

Unlocking Potential for Seniors Housing Development

Meeting the need of an ageing population



The UK’s population is ageing. By 2037, it’s forecast that one in four of us will be over 65.

The results of the latest census, released in June 2022, show that the 65+ population in England has grown by almost 1.7 million since the 2011 census and stood at 10.4 million as of mid-2021. This represents an increase of 19%, while the proportion of the population aged 65+ also increased from 16.4% in 2011 to 18.4% in 2021.

With this in mind, there’s a clear need for local authorities to put plans in place to ensure there’s a suitable, age-appropriate choice of housing for individuals in later life. In 2017, we started to analyse and grade local plans for all local authorities in England based on their approach to housing for seniors. We’ve specifically focused on whether they have either a policy for seniors housing, or have made site-specific allocations for this use. This year, as in 2020, we’ve supplemented our research by looking at wider demographic changes, recent seniors housing delivery, residential pricing, and housing wealth.

Change is coming, and at an increasing rate. Over the past five years, there’s been a 13.5% increase in English local authorities that have adopted planning policies and site allocations for seniors housing.

Whilst this is significant progress, the figure also masks several regressions in the data. Since our last survey in 2020, 13 local authorities have moved backwards. Planning remains one of the largest barriers to growth of the seniors housing sector in England. It’s now 2022, and nearly half of local authorities still don’t have clear policies in place to deliver housing for seniors – though this is still an improvement on 2017.

This year’s survey is released against a backdrop of an increasingly difficult development environment, with rising operational and build costs, as well as an increasingly competitive land market. These factors have made it harder than ever to bring forward new seniors housing schemes.

Nutrient and water neutrality issues, insufficient local government resources, and local plan failures have added another layer of complexity.

Yet there are positive signs. There’s growing recognition of the role that seniors housing can play, both in improving quality of life for seniors and the wider societal benefits of releasing under-occupied homes into the housing market. The government has finally acknowledged these benefits, and has announced the creation of a cross-departmental task force on housing for older people. This will champion the need for sector-specific legislation, clarity in the planning system, and funding for affordable housing.

Meanwhile, more than 7,500 seniors housing units were delivered in 2021, up 12% on the previous year. In addition, over 200 planning applications were submitted for seniors housing schemes in 2021, with almost 120 schemes receiving planning permission.

Data on the development pipeline points to a rapidly growing mix of for sale and rental options, across both Retirement Housing and Integrated Retirement Community (IRC) developments. More supply, more propositions, and more choice will help fuel awareness and exposure to the benefits of specialist seniors housing. However, a supportive policy environment will be key if the sector is to meet its near-term potential.



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Ranking England’s Planning Authorities

We’ve reviewed the plans of all local planning authorities in England and graded them using the following system:



Grade A:
Clear policies indicating details of the required number of dwellings or care home beds, how this will be achieved and specific site allocations given



Grade B:
A clear policy as above, but no land or site allocations



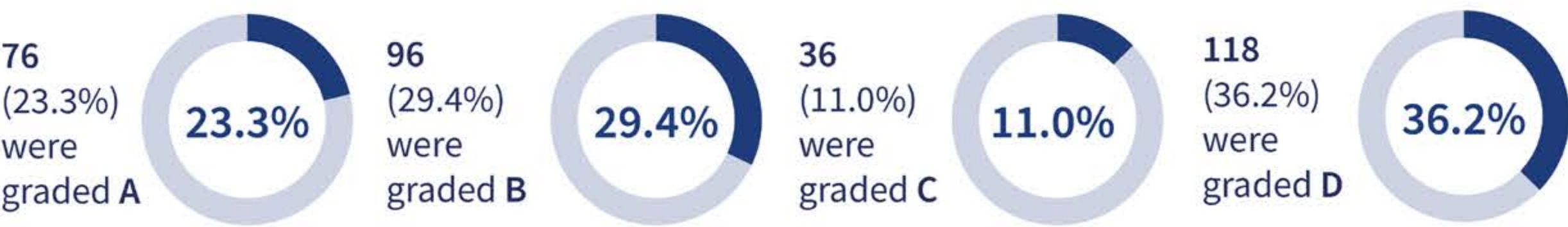
Grade C:
Site allocations given, but no clear seniors housing policy



Grade D:
Neither – with policy (at the most) confined to generalisations such as “we will make provision for housing all types of people including the elderly and the disabled.”

Ranking Results

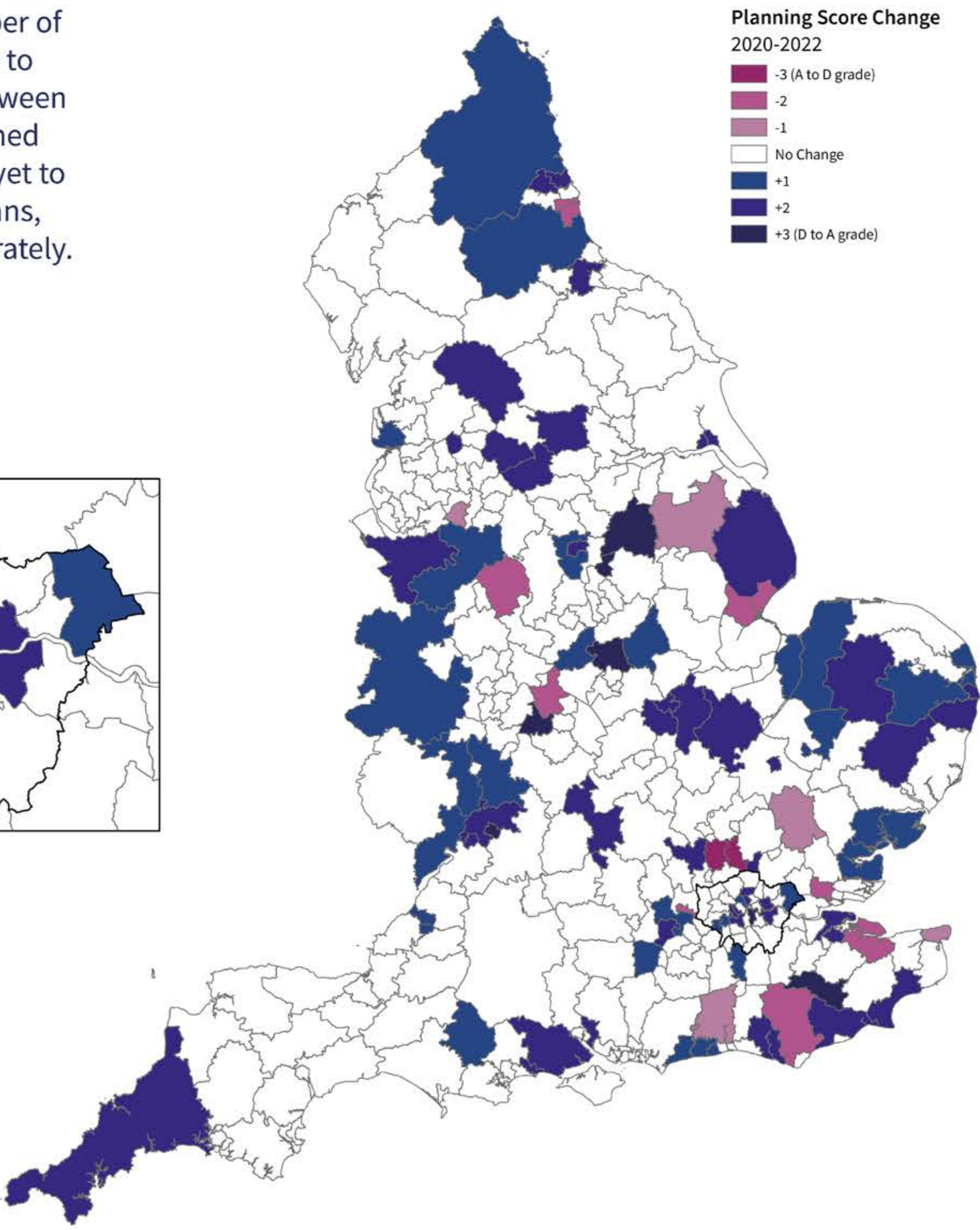
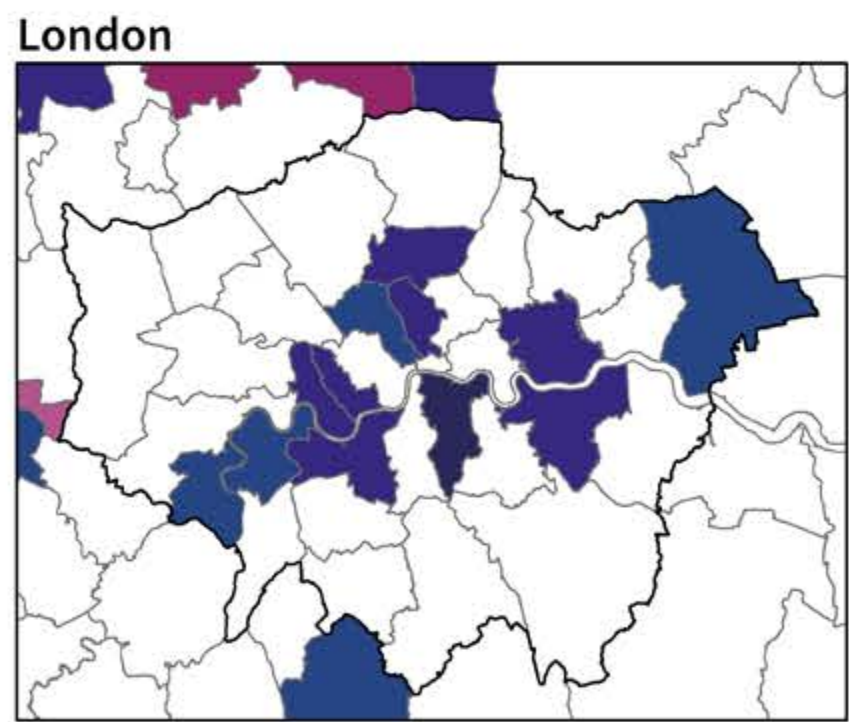
This year’s survey results found that out of 326* local authorities in England:



