



Hart Housing and Economic Development Needs Assessment (HEDNA)

FINAL REPORT

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Quality information

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List of Acronyms

APS	Annual Population Survey
AR	Affordable Rent
BRES	Business Register and Employment Survey
BRMA	Broad Rental Market Area
CLT	Community Land Trust
DfE	Department for Education
DLA	Disability Living Allowance
ENA	Economic Needs Assessment
FEMA	Functional Economic Market Area
GVA	Gross Value Added
HCC	Hampshire County Council
HDC	Hart District Council
HEDNA	Housing & Economic Development Needs Assessment
HLIN	Housing Learning and Improvement Network
HRF	Housing Requirement Figure
HRP	Household Reference Person
JSNA	Joint Strategic Needs Assessment
LAA	Land Availability Assessment
LDS	Local Development Scheme
LGR	Local Government Reorganisation
LHA	Local Housing Allowance
LHN	Local Housing Need
LHNA	Local Housing Needs Assessment
LHNF	Local Housing Need Figure
LPA	Local Planning Authority
LQ	Location Quotient
LTHPD	Long Term Health Problem or Disability
MHCLG	Ministry of Housing, Communities, and Local Government
MOD	Ministry of Defence
NPPF	National Planning Policy Framework
ONS	Office for National Statistics

PIP	Personal Independence Payment
PPG	Planning Practice Guidance
PRS	Private Rented Sector
SDS	Spatial Development Strategy
SHMA	Strategic Housing Market Assessment
SHOP	Strategic Housing for Older People
SNPP	Sub-National Population Projections
SR	Social Rent
TTWA	Travel to Work Area
UASC	Unaccompanied Asylum Seeking Children
UC	Universal Credit
VOA	Valuation Office Agency

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1. Key Findings

- 1.1.1 Hart District Council (HDC) are preparing a new Local Plan. This will be a key planning document that will shape, plan, and manage growth, and development across the district. The new Local Plan will cover a minimum 10-year period from adoption between 2026 and 2039 (2039 being the end date).
- 1.1.2 This Housing & Economic Development Needs Assessment (HEDNA) is part of the evidence base for the new Local Plan. It considers housing needs and economic development needs in line with the National Planning Policy Framework (2026) and Planning Practice Guidance (PPG) on housing and economic needs assessment (2025). An employment land review has also been prepared by AECOM alongside this report.

1.2 Housing Market and Functional Economic Area

- 1.2.1 A review of both the housing market and functional economic market area suggests that Hart's strongest relationships are with Rushmoor and Basingstoke & Deane. Together the three authorities can be defined as the FEMA and the local Housing Market Area that relates to Hart. Given the proposed formation of the North Hampshire Unitary Authority in 2028, the grouping of Hart, Rushmoor and Basingstoke & Deane would broadly align with new administrative boundaries. For the purposes of the analysis in this HEDNA, Hart District is benchmarked against North Hampshire (Hart, Rushmoor and Basingstoke & Deane) as well as the Hampshire and the Solent Combined Authority area covering Hampshire County Council area, Isle of Wight, Portsmouth, and Southampton. This area will develop a Spatial Development Strategies (SDS) which includes Hart.

1.3 Housing Need

Overall Need for Housing in Hart

- 1.3.1 NPPF 2026 policy HO1: 'Assessing the need for homes' describes how the overall need for housing should be established through a housing need assessment, using the 'Standard Method', as set out in the planning practice guidance on housing and economic needs assessment (PPG)¹.
- 1.3.2 PPG states that "housing need is an unconstrained assessment of the number of homes needed in an area. Assessing housing need is the first step in the process of deciding how many homes need to be planned for. It should be undertaken separately from assessing land availability, establishing a housing

¹ [Housing and economic needs assessment - GOV.UK](https://www.gov.uk/guidance/housing-and-economic-needs-assessment)

requirement figure, and preparing policies to address this such as site allocations”².

- 1.3.3 The Standard Method identifies a minimum figure of 804 dwellings per annum in Hart, equivalent to 10,446 dwellings over the period 2026-2039 (end of plan period) or 14,464 dwellings over the longer period 2026-2044. This represents a significant increase compared with previous assessments of housing need and historic delivery rates. The uplift is principally driven by the affordability adjustment within the Standard Method and reflects the Government’s objective of increasing housing delivery across England.
- 1.3.4 The Standard Method figure substantially exceeds both the 2022-based household projections (384 households per annum 2026-2039) and the number of homes required to support forecast employment growth (186 homes per annum). While this demonstrates that the level of housing need identified is sufficient to accommodate future labour force requirements, it also raises important strategic questions regarding the composition of future growth, the balance between locally arising need and in-migration, and the nature of growth Hart wishes to support through the Local Plan.

