seen across the East Midlands and England as a whole.

Table 3.1 Households with Dependent Children (2021) – HMA

	Leicester & Leicestershire		East Midlands	England
	No.	%	%	%
Married couple	67,161	15.8%	13.8%	14.4%
Cohabiting couple	19,695	4.6%	5.1%	4.5%
Lone parent	26,630	6.3%	6.5%	6.9%
Other households (with dependent children)	14,354	3.4%	2.4%	2.7%
Households with dependent children	127,840	30.2%	27.8%	28.5%
Households without dependent children	295,952	69.8%	72.2%	71.5%
Total	423,792	100.0%	100.0%	100.0%

Source: Census (2021)

- 3.5 The tables below show the same information for each of the local authorities. There are some notable variations in the proportion of households with dependent children, this being highest in Leicester (36% of households) and lowest in Melton (25% of households).

Table 3.2 Households with Dependent Children (2021) – Blaby, Charnwood, Harborough and Hinckley & Bosworth

	Blaby	Charnwood	Harborough	Hinckley & Bosworth
Married couple	15.9%	14.9%	17.2%	14.1%
Cohabiting couple	5.8%	4.8%	4.3%	5.3%
Lone parent	5.9%	5.7%	5.1%	5.7%
Other households (with dependent children)	2.3%	2.1%	1.9%	1.6%
Households with dependent children	29.8%	27.4%	28.6%	26.6%
Households without dependent children	70.2%	72.6%	71.4%	73.4%
Total	100.0%	100.0%	100.0%	100.0%

Source: Census (2021)

Table 3.3 Households with Dependent Children (2021) – Leicester, Melton, NW Leicestershire and O&W

	Leicester	Melton	NWL	Oadby & Wigston
Married couple	17.6%	13.5%	14.3%	16.1%
Cohabiting couple	3.7%	4.9%	5.7%	4.3%
Lone parent	7.7%	5.5%	5.8%	6.1%
Other households (with dependent children)	6.6%	1.5%	1.6%	3.4%
Households with dependent children	35.6%	25.4%	27.4%	29.8%
Households without dependent children	64.4%	74.6%	72.6%	70.2%
Total	100.0%	100.0%	100.0%	100.0%

Source: Census (2021)

The Current Mix of Housing by Tenure

- 3.6 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.
- 3.7 On the assumption that occupancy patterns for each age group (within each tenure) remain the same, it is possible to assess the profile of housing needed over the assessment period (taken to be 2024-46 to be consistent with other plan period, based analysis in this report).
- 3.8 An important starting point is to understand the current balance of housing in the area – the table below profiles the sizes of homes in different tenure groups across areas. This draws from the 2021 Census (whereas the 2022 HENA report used 2011 Census data).
- 3.9 The data shows a market stock (owner-occupied) that is dominated by 3+-bedroom homes (making up 81% of the total in this tenure group, a slightly higher proportion to that seen both nationally and across the East Midlands). The profiles of both the social and private rented sectors are broadly similar across areas. Observations about the current mix feed into conclusions about future mix later in this section.

Table 3.4 Number of Bedrooms by Tenure, 2021

		Leicester & Leicestershire	East Midlands	England
Owner-occupied	1-bedroom	2%	2%	4%
	2-bedrooms	18%	20%	21%
	3-bedrooms	49%	49%	46%
	4+-bedrooms	32%	29%	29%
	Total	100%	100%	100%
	Ave. no. beds	3.10	3.06	3.01
Social rented	1-bedroom	31%	28%	29%
	2-bedrooms	33%	36%	36%
	3-bedrooms	32%	32%	31%
	4+-bedrooms	4%	4%	4%
	Total	100%	100%	100%
	Ave. no. beds	2.11	2.11	2.10
Private rented	1-bedroom	18%	14%	21%
	2-bedrooms	37%	39%	39%
	3-bedrooms	35%	36%	29%
	4+-bedrooms	11%	11%	11%
	Total	100%	100%	100%
	Ave. no. beds	2.39	2.43	2.30

Source: Census (2021)

3.10 The table below shows the same information by local authority. Probably the most interesting finding is the smaller than average dwelling sizes in Leicester in both the owner-occupied and private rented sectors – particularly given that the City has the greatest proportion of households with dependent children.

Table 3.5 Number of Bedrooms by Tenure, 2021 – Blaby, Charnwood, Harborough and Hinckley & Bosworth

		Blaby	Charnwood	Harborough	Hinckley & Bosworth
Owner-occupied	1-bedroom	1%	2%	2%	2%
	2-bedrooms	15%	19%	16%	21%
	3-bedrooms	51%	47%	37%	47%
	4+-bedrooms	32%	32%	45%	31%
	Total	100%	100%	100%	100%
	Ave. no. beds	3.14	3.09	3.24	3.07
Social rented	1-bedroom	33%	36%	29%	24%
	2-bedrooms	42%	27%	41%	41%
	3-bedrooms	23%	32%	28%	33%
	4+-bedrooms	2%	4%	3%	2%
	Total	100%	100%	100%	100%
	Ave. no. beds	1.95	2.05	2.05	2.13
Private rented	1-bedroom	10%	13%	12%	15%
	2-bedrooms	36%	38%	40%	43%
	3-bedrooms	45%	33%	35%	34%
	4+-bedrooms	9%	16%	13%	8%
	Total	100%	100%	100%	100%
	Ave. no. beds	2.54	2.52	2.48	2.34

Source: Census (2021)

Table 3.6 Number of Bedrooms by Tenure, 2021 – Leicester, Melton, NW Leicestershire and O&W

		Leicester	Melton	NWL	Oadby & Wigston
Owner-occupied	1-bedroom	3%	1%	1%	2%
	2-bedrooms	18%	16%	17%	19%
	3-bedrooms	56%	48%	47%	49%
	4+-bedrooms	23%	35%	34%	30%
	Total	100%	100%	100%	100%
	Ave. no. beds	3.00	3.16	3.14	3.07
Social rented	1-bedroom	32%	28%	23%	29%
	2-bedrooms	30%	37%	34%	35%
	3-bedrooms	32%	31%	38%	33%
	4+-bedrooms	6%	4%	4%	3%
	Total	100%	100%	100%	100%
	Ave. no. beds	2.12	2.10	2.23	2.08
Private rented	1-bedroom	24%	12%	11%	11%
	2-bedrooms	34%	36%	39%	41%
	3-bedrooms	32%	42%	38%	39%
	4+-bedrooms	10%	10%	12%	9%
	Total	100%	100%	100%	100%
	Ave. no. beds	2.29	2.51	2.51	2.47

Source: Census (2021)

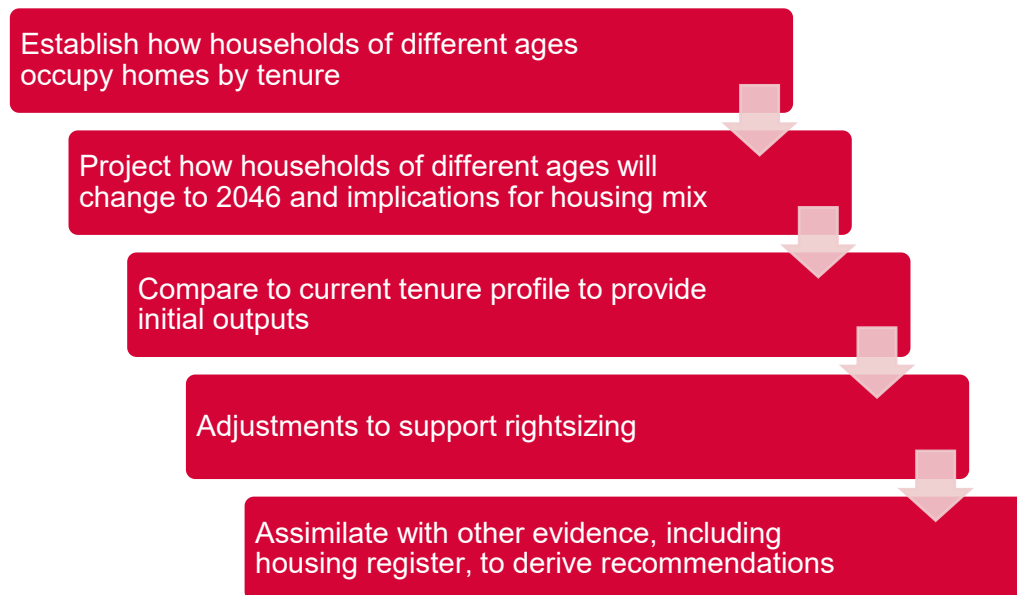
Overview of Methodology

3.11 The method to consider future housing mix looks at the ages of the Household Reference Persons (HRP)⁴ and how these are projected to

⁴ The Census 2021 definition of the Household Reference Person (HRP) is the individual in whose name the accommodation is owned or rented, or who is otherwise responsible for the accommodation; where more than one person is responsible, the HRP is identified using economic activity and age criteria.

change over time. The overall methodology is consistent with that in the 2022 HENA, but the data inputs have been updated. The diagram below provides an overview of the methodology. The sub-sections to follow describe some of the key analyses.

Figure 3.1 Overview of Approach



Understanding How Households Occupy Homes

- 3.12 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.
- 3.13 The size of housing which households occupy in the market sector relates more to their access to capital 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 4-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.

3.14 This is reflected in the occupancy rating of homes, in the 2021 Census 49.9% of owner occupied homes across England had at least 2 spare bedrooms. This is compared to only 14.4% of homes in the private rented sector and 8.9% in the social rented sector having 2 spare rooms. Therefore it can be seen access to capital directly translates into ability to afford housing which often translates into ability to under-occupy homes.

3.15 That said, issues of supply can also impact occupancy patterns, for example, 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.

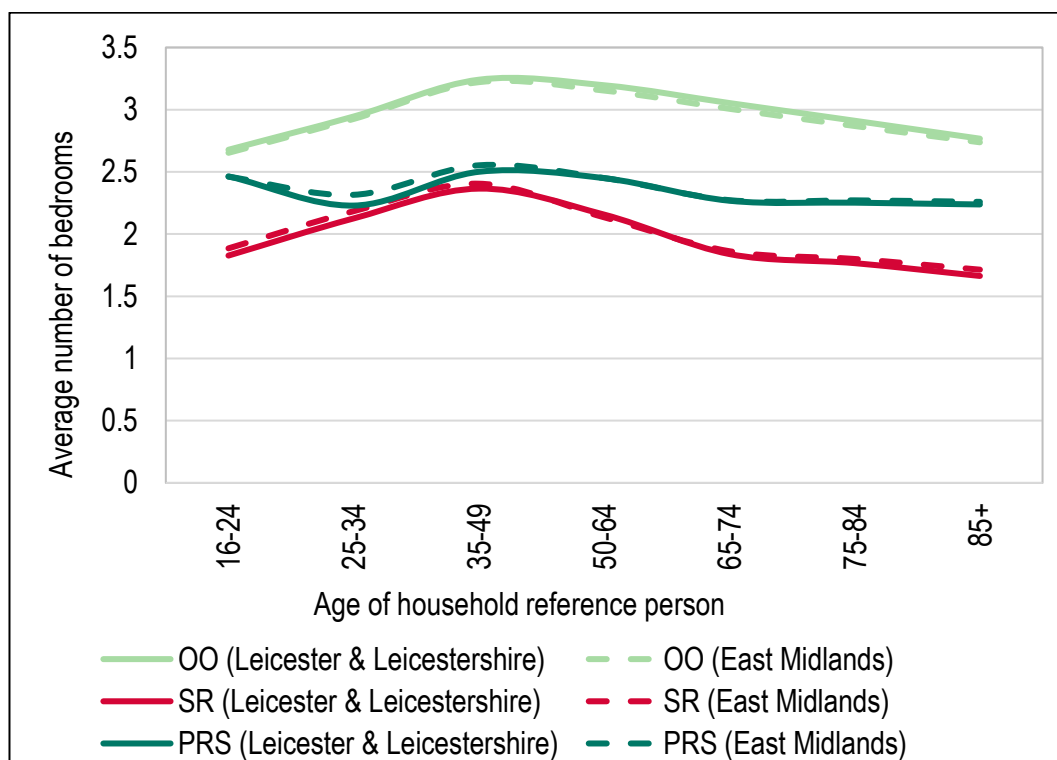
3.16 The issue of choice is less relevant in the affordable sector (particularly since the introduction of the social sector size criteria) where households are allocated properties which reflect the size of the household, although there will still be some level of under-occupation moving forward with 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')).