How does 2022 compare with previous years?

Ranking	2017		2020		2022	
A	32	9.7%	60	18.6%	76	23.3%
B	72	22%	80	24.8%	96	29.4%
C	22	6.7%	21	6.5%	36	11.0%
D	203	62%	161	50%	118	36.2%
Total	329	100%	322	100%	326	100%

* The changes in number of local authorities is due to boundary changes between surveys. Where combined local authorities have yet to combine their local plans, they are counted separately.



Seniors Housing Opportunity Rankings

By overlaying key demographic and economic indicators onto the planning policy survey, we have identified locations where there are the greatest prospects for seniors housing to be developed. We have also found areas where bringing forward new developments may be more challenging.

As well as the planning scores, our model considers the following metrics:

- **65+ population estimates, 2020:** ONS data providing an estimate of the number of individuals aged 65+ in each local authority
- **65+ population change, 2020-2035:** ONS projections providing an estimate of the growth in the number of individuals aged 65+ in each local authority over the next 15 years
- **Average 65+ owner occupier property value:** using a combination of datasets, we estimate the average value of a property owned by a 65+ owner occupier in each local authority. We compare it to the average sale price of a seniors housing unit in an integrated retirement community in that region. We achieved this using a combination of Land Registry, Experian, Rightmove and LonRes data
- **Percentage of 65+ households that are owner occupiers/ social renters:** for the private opportunity score, we incorporate the proportion of 65+ households that are owner occupiers. For the affordable opportunity score, we incorporate the proportion of 65+ households that are social renters

- **Average achieved residential £psf:** using Land Registry and Ministry of Housing, Communities & Local Government (MHCLG) data, we calculate the average achieved £psf for sales in each local authority, across the wider residential sales market
- **Number of seniors housing units delivered, 2017-2021:** using data from the Elderly Accommodation Counsel and local planning portals, we calculate the number of private and affordable seniors housing units that were delivered in each local authority from 2017 to 2021.

We gave these metrics a weighting based on their relative importance to the private and affordable seniors housing markets. There’s a clear distinction in the offering and proposition of these products, so target areas will be different.

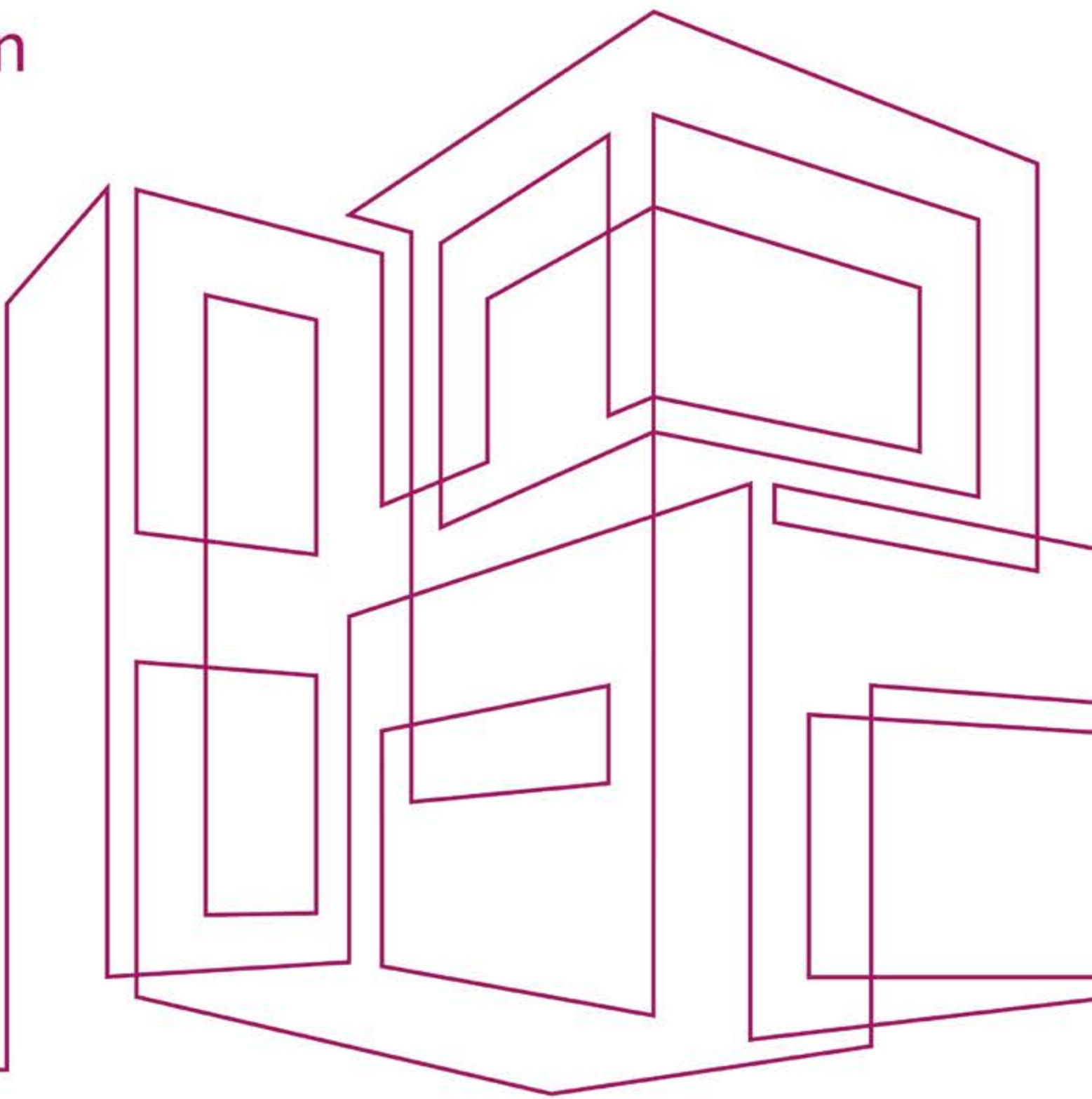
These metrics provide an accurate reflection of the demand and supply landscape in each local authority. However, there are other key indicators that a seniors housing operator would consider on a more granular and site-specific basis. Analysis on supply pipeline, affordability, care needs and demand-supply gap are also crucial to the site finding and decision-making process.