People and Households

- 1.3.5 Hart is expected to experience continued population and household growth over the plan period, with demographic change characterised by an ageing population alongside ongoing demand from families and working-age households. Between 2026 and 2039 the population is projected to increase by around 5,537 people (5.4%), whilst household growth is expected to be stronger (an increase of 4,986 households, 11.8% growth). This reflects longer life expectancy and a growing number of smaller households.
- 1.3.6 The district already has a higher proportion of older residents than many comparator areas – the proportion of older individuals aged 65+ (19.7%) in Hart was higher than North Hampshire (17.4%) and England (18.4%) in 2021 and this trend is expected to continue, creating demand for housing that meets the needs of older people while maintaining opportunities for younger households and families.
- 1.3.7 Household composition data demonstrates that Hart remains an attractive location for family households, with above-average proportions of households with dependent children (29.8% of all households in 2021 compared to 28.4% in North Hampshire and 25.0% in Hampshire & the Solent). 24.4% of households in Hart were older households (single people or couples where all occupants were over 66 years of age).
- 1.3.8 On average, households in Hart have relatively high incomes (estimated at £87,455 in 2025). However, lower quartile incomes are estimated at around

² Paragraph: 001 Reference ID: 2a-001-20241212. Available at: <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

£45,385 and individual lower quartile earnings are around £25,656. These figures are used to understand the affordability of different housing options within the district.

- 1.3.9 AECOM's housing mix modelling indicates a continued requirement for a broad range of homes across all tenures under current trends in household growth and occupancy. Long term trends in demographic change and occupancy patterns would expect that demand for new market housing is focused on three- and four-bedroom houses, affordable home ownership products on one, two and three-bedroom homes, and social/affordable rented housing on one, two and three-bedroom dwellings, whilst maintaining some provision for larger 4+ bedroom accommodation. This modelling does not take into account current pressures in the Affordable Housing sector (see Section 9), or the viability or deliverability of different types and sizes of homes in the market.
- 1.3.10 Provision of new housing to meet the anticipated demographic change in Hart (described above) would reinforce the existing patterns within the housing stock. New housing provision, particularly if in line with Standard Method levels of delivery, would offer the opportunity to widen the range of homes available within Hart to improve choice within the housing stock and address gaps.

Housing Stock and Supply

- 1.3.11 Hart's housing stock is characterised by high levels of home ownership (75.7% household owned their own home in 2021 compared to 66.5% in North Hampshire and 65% in Hampshire and Solent Combined Authority area. There is relatively limited affordable and private rented provision compared with the wider housing market area and other comparator areas. Just 8.8% of households in Hart live in social/affordable rented housing compared to 15% in North Hampshire and 17% in England as a whole. Hart also had the smallest private rented sector, with 13.6% of households private renting, well below national levels of 20.5%.
- 1.3.12 The existing housing stock in Hart is heavily weighted towards detached properties and larger homes, with almost 40% of households occupying dwellings with four or more bedrooms. This distinguishes Hart from comparator areas and reflects the district's attractiveness to families and higher-income households. However, the relative lack of smaller homes (particularly 1-2 bedroom terraces and flats) and the relative lack of affordable homes (both Affordable Housing and more affordable forms of market housing) presents challenges for younger households, first-time buyers, lower-income residents and those seeking to downsize.
- 1.3.13 It is important to keep in mind that Hart sits within a wider housing market area and has particularly close relationships with Rushmoor. The neighbouring authority provides a complimentary mix of housing to some extent so the

choice of properties within the stock needs to be viewed within this wider context.