3.17 The approach used is to interrogate information derived in 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).

3.18 The figure below shows an estimate of how the average number of bedrooms varies by different ages of HRP and broad tenure group for Leicester & Leicestershire and the East Midlands region. In all sectors,

the average size of accommodation rises over time to typically reach a peak around the age of 50. After peaking, the average dwelling size decreases slightly – as typically some households downsize as they get older. The analysis also shows the area as having broadly similar dwelling sizes by age to the position across the East Midlands across all tenures.

Figure 3.2 Average Bedrooms by Age and Tenure in Leicester & Leicestershire and the region



Source: Census (2021)

3.19 The analysis uses the existing occupancy patterns at a local and regional level as a starting point for analysis 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 market sector (i.e. owner-occupiers and the private rented 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.

Changes to Households by Age

3.20 The table below presents the projected change in households by age of household reference person based on the proposed housing distribution. This shows growth as being expected in all age groups and in particular older age groups (notably 85+), although some high growth is also projected in younger age groups, in part due to an assumption that household formation could improve and increase over time).

Table 3.7 Projected Change in Household by Age of HRP in Leicester & Leicestershire based on proposed housing distribution

	2024	2046	Change in Households	% Change
Under 25	13,977	15,197	1,220	8.7%
25-34	58,054	71,855	13,801	23.8%
35-49	117,087	153,436	36,350	31.0%
50-64	125,907	147,849	21,941	17.4%
65-74	59,518	69,831	10,313	17.3%
75-84	49,874	72,656	22,782	45.7%
85+	19,372	38,225	18,853	97.3%
TOTAL	443,790	569,050	125,260	28.2%

Source: Icen Analysis

Modelled Outputs

- 3.21 By following the methodology set out 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 at a local authority level.
- 3.22 The table below shows the modelled outputs of need by dwelling size in the three broad tenures. The need for market housing is strongest for 3+ bedroom homes; for affordable home ownership for 2- and 3-bedroom homes; and rented affordable housing showing a slightly smaller profile again.

Table 3.8 Initial Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Leicester & Leicestershire

	1- bedroom	2- bedrooms	3- bedrooms	4+ bedrooms
Market	5%	25%	47%	24%
Affordable home ownership	16%	38%	36%	10%
Affordable housing (rented)	30%	34%	32%	4%

Source: Housing Market Model

Rightsizing

- 3.23 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).

3.24 There is a case to seek for new stock to more closely match actual size requirements. 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. Further analysis has been undertaken to take account of overcrowding and under-occupancy (by tenure).

3.25 The table below shows a cross-tabulation of a household’s occupancy rating and the number of bedrooms in their home (for owner-occupiers) using 2021 Census data. This shows a high number of households with at least 2 spare bedrooms who are living in homes with 3 or more bedrooms. There are also a number of overcrowded households. In the owner-occupied sector in 2021, there were 241,100 households with some degree of under-occupation and around 6,600 overcrowded households – some 86% of all owner-occupiers have some degree of under-occupancy.

Table 3.9 Cross-tabulation of occupancy rating and number of bedrooms (owner-occupied sector) – Leicester & Leicestershire

Occupancy rating	Number of bedrooms				
	1-bed	2-bed	3-bed	4+-bed	TOTAL
+2 spare bedrooms	0	0	77,502	69,987	147,489
+1 spare bedrooms	0	39,842	39,262	14,509	93,613
0 “Right sized”	4,984	8,599	16,495	3,113	33,191
-1 bedrooms (too few bedrooms)	344	1,625	3,469	1,151	6,589
TOTAL	5,328	50,066	136,728	88,760	280,882

Source: Census (2021)

3.26 For completeness the tables below show the same information for the social and private rented sectors. In both cases there are more under-occupying households than overcrowded, but differences are less marked than seen for owner-occupied housing.

Table 3.10 Cross-tabulation of occupancy rating and number of bedrooms (social rented sector) – Leicester & Leicestershire

Occupancy rating	Number of bedrooms				
	1-bed	2-bed	3-bed	4+-bed	TOTAL
+2 spare bedrooms	0	0	4,360	874	5,234
+1 spare bedrooms	0	8,100	5,476	735	14,311
0 "Right sized"	17,118	9,048	7,345	681	34,192
-1 too few bedrooms	1,359	2,687	2,304	408	6,758
TOTAL	18,477	19,835	19,485	2,698	60,495

Source: Census (2021)

Table 3.11 Cross-tabulation of occupancy rating and number of bedrooms (private rented sector) – Leicester & Leicestershire

Occupancy rating	Number of bedrooms				
	1-bed	2-bed	3-bed	4+-bed	TOTAL
+2 spare bedrooms	0	0	8,619	4,668	13,287
+1 spare bedrooms	0	16,531	10,241	2,375	29,147
0 "Right sized"	12,441	10,754	7,355	1,562	32,112
-1 too few bedrooms	2,077	2,831	2,400	553	7,861
TOTAL	14,518	30,116	28,615	9,158	82,407

Source: Census (2021)

3.27 In using this data in the modelling an adjustment is made to move some of those who would have been picked up in the modelling as under-occupying into smaller accommodation. Where there is under-occupation by 2 or more bedrooms, the adjustment takes 25% of this group and assigns to a '+1' occupancy. This does need to be recognised as an assumption but can be seen to be reasonable as they do retain some (considerable) degree of under-occupation (which is likely) but does also seek to model a better match between household needs and the size of their home. For overcrowded households, a move in the other direction

is made: in this case households are moved up as many bedrooms as is needed to resolve the problems (this is applied for all overcrowded households).

3.28 The adjustments for under-occupation and overcrowding lead to the suggested mix as set out in the following tables. It can be seen that this tends to suggest a very slightly different profile of homes as being needed (compared to the initial modelling) including an increase in the need for 4+-bedroom homes in the rented affordable housing sector due to levels of overcrowding and a reduction in the 4+-bedroom market need due to high levels of under-occupancy.

Table 3.12 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Leicester & Leicestershire

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	30%	45%	20%
Affordable home ownership	13%	40%	35%	11%
Affordable housing (rented)	28%	34%	31%	7%

Source: Housing Market Model

3.29 Across the HMA, the analysis points to over a quarter of the social/affordable housing need being for 1-bedroom 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 (as shown earlier) are more likely to occupy smaller dwellings. The impacts older people have on demand for smaller stock is outlined in the table below.

3.30 This indeed identifies a slightly larger profile of homes needed for households where the household reference person is aged Under 65, with a concentration of 1-bedroom homes for older people. This information can be used to inform the mix required for housing for older

people (e.g. age restricted), although it does need to be noted that not all older people would be expected to live in homes solely for older people.

- 3.31 The 2, 3, and 4+-bedroom categories have been merged for the purposes of 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 2-bedrooms in the rented affordable housing sector.

Table 3.13 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – Leicester & Leicestershire

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	21%	33%	37%	9%
65 and over	40%	60%		
All affordable housing (rented)	28%	34%	31%	7%

Source: Housing Market Model

Initial Housing Distribution Based Outputs for Local Authorities

- 3.32 The series of tables below show outputs using the same method for each local authority. For each area two tables are provided, one with the mix by size and tenure and the second looking at older persons in the rented affordable housing sector.

Table 3.14 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Blaby

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	3%	29%	47%	21%
Affordable home ownership	11%	40%	39%	10%
Affordable housing (rented)	31%	38%	26%	5%

Source: Housing Market Model

Table 3.15 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – Blaby

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	20%	38%	35%	7%
65 and over	48%	52%		
All affordable housing (rented)	31%	38%	26%	5%

Source: Housing Market Model

Table 3.16 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Charnwood

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	31%	45%	20%
Affordable home ownership	13%	41%	34%	12%
Affordable housing (rented)	31%	33%	30%	6%

Source: Housing Market Model

Table 3.17 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – Charnwood

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	22%	37%	34%	7%
65 and over	57%	43%		
All affordable housing (rented)	31%	33%	30%	6%

Source: Housing Market Model

Table 3.18 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Harborough

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	29%	44%	23%
Affordable home ownership	13%	42%	35%	10%
Affordable housing (rented)	30%	38%	27%	5%

Source: Housing Market Model

Table 3.19 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – Harborough

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	21%	37%	35%	7%
65 and over	43%	57%		
All affordable housing (rented)	30%	38%	27%	5%

Source: Housing Market Model

Table 3.20 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Hinckley & Bosworth

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	34%	44%	19%
Affordable home ownership	13%	44%	35%	8%
Affordable housing (rented)	26%	38%	30%	6%

Source: Housing Market Model

Table 3.21 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – Hinckley & Bosworth

	1- bedroom	2- bedrooms	3- bedrooms	4+ bedrooms
Under 65	18%	37%	37%	8%
65 and over	42%	58%		
All affordable housing (rented)	26%	38%	30%	6%

Source: Housing Market Model

Table 3.22 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Leicester

	1- bedroom	2- bedrooms	3- bedrooms	4+ bedrooms
Market	6%	30%	45%	19%
Affordable home ownership	15%	37%	34%	13%
Affordable housing (rented)	27%	32%	33%	8%

Source: Housing Market Model

Table 3.23 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – Leicester

	1- bedroom	2- bedrooms	3- bedrooms	4+ bedrooms
Under 65	21%	35%	35%	9%
65 and over	43%	57%		
All affordable housing (rented)	27%	32%	33%	8%

Source: Housing Market Model

Table 3.24 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Melton

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	33%	46%	18%
Affordable home ownership	13%	42%	37%	8%
Affordable housing (rented)	30%	37%	28%	5%

Source: Housing Market Model

Table 3.25 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – Melton

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	18%	39%	36%	8%
65 and over	48%	52%		
All affordable housing (rented)	30%	37%	28%	5%

Source: Housing Market Model

Table 3.26 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – North West Leicestershire

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	3%	30%	46%	21%
Affordable home ownership	12%	42%	36%	10%
Affordable housing (rented)	26%	37%	32%	6%

Source: Housing Market Model

Table 3.27 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – North West Leicestershire

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	19%	35%	38%	7%
65 and over	37%	63%		
All affordable housing (rented)	26%	37%	32%	6%

Source: Housing Market Model

Table 3.28 Modelled Mix of Housing by Size and Tenure based on proposed housing distribution – Oadby & Wigston

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	31%	46%	20%
Affordable home ownership	11%	42%	38%	9%
Affordable housing (rented)	27%	37%	31%	5%

Source: Housing Market Model

Table 3.29 Modelled Mix of Housing by Size and Age based on proposed housing distribution – affordable housing (rented) – Oadby & Wigston

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	21%	36%	39%	4%
65 and over	46%	54%		
All affordable housing (rented)	28%	35%	33%	3%

Source: Housing Market Model

Potential Delivery in Leicester

- 3.33 A potential question in considering the appropriate mix of housing in different areas is the influence of the nature of the land supply in Leicester City. To consider this, Leicester City Council has provided Iceni with details of planning approvals on major schemes over the period from 1st April 2022 – 31st March 2025.
- 3.34 This data shows that the pipeline is strongly focused towards studio, one and two-bed properties, as Table 3.30 below shows.

Table 3.30 Development Pipeline – Leicester

	Studio	1 bed	2 bed	3 bed	4+ bed	Total
C3 Residential Dwellings	511	2,016	1,544	780	410	5,261
% C3 residential dwellings by size	10%	38%	29%	15%	8%	100%
Student Bedspaces	1,368	1,088	9	13	207	2,685
% student bedspaces by size	51%	41%	0%	0%	8%	100%

Source: LCC

- 3.35 The City's draft Local Plan does however include a number of strategic housing sites – at the former Western Park Golf Course; land East of Ashton Green; land north of the A46 Bypass; and Land West of Anstey Lane which are collectively anticipated to deliver c. 1,800 dwellings. These sites have a key role in helping to broaden the mix of housing delivery in the City, and as a result can help support a more balanced profile of delivery through supporting delivery of homes with 3+ beds.

Initial Standard Method Based Outputs for Local Authorities

3.36 The series of tables below show the same information for modelling against the Standard Method. Generally patterns do not differ substantially based on the scenario used although some minor changes in the numbers can be seen in some areas.