The relationship between planning and overall opportunity score

While there’s a correlation between a local authority’s planning score as identified by the survey and its overall opportunity score, it isn’t a clear-cut relationship. Planning authorities with low planning rankings can still perform strongly on other metrics, and vice versa.

But it’s clear that, in some parts of the country, adjustments to a council’s policy approach are needed to unlock the sector’s true potential for growth.

In these areas, the planning position is still acting as a brake on the sector’s ability to develop and meet the needs of the local population.



Where local plan issues have led to regression



Impacts of a difficult planning environment

The results of this year's survey demonstrate that seniors housing is suffering from the same headwinds that affect the development industry as a whole.

The research reveals 13 councils whose planning score has regressed over the last two years. Of these, six have regressed because of issues with their local plans. This can be seen in the graphic above.

The remaining seven authorities either didn't bring forward an allocation, or had moved to a more generic policy.

These policies were concerned with meeting the needs of all demographics in their community, rather than being specifically aimed at promoting seniors housing.

Councils that have regressed since 2020

Council	2020	2022	Comment
Basildon	B	D	Local Plan withdrawn prior to adoption
Castle Point	D	D(A)	Approved Local Plan would have been an A, but council has voted not to adopt it
Cheshire East	A	B	Allocation removed from submitted allocation plan
Horsham	A	B	Allocation affected by plan delay - water and nutrients
Isle of Wight	A	B	Allocation not taken forward
North Warwickshire	A	C	Adopted Local Plan policy more generic than previously consulted draft
Slough	B	D	Local Plan work abandoned
Staffordshire Moorlands	B	D	New Local Plan doesn't have a specific policy promoting older persons housing, or a specific allocation for it
Sunderland	B	D	New Local Plan has a supportive, but generic mention in housing mix policy
Thanet	A	B	New Local Plan doesn't contain a specific allocation
Trafford	A	B	Places for Everyone taken over as allocation document - no specific allocations
Wealden	B	D	Local Plan struck down over Duty to Co-operate issues
Welwyn Hatfield	A	D	Downgraded because of Local Plan issues. Whilst draft plan would be an A, it's been at examination since 2017 and looks like it will be considered unsound



Seniors Housing Successes

The seniors housing market has grown and diversified in recent years, in part because of the increasing level of policy recognition that has been achieved.

Both the National Planning Policy Framework (NPPF) and the National Planning Policy Guidance (NPPG) acknowledge the importance of seniors housing. In February 2022, the UK government launched a cross-departmental task force to promote better choice, quality, and security of housing for older people.

The impact of this diversification can be seen in the shift in opportunity areas revealed by our research.

A number of new entrants are already making their way into the top fifteen, such as Tunbridge Wells. In 2020, it ranked 171st in the overall private opportunity area score. Over the last two years, the borough has rocketed into the top fifteen (coming sixth overall in the private opportunity ranking).

This comes as a result of an increased level of investment in the area, a supportive local council, and a significantly improved planning policy position in the emerging local plan. The number of London boroughs appearing in the top fifteen in the private opportunity area rankings has tripled, from two in 2020, to six in 2022.

The increased understanding of the sector, as well as the newly adopted national planning policy guidance, is also improving the prospects of success at appeal.

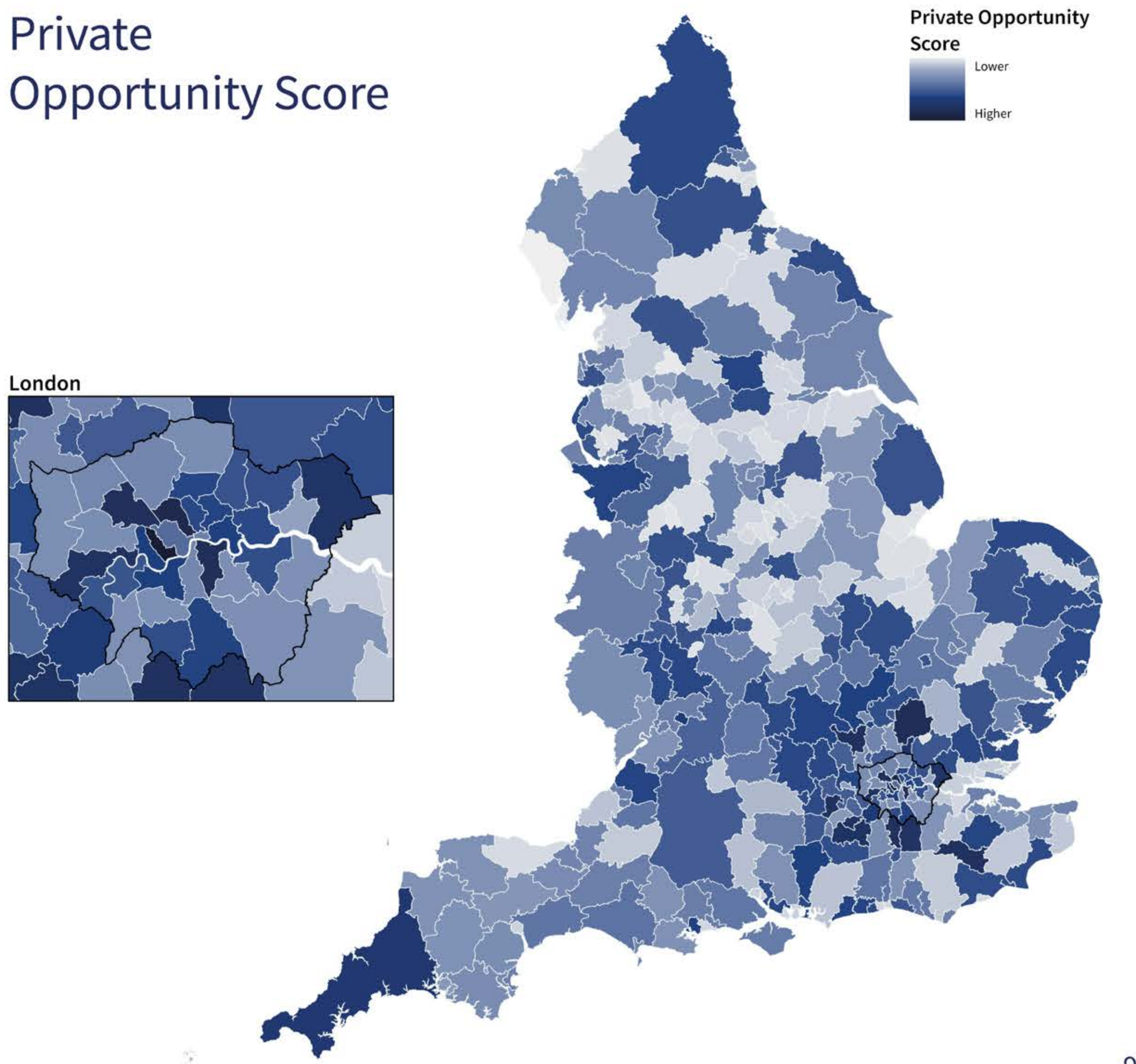


Private Opportunity

Private Opportunity Ranking – Top 15

Private Score Rank	Council	Region	2022 result	2020 result
1	Kensington and Chelsea	London	A	C
2	Camden	London	A	B
3	East Hertfordshire	East of England	A	A
4	Southwark	London	A	D
5	Brent	London	A	A
6	Tunbridge Wells	South East	A	D
7	Reigate and Banstead	South East	A	B
8	Dacorum	East of England	A	C
9	Bracknell Forest	South East	A	C
10	Hounslow	London	A	A
11	Guildford	South East	A	A
12	Woking	South East	A	A
13	Tandridge	South East	A	A
14	Havering	London	A	B
15	Broxbourne	East of England	A	C