Prices, Rents and Affordability

- 1.3.14 Housing in Hart is relatively expensive compared to the rest of North Hampshire and the other comparator areas and that affordability pressures remain significant across both the owner-occupied and private rented sectors. House prices are substantially above national averages, with the median house price £460,000 in 2025 and lower quartile prices at £348,000. New build homes generally command a premium over the existing housing stock.
- To afford a median priced property on the open market in Hart, households would need an income of £134,065, 53.3% greater than the estimated average household income in the district.
 - Lower quartile properties are at the margins of affordability for households on average incomes in Hart. In addition to this, households would require a deposit of £34,800 (if a 10% deposit is assumed), with this increasing to £46,000 for median priced dwellings.
 - Households with access to a higher than 10% deposit would reduce the income requirements for purchasing. While wealthier households may have access to higher deposits through savings or existing equity, first time buyers tend to have more limited deposits and are therefore likely to face a particularly high barrier to home ownership in Hart.
 - While some cheaper properties will be available in the district (i.e. the smallest flats) and may offer an option for ownership for some households, these properties will not be suitable for all households (e.g. families with children looking to buy for the first time).
- 1.3.15 Private rents have increased considerably over the past decade, rising by more than 40% since 2015. Although households on average incomes in Hart can generally afford market renting, lower-income households and many single earners have much more limited housing choices, particularly for larger dwellings.
- 1.3.16 Many households on lower quartile incomes and single earning households require subsidy (e.g. Housing Benefit or Universal Credit (housing entitlement)) to access market rents. It is important to note that the lower quartile private rents (all sizes of property) in Hart are not covered by LHA (housing benefit) rates applicable within the district. This means that households on housing benefit would not be able to afford lower quartile private rents without ‘topping up’ the cost from other sources of income (including benefits intended for other essentials). This indicates an ongoing need for Affordable Housing.
- 1.3.17 Affordable home ownership products such as shared ownership and discounted market sale could improve access to home ownership for households on average incomes in Hart, but they are less effective in meeting

the needs of lower-income households without substantial discounts or lower equity shares.

Affordable Housing Need

- 1.3.18 The HEDNA identifies a significant need for Affordable Housing in Hart across both social/affordable rented and affordable home ownership tenures. Based on projected household growth (ONS 2022 based household projections), there is a net requirement for approximately 182 social/affordable rented homes per annum and a potential demand for around 282 affordable home ownership properties per annum, resulting in a total Affordable Housing need of approximately 465 homes per annum over the 2026–2039 plan period. This is the baseline estimate based on projected household growth.
- 1.3.19 Under the Standard Method scenario, household growth would be higher and would translate into an estimated need for 304 social/affordable rented homes and 412 affordable home ownership homes per annum. Social/affordable rented needs under this scenario would equate to 38% of Hart's Standard Method figure (804 dwellings per annum). The potential demand for affordable home ownership would equate to an additional 51% of Hart's Standard method figure.
- 1.3.20 These estimates underline the need to maximise the delivery of Affordable Homes over the plan period. Hart's adopted Local Plan policy H2 requires 65% of new Affordable Housing to be delivered as social/affordable rent within the overall quota of 40% Affordable Housing on qualifying sites. The evidence in this HEDNA suggests that to deliver the estimated need for social/affordable rented homes from households in acute housing need, the majority of new Affordable Housing will need to be delivered as this tenure.
- 1.3.21 The size and mix of new Affordable Homes (particularly social/affordable rented) needs to consider both the long term projections of need based on demographic change (Section 6) which indicate higher proportions of smaller and modest sized homes (1-3 beds) as well as Hart's Housing Register data which indicates current pressure on larger family-sized homes. The very limited availability of larger social/affordable rented homes creates significant challenges for families requiring three and four-bedroom accommodation.
- 1.3.22 The analysis also indicates that households on the lowest incomes, particularly larger households affected by welfare benefit caps may experience affordability challenges even in affordable rented housing. The analysis in this report and a more detailed study undertaken for Hart by AECOM in 2024, 'Social and Affordable Rent Affordability Assessment', provides evidence to inform the Council's approach outlined in its Affordable Homes in New Developments SPD (2025) which states that all new affordable housing which is provided for rent should be provided as social rented housing.