Table 3.31 Modelled Mix of Housing by Size and Tenure – Leicester & Leicestershire – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	30%	45%	20%
Affordable home ownership	13%	40%	35%	11%
Affordable housing (rented)	28%	34%	31%	7%

Source: Housing Market Model

Table 3.32 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Leicester & Leicestershire – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	21%	36%	35%	8%
65 and over	44%	56%		
All affordable housing (rented)	28%	34%	31%	7%

Source: Housing Market Model

Table 3.33 Modelled Mix of Housing by Size and Tenure – Blaby – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	3%	29%	47%	21%
Affordable home ownership	11%	40%	39%	10%
Affordable housing (rented)	31%	38%	26%	5%

Source: Housing Market Model

Table 3.34 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Blaby – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	20%	38%	35%	7%
65 and over	48%	52%		
All affordable housing (rented)	31%	38%	26%	5%

Source: Housing Market Model

Table 3.35 Modelled Mix of Housing by Size and Tenure – Charnwood – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	31%	45%	20%
Affordable home ownership	13%	41%	34%	12%
Affordable housing (rented)	32%	32%	30%	6%

Source: Housing Market Model

Table 3.36 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Charnwood – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	22%	37%	34%	7%
65 and over	57%	43%		
All affordable housing (rented)	32%	32%	30%	6%

Source: Housing Market Model

Table 3.37 Modelled Mix of Housing by Size and Tenure – Harborough – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	30%	44%	23%
Affordable home ownership	13%	42%	35%	10%
Affordable housing (rented)	30%	38%	27%	5%

Source: Housing Market Model

Table 3.38 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Harborough – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	21%	37%	35%	7%
65 and over	43%	57%		
All affordable housing (rented)	30%	38%	27%	5%

Source: Housing Market Model

Table 3.39 Modelled Mix of Housing by Size and Tenure – Hinckley & Bosworth – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	32%	45%	19%
Affordable home ownership	13%	44%	35%	8%
Affordable housing (rented)	26%	38%	30%	6%

Source: Housing Market Model

Table 3.40 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Hinckley & Bosworth – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	18%	37%	37%	8%
65 and over	42%	58%		
All affordable housing (rented)	26%	38%	30%	6%

Source: Housing Market Model

Table 3.41 Modelled Mix of Housing by Size and Tenure – Leicester – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	6%	29%	44%	21%
Affordable home ownership	15%	37%	34%	13%
Affordable housing (rented)	26%	32%	33%	8%

Source: Housing Market Model

Table 3.42 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Leicester – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	21%	35%	35%	9%
65 and over	43%	57%		
All affordable housing (rented)	26%	32%	33%	8%

Source: Housing Market Model

Table 3.43 Modelled Mix of Housing by Size and Tenure – Melton – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	33%	46%	18%
Affordable home ownership	13%	42%	37%	8%
Affordable housing (rented)	30%	37%	28%	5%

Source: Housing Market Model

Table 3.44 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Melton – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	18%	39%	36%	8%
65 and over	48%	52%		
All affordable housing (rented)	30%	37%	28%	5%

Source: Housing Market Model

Table 3.45 Modelled Mix of Housing by Size and Tenure – North West Leicestershire – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	3%	30%	46%	21%
Affordable home ownership	12%	42%	36%	10%
Affordable housing (rented)	26%	37%	32%	6%

Source: Housing Market Model

Table 3.46 Modelled Mix of Housing by Size and Age – affordable housing (rented) – North West Leicestershire – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	19%	35%	38%	7%
65 and over	37%	63%		
All affordable housing (rented)	26%	37%	32%	6%

Source: Housing Market Model

Table 3.47 Modelled Mix of Housing by Size and Tenure – Oadby & Wigston – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	4%	31%	46%	20%
Affordable home ownership	11%	42%	38%	9%
Affordable housing (rented)	27%	37%	31%	5%

Source: Housing Market Model

Table 3.48 Modelled Mix of Housing by Size and Age – affordable housing (rented) – Oadby & Wigston – Standard Method

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Under 65	21%	36%	39%	4%
65 and over	46%	54%		
All affordable housing (rented)	28%	35%	33%	3%

Source: Housing Market Model

Overall Recommendations on Housing Mix

- 3.37 In drawing together, we have sought to consider the level of housing provision which is currently being planned for and issues associated with the management of the housing stock – such as the role in which provision of larger rented affordable homes can have in supporting chains of moves. We draw conclusions on a local authority specific basis below.
- 3.38 The evidence herein may need to be considered alongside other local evidence – including evidence from Housing Registers for individual authorities regarding the need for rented affordable homes. Regarding 1-bed homes, Councils will also need to be mindful of what social housing providers will deliver as it is possible for management purposes (and due to issues about turnover) that a smaller proportion of 1-bed properties might be sought in some circumstances.

Blaby

- 3.39 We recommend a mix of homes in Blaby which is relatively consistent to the modelling based on the proposed distribution; and to the 2022 HENA findings. The focus of market housing need is on 3-bed homes; and for affordable housing the greatest need is for 2-bed homes but with an evident need for larger properties as well which help to support chains of moves.

Table 3.49 Recommended Housing Mix – Blaby

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

Charnwood

- 3.40 The modelling for Charnwood, as shown in Table 3.35, is broadly consistent with the mix set out in Table 6 in the Council's recently adopted Local Plan. It supports the continued application of the mix therein.
- 3.41 Setting out a mix of homes in the same format as for other authorities, the table below shows a focus on 3-bed market homes; but with a focus more on 2-bed homes within the affordable housing provision. The table below provides additional guidance on the profile of rented affordable homes.

Table 3.50 Recommended Housing Mix – Charnwood

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

Harborough

- 3.42 In considering the recommended housing mix for Harborough, the modelling herein (see Table 3.37) is based on a greater scale of housing provision than in the draft Local Plan. It is therefore of greater relevance to a future review of the Plan, and we would recommend that the position based on previous evidence is currently retained. This is shown below. It does not substantially differ from the evidence herein, but is based on modelling which more aligns to the scale of provision within the Local Plan.
- 3.43 Three size and market categories are recommended to split across different size categories, these are 1-2 bedroom market homes at 30% of the total, 3-4+ bedrooms affordable homeownership at 40% and 2-4+ bedroom affordable rented older persons homes at 50%. These splits are recommended in order to provide flexibility on what can be delivered across these groups without the mix being too prescriptive.

Table 3.51 Recommended Housing Mix- Harborough

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	30%		45%	25%
Affordable home ownership	15%	45%	40%	
Affordable housing (rented) – General Needs	25%	30%	30%	15%
Affordable housing (rented) – Older Persons	50%	50%		

Hinckley and Bosworth

- 3.44 For Hinckley and Bosworth we recommend a similar mix to the modelling, with a slightly greater emphasis on larger rented homes than in the 2022 HENA but otherwise a profile which is relatively similar.

Table 3.52 Recommended Housing Mix- Hinckley & Bosworth

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	0-5%	30-35%	40-45%	20-25%
Affordable home ownership	10-20%	40-55%	25-35%	5-10%
Affordable housing (rented) – General Needs	25-30%	35-40%	25-30%	5-10%
Affordable housing (rented) – Older Persons	40%	60%		

3.45 The housing mix conclusions points to a slightly stronger need for larger market homes than in the 2024 Housing Needs Study for the Borough, which reflects the higher expected housing provision taking account of unmet needs. Relative to the modelling, the need for affordable home ownership shown is more strongly focused on providing smaller family housing for younger households and for childless couples.

Leicester

3.46 We recommend a mix of provision in Leicester which relates relatively closely to the results of the modelling in the proposed distribution scenario. It shows a broader profile of need than the ORS Housing Study⁵ which informed the current Local Plan which showed a particular focus on need for 3-bed properties.

⁵ [Leicester City Local Housing Need Assessment](#)

Table 3.53 Recommended Housing Mix – Leicester

	1- bedroom	2- bedrooms	3- bedrooms	4+- bedrooms
Market	5-10%	30-35%	40-45%	15-20%
Affordable home ownership	20-25%	34-40%	30-35%	5-10%
Affordable housing (rented)	25-30%	30-35%	30-35%	5-10%

3.47 The table above can be used as a tool in monitoring housing provision. We note that the housing supply is quite heavily skewed towards smaller homes, influenced by the land supply position. It is therefore particularly important that strategic allocations support higher levels of delivery of 3+ bed homes than the benchmarks shown in the table, particularly for market housing.

Melton

3.48 As with Harborough above, Icenii undertook specific analysis as part of the Melton Local Housing Needs Assessment 2024 for the Borough, which derived a housing mix which aligns to the scale of housing provision in the Plan to 2036. The table below (to 2046) shows a longer-term summary that is not immediately relevant for the Local Plan Update.

3.49 For rented affordable housing for older people, a split is provided between 1-bed properties and larger properties. This aims to provide flexibility, but of the 50-55% of need which is for 2+ bed properties in this category we would expect most to be 2-bed homes.

Table 3.54 Recommended Housing Mix – Melton

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

North West Leicestershire

- 3.50 For North West Leicestershire there is no difference between the two modelled scenarios linked to the standard method and proposed distribution. Our recommended mix is set out below.
- 3.51 Our recommendations take into account both the modelling undertaken as well as 2026 data on the profile of households on the housing register and comparison of this with the profile of lettings. This Register data provides a point in time assessment which the conclusions bring together with the analysis considering the implications of long-term demographic trends.
- 3.52 The need for market housing is focused in particularly towards 3-bed properties. Affordable home ownership need is focused on 2- and 3-bed properties; whilst for general needs rented affordable there is a need for a balance of different property types including a need for larger 4+ bed homes for which the average waiting time is currently significantly longer than for other property types.

Table 3.55 Recommended Housing Mix – North West Leicestershire

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

Oadby and Wigston

3.53 For Oadby & Wigston, we have taken the standard method modelling as a starting point (Table 3.57) and evidence from the draft Local Plan on the Council’s own affordable housing needs position which shows a particular need for 2-bed affordable homes. Our recommended mix is set out below.

Table 3.56 Recommended Housing Mix – Oadby & Wigston

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

Application to Individual Development Schemes

3.54 The application of the above mix to individual development schemes should have regard to:

- Development size and location;

-
- Appropriate development densities having regard to character and accessibility
 - Local market evidence where relevant, recognising that market dynamics can vary over time.

3.55 Regarding 1-bed rented affordable homes, Councils will also need to be mindful of what social housing providers will deliver as it is possible for management purposes (and due to issues about turnover) that a smaller proportion of 1-bed properties might be sought in some circumstances.

3.56 The suggested figures can be used as a monitoring tool to ensure that future delivery is not unbalanced when compared with the likely requirements as driven by demographic change in the area. The recommendations can also be used as a set of guidelines to consider the appropriate mix on larger development sites, and the Councils could expect justification for a housing mix on such sites which significantly differs from that modelled herein.

4. Older Persons and those with Disabilities

4.1 This section studies the characteristics and housing needs of the older person population and the population with some form of disability. The two groups are taken together as there is a clear link between age and disability. It responds to Planning Practice Guidance on Housing for Older and Disabled People published by Government in June 2019. It includes an assessment of the need for specialist accommodation for older people and the potential requirements for housing to be built to M4(2) and M4(3) housing technical standards (accessibility and wheelchair standards).

Current Population of Older People

4.2 The table below provides baseline population data about older persons in Leicester & Leicestershire and compares this with other areas. The table shows the area has a slightly younger age structure to that seen regionally and nationally with 18% of the population being aged 65 and over. The proportion of people aged 75 and over is also slightly below equivalent figures for the East Midlands and the whole of England.

Table 4.1 Older Persons Population, 2024

	Leicester & Leicestershire		East Midlands	England
	No.	%	%	%
Under 65	929,949	82.0%	80.1%	81.3%
65-74	105,134	9.3%	10.0%	9.4%
75-84	72,804	6.4%	7.3%	6.8%
85+	26,034	2.3%	2.5%	2.5%
Total	1,133,921	100.0%	100.0%	100.0%
Total 65+	203,972	18.0%	19.9%	18.7%
Total 75+	98,838	8.7%	9.8%	9.3%

Source: ONS

4.3 The tables below show the same data for local authorities. The analysis points to some notable variation in the proportion of older people, this being higher in areas outside of Leicester City) – the City sees just 12% of people aged 65+.