Private Opportunity Score

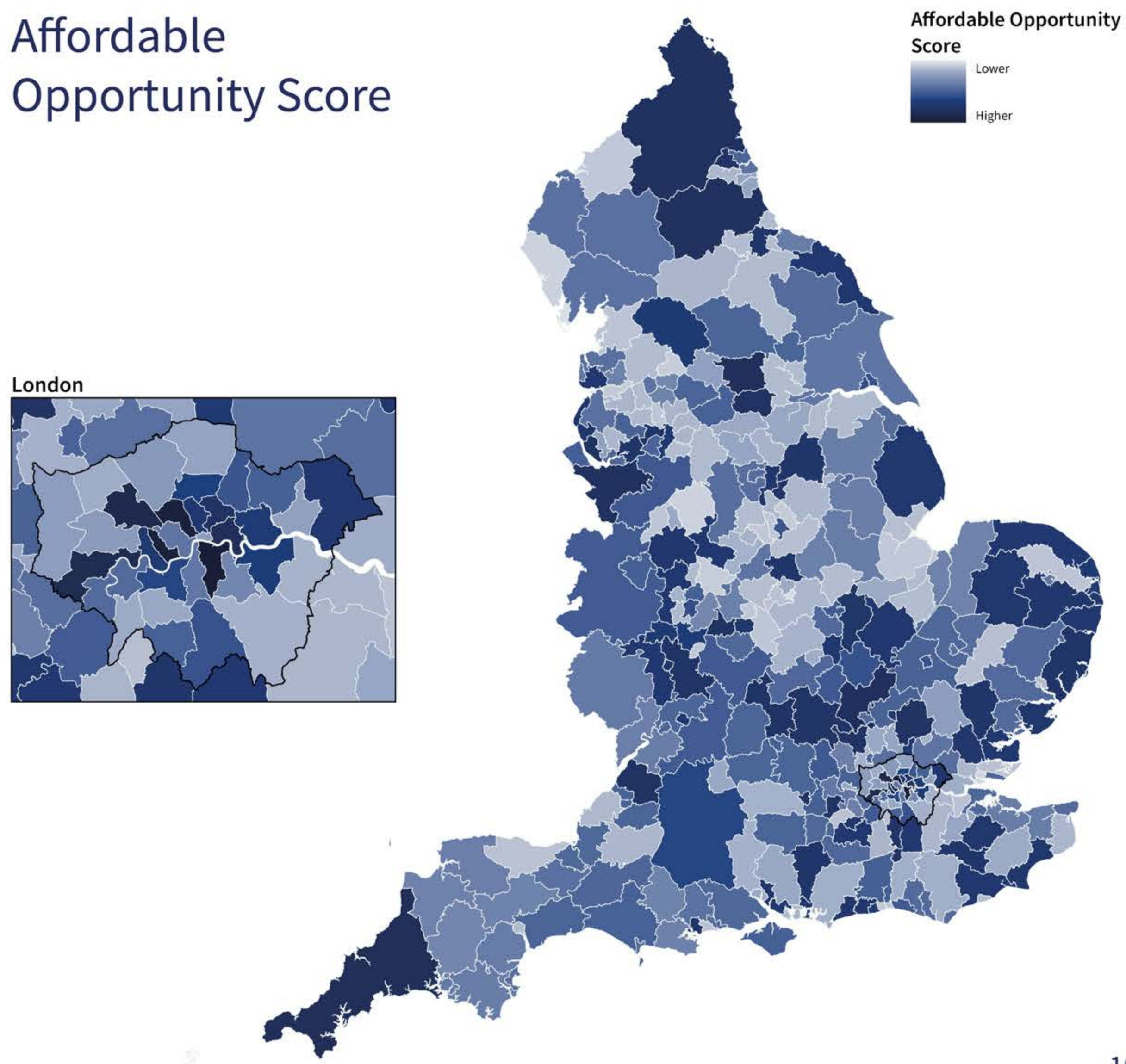


Affordable Opportunity

Affordable Opportunity Ranking – Top 15

Affordable Score Rank	Council	Region	2022 result	2020 result
1	Southwark	London	A	D
2	Camden	London	A	B
3	Kensington and Chelsea	London	A	C
4	Brent	London	A	A
5	Hounslow	London	A	A
6	Tower Hamlets	London	B	B
7	Cornwall	South West	A	C
8	Leeds	Yorkshire and The Humber	A	C
9	Central Bedfordshire	East of England	A	A
10	County Durham	North East	A	B
11	Cheshire West and Chester	North West	A	C
12	Northumberland	North East	A	B
13	South Gloucestershire	South West	A	A
14	Wakefield	Yorkshire and The Humber	A	A
15	Hackney	London	B	B

Affordable Opportunity Score





A Look At Sonning Common, Oxfordshire

Inspired Villages successfully promoted an integrated retirement community of up to 133 units, at Sonning Common, in South Oxfordshire.

The application was decided at appeal. The appeal decision is particularly noteworthy because of the inspector's conclusions. These regarded both the level of need in the local authority area and how that need had been addressed in the Council's local plan.

The inspector concluded that: "there is a specific and immediate need for extra care provision and market extra care housing... there are no sites with planning permission in the pipeline other than the Lower Shiplake site which is now uncertain.... the appeal site stands alone as the only site in the whole of the District which can deliver extra care market housing and deliver the affordable housing contribution which the SOLP Policy H9 now requires for C2 uses."

This conclusion was based on a detailed analysis of how the Council's local plan had addressed the need for seniors housing. In particular, the inspector considered how that need had been broken down by the type of seniors housing on offer.

The inspector found that while the local plan did contain a policy that "expressly deals with specialist housing for older people, covering all forms of specialist housing for older people, it is completely generic as to provision. No attempt is made to differentiate between types and tenure of specialist housing for older people, nor to address the need for each. The needs of all older people are simply lumped together. Nor is there any engagement with the market constraints and viability considerations relating to specialist accommodation for older people."

As a result, the Council couldn't establish that the need for extra care housing within the district had been met. The inspector found that there was a significant shortfall, and the appeal was allowed.



The Outlook for Seniors Housing

The UK population is ageing rapidly and there is an urgent need to accelerate the delivery of age-appropriate housing stock.

Local authorities are responding to this, but they are moving at a slow pace. Three quarters of them are yet to adopt specific planning policies and site allocations addressing seniors housing, while 13 have regressed since the last report was published.

Nationally, the mood is shifting. In February, the UK announced a new task force to speed up the development of retirement communities in the levelling up white paper. The NPPF and NPPG also acknowledge seniors housing and say there is a need to increase this in local plan requirements, but it isn't prescriptive. So how do we further encourage councils to recognise the importance of seniors housing as a key component of the housing market? And how do we convince them that this is a housing product that is worth supporting?

There are several arguments that can be made, but the following three are key:

1. Councils need to be educated on the growing breadth of housing need that can be addressed through seniors housing schemes. A more diverse tenure choice means there are now for sale and rental options, as well as the provision of affordable housing. This opens the sector up to more people at different price points, addressing a broad spectrum of housing need. That the sector provides a wider range of choices is also something the NPPF asks councils to plan for.

This is key, as pre-conceived ideas about seniors housing can be challenged. It stands to reason that as an increasing number of people turn to seniors housing, more family homes can be released to the market. At a time when the number of new homes being built and purchased is decreasing, finding other ways to address housing need is a good move.

2. The economic and social benefit of seniors housing must be recognised. The development of these schemes creates direct and indirect jobs during construction. During the operational phase, a significant number of jobs are created and sustained over the long term.

If we think more widely, seniors housing schemes can help to reduce the cost of health and social services. Housing people in age-appropriate homes can hugely reduce instances of trips, falls and other injuries within the home. Housing people in safe communities, where residents can interact with each other, is proven to be better for people's mental health and wellbeing. It again reduces the reliance on social services to deal with issues of loneliness and isolation.

3. There is unprecedented need for this type of accommodation, and one which isn't being acknowledged by councils. There have been examples of seniors housing planning applications rejected by councils being overturned at appeal stage. In these cases, inspectors are finding evidence of immediate need for extra care provision and housing in local authorities. This was the case with Inspired Villages' 133-unit integrated retirement community application at Sonning Common in South Oxfordshire.

The cost of appeals at inquiry is not insignificant. Through better understanding and acceptance of need, planning for it through the local plan process, and taking a proactive approach to this sector, councils could reduce the costs to the taxpayer of fighting unnecessary and unjustified appeals.

This last point isn't one where the private sector should berate our public sector counterparts. Rather, we should seek to work proactively together to collectively understand the methodology for calculating need, and properly plan for it. The results of the ARCO-commissioned review into seniors housing need should help in this regard, with the findings due to be released later this year.



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Key Concepts

Concept	Impact on Seniors Housing
Community Infrastructure Levy (CIL)	<p>CIL is a development land tax charged on new build developments at differential rates.</p> <p>Local authorities set their CIL rates based on high level viability studies. These studies look at general types of development that are likely to come forward in their area.</p> <p>However, often they don't take seniors housing into account. This presents a problem, as the economic model underpinning the sector is very different to that of standard housing schemes.</p>
Use Classes	<p>Use Classes are broad categories of developments which are grouped together for planning purposes. The category that a development falls into will determine the starting points for the planning obligations that it will provide. It also decides how it is treated for CIL purposes.</p> <p>There are two use classes that senior housing schemes could fall into. C3 Dwellings, which contains people's homes and standard market housing; and C2 Residential Institutions that provide care to those in need of it.</p> <p>Modern care provision often aims at preserving resident's independence as long as possible, meaning that it can share many characteristics with market housing. The key difference between the two is the provision of care to residents.</p> <p>For a number of years, ARCO been calling for the creation of a clear definition for housing-with-care in the planning system under a separate use class, or alternatively, clarification under which circumstances housing with care schemes should sit within the existing C2 use class.</p>
Local Plan/ Development Plan	<p>These documents set the strategic planning priorities for a local authority area over the plan period, which usually run for ten to fifteen years. The local plan policies determine where, and what types of development are likely to come forward in the foreseeable future.</p>

The Data Behind the Report

Private opportunity area rankings

The Data Behind the Report

Private opportunity area rankings

Council	Region	Private opportunity score rank
Kensington and Chelsea	London	1
Camden	London	2
East Hertfordshire	East of England	3
Southwark	London	4
Brent	London	5
Tunbridge Wells	South East	6
Reigate and Banstead	South East	7
Dacorum	East of England	8
Bracknell Forest	South East	9
Hounslow	London	10
Guildford	South East	11
Woking	South East	12
Tandridge	South East	13
Havering	London	14
Broxbourne	East of England	15
Cornwall	South West	16
Elmbridge	South East	17
Cheltenham	South West	18
Hammersmith and Fulham	London	19
Wandsworth	London	20
Central Bedfordshire	East of England	21
East Hampshire	South East	22
Tower Hamlets	London	23
Poole	South West	24
Croydon	London	25
South Gloucestershire	South West	26
Hackney	London	27
Cheshire West and Chester	North West	28
Arun	South East	29
Aylesbury Vale	South East	30
South Bucks	South East	31
Maidstone	South East	32
Fareham	South East	33
Leeds	Yorkshire and The Humber	34

Council	Region	Private opportunity score rank
Haringey	London	35
Wychavon	West Midlands	36
Solihull	West Midlands	37
South Oxfordshire	South East	38
Havant	South East	39
Chelmsford	East of England	40
Islington	London	41
Northumberland	North East	42
Newham	London	43
Wycombe	South East	44
North Norfolk	East of England	45
Suffolk Coastal	East of England	46
Malvern Hills	West Midlands	47
Wokingham	South East	48
Folkestone and Hythe	South East	49
Sefton	North West	50
Cherwell	South East	51
Reading	South East	52
Worthing	South East	53
Maldon	East of England	54
East Northamptonshire	East Midlands	55
Sutton	London	56
Scarborough	Yorkshire and The Humber	57
Eastleigh	South East	58
Brentwood	East of England	59
Rother	South East	60
Wakefield	Yorkshire and The Humber	61
South Norfolk	East of England	62
Huntingdonshire	East of England	63
Greenwich	London	64
Waveney	East of England	65
Waverley	South East	66
North Hertfordshire	East of England	67
County Durham	North East	68
Tendring	East of England	69
Redbridge	London	70
Stafford	West Midlands	71
Charnwood	East Midlands	72
Crawley	South East	73

Council	Region	Private opportunity score rank
Warrington	North West	74
Waltham Forest	London	75
East Lindsey	East Midlands	76
Worcester	West Midlands	77
Bromsgrove	West Midlands	78
Fylde	North West	79
Cambridge	East of England	80
Braintree	East of England	81
Richmond upon Thames	London	82
East Staffordshire	West Midlands	83
Wellingborough	East Midlands	84
South Staffordshire	West Midlands	85
Breckland	East of England	86
Craven	Yorkshire and The Humber	87
Brighton and Hove	South East	88
Liverpool	North West	89
Epping Forest	East of England	90
Mansfield	East Midlands	91
Hart	South East	92
Bassetlaw	East Midlands	93
Coventry	West Midlands	94
Watford	East of England	95
Oxford	South East	96
Stevenage	East of England	97
Stockton-on-Tees	North East	98
Newcastle upon Tyne	North East	99
Hertsmere	East of England	100
Salford	North West	101
Wyre Forest	West Midlands	102
Windsor and Maidenhead	South East	103
Spelthorne	South East	104
Wiltshire	South West	105
Bolsover	East Midlands	106
Great Yarmouth	East of England	107
Chiltern	South East	108
Cotswold	South West	109
Cheshire East	North West	110
Runnymede	South East	111
Westminster	London	112

Council	Region	Private opportunity score rank
West Dorset DC	South West	113
Bedford	East of England	114
Horsham	South East	115
East Devon	South West	116
Bath and North East Somerset	South West	117
New Forest	South East	118
South Cambridgeshire	East of England	119
Milton Keynes	South East	120
Stratford-on-Avon	West Midlands	121
West Oxfordshire	South East	122
Vale of White Horse	South East	123
Lewes	South East	124
Kirklees	Yorkshire and The Humber	125
Isle of Wight	South East	126
Harrogate	Yorkshire and The Humber	127
South Northamptonshire	East Midlands	128
Trafford	North West	129
East Dorset DC	South West	130
Shropshire	West Midlands	131
Wyre	North West	132
Christchurch	South West	133
Babergh	East of England	134
Gloucester	South West	135
Southend-on-sea	East of England	136
East Cambridgeshire	East of England	137
Basingstoke and Deane	South East	138
Tewkesbury	South West	139
South Somerset	South West	140
Torbay	South West	141
Bristol, City of	South West	142
City of London	London	143
Eastbourne	South East	144
North East Lincolnshire	Yorkshire and The Humber	145
Medway	South East	146
Colchester	East of England	147
Corby	East Midlands	148
Mid Suffolk	East of England	149
York	Yorkshire and The Humber	150
Thanet	South East	151

Council	Region	Private opportunity score rank
Wirral	North West	152
Rushmoor	South East	153
Wigan	North West	154
Derbyshire Dales	East Midlands	155
Kettering	East Midlands	156
Telford and Wrekin	West Midlands	157
Calderdale	Yorkshire and The Humber	158
Warwick	West Midlands	159
Ryedale	Yorkshire and The Humber	160
Weymouth and Portland BC	South West	161
Sedgemoor	South West	162
St Albans	East of England	163
East Riding of Yorkshire	Yorkshire and The Humber	164
Walsall	West Midlands	165
North Tyneside	North East	166
Luton	East of England	167
Barnet	London	168
Manchester	North West	169
South Lakeland	North West	170
Nottingham	East Midlands	171
Eden	North West	172
Lambeth	London	173
Forest Heath	East of England	174
Lincoln	East Midlands	175
North East Derbyshire	East Midlands	176
Harrow	London	177
Halton	North West	178
Tamworth	West Midlands	179
Sandwell	West Midlands	180
Allerdale	North West	181
Taunton Deane	South West	182
West Lancashire	North West	183
South Hams	South West	184
Three Rivers	East of England	185
Chesterfield	East Midlands	186
Ealing	London	187
Herefordshire, County of	West Midlands	188
Blackpool	North West	189
Mole Valley	South East	190