Table 4.2 Older Persons Population, 2024 – Blaby, Charnwood, Harborough, Hinckley & Bosworth

	Blaby	Charnwood	Harborough	Hinckley & Bosworth
Under 65	79.4%	80.6%	77.3%	77.2%
65-74	10.2%	9.8%	11.1%	11.3%
75-84	7.7%	7.1%	8.4%	8.7%
85+	2.7%	2.5%	3.1%	2.8%
Total	100.0%	100.0%	100.0%	100.0%
Total 65+	20.6%	19.4%	22.7%	22.8%
Total 75+	10.4%	9.6%	11.5%	11.5%

Source: ONS

Table 4.3 Older Persons Population, 2024 – Leicester, Melton, NW Leicestershire, Oadby & Wigston

	Leicester	Melton	NWL	Oadby & Wigston
Under 65	88.0%	75.9%	79.9%	79.6%
65-74	6.9%	12.3%	10.3%	9.7%
75-84	3.7%	9.0%	7.6%	7.4%
85+	1.5%	2.8%	2.2%	3.3%
Total	100.0%	100.0%	100.0%	100.0%
Total 65+	12.0%	24.1%	20.1%	20.4%
Total 75+	5.2%	11.8%	9.8%	10.8%

Source: ONS

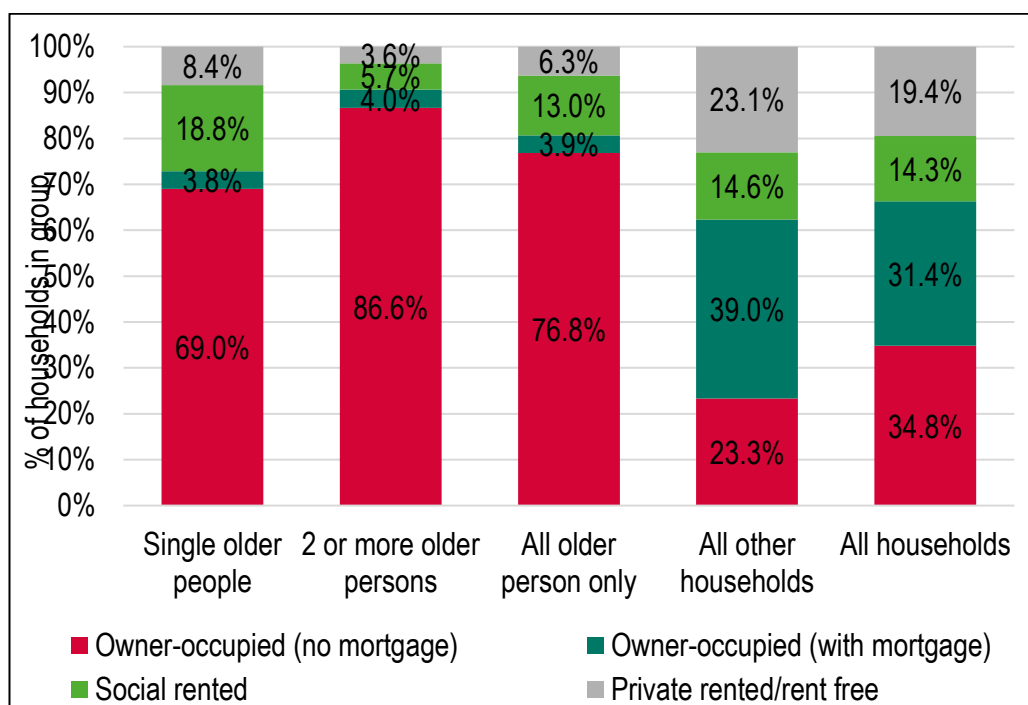
Characteristics of Older Person Households

4.4 The figure below shows the tenure of older person households. The data has been split between single older person households and those with two or more older people (which will largely be couples). The data shows

that the majority of older persons households are owner occupiers (81% of older person households), and indeed most are owner-occupiers with no mortgage and thus may have significant equity which can be put towards the purchase of a new home. Some 13% of older person households live in the social rented sector and the proportion of older person households living in the private rented sector is relatively low (about 6%).

- 4.5 There are also notable differences for different types of older person households with single older people having a lower level of owner-occupation than larger older person households – this group also has a higher proportion living in the social rented sector.

Figure 4.1 Tenure of Older Persons Households in Leicester and Leicestershire, 2021



Source: 2021 Census

- 4.6 The table below shows the tenure of older person households by local authority (figures are for all older person households). This shows some notable differences between areas with a range from 63% of older persons being outright owners in Leicester, up to 83% in Oadby &

Wigston. Leicester also shows a notably higher proportion of older person households living in social rented housing whilst proportions living in private rented housing are low across all locations.

Table 4.4 Tenure of Older Persons Households, 2021 – local authorities

	Owner-occupied (no mortgage)	Owner-occupied (with mortgage)	Social rented	Private rented	TOTAL
Blaby	82.0%	3.7%	9.8%	4.6%	100.0%
Charnwood	80.4%	3.7%	10.3%	5.6%	100.0%
Harborough	80.2%	4.8%	8.8%	6.2%	100.0%
Hinckley & Bosworth	81.1%	3.8%	9.4%	5.6%	100.0%
Leicester	63.1%	3.3%	25.3%	8.2%	100.0%
Melton	76.6%	4.4%	10.0%	9.0%	100.0%
NWL	77.3%	4.0%	13.0%	5.7%	100.0%
Oadby & Wigston	82.9%	4.2%	7.2%	5.7%	100.0%
TOTAL	76.8%	3.9%	13.0%	6.3%	100.0%

Source: 2021 Census

Disabilities

4.7 The table below shows the proportion of people who are considered as disabled under the definition within the 2010 Equality Act⁶, drawn from 2021 Census data, and the proportion of households where at least one person has a disability. The data suggests that some 31% of households in the HMA contain someone with a disability. This figure is slightly lower than seen in a range of other areas (regionally and nationally). The figures for the population with a disability show the same pattern in

⁶ The Census uses the same definition of disability as described in the Equality Act. This defines disability as a person with a physical or mental impairment that has a 'substantial' and 'long-term' negative effect on their ability to do normal daily activities.

comparison with other areas, being lower than both the region and England, with some 16% of the population having a disability.

Table 4.5 Households and People with a Disability, 2021

	Households Containing Someone with a Disability		Population with a Disability	
	No.	%	No.	%
Leicester & Leicestershire	133,334	31.5%	175,210	16.2%
East Midlands	680,792	33.4%	894,920	18.3%
England	7,507,887	32.0%	9,774,510	17.3%

Source: 2021 Census

- 4.8 The table below shows the same information for local authorities; this shows some modest variation in the proportion of the population and households with a disability across areas – with the above average instance of households containing someone with a disability in Leicester being noteworthy.

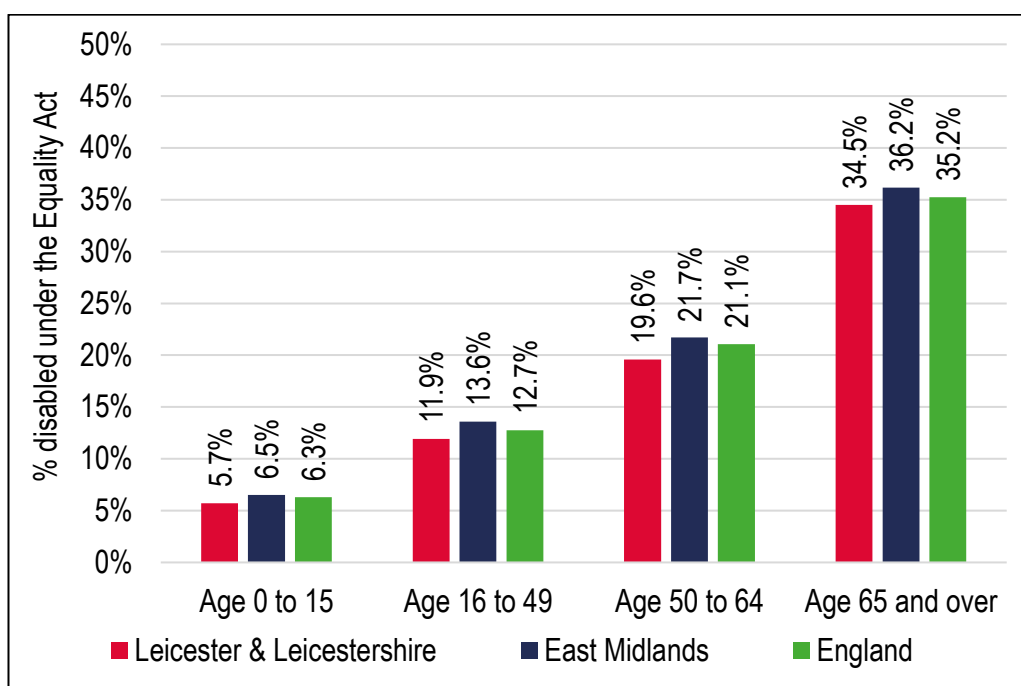
Table 4.6 Households and People with a Disability, 2021 – local authorities

	Households Containing Someone with a Disability		Population with a Disability	
	No.	%	No.	%
Blaby	12,843	30.2%	16,305	15.8%
Charnwood	22,743	30.8%	30,149	16.4%
Harborough	11,512	28.5%	14,709	15.1%
Hinckley & Bosworth	15,642	31.6%	19,926	17.5%
Leicester	41,872	32.9%	57,148	15.5%
Melton	6,925	30.6%	8,727	16.9%
NWL	14,380	32.0%	18,330	17.5%
Oadby & Wigston	7,417	32.8%	9,916	17.2%
TOTAL	133,334	31.5%	175,210	16.2%

Source: 2021 Census

4.9 As noted, it is likely that the age profile will impact upon the numbers of people with a disability, as older people tend to be more likely to have a disability. The figure below shows the age bands of people with a disability. It is clear from this analysis that those people in the oldest age bands are more likely to have a disability. The analysis also shows slightly lower age-specific levels of disability when compared with the national and regional position.

Figure 4.2: Population with Disability by Age



Source: 2021 Census

Specialist Housing Need

4.10 The analysis below is provided on a local authority basis to look at a range of data relating to people with disabilities and specialist housing needs (including for older people and wheelchair users). The analysis is undertaken for local authorities separately as some of it relates to a different plan period (to the 2046 typically used in the housing mix modelling above) and in some cases to different housing numbers. For each area four analyses are provided:

-
- Projected Change in Population of Older Persons;
 - Projected Changes to Population with a Range of Disabilities;
 - Specialist Housing Need for Older Persons; and
 - Estimated need for wheelchair user homes

Methodology and HMA-wide Analysis

4.11 The analysis below looks at the range of data for the whole of Leicester and Leicestershire (in this case for the 2024-46 period). This includes an explanation of the methodology used which is then rolled out for individual local authorities.

Demographic Change

4.12 Population projections can next be used to provide an indication of how the number of older persons might change in the future with the table below showing that Leicester and Leicestershire is projected to see a notable increase in the older person population – the projection is based on the Proposed Housing Distribution.

4.13 For the 2024-46 period a projected increase in the population aged 65+ of around 37% is shown. The population aged under 65 is in contrast projected to see a more modest but still significant increase (of 14%). In total population terms, the projections show an increase in the population aged 65 and over of 76,100 people. This is against a backdrop of an overall increase of 204,000 – population growth of people aged 65 and over therefore accounts for 37% of the total projected population change.

Table 4.7 Projected Change in Population of Older Persons, 2024 to 2046 – Leicester & Leicestershire

	2024	2046	Change in population	% change
Under 65	929,949	1,057,858	127,909	13.8%
65-74	105,134	123,287	18,153	17.3%
75-84	72,804	105,663	32,859	45.1%
85+	26,034	51,074	25,040	96.2%
Total	1,133,921	1,337,882	203,961	18.0%
Total 65+	203,972	280,024	76,052	37.3%
Total 75+	98,838	156,737	57,899	58.6%

Source: Icen Analysis

Health-related Population Projections

- 4.14 The prevalence of a range of health conditions is an important component in understanding the potential need for care or support for a growing older population. The analysis undertaken covers both younger and older age groups and is based on target prevalence rates⁷ from PANSI (Projecting Adult Needs and Service Information) and POPPI (Projecting Older People Population Information) data (2022). These rates have been adjusted to take account of the age specific health/disabilities as previously shown.
- 4.15 Of particular note are the large increases in the number of older people with dementia (increasing by 64% from 2024 to 2046) and mobility problems (up 53% over the same period). Changes for younger age groups are smaller, reflecting the fact that projections are expecting older age groups to see the greatest proportional increases in population.

⁷ Prevalence rate is the proportion of a population that has a particular condition, characteristic, or need at a given point in time (or over a defined period)

Table 4.8 Projected Changes to Population with a Range of Disabilities – Leicester & Leicestershire

Disability	Age Range	2024	2046	Change	% change
Dementia	65+	13,637	22,363	8,726	64.0%
Mobility problems	65+	36,141	55,285	19,144	53.0%
Autistic Spectrum Disorders	18-64	6,513	7,752	1,239	19.0%
	65+	1,888	2,562	675	35.7%
Learning Disabilities	15-64	17,015	19,780	2,765	16.3%
	65+	4,151	5,620	1,469	35.4%
Impaired mobility	16-64	34,417	40,740	6,323	18.4%

Source: POPPI/PANSI and Demographic Projections

Need for Specialist Accommodation for Older People

- 4.16 Given the ageing population and higher levels of disability and health problems amongst older people, there is likely to be an increased requirement for specialist housing options moving forward. The box below shows the different types of older persons housing which are considered.

Definitions of Different Types of Older Persons' Accommodation

Age-restricted general market housing: This type of housing is generally for people aged 55 and over and the active elderly. It may include some shared amenities such as communal gardens but does not include support or care services.

Retirement living or sheltered housing (housing with support): This usually consists of purpose-built flats or bungalows with limited communal facilities such as a lounge, laundry room and guest room. It does not generally provide care services but provides some support to enable residents to live independently. This can include 24-hour on-site assistance (alarm) and a warden or house manager.

Extra care housing or housing-with-care (housing with care): This usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required, through an onsite care agency registered through the Care Quality Commission (CQC). Residents are able to live independently with 24-hour access to support services and staff, and meals are also available. There are often extensive communal areas, such as space to socialise or a wellbeing centre. In some cases, these developments are known as retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.

Residential care homes and nursing homes (care bedspaces): These have individual rooms within a residential building and provide a high level of care meeting all activities of daily living. They do not usually include support services for independent living. This type of housing can also include dementia care homes.

Source: Planning Practice Guidance [63-010]

Strategic Context

4.17 There are two authorities responsible for Adult Social Care in the HMA: Leicestershire County Council and Leicester City Council.

4.18 The County Council's **Investment Prospectus 2019-37**⁸ sets out its ambition to develop different housing options, including housing with care and accommodation with support schemes, to cater for a range of different needs both for older adults and working-age adults with disabilities. It aims to focus residential care on supporting those with the most complex needs and avoid people needing to move to a care home where possible. It expects that Supported Living Schemes for working adults will incorporate around 12 homes; with Extra Care schemes for older adults having a minimum of 60 homes. Core ambitions are to:

- Develop mainstream and open market housing that is suitable for older people;
- Develop smaller-scale housing development for older people in small towns and village;
- Developer housing solutions for older people in town centres and neighbourhoods, where they are close to services;
- Develop specialist supported living schemes for adults 18+ with a disability or condition requiring support from carers;
- Develop specialist Extra Care schemes for which it identifies huge potential;
- Develop housing facilities for those needing transitional accommodation – including supported accommodation for young people;
- Develop specialist assessment and reablement units (such as for those recovering from a hospital stay) and dementia-friendly units.

⁸ Building accommodation to meet the needs of people in Leicestershire: Investment Prospectus 2019-2037

-
- 4.19 The County Council is keen to see development of specialist accommodation – including extra care schemes – in strategic development schemes.
- 4.20 The County Council’s **Accommodation Strategy for Working-Age Adults 2017-22** addresses the needs of those of working age with learning disabilities and autism, mental health needs, a physical disability, and those transitioning into adult social services (such as care leavers). It focuses on seeking to support and maximise individuals’ independence; and prevent and reduce the number of individuals in residential care placements. Development of supported housing and suitable accommodation for those with complex needs is identified as needed; with the document identifying particular gaps in provision in Melton and Lutterworth. In addition, it identifies a lack of step-down/ step-up/ move on facilities⁹.
- 4.21 In addition to this, the **Leicestershire Accommodation Strategy for Older People 2016-2026** sets out that going forwards, care will be commissioned to support independence and wellbeing through housing-based solutions wherever possible. Investment and commissioning will prioritise adaptations, assistive technology, reablement and extra care housing, with residential care used only where needs cannot be met in less institutional settings.

Modelling Assumptions

- 4.22 The need for specialist housing for older persons is typically modelled by applying prevalence rates to current and projected population changes and considering the level of existing supply.

⁹ Step-up facilities provide short-term support to prevent escalation of need and avoid hospital admission; step-down facilities provide short-term support following hospital discharge to enable recovery and reablement; and move-on facilities provide transitional accommodation or support to help individuals progress from temporary or intensive care settings to independent living.

4.23 The approach taken below considers a range of publications from Housing Learning Improvement Network (LIN) (including that mentioned in the PPG) to derive a series of prevalence rates. The rates also take into account the health of the population and levels of deprivation (which will impact on the tenure split between market and affordable housing).

4.24 The following prevalence rates, expressed as a need per 1,000 people aged 75 and over have been used in the analysis. These figures are for the whole of Leicester & Leicestershire with different figures used in each local authority (these figures can be seen in detailed tables below):

- Housing with support (market) – 61 units;
- Housing with support (affordable) – 64 units;
- Housing with care (market) – 28 units;
- Housing with care (affordable) – 18 units;
- Residential care – 40 bedspaces; and
- Nursing care – 45 bedspaces

4.25 It is also important to understand the supply of different types of specialist accommodation with the tables below showing the existing supply (as of Autumn 2025) of various categories of accommodation by local authority. The first table is for housing with support and housing with care which are more likely to be self-contained dwellings with the second table looking at residential and nursing care bedspaces. The total figures have also been standardised on the basis of the number of units per 1,000 people aged 75 and over (in 2024).

4.26 The analysis shows a total of 9,351 units of housing with support or care, which represents around 95 per 1,000 people aged 75 and over. There is some variation by local authority with Leicester seeing the highest number (1,863 units) but Melton has the highest proportion per population aged 75+ (at 132 units per 1,000 population aged 75+).

4.27 For nursing and residential care, a slightly lower level of supply is shown, with a total of 7,300 bedspaces, the highest number and proportion per 1,000 people aged 75+ is in Leicester.

Table 4.9 Current supply of housing with support and housing with care by local authority

	Housing with support		Housing with care		Total	Popn aged 75+ (2024)	Supply per 1,000 aged 75+
	Market	Affordable	Market	Affordable			
Blaby	127	1,053	54	83	1,317	11,277	117
Charnwood	530	846	0	100	1,476	18,110	82
Harborough	410	494	159	28	1,091	12,087	90
Hinckley & Bosworth	496	472	0	0	968	13,391	72
Leicester	258	1,402	40	163	1,863	20,010	93
Melton	167	627	0	48	842	6,396	132
NWL	215	960	0	65	1,240	10,924	114
Oadby & Wigston	262	292	0	0	554	6,643	83
TOTAL	2,465	6,146	253	487	9,351	98,838	95

Source: *Elderly Accommodation Counsel Autumn 2025*

Table 4.10 Current supply of residential and nursing care bedspaces by local authority

	Residential care	Nursing care	Total	Popn aged 75+ (2024)	Supply per 1,000 aged 75+
Blaby	376	91	467	11,277	41
Charnwood	764	373	1,137	18,110	63
Harborough	413	429	842	12,087	70
Hinckley & Bosworth	652	198	850	13,391	63
Leicester	1,515	939	2,454	20,010	123
Melton	343	88	431	6,396	67
NWL	219	204	423	10,924	39
Oadby & Wigston	508	204	712	6,643	107
TOTAL	4,790	2,526	7,316	98,838	74

Source: Elderly Accommodation Counsel Autumn 2025

- 4.28 Taking the supply forward and using the prevalence rates suggested, the table below shows estimated needs for different types of housing linked to the population projections. The analysis is separated into the various types and tenures although it should be recognised that there could be some overlap between categories (i.e. some households might be suited to more than one type of accommodation).
- 4.29 The analysis shows there is currently a largely sufficient supply of housing with support (e.g. sheltered/retirement housing) in the affordable sector now, although by 2046 a notable additional need is identified. Overall, by 2046, a shortfall of almost 11,000 units of housing with support is identified (around two-thirds in the market sector).
- 4.30 For housing with care (e.g. extra-care) the data suggests a current need for both market and affordable housing and an overall additional need for around 6,300 units by 2046 (again around two-thirds as market housing).

4.31 For nursing and residential care, the analysis suggests a modest current shortfall (only for nursing care). Moving through to 2046, a total need for around 6,000 additional bedspaces is identified – three-quarters as nursing care.

Table 4.11 Specialist Housing Need for Older Persons, 2024-46 – Leicester & Leicestershire

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Additional demand to 2046	Shortfall /surplus by 2046
Housing with support	Market	61	2,465	6,060	3,595	3,577	7,172
	Affordable	64	6,146	6,323	177	3,635	3,812
Total (housing with support)		125	8,611	12,383	3,772	7,212	10,983
Housing with care	Market	28	253	2,718	2,465	1,598	4,063
	Affordable	18	487	1,740	1,253	998	2,251
Total (housing with care)		45	740	4,458	3,718	2,596	6,314
Residential care bedspaces		40	4,790	3,962	-828	2,308	1,480
Nursing care bedspaces		45	2,526	4,458	1,932	2,596	4,528
Total bedspaces		85	7,316	8,420	1,104	4,904	6,008

Source: Icen analysis/EAC

Wheelchair User Housing

4.32 The analysis below draws on secondary data sources to estimate the number of current and future wheelchair users and to estimate the number of wheelchair accessible/adaptable dwellings that might be required in the future. Estimates of need produced in this report draw on data from the English Housing Survey (EHS) – mainly 2020/21 data. The EHS data used includes the age structure of wheelchair users, information about work needed to homes to make them ‘visitable’ for wheelchair users and data about wheelchair users by tenure.

4.33 The table below shows at a national level the proportion of wheelchair user households by the age of household reference person. Nationally,

around 3.1% of households contain a wheelchair user – with around 1% using a wheelchair indoors. There is a clear correlation between the age of the household reference person and the likelihood of there being a wheelchair user in the household.

Table 4.12 Proportion of wheelchair user households by age of household reference person – England

Age of household reference person	No household members use a wheelchair	Uses wheelchair all the time	Uses wheelchair indoors only	Uses wheelchair outdoors only	TOTAL
24 and under	99.4%	0.4%	0.0%	0.1%	100.0%
25-34	99.4%	0.1%	0.1%	0.3%	100.0%
35-49	97.9%	0.4%	0.3%	1.4%	100.0%
50-64	97.1%	0.5%	0.2%	2.2%	100.0%
65 and over	94.3%	1.3%	0.5%	4.0%	100.0%
All households	96.9%	0.6%	0.3%	2.2%	100.0%

Source: English Housing Survey (2020/21)

- 4.34 The prevalence rate data can be brought together with information about the household age structure and how this is likely to change moving forward – adjustments have also been made to take account of the relative health (by age) of the population. The data estimates a total of 12,500 wheelchair user households in 2024, and that this will rise to 16,300 by 2046.

Table 4.13 Estimated number of wheelchair user households (2024-46) – Leicester & Leicestershire

	Prevalence rate (% of households)	Households 2024	Households 2046	Wheelchair user households (2024)	Wheelchair user households (2046)
24 and under	0.5%	13,977	15,197	72	78
25-34	0.6%	58,054	71,855	334	416
35-49	1.8%	117,087	153,436	2,093	2,692
50-64	2.3%	125,907	147,849	2,957	3,405
65 and over	5.4%	128,765	180,712	6,998	9,748
All households	-	443,790	569,050	12,453	16,339

Source: Icenis analysis

- 4.35 The finding of an estimated current number of wheelchair user households does not indicate how many homes might be needed for this group – some households will be living in a home that is suitable for wheelchair use, whilst others may need improvements to accommodation, or a move to an alternative home. Data from the EHS shows that of the 814,000 wheelchair user households, some 200,000 live in a home that would either be problematic or not feasible to make fully ‘visitable’ – this is around 25% of wheelchair user households.
- 4.36 Applying this to the current number of wheelchair user households across the study area gives a current need for 3,113 additional wheelchair user homes. If the projected need for wheelchair user accommodation is also discounted to 25% of the total (on the basis that many additional wheelchair user households will already be in suitable accommodation) then a further need for 970 homes in the 2024-46 period can be identified. Added together this leads to a need estimate of 4,085 wheelchair user homes – equating to 186 dwellings per annum across the HMA.