Council	Region	Private opportunity score rank
Teignbridge	South West	191
Enfield	London	192
Merton	London	193
Hillingdon	London	194
Canterbury	South East	195
Hyndburn	North West	196
Bromley	London	197
Lewisham	London	198
Kingston upon Hull, City of	Yorkshire and The Humber	199
Kingston upon Thames	London	200
Bexley	London	201
Swale	South East	202
Welwyn Hatfield	East of England	203
West Devon	South West	204
Winchester	South East	205
North Dorset DC	South West	206
Epsom and Ewell	South East	207
North West Leicestershire	East Midlands	208
Purbeck DC	South West	209
Torridge	South West	210
North Devon	South West	211
Stroud	South West	212
Mid Sussex	South East	213
South Kesteven	East Midlands	214
Melton	East Midlands	215
Sevenoaks	South East	216
King's Lynn and West Norfolk	East of England	217
North Kesteven	East Midlands	218
Mid Devon	South West	219
West Lindsey	East Midlands	220
Forest of Dean	South West	221
Surrey Heath	South East	222
North Warwickshire	West Midlands	223
Plymouth	South West	224
Slough	South East	225
South Tyneside	North East	226
Redcar and Cleveland	North East	227
Norwich	East of England	228
Rossendale	North West	229

Council	Region	Private opportunity score rank
Preston	North West	230
Burnley	North West	231
Barking and Dagenham	London	232
Uttlesford	East of England	233
Isles of Scilly	South West	234
Birmingham	West Midlands	235
West Berkshire	South East	236
Harborough	East Midlands	237
Test Valley	South East	238
Chichester	South East	239
North Somerset	South West	240
Stockport	North West	241
Swindon	South West	242
Tonbridge and Malling	South East	243
Sheffield	Yorkshire and The Humber	244
Dover	South East	245
Ashford	South East	246
Dartford	South East	247
Wealden	South East	248
Rutland	East Midlands	249
Mendip	South West	250
Daventry	East Midlands	251
Bradford	Yorkshire and The Humber	252
South Derbyshire	East Midlands	253
Ribble Valley	North West	254
Northampton	East Midlands	255
Rochford	East of England	256
Peterborough	East of England	257
Thurrock	East of England	258
Broadland	East of England	259
Southampton	South East	260
Rushcliffe	East Midlands	261
Portsmouth	South East	262
Hinckley and Bosworth	East Midlands	263
Basildon	East of England	264
Blaby	East Midlands	266
Exeter	South West	267
South Ribble	North West	268
Chorley	North West	269

Council	Region	Private opportunity score rank
Barnsley	Yorkshire and The Humber	270
Amber Valley	East Midlands	271
Lancaster	North West	272
Selby	Yorkshire and The Humber	273
Gosport	South East	274
Bournemouth	South West	275
Leicester	East Midlands	276
Doncaster	Yorkshire and The Humber	277
Adur	South East	278
Gravesham	South East	279
Hambleton	Yorkshire and The Humber	280
Castle Point	East of England	281
Newark and Sherwood	East Midlands	282
High Peak	East Midlands	283
Wolverhampton	West Midlands	284
Derby	East Midlands	285
Ashfield	East Midlands	286
Hastings	South East	287
North Lincolnshire	Yorkshire and The Humber	288
Dudley	West Midlands	289
Bury	North West	290
Gedling	East Midlands	291
Richmondshire	Yorkshire and The Humber	292
Bolton	North West	293
Darlington	North East	294
West Somerset	South West	295
Fenland	East of England	296
Rochdale	North West	297
Nuneaton and Bedworth	West Midlands	298
Lichfield	West Midlands	299
Staffordshire Moorlands	West Midlands	300
Cannock Chase	West Midlands	301
Broxtowe	East Midlands	302
Tameside	North West	303
Rotherham	Yorkshire and The Humber	304
Carlisle	North West	305
Oldham	North West	306
Rugby	West Midlands	307
South Holland	East Midlands	308

Council	Region	Private opportunity score rank
Erewash	East Midlands	309
Knowsley	North West	310
Sunderland	North East	311
Oadby and Wigston	East Midlands	312
Harlow	East of England	313
St. Helens	North West	314
Newcastle-under-lyme	West Midlands	315
Ipswich	East of England	316
Redditch	West Midlands	317
Boston	East Midlands	318
Gateshead	North East	319
Stoke-on-Trent	West Midlands	320
Blackburn with Darwen	North West	321
Pendle	North West	322
Hartlepool	North East	323
Middlesborough	North East	324
Barrow-in-Furness	North West	325
Copeland	North West	326

The Data Behind the Report

Affordable opportunity area rankings

Affordable opportunity area rankings

Council	Region	Affordable opportunity score rank
Southwark	London	1
Camden	London	2
Kensington and Chelsea	London	3
Brent	London	4
Hounslow	London	5
Tower Hamlets	London	6
Cornwall	South West	7
Leeds	Yorkshire and The Humber	8
Central Bedfordshire	East of England	9
County Durham	North East	10
Cheshire West and Chester	North West	11
Northumberland	North East	12
South Gloucestershire	South West	13
Wakefield	Yorkshire and The Humber	14
Hackney	London	15
Liverpool	North West	16
East Hertfordshire	East of England	17
Dacorum	East of England	18
Bracknell Forest	South East	19
Newcastle upon Tyne	North East	20
Solihull	West Midlands	21
Wychavon	West Midlands	22
Crawley	South East	23
Cherwell	South East	24
Aylesbury Vale	South East	25
Reading	South East	26
Salford	North West	27
Warrington	North West	28
Suffolk Coastal	East of England	29
East Northamptonshire	East Midlands	30
Stockton-on-Tees	North East	31
Mansfield	East Midlands	32
East Hampshire	South East	33
Tunbridge Wells	South East	34
Poole	South West	35
Reigate and Banstead	South East	36

Council	Region	Affordable opportunity score rank
Worcester	West Midlands	37
Bassetlaw	East Midlands	38
Charnwood	East Midlands	39
Braintree	East of England	40
Stevenage	East of England	41
Chelmsford	East of England	42
Havant	South East	43
South Norfolk	East of England	44
Stafford	West Midlands	45
Sefton	North West	46
Bolsover	East Midlands	47
Eastleigh	South East	48
Arun	South East	49
Maidstone	South East	50
Folkestone and Hythe	South East	51
Tendring	East of England	52
Woking	South East	53
Breckland	East of England	54
Coventry	West Midlands	55
East Lindsey	East Midlands	56
South Staffordshire	West Midlands	57
Wellingborough	East Midlands	58
Huntingdonshire	East of England	59
Maldon	East of England	60
Islington	London	61
Rother	South East	62
Guildford	South East	63
Havering	London	64
East Staffordshire	West Midlands	65
North Norfolk	East of England	66
Cheltenham	South West	67
Scarborough	Yorkshire and The Humber	68
Malvern Hills	West Midlands	69
Tandridge	South East	70
Fylde	North West	71
Waveney	East of England	72
Worthing	South East	73
Manchester	North West	74
Fareham	South East	75

Council	Region	Affordable opportunity score rank
Hammersmith and Fulham	London	76
Great Yarmouth	East of England	77
Broxbourne	East of England	78
Craven	Yorkshire and The Humber	79
Wyre Forest	West Midlands	80
Newham	London	81
Bromsgrove	West Midlands	82
Greenwich	London	83
Haringey	London	84
Wandsworth	London	85
Wiltshire	South West	86
Sandwell	West Midlands	87
Kingston upon Hull, City of	Yorkshire and The Humber	88
Bedford	East of England	89
Croydon	London	90
Cambridge	East of England	91
Waltham Forest	London	92
Nottingham	East Midlands	93
Cheshire East	North West	94
Milton Keynes	South East	95
Wycombe	South East	96
Stratford-on-Avon	West Midlands	97
Elmbridge	South East	98
Shropshire	West Midlands	99
Cotswold	South West	100
Brighton and Hove	South East	101
Corby	East Midlands	102
Wirral	North West	103
Horsham	South East	104
Oxford	South East	105
Telford and Wrekin	West Midlands	106
Wokingham	South East	107
Redbridge	London	108
Isle of Wight	South East	109
Walsall	West Midlands	110
Kirklees	Yorkshire and The Humber	111
West Dorset DC	South West	112
Sutton	London	113
Bristol, City of	South West	114
South Bucks	South East	115