Table 4.14 Estimated need for wheelchair user homes, 2024-46

	Current need	Projected need (2024-46)	Total current and future need
TOTAL	3,113	972	4,085

Source: *Iceni Analysis*

4.37 Furthermore, information in the EHS (for 2020/21) also provides national data about wheelchair users by tenure. This showed that, at that time, around 6.7% of social tenants were wheelchair users (including 1.8% using a wheelchair indoors/all the time), compared with 2.6% of owner-occupiers (0.8% indoors/all the time). These proportions can be expected to increase with an ageing population but do highlight the likely need for a greater proportion of social (affordable) homes to be for wheelchair users.

Table 4.15 Proportion of wheelchair user households by tenure of household reference person – England

Tenure	No household members use a wheelchair	Uses wheelchair all the time	Uses wheelchair indoors only	Uses wheelchair outdoors only	TOTAL
Owners	97.4%	0.6%	0.2%	1.8%	100.0%
Social sector	93.3%	1.3%	0.5%	4.9%	100.0%
Private renters	98.6%	0.2%	0.2%	1.0%	100.0%
All households	96.9%	0.6%	0.3%	2.2%	100.0%

Source: *English Housing Survey (2020/21)*

Local Authority Level Outputs

4.38 The series of tables below provide the same analysis as above for each local authority. In this case some of the plan periods or housing numbers scenarios modelled are different and this is explained as relevant.

Blaby

4.39 For Blaby the Proposed Housing Distribution figure of 654 dwellings per annum has been used but looking over a shorter plan period of 2024-42 to align to that for the emerging Local Plan.

4.40 The population aged 65+ in Blaby is projected to increase by 6,840 persons between 2024-42, equivalent to a 30.7% increase.

Table 4.16 Projected Change in Population of Older Persons, 2024 to 2042 – Blaby

	2024	2042	Change in population	% change
Under 65	85,905	98,778	12,873	15.0%
65-74	10,983	13,214	2,231	20.3%
75-84	8,303	11,002	2,699	32.5%
85+	2,974	4,884	1,910	64.2%
Total	108,165	127,878	19,713	18.2%
Total 65+	22,260	29,100	6,840	30.7%
Total 75+	11,277	15,886	4,609	40.9%

Source: Icen Analysis

4.41 With this demographic growth, there is projected to be an increase in the population with mobility problems of 40% (+1,544). This supports the justification for new housing to be delivered to M4(2) accessible and adaptable homes standards.

4.42 The evidence in the table below also indicates a need for specialist housing for those with learning disabilities and autistic spectrum disorders – albeit not all people in these groups may require specialist housing.

Table 4.17 Projected Changes to Population with a Range of Disabilities – Blaby

Disability	Age Range	2024	2042	Change	% change
Dementia	65+	1,476	2,165	689	46.7%
Mobility problems	65+	3,868	5,412	1,544	39.9%
Autistic Spectrum Disorders	18-64	546	659	113	20.7%
	65+	198	261	63	31.6%
Learning Disabilities	15-64	1,399	1,660	261	18.7%
	65+	434	566	131	30.2%
Impaired mobility	16-64	3,117	3,672	555	17.8%

Source: POPPI/PANSI and Demographic Projections

Charnwood

- 4.43 The adopted Charnwood Local Plan sets out a housing requirement of 19,024 dwellings between 2021-37. There were 2,274 dwellings completed between 2021-24, resulting in a residual requirement for 16,750 dwellings between 2024-37. This is equivalent to 1,288 dpa and is the figure used in analysis below.
- 4.44 The population aged 65+ in Charnwood is projected to increase by 11,112 persons between 2024-41, equivalent to a 30.4% increase.

Table 4.18 Projected Change in Population of Older Persons, 2024 to 2041 – Charnwood

	2024	2041	Change in population	% change
Under 65	151,802	169,437	17,635	11.6%
65-74	18,473	21,833	3,360	18.2%
75-84	13,353	17,472	4,119	30.8%
85+	4,757	8,389	3,632	76.4%
Total	188,385	217,132	28,747	15.3%
Total 65+	36,583	47,695	11,112	30.4%
Total 75+	18,110	25,861	7,751	42.8%

Source: *Iceni Analysis*

4.45 With this demographic growth, there is projected to be an increase in the population with mobility problems of 43% (+2,713). This supports the justification for new housing to be delivered to M4(2) accessible and adaptable homes standards.

4.46 The evidence in the table below also indicates a need for specialist housing for those with learning disabilities and autistic spectrum disorders – albeit not all people in these groups may require specialist housing.

Table 4.19 Projected Changes to Population with a Range of Disabilities – Charnwood

Disability	Age Range	2024	2041	Change	% change
Dementia	65+	2,424	3,655	1,231	50.8%
Mobility problems	65+	6,364	9,076	2,713	42.6%
Autistic Spectrum Disorders	18-64	1,085	1,258	173	15.9%
	65+	326	420	93	28.7%
Learning Disabilities	15-64	2,798	3,215	418	14.9%
	65+	720	935	214	29.8%
Impaired mobility	16-64	5,619	6,245	627	11.2%

Source: *POPPI/PANSI and Demographic Projections*

Harborough

- 4.47 Harborough District Council's emerging Local Plan proposes a requirement for 13,182 dwellings between 2020-41, with a phased trajectory of 657 dpa between 2020-36 and 534 dpa between 2036-41. Completions of 2,713 dwellings between 2021-24 have been recorded, resulting in a residual requirement between 2024-41 of 10,469 dwellings. This is equivalent to 616 dpa.
- 4.48 The population aged 65+ in Harborough is projected to increase by 9,856 persons between 2024-41, equivalent to a 41.5% increase.

Table 4.20 Projected Change in Population of Older Persons, 2024 to 2041 – Harborough

	2024	2041	Change in population	% change
Under 65	80,989	89,586	8,597	10.6%
65-74	11,637	14,940	3,303	28.4%
75-84	8,834	12,645	3,811	43.1%
85+	3,253	5,995	2,742	84.3%
Total	104,713	123,166	18,453	17.6%
Total 65+	23,724	33,580	9,856	41.5%
Total 75+	12,087	18,640	6,553	54.2%

Source: Icen Analysis

- 4.49 With this demographic growth, there is projected to be an increase in the population with mobility problems of 54% (+2,074). This supports the justification for new housing to be delivered to M4(2) accessible and adaptable homes standards.
- 4.50 The evidence in the table below also indicates a need for specialist housing for those with learning disabilities and autistic spectrum disorders – albeit not all people in these groups may require specialist housing.

Table 4.21 Projected Changes to Population with a Range of Disabilities – Harborough

Disability	Age Range	2024	2041	Change	% change
Dementia	65+	1,462	2,381	919	62.8%
Mobility problems	65+	3,818	5,892	2,074	54.3%
Autistic Spectrum Disorders	18-64	470	519	49	10.4%
	65+	195	271	76	39.0%
Learning Disabilities	15-64	1,234	1,381	147	11.9%
	65+	427	602	175	41.1%
Impaired mobility	16-64	2,926	3,177	251	8.6%

Source: POPPI/PANSI and Demographic Projections

Hinckley & Bosworth

- 4.51 For Hinckley & Bosworth the Proposed Housing Distribution figure of 711 dwellings per annum has been used but looking over a 2024-45 plan period.
- 4.52 The population aged 65+ in Harborough is projected to increase by 8,401 persons between 2024-45, equivalent to a 31.6% increase.

Table 4.22 Projected Change in Population of Older Persons, 2024 to 2045 – Hinckley & Bosworth

	2024	2045	Change in population	% change
Under 65	90,061	108,674	18,613	20.7%
65-74	13,230	15,036	1,806	13.6%
75-84	10,108	13,599	3,491	34.5%
85+	3,283	6,388	3,105	94.6%
Total	116,682	143,696	27,014	23.2%
Total 65+	26,621	35,022	8,401	31.6%
Total 75+	13,391	19,986	6,595	49.3%

Source: Icen Analysis

4.53 With this demographic growth, there is projected to be an increase in the population with mobility problems of 48% (+2,146). This supports the justification for new housing to be delivered to M4(2) accessible and adaptable homes standards.

4.54 The evidence in the table below also indicates a need for specialist housing for those with learning disabilities and autistic spectrum disorders – albeit not all people in these groups may require specialist housing.

Table 4.23 Projected Changes to Population with a Range of Disabilities – Hinckley & Bosworth

Disability	Age Range	2024	2045	Change	% change
Dementia	65+	1,709	2,726	1,017	59.5%
Mobility problems	65+	4,521	6,667	2,146	47.5%
Autistic Spectrum Disorders	18-64	652	823	171	26.2%
	65+	235	309	74	31.3%
Learning Disabilities	15-64	1,693	2,096	403	23.8%
	65+	517	673	157	30.3%
Impaired mobility	16-64	3,939	4,764	825	20.9%

Source: POPPI/PANSI and Demographic Projections

Leicester

4.55 For Leicester the Proposed Housing Distribution figure of 1,102 dwellings per annum has been used and looking over the period from 2024 to 2046.

4.56 The population aged 65+ in Leicester is projected to increase by 13,261 persons between 2024-46, equivalent to a 28.4% increase.

Table 4.24 Projected Change in Population of Older Persons, 2024 to 2046 – Leicester

	2024	2046	Change in population	% change
Under 65	341,725	342,972	1,247	0.4%
65-74	26,613	28,807	2,194	8.2%
75-84	14,256	20,520	6,264	43.9%
85+	5,754	10,556	4,802	83.5%
Total	388,348	402,855	14,507	3.7%
Total 65+	46,623	59,884	13,261	28.4%
Total 75+	20,010	31,077	11,067	55.3%

Source: Icen Analysis

- 4.57 With this demographic growth, there is projected to be an increase in the population with mobility problems of 44% (+4,077). This supports the justification for new housing to be delivered to M4(2) accessible and adaptable homes standards.
- 4.58 The evidence in the table below also indicates a need for specialist housing for those with learning disabilities and autistic spectrum disorders – albeit not all people in these groups may require specialist housing.

Table 4.25 Projected Changes to Population with a Range of Disabilities – Leicester

Disability	Age Range	2024	2046	Change	% change
Dementia	65+	3,404	5,299	1,895	55.7%
Mobility problems	65+	9,217	13,295	4,077	44.2%
Autistic Spectrum Disorders	18-64	2,515	2,717	202	8.0%
	65+	494	632	138	27.9%
Learning Disabilities	15-64	6,615	6,859	244	3.7%
	65+	1,096	1,393	297	27.1%
Impaired mobility	16-64	11,382	12,142	760	6.7%

Source: POPPI/PANSI and Demographic Projections

Melton

- 4.59 The Local Plan Review is not amending the housing requirement for Melton Borough. The residual requirement, taking account of completions between 2011-24 is for 3,359 dwellings over the 2024-36 period, equivalent to 280 dpa.
- 4.60 The population aged 65+ in Melton is projected to increase by 4,235 persons between 2024-36, equivalent to a 32.4% increase.

Table 4.26 Projected Change in Population of Older Persons, 2024 to 2036 – Melton

	2024	2036	Change in population	% change
Under 65	41,000	42,400	1,400	3.4%
65-74	6,656	8,798	2,142	32.2%
75-84	4,878	5,812	934	19.1%
85+	1,518	2,677	1,159	76.3%
Total	54,052	59,686	5,634	10.4%
Total 65+	13,052	17,287	4,235	32.4%
Total 75+	6,396	8,488	2,092	32.7%

Source: Icen Analysis

4.61 With this demographic growth, there is projected to be an increase in the population with mobility problems of 41% (+834). This supports the justification for new housing to be delivered to M4(2) accessible and adaptable homes standards.

4.62 The evidence in the table below also indicates a need for specialist housing for those with learning disabilities and autistic spectrum disorders – albeit not all people in these groups may require specialist housing.