Council	Region	Affordable opportunity score rank
South Cambridgeshire	East of England	116
Wigan	North West	117
North Hertfordshire	East of England	118
Trafford	North West	119
Watford	East of England	120
North Tyneside	North East	121
Vale of White Horse	South East	122
South Oxfordshire	South East	123
York	Yorkshire and The Humber	124
Rushmoor	South East	125
East Devon	South West	126
Bath and North East Somerset	South West	127
West Oxfordshire	South East	128
Calderdale	Yorkshire and The Humber	129
Harrogate	Yorkshire and The Humber	130
Basingstoke and Deane	South East	131
Gloucester	South West	132
Tewkesbury	South West	133
Lincoln	East Midlands	134
South Somerset	South West	135
Halton	North West	136
South Northamptonshire	East Midlands	137
Southend-on-sea	East of England	138
Waverley	South East	139
Hart	South East	140
Sedgemoor	South West	141
Medway	South East	142
Warwick	West Midlands	143
New Forest	South East	144
East Cambridgeshire	East of England	145
Mid Suffolk	East of England	146
Kettering	East Midlands	147
Richmond upon Thames	London	148
Lewes	South East	149
Babergh	East of England	150
Colchester	East of England	151
Weymouth and Portland BC	South West	152
Thanet	South East	153
Luton	East of England	154
North East Lincolnshire	Yorkshire and The Humber	155
Eastbourne	South East	156

Council	Region	Affordable opportunity score rank
Ryedale	Yorkshire and The Humber	157
Torbay	South West	158
Spelthorne	South East	159
Christchurch	South West	160
Derbyshire Dales	East Midlands	161
North East Derbyshire	East Midlands	162
Chesterfield	East Midlands	163
Brentwood	East of England	164
Forest Heath	East of England	165
Tamworth	West Midlands	166
Eden	North West	167
Hertsmere	East of England	168
Wyre	North West	169
Taunton Deane	South West	170
Allerdale	North West	171
West Lancashire	North West	172
South Tyneside	North East	173
South Lakeland	North West	174
East Dorset DC	South West	175
Hyndburn	North West	176
Epping Forest	East of England	177
Westminster	London	178
North West Leicestershire	East Midlands	179
East Riding of Yorkshire	Yorkshire and The Humber	180
Blackpool	North West	181
Norwich	East of England	182
Lambeth	London	183
Windsor and Maidenhead	South East	184
Herefordshire, County of	West Midlands	185
Plymouth	South West	186
Teignbridge	South West	187
Redcar and Cleveland	North East	188
South Kesteven	East Midlands	189
South Hams	South West	190
Canterbury	South East	191
Stroud	South West	192
Swale	South East	193
North Kesteven	East Midlands	194
West Lindsey	East Midlands	195

Council	Region	Affordable opportunity score rank
Runnymede	South East	196
North Devon	South West	197
Chiltern	South East	198
Forest of Dean	South West	199
North Warwickshire	West Midlands	200
Melton	East Midlands	201
Purbeck DC	South West	202
Preston	North West	203
King's Lynn and West Norfolk	East of England	204
Torridge	South West	205
Mid Devon	South West	206
Rossendale	North West	207
North Dorset DC	South West	208
West Devon	South West	209
Lewisham	London	210
Burnley	North West	211
Birmingham	West Midlands	212
Barnet	London	213
Ealing	London	214
Hillingdon	London	215
City of London	London	216
Uttlesford	East of England	217
Bradford	Yorkshire and The Humber	218
Knowsley	North West	219
Barking and Dagenham	London	220
Enfield	London	221
Sunderland	North East	222
Sheffield	Yorkshire and The Humber	223
Welwyn Hatfield	East of England	224
Slough	South East	225
Tonbridge and Malling	South East	226
Swindon	South West	227
Southampton	South East	228
Winchester	South East	229
Merton	London	230
Doncaster	Yorkshire and The Humber	231
St Albans	East of England	232
Stoke-on-Trent	West Midlands	233
Barnsley	Yorkshire and The Humber	234

Council	Region	Affordable opportunity score rank
Peterborough	East of England	235
Leicester	East Midlands	236
Ashford	South East	237
Kingston upon Thames	London	238
Northampton	East Midlands	239
Thurrock	East of England	240
Harrow	London	241
Chichester	South East	242
Mid Sussex	South East	243
Wealden	South East	244
Three Rivers	East of England	245
Harlow	East of England	246
Bromley	London	247
Test Valley	South East	248
South Derbyshire	East Midlands	249
Wolverhampton	West Midlands	250
West Berkshire	South East	251
Daventry	East Midlands	252
Rotherham	Yorkshire and The Humber	253
Derby	East Midlands	254
Bexley	London	255
Portsmouth	South East	256
Mole Valley	South East	257
Basildon	East of England	258
Richmondshire	Yorkshire and The Humber	259
Tameside	North West	260
Rochdale	North West	261
Chorley	North West	262
Dover	South East	263
Mendip	South West	264
Harborough	East Midlands	265
St. Helens	North West	266
Dartford	South East	267
Sevenoaks	South East	268
Oldham	North West	269
Newark and Sherwood	East Midlands	270
Gateshead	North East	271
Bolton	North West	272
Dudley	West Midlands	273

Council	Region	Affordable opportunity score rank
North Somerset	South West	274
Ashfield	East Midlands	275
Cannock Chase	West Midlands	276
High Peak	East Midlands	277
North Lincolnshire	Yorkshire and The Humber	278
Hastings	South East	279
Hambleton	Yorkshire and The Humber	280
Hartlepool	North East	281
Selby	Yorkshire and The Humber	282
Blackburn with Darwen	North West	283
Gosport	South East	284
Exeter	South West	285
Middlesborough	North East	286
Darlington	North East	287
Stockport	North West	288
Ribble Valley	North West	289
Amber Valley	East Midlands	290
Rutland	East Midlands	291
Fenland	East of England	292
Hinckley and Bosworth	East Midlands	293
Ipswich	East of England	294
St Edmundsbury	East of England	295
Rushcliffe	East Midlands	296
Epsom and Ewell	South East	297
Boston	East Midlands	298
Blaby	East Midlands	299
Bournemouth	South West	300
West Somerset	South West	301
Gravesham	South East	302
Rochford	East of England	303
Surrey Heath	South East	304
Broadland	East of England	305
Lancaster	North West	306
Rugby	West Midlands	307
Bury	North West	308
Newcastle-under-lyme	West Midlands	309
Carlisle	North West	310
Broxtowe	East Midlands	311
Erewash	East Midlands	312

Council	Region	Affordable opportunity score rank
Redditch	West Midlands	313
South Holland	East Midlands	314
Nuneaton and Bedworth	West Midlands	315
Adur	South East	316
Gedling	East Midlands	317
South Ribble	North West	318
Lichfield	West Midlands	319
Pendle	North West	320
Copeland	North West	321
Staffordshire Moorlands	West Midlands	322
Castle Point	East of England	323
Oadby and Wigston	East Midlands	324
Barrow-in-Furness	North West	325
Isles of Scilly	South West	326

The Data Behind the Report

Planning rankings

Planning rankings

Council	2022 result	2020 result
Arun	A	B
Aylesbury Vale	A	A
Bassetlaw	A	D
Bolsover	A	A
Bracknell Forest	A	C
Braintree	A	A
Breckland	A	C
Brent	A	A
Bromsgrove	A	A
Broxbourne	A	C
Camden	A	B
Central Bedfordshire	A	A
Charnwood	A	D
Chelmsford	A	A
Cheltenham	A	D
Cherwell	A	C
Cheshire West and Chester	A	C
Cornwall	A	C
County Durham	A	B
Coventry	A	A
Craven	A	C
Crawley	A	A
Dacorum	A	C
East Hampshire	A	A
East Hertfordshire	A	A
East Lindsey	A	C
East Northamptonshire	A	C
East Staffordshire	A	A
Eastleigh	A	C
Fareham	A	A
Folkestone and Hythe	A	C
Fylde	A	B
Great Yarmouth	A	B
Guildford	A	A
Havant	A	A
Havering	A	B