Table 4.27 Projected Changes to Population with a Range of Disabilities – Melton

Disability	Age Range	2024	2036	Change	% change
Dementia	65+	770	1,105	334	43.4%
Mobility problems	65+	2,053	2,887	834	40.6%
Autistic Spectrum Disorders	18-64	274	292	17	6.3%
	65+	111	144	34	30.3%
Learning Disabilities	15-64	723	770	47	6.5%
	65+	240	317	77	32.2%
Impaired mobility	16-64	1,810	1,739	-70	-3.9%

Source: POPPI/PANSI and Demographic Projections

North West Leicestershire

4.63 For North West Leicestershire the Proposed Housing Distribution figure of 690 dwellings per annum has been used, looking over the period from 2024 to 2042.

4.64 The population aged 65+ in NW Leicestershire is projected to increase by 8,776 persons between 2024-42, equivalent to a 39% increase.

Table 4.28 Projected Change in Population of Older Persons, 2024 to 2042 – NWL

	2024	2042	Change in population	% change
Under 65	89,378	102,285	12,907	14.4%
65-74	11,579	15,153	3,574	30.9%
75-84	8,477	11,670	3,193	37.7%
85+	2,447	4,456	2,009	82.1%
Total	111,881	133,563	21,682	19.4%
Total 65+	22,503	31,279	8,776	39.0%
Total 75+	10,924	16,126	5,202	47.6%

Source: *Iceni Analysis*

4.65 With this demographic growth, there is projected to be an increase in the population with mobility problems of 49.5% (+1,916). This supports the justification for new housing to be delivered to M4(2) accessible and adaptable homes standards.

4.66 The evidence in the table below also indicates a need for specialist housing for those with learning disabilities and autistic spectrum disorders – albeit not all people in these groups may require specialist housing.

Table 4.29 Projected Changes to Population with a Range of Disabilities – North West Leicestershire

Disability	Age Range	2024	2042	Change	% change
Dementia	65+	1,434	2,248	814	56.8%
Mobility problems	65+	3,868	5,784	1,916	49.5%
Autistic Spectrum Disorders	18-64	644	755	112	17.3%
	65+	212	293	80	37.9%
Learning Disabilities	15-64	1,686	1,968	282	16.7%
	65+	459	637	178	38.7%
Impaired mobility	16-64	3,792	4,381	589	15.5%

Source: *POPPI/PANSI and Demographic Projections*

Oadby and Wigston

- 4.67 For Oadby and Wigston the Proposed Housing Distribution figure of 389 dwellings per annum (which is the same as the Standard Method) has been used but looking over a shorter plan period of (2024-42).
- 4.68 The population aged 65+ in Oadby ad Wigston is projected to increase by 2,943 persons between 2024-42, equivalent to a 23.3% increase.

Table 4.30 Projected Change in Population of Older Persons, 2024 to 2042 – Oadby & Wigston

	2024	2042	Change in population	% change
Under 65	49,089	59,388	10,299	21.0%
65-74	5,963	6,674	711	11.9%
75-84	4,595	5,762	1,167	25.4%
85+	2,048	3,113	1,065	52.0%
Total	61,695	74,937	13,242	21.5%
Total 65+	12,606	15,549	2,943	23.3%
Total 75+	6,643	8,875	2,232	33.6%

Source: Icen Analysis

- 4.69 With this demographic growth, the is projected to be an increase in the population with mobility problems of 32% (+778). This supports the justification for new housing to be delivered to M4(2) accessible and adaptable homes standards.
- 4.70 The evidence in the table below also indicates a need for specialist housing for those with learning disabilities and autistic spectrum disorders – albeit not all people in these groups may require specialist housing.

Table 4.31 Projected Changes to Population with a Range of Disabilities – Oadby & Wigston

Disability	Age Range	2024	2042	Change	% change
Dementia	65+	958	1,334	377	39.3%
Mobility problems	65+	2,432	3,210	778	32.0%
Autistic Spectrum Disorders	18-64	326	416	90	27.5%
	65+	116	145	29	24.7%
Learning Disabilities	15-64	867	1,082	215	24.8%
	65+	258	317	59	22.7%
Impaired mobility	16-64	1,831	2,240	409	22.3%

Source: POPPI/PANSI and Demographic Projections

Local Authority Level Recommendations

4.71 The series of tables below provide the overall recommendations for each local authority.

Blaby

4.72 The table below models the need for different forms of specialist housing to accommodate the needs of a growing older population. It indicates:

- A need for housing with support, particularly for market housing, which is equivalent to around 3-4 schemes;
- A need for 554 housing with care units, with the larger need being for market-based provision (445 units); with a need for 108 affordable units, which is equivalent to around 2 schemes;
- A need for 838 nursing/care home bedspaces, with the stronger relative need being for nursing care. This is potentially equivalent to 10+ large schemes.

Table 4.32 Specialist Housing Need for Older Persons, 2024-42 – Blaby

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition al demand to 2042	Shortfall /surplus by 2042
Housing with support	Market	74	127	834	707	341	1,048
	Affordable	47	1,053	528	-525	216	-309
Total (housing with support)		121	1,180	1,362	182	557	739
Housing with care	Market	31	54	354	300	145	445
	Affordable	12	83	136	53	56	108
Total (housing with care)		43	137	490	353	200	554
Residential care bedspaces		39	376	436	60	178	238
Nursing care bedspaces		43	91	490	399	200	600
Total bedspaces		82	467	926	459	378	838

Source: Icenis analysis/EAC

4.73 The modelling of wheelchair-user need indicates a need for 365 wheelchair-user homes over the plan period to 2042. Such users would require M4(3) wheelchair-accessible homes.

Table 4.33 Estimated need for wheelchair user homes, 2024-42

	Current need	Projected need (2024-42)	Total current and future need
Blaby	282	84	365

Source: Icenis Analysis

Charnwood

4.74 The table below models the need for different forms of specialist housing to accommodate the needs of a growing older population. It indicates:

- A need for almost 1,800 housing with support units, particularly for market housing;

- A need for 1,042 housing with care units, with the larger need being for market-based provision (794 units); with a need for 249 affordable units;
- A need for 1,021 nursing/care home bedspaces, with the stronger relative need being for nursing care.

Table 4.34 Specialist Housing Need for Older Persons, 2024-41 – Charnwood

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition al demand to 2041	Shortfall /surplus by 2041
Housing with support	Market	68	530	1,229	699	526	1,225
	Affordable	55	846	993	147	425	573
Total (housing with support)		123	1,376	2,222	846	951	1,797
Housing with care	Market	31	0	556	556	238	794
	Affordable	13	100	244	144	104	249
Total (housing with care)		44	100	800	700	342	1,042
Residential care bedspaces		39	764	711	-53	304	251
Nursing care bedspaces		44	373	800	427	342	769
Total bedspaces		83	1,137	1,511	374	647	1,021

Source: Icen analysis/EAC

4.75 The modelling of wheelchair-user need indicates a need for 623 wheelchair-user homes over the plan period to 2041. Such users would require M4(3) wheelchair-accessible homes.

Table 4.35 Estimated need for wheelchair user homes, 2024-41

	Current need	Projected need (2024-41)	Total current and future need
Charnwood	498	126	623

Source: Icen Analysis

Harborough

4.76 The table below models the need for different forms of specialist housing to accommodate the needs of a growing older population. It indicates:

- A need for almost 1,223 housing with support, particularly for market housing;
- A need for 579 housing with care units, with the larger need being for market-based provision (410 units); with a need for 169 affordable units;
- A need for 604 nursing/care home bedspaces, with the stronger relative need being for nursing care.

Table 4.36 Specialist Housing Need for Older Persons, 2024-41 – Harborough

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition al demand to 2041	Shortfall /surplus by 2041
Housing with support	Market	75	410	904	494	490	984
	Affordable	39	494	475	-19	258	238
Total (housing with support)		114	904	1,379	475	748	1,223
Housing with care	Market	31	159	369	210	200	410
	Affordable	11	28	127	99	69	169
Total (housing with care)		41	187	496	309	269	579
Residential care bedspaces		37	413	441	28	239	267
Nursing care bedspaces		41	429	496	67	269	337
Total bedspaces		78	842	938	96	508	604

Source: Icenis analysis/EAC

4.77 The modelling of wheelchair-user need indicates a need for 325 wheelchair-user homes over the plan period to 2041. Such users would require M4(3) wheelchair-accessible homes.

Table 4.37 Estimated need for wheelchair user homes, 2024-41

	Current need	Projected need (2024-41)	Total current and future need
Harborough	244	81	325

Source: Icen Analysis

Hinckley & Bosworth

4.78 The table below models the need for different forms of specialist housing to accommodate the needs of a growing older population. It indicates:

- A need for almost 1,458 housing with support, particularly for market housing;
- A need for 874 housing with care units, with the larger need being for market-based provision (599 units); with a need for 274 affordable units;
- A need for 800 nursing/care home bedspaces, with the stronger relative need being for nursing care.

4.79 The high housing with care need shown is a reflection of the lack of existing supply in the Borough. The evidence also shows a weaker supply of housing with support in the Borough than in other parts of the county.

Table 4.38 Specialist Housing Need for Older Persons, 2024-45 – Hinckley & Bosworth

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Additional demand to 2045	Shortfall /surplus by 2045
Housing with support	Market	65	496	868	372	427	799
	Affordable	57	472	758	286	373	659
Total (housing with support)		121	968	1,626	658	801	1,458
Housing with care	Market	30	0	401	401	198	599
	Affordable	14	0	184	184	91	274
Total (housing with care)		44	0	585	585	288	874
Residential care bedspaces		39	652	520	-132	256	124
Nursing care bedspaces		44	198	585	387	288	676
Total bedspaces		83	850	1,105	255	544	800

Source: Icenis analysis/EAC

4.80 The modelling of wheelchair-user need indicates a need for 458 wheelchair-user homes over the plan period to 2045. Such users would require M4(3) wheelchair-accessible homes.

Table 4.39 Estimated need for wheelchair user homes, 2024-45

	Current need	Projected need (2024-45)	Total current and future need
Hinckley & Bosworth	349	109	458

Source: Icenis Analysis

Leicester

4.81 The table below models the need for different forms of specialist housing to accommodate the needs of a growing older population. It indicates:

- A need for almost 2,748 housing with support, with the focus of need being for affordable housing;
- A need for 1,384 housing with care units, with a greater need for affordable housing (948 units) than market housing (436 units);
- A need for 648 nursing care bedspaces, with no net need for residential care provision.

Table 4.40 Specialist Housing Need for Older Persons, 2024-46 – Leicester

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition al demand to 2046	Shortfall /surplus by 2046
Housing with support	Market	32	258	641	383	355	738
	Affordable	110	1,402	2,197	795	1,215	2,010
Total (housing with support)		142	1,660	2,838	1,178	1,570	2,748
Housing with care	Market	15	40	307	267	170	436
	Affordable	36	163	715	552	396	948
Total (housing with care)		51	203	1,022	819	565	1,384
Residential care bedspaces		45	1,515	908	-607	502	-105
Nursing care bedspaces		51	939	1,022	83	565	648
Total bedspaces		96	2,454	1,930	-524	1,067	543

Source: Icen analysis/EAC

4.82 The modelling of wheelchair-user need indicates a need for 1,320 wheelchair-user homes over the period to 2046. Such users would require M4(3) wheelchair-accessible homes.

Table 4.41 Estimated need for wheelchair user homes, 2024-46

	Current need	Projected need (2024-46)	Total current and future need
Leicester	1,098	221	1,320

Source: Icen Analysis

Melton

4.83 The table below models the need for different forms of specialist housing to accommodate the needs of a growing older population. It indicates:

- A need for almost 378 market units of housing with support, with no net need for affordable provision;
- A need for 302 housing with care units, with a greater need for market housing (245 units) than for affordable units (58 units). The latter is equivalent to one scheme;
- A need for 262 nursing care bedspaces, with no net need for residential care provision.

Table 4.42 Specialist Housing Need for Older Persons, 2024-36 – Melton

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition al demand to 2036	Shortfall /surplus by 2036
Housing with support	Market	64	167	410	243	134	378
	Affordable	51	627	323	-304	106	-198
Total (housing with support)		115	794	734	-60	240	180
Housing with care	Market	29	0	184	184	60	245
	Affordable	12	48	80	32	26	58
Total (housing with care)		41	48	264	216	86	302
Residential care bedspaces		37	343	235	-108	77	-31
Nursing care bedspaces		41	88	264	176	86	262
Total bedspaces		78	431	499	68	163	231

Source: Icenis analysis/EAC

4.84 The modelling of wheelchair-user need indicates a need for 175 wheelchair-user homes over the remaining plan period to 2036. Such users would require M4(3) wheelchair-accessible homes.