Council	2022 result	2020 result
Hounslow	A	A
Huntingdonshire	A	C
Kensington and Chelsea	A	C
Leeds	A	C
Liverpool	A	A
Maidstone	A	A
Maldon	A	B
Malvern Hills	A	B
Mansfield	A	D
Newcastle upon Tyne	A	C
North Norfolk	A	A
Northumberland	A	B
Poole	A	A
Reading	A	A
Reigate and Banstead	A	B
Rother	A	C
Salford	A	A
Scarborough	A	A
Sefton	A	A
Solihull	A	D
South Gloucestershire	A	A
South Norfolk	A	B
South Staffordshire	A	A
Southwark	A	D
Stafford	A	A
Stevenage	A	A
Stockton-on-Tees	A	C
Suffolk Coastal	A	A
Tandridge	A	A
Tendring	A	B
Tunbridge Wells	A	D
Wakefield	A	A
Warrington	A	A
Waveney	A	C
Wellingborough	A	A
Woking	A	A
Worcester	A	A
Worthing	A	B
Wychavon	A	B

Council	2022 result	2020 result
Wyre Forest	A	A
Allerdale	B	B
Babergh	B	B
Basingstoke and Deane	B	B
Bath and North East Somerset	B	B
Bedford	B	B
Blackpool	B	B
Brentwood	B	B
Brighton and Hove	B	B
Bristol, City of	B	C
Calderdale	B	D
Cambridge	B	D
Cheshire East	B	C
Chesterfield	B	D
Christchurch	B	D
Colchester	B	C
Corby	B	D
Cotswold	B	B
Croydon	B	B
Derbyshire Dales	B	B
East Cambridgeshire	B	B
East Devon	B	B
East Dorset DC	B	B
Eastbourne	B	B
Eden	B	B
Elmbridge	B	B
Forest Heath	B	C
Gloucester	B	D
Greenwich	B	D
Hackney	B	B
Halton	B	B
Hammersmith and Fulham	B	D
Haringey	B	D
Harrogate	B	B
Hart	B	C
Horsham	B	A
Hyndburn	B	D
Isle of Wight	B	B
Islington	B	D

Council	2022 result	2020 result
Kettering	B	D
Kingston upon Hull, City of	B	D
Kirklees	B	D
Lewes	B	D
Lincoln	B	B
Luton	B	B
Manchester	B	B
Medway	B	D
Mid Suffolk	B	D
Milton Keynes	B	B
New Forest	B	D
Newham	B	D
North East Derbyshire	B	C
North East Lincolnshire	B	B
North Hertfordshire	B	B
North Tyneside	B	D
Nottingham	B	B
Oxford	B	D
Redbridge	B	B
Rushmoor	B	B
Ryedale	B	B
Sandwell	B	B
Sedgemoor	B	B
South Bucks	B	B
South Cambridgeshire	B	B
South Lakeland	B	B
South Northamptonshire	B	B
South Oxfordshire	B	B
South Somerset	B	B
Southend-on-sea	B	B
Spelthorne	B	B
Stratford-on-Avon	B	B
Sutton	B	B
Tamworth	B	B
Telford and Wrekin	B	B
Tewkesbury	B	D
Thanet	B	A
Torbay	B	B
Tower Hamlets	B	B

Council	2022 result	2020 result
Trafford	B	A
Vale of White Horse	B	B
Walsall	B	B
Waltham Forest	B	B
Wandsworth	B	D
Warwick	B	B
Watford	B	B
Waverley	B	B
West Dorset DC	B	B
West Lancashire	B	B
West Oxfordshire	B	B
Weymouth and Portland BC	B	B
Wigan	B	B
Wiltshire	B	B
Wirral	B	B
Wokingham	B	B
Wycombe	B	B
Wyre	B	B
York	B	B
Burnley	C	C
Canterbury	C	C
Chiltern	C	C
East Riding of Yorkshire	C	C
Epping Forest	C	C
Forest of Dean	C	D
Herefordshire, County of	C	C
Hertsmere	C	C
King's Lynn and West Norfolk	C	D
Melton	C	D
Mid Devon	C	C
North Devon	C	C
North Dorset DC	C	D
North Kesteven	C	C
North Warwickshire	C	A
North West Leicestershire	C	D
Norwich	C	C
Plymouth	C	C
Preston	C	C
Purbeck DC	C	C

Council	2022 result	2020 result
Redcar and Cleveland	C	C
Richmond upon Thames	C	D
Rossendale	C	C
Runnymede	C	C
Shropshire	C	D
South Hams	C	C
South Kesteven	C	C
South Tyneside	C	C
Stroud	C	C
Swale	C	A
Taunton Deane	C	C
Teignbridge	C	C
Torridge	C	C
West Devon	C	C
West Lindsey	C	B
Windsor and Maidenhead	C	D
Adur	D	D
Amber Valley	D	D
Ashfield	D	D
Ashford	D	D
Barking and Dagenham	D	D
Barnet	D	D
Barnsley	D	D
Barrow-in-Furness	D	D
Basildon	D	B
Bexley	D	D
Birmingham	D	D
Blaby	D	D
Blackburn with Darwen	D	D
Bolton	D	D
Boston	D	B
Bournemouth	D	D
Bradford	D	D
Broadland	D	D
Bromley	D	D
Broxtowe	D	D
Bury	D	D
Cannock Chase	D	D
Carlisle	D	D

Council	2022 result	2020 result
Castle Point	D	D
Chichester	D	D
Chorley	D	D
City of London	D	D
Copeland	D	D
Darlington	D	D
Dartford	D	D
Daventry	D	D
Derby	D	D
Doncaster	D	D
Dover	D	D
Dudley	D	D
Ealing	D	D
Enfield	D	D
Epsom and Ewell	D	D
Erewash	D	D
Exeter	D	D
Fenland	D	D
Gateshead	D	D
Gedling	D	D
Gosport	D	D
Gravesham	D	D
Hambleton	D	D
Harborough	D	D
Harlow	D	D
Harrow	D	D
Hartlepool	D	D
Hastings	D	D
High Peak	D	D
Hillingdon	D	D
Hinckley and Bosworth	D	D
Ipswich	D	D
Isles of Scilly	D	D
Kingston upon Thames	D	D
Knowsley	D	D
Lambeth	D	D
Lancaster	D	D
Leicester	D	D
Lewisham	D	D

Council	2022 result	2020 result
Lichfield	D	D
Mendip	D	D
Merton	D	D
Mid Sussex	D	D
Middlesborough	D	D
Mole Valley	D	D
Newark and Sherwood	D	D
Newcastle-under-lyme	D	D
North Lincolnshire	D	D
North Somerset	D	D
Northampton	D	D
Nuneaton and Bedworth	D	D
Oadby and Wigston	D	D
Oldham	D	D
Pendle	D	D
Peterborough	D	D
Portsmouth	D	D
Redditch	D	D
Ribble Valley	D	D
Richmondshire	D	D
Rochdale	D	D
Rochford	D	D
Rotherham	D	D
Rugby	D	D
Rushcliffe	D	D
Rutland	D	D
Selby	D	D
Sevenoaks	D	D
Sheffield	D	D
Slough	D	B
South Derbyshire	D	D
South Holland	D	D
South Ribble	D	D
Southampton	D	D
St Albans	D	A
St Edmundsbury	D	D
St. Helens	D	D
Staffordshire Moorlands	D	B
Stockport	D	D

Council	2022 result	2020 result
Stoke-on-Trent	D	D
Sunderland	D	B
Surrey Heath	D	D
Swindon	D	D
Tameside	D	D
Test Valley	D	D
Three Rivers	D	D
Thurrock	D	D
Tonbridge and Malling	D	D
Uttlesford	D	C
Wealden	D	B
Welwyn Hatfield	D	A
West Berkshire	D	D
West Somerset	D	D
Westminster	D	D
Winchester	D	D
Wolverhampton	D	D