Table 4.43 Estimated need for wheelchair user homes, 2024-36

	Current need	Projected need (2024-36)	Total current and future need
Melton	143	31	175

Source: *Iceni Analysis*

North West Leicestershire

4.85 The table below models the need for different forms of specialist housing to accommodate the needs of a growing older population. It indicates:

- A need for 857 units of housing with support, with the focus of need being for market provision;
- A need for 666 housing with care units, with a greater need for market housing (493 units) than for affordable units (174 units);
- A need for 959 nursing care bedspaces, with a need for both residential and nursing care.

Table 4.44 Specialist Housing Need for Older Persons, 2024-42 – North West Leicestershire

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition al demand to 2042	Shortfall /surplus by 2042
Housing with support	Market	64	215	699	484	333	817
	Affordable	62	960	677	-283	322	40
Total (housing with support)		126	1,175	1,376	201	655	857
Housing with care	Market	31	0	334	334	159	493
	Affordable	15	65	162	97	77	174
Total (housing with care)		45	65	495	430	236	666
Residential care bedspaces		40	219	440	221	210	431
Nursing care bedspaces		45	204	495	291	236	527
Total bedspaces		86	423	936	513	446	959

Source: Icen analysis/EAC

4.86 The modelling of wheelchair-user need indicates a need for 438 wheelchair-user homes over the remaining plan period to 2042. Such users would require M4(3) wheelchair-accessible homes.

Table 4.45 Estimated need for wheelchair user homes, 2024-42

	Current need	Projected need (2024-42)	Total current and future need
NWL	331	107	438

Source: Icen Analysis

Oadby and Wigston

4.87 The table below models the need for different forms of specialist housing to accommodate the needs of a growing older population. It indicates:

- A need for almost 576 units of housing with support, with a need for both market and affordable provision;
- A need for 407 housing with care units, with a greater need for market housing (284 units) than for affordable units (123 units);

- A need for 203 nursing care bedspaces, with no net need for additional residential care bedspaces.

Table 4.46 Specialist Housing Need for Older Persons, 2024-42 – Oadby & Wigston

		Housing demand per 1,000 75+	Current supply	Current demand	Current shortfall / surplus (-ve)	Addition al demand to 2042	Shortfall /surplus by 2042
Housing with support	Market	71	262	474	212	159	372
	Affordable	56	292	371	79	125	204
Total (housing with support)		127	554	846	292	284	576
Housing with care	Market	32	0	213	213	71	284
	Affordable	14	0	92	92	31	123
Total (housing with care)		46	0	304	304	102	407
Residential care bedspaces		41	508	271	-237	91	-146
Nursing care bedspaces		46	204	304	100	102	203
Total bedspaces		87	712	575	-137	193	56

Source: Icen analysis/EAC

4.88 The modelling of wheelchair-user need indicates a need for 213 wheelchair-user homes over the remaining plan period to 2042. Such users would require M4(3) wheelchair-accessible homes.

Table 4.47 Estimated need for wheelchair user homes, 2024-42

	Current need	Projected need (2024-42)	Total current and future need
Oadby & Wigston	169	45	213

Source: Icen Analysis

Delivery of M4(2) and M4(3) dwellings

4.89 Homes that are built to accessible and adaptable standards or are located on the ground floor or provide level access, can support people

as their needs change over time. Such housing allows residents to move into a home earlier in life and remain there for longer, reducing the need for later moves into specialist accommodation.

4.90 This approach supports independence, enables quicker and safer discharge from hospital, and helps people remain active and socially connected for longer, while also reducing pressure on health and social care services. Embedding accessibility within mainstream housing therefore plays a key role in creating resilient communities and making more effective use of the overall housing stock.

4.91 With this in mind, and considering also the County Council's ambition to develop mainstream housing that is suitable for older people, we have considered the potential delivery of housing for accessible and adaptable housing across the plan period. The table below sets out the key features and differences of each of the standards.

Table 4.48 M4(2) and M4(3) - Key Features

Standard	Key Features
<p>M4(2) – Accessible and Adaptable Dwellings</p>	<p>Step-free access to the dwelling</p> <p>Wider doorways and corridors (typically 850mm doors, 900mm corridors)</p> <p>Space in bathrooms and kitchens for future adaptations</p> <p>Reinforced walls for grab rails</p> <p>Living space on the entrance level</p>
<p>M4(3) – Wheelchair User Dwellings</p> <p>Two types:</p> <p>M4(3)2a – Adaptable - Can be modified later</p> <p>M4(3)2b – Accessible – Fully usable from day one.</p>	<p>Larger circulation spaces (corridors ≥1050mm, turning circles of 1500mm)</p> <p>Step-free access throughout</p> <p>Space for through-floor lifts or stairlifts</p> <p>Bathrooms with level-access showers and sufficient transfer space</p> <p>Storage/charging space for wheelchairs</p>

4.92 Conclusions on the wheelchair user housing need for M4(3) properties is set out in the table below, summarises the estimated need for this in each area across their respective plan periods. The need varies across each authority although is highest in Leicester at 1,320 homes.

Table 4.49 Estimated need for wheelchair user homes over relevant plan periods

	Current need	Projected need	Total need
Blaby	282	84	365
Charnwood	498	126	623
Harborough	244	81	325
Hinckley & Bosworth	349	109	458
Leicester	1,098	221	1,320
Melton	143	31	175
NWL	331	107	438
Oadby & Wigston	169	45	213

Source: Icen Analysis

- 4.93 In order to assess the appropriate starting point for proportions of dwellings to be built to M4(3) standard for plans which are progressing in the short-term, we have compared how the total need for wheelchair user dwellings compares with the overall housing need. This is set out below.
- 4.94 We consider the proportions in the table below to be appropriate starting points for the councils to consider requiring through policy within new housing developments. These potential policy thresholds are based on the needs position herein and should be tested through whole plan viability studies. The proportions differ for market and affordable housing reflecting the fact that disabled people are more likely to be in need of affordable housing than market.
- 4.95 Market housing should be delivered to M4(3)(a) (adaptable) standards; with affordable housing delivered to M4(3)(b) accessible standards where there is an identified need at the time of a planning application.

Table 4.50 Recommended M4(3) Provision

	Proportion of overall need	Recommended requirement	
		Market	Affordable
Blaby	3%	3%	4%
Hinckley & Bosworth	3%	3%	4%
NWL	4%	3%	5%
Oadby & Wigston	3%	3%	4%

Source: Icen Analysis

4.96 Looking then at M4(2) standards, the December 2025 consultation version of the NPPF considers this and states that at least 40% of new housing should be delivered to M4(2) standards over the course of the plan period.

4.97 In order to understand if this level of delivery would be appropriate or if it should be increased, we have considered below how the population with either mobility problems (aged 65+) or impaired mobility (aged 16-64) is expected to change in each area over the course of the plan periods as relevant to each authority¹⁰. This is shown in the table below.

Table 4.51 Change in population with mobility issues over relevant plan periods

	2024	Plan period end point	Change	% change
Blaby	6,985	9,084	2,099	30%
Hinckley & Bosworth	8,460	11,431	2,971	35%
NWL	7,660	10,165	2,505	33%
Oadby & Wigston	4,263	5,450	1,187	28%

Source: Icen Analysis

4.98 The table below shows how the change in population with mobility issues aged 16+ compares to the overall population change of those ages 16+. As can be seen in Table 4.51, all areas see an over 20% increase in the population with mobility issues.

¹⁰ The plan periods are set out in Table 1.1

4.99 Based on the analysis and standard method housing provision, the provision at a level of at least the minimum 40% M4(2) dwellings as set out in the consultation NPPF would be appropriate in each area based on the needs evidence herein; and there is a case for seeking higher provision in particular to increase the stock of adaptable homes. We note that the Government had previously intended to seek provision of all homes to M4(2) standard where level access was achievable.

Table 4.52 Proportional Mobility issue change

	Mobility Issue Change	Total Change	% Mobility Issue of total change
Blaby	2,099	18,441	11%
Hinckley & Bosworth	2,971	24,440	12%
NWL	2,505	21,712	12%
Oadby & Wigston	1,187	14,604	8%

Source: Icen Analysis

4.100 The expected proportion of dwellings for M4(2) and M4(3) homes recommended should be considered in the Councils' viability evidence. The viability challenge is particularly relevant for M4(3)(B) standards. These make properties accessible from the moment they are built and involve high additional costs that could in some cases challenge the feasibility of delivering all or any of a policy target. It should be noted that local authorities only have the right to request M4(3)(B) accessible compliance from homes for which they have nomination rights. They can, however, request M4(3)(A) adaptable compliance from the wider (market) housing stock.

4.101 Equally, with both M4(2) and M4(3) homes it may not be possible for some schemes to be built to these higher standards due to built-form, topography, flooding etc.

5. Conclusions and Recommendations

- 5.1 This section draws together the key findings of the housing mix and specialist housing needs, summarising the implications of demographic change, policy updates and modelling undertaken across the Leicester and Leicestershire Housing Market Area. It highlights the main conclusions arising from the analysis and sets out clear recommendations to inform plan-making, development management and future housing delivery.

Drivers of Change

- 5.2 Across the Housing Market Area, population growth to 2046 is projected to be substantial, with growth of around 204,000 (rounded) additional people. The most significant change is the rapid ageing of the population, with people aged 65 and over expected to account for approximately 37% of total population growth and the population aged 85 and over almost doubling. Growth in the working-age population is also projected, while growth in the number of children is relatively modest.
- 5.3 The analysis and report conclusions take account of these demographic dynamics and how households in different tenures occupy homes. There is extensive under-occupation in the owner-occupied sector, particularly in larger homes, alongside overcrowding in rented housing in some areas; and the analysis seeks to address overcrowding and provide some potential for right-sizing.
- 5.4 Better alignment between household needs and dwelling sizes would support more efficient use of land and stock, particularly over the longer term. New supply therefore has a role in gradually rebalancing the housing stock rather than simply replicating existing patterns.

Need for Different Sizes and Types of Homes

- 5.5 In terms of housing mix, the report concludes that demand in the market sector will continue to be strongest for three-bedroom homes across most authorities, with a continuing but more limited requirement for four-bedroom and larger properties. Affordable home ownership is most strongly focused on two- and three-bedroom homes, reflecting the role of this tenure in supporting the ability of people to get on the housing ladder.
- 5.6 Rented affordable housing shows a consistently stronger need for one- and two-bedroom properties, driven by growth in smaller and older households, although there remains a clear role for larger rented homes in supporting family needs and enabling chains of moves.
- 5.7 Overall, housing mix recommendations should not be applied automatically to every site. They are intended as strategic guidance and monitoring benchmarks, to be interpreted alongside site-specific factors such as location, scale, density, accessibility, local market evidence and viability. However, where development proposals diverge significantly from the recommended mix, it is reasonable for local authorities to expect clear justification, particularly on larger or strategic sites.

Older Persons and those with Disabilities

- 5.8 In terms of housing for disabled and older people it is considered that the ageing of the population will drive a substantial increase in demand for accessible, adaptable and specialist housing. Although the HMA currently has a slightly younger age profile than regional and national averages, the scale of future growth in older age groups will generate significant additional need for housing with support, housing with care, residential and nursing care and wheelchair-accessible homes. Current provision meets some needs but is insufficient to accommodate projected

growth, with modelling identifying significant shortfalls across most categories by 2046.

- 5.9 Planning policy should take a proactive role in addressing these needs. Policy should consider the application of accessible and adaptable housing standards (M4(2)) across a minimum 40% of new housing, alongside targeted provision of wheelchair-accessible homes (M4(3)), particularly within the affordable sector. The provision of housing that meets accessibility standards is not solely about meeting the needs of wheelchair users, but about supporting independence, enabling people to remain in their homes for longer and reducing pressure on health and social care systems.
- 5.10 Going forwards it is recommended that growth of specialist housing is focused in extra-care and housing-with-care schemes, particularly in accessible locations close to services, while reserving residential and nursing care for those with the most complex needs. Strategic and larger development sites are particularly important opportunities for delivering specialist accommodation at scale.
- 5.11 There is also a growing need for supported housing for working-age adults with disabilities, including learning disabilities and autistic spectrum disorders, as well as a shortage of step-down, step-up and move-on accommodation. While not all individuals in these groups will require specialist housing, the scale of projected growth indicates that this need should be explicitly recognised in planning and commissioning strategies.