Specialist Housing for Older People

- 1.3.23 Hart is projected to experience substantial growth in its older population over the plan period, with particularly strong increases in the number of residents aged 75 and over and those aged 85 and over. This demographic change is expected to generate increased demand for a range of housing and care options, including specialist housing for older people, housing with care, and accommodation capable of supporting residents with age-related disabilities, mobility limitations and dementia.
- 1.3.24 The evidence suggests a need for approximately 786–815 additional units of specialist housing for older people between 2026 and 2039, equivalent to around 60–63 units per annum. This figure falls within the overall need for housing (C3 use class) and is not additional to it. This need is expected to be concentrated primarily in the owner-occupied sector, reflecting the tenure profile of older households in Hart, although there is also a requirement for affordable specialist accommodation. Demand is anticipated across a spectrum of provision, including sheltered housing, retirement living and extra care housing, with sheltered and other lower-support models accounting for the largest share of need.
- 1.3.25 The analysis also identifies continuing demand for residential and nursing care accommodation (C2 use class), although estimates vary depending on the methodology applied and it is unclear to what extent the existing stock has capacity.
- 1.3.26 The need for specialist housing for older people should be considered alongside the important role of mainstream housing, in which most older people will continue to live. Ensuring that new homes are accessible and adaptable, including the delivery of M4(2) dwellings and an appropriate supply of wheelchair-accessible homes, will be critical to supporting independent living, enabling residents to age in place, and reducing pressure on specialist housing and care services over time.

Vulnerable Groups

- 1.3.27 The HEDNA presents summarised evidence on the groups needing supported housing and the stock of accommodation within Hart to meet their needs. Further detail, and information on further groups, can be found in the Hart Supported Housing Needs Assessment (2026).
- 1.3.28 Hampshire County Council commission 4 schemes with 43 units/bedspaces in Hart District for people with learning disabilities or autism. It is unlikely that the turnover in existing HCC commissioned stock would meet this need as supported housing to meet the needs of people with learning disabilities is generally long term, with all of the HCC commissioned stock long-term.
- 1.3.29 Although there is a notable population of working age adults with physical disabilities in Hart, the majority of individuals will be supported in their own

home, particularly where this meets M4(2) accessible and adaptable and M4(3) wheelchair accessible standards.

- 1.3.30 Hampshire County Council commissions 1 scheme, of 5 bedspaces, of short-term (less than 2 years) supported housing for working-age adults with mental health conditions in Hart District. The Hart Supported Housing Needs Assessment identified increases in mental health needs over time, with this likely to increase the need for supported housing for those with mental health conditions.
- 1.3.31 The Hart Housing Register (April 2026) identifies 52 applicants with a current housing situation relating to homelessness. MHCLG data on statutory homelessness (October – December 2025) shows 44 households owed a duty in Hart. Heathlands Court in Hart provides temporary accommodation through 23 1-bedroom and 2-bedroom flats.
- 1.3.32 When planning for the needs for vulnerable groups, this HEDNA should be read in conjunction with the Hart Supported Housing Needs Assessment and associated Local Supported Housing Strategy. However, it is the study team's view that, on the basis of housing need evidence, all new housing should be built to M4(2) standards (with any exceptions determined on a scheme by scheme basis), with a proportion of new homes built to M4(3), in line with local need on the Waiting List or national rates of wheelchair use.

1.4 Economic Development Needs

Economic Profile

- 1.4.1 The district benefits from a strong labour market, characterised by high levels of economic activity and employment relative to the Hampshire & Solent Combined Authority area and England. However, Hart's low job density indicates a reliance on employment opportunities elsewhere within the wider North Hampshire functional economic area, underlining the importance of strong transport connectivity and commuting links.
- 1.4.2 The local economy is dominated by service sector activities, with wholesale and retail, administrative and support services, accommodation and food services, and health and social care accounting for over half of all employment. While some sectors have recorded significant growth since 2015, overall employment has declined, reflecting structural changes within the local economy, and notably a decline in industrial activities (manufacturing) and some knowledge based activities (such as information and communication, finance and insurance and professional, scientific and technical activities) and a growth in construction and service related activities (such as wholesale and retail trade, logistics, administrative and support service activities and health and social services). Hart continues to exhibit notable concentrations in administrative and support services, accommodation and food services, and construction-related activities.

- 1.4.3 The district is characterised by a highly qualified workforce, with above-average proportions of residents educated to degree level or higher and employed in managerial, professional and technical occupations. Earnings are also comparatively strong. Despite these characteristics, productivity as measured by GVA per head remains below comparator areas, whilst GVA per hour worked is slightly below the FEMA average, but notably above the average for Hampshire and Solent and for England. This suggests that Hart performs well on the quality/productivity of local work, but less strongly on the quantity of local workplace activity relative to its population.
- 1.4.4 These findings suggest that future employment growth in Hart is likely to depend not just on overall population growth, but on the district's ability to retain and attract higher value jobs, support business expansion, and improve productivity. At the same time, the positive business demography trend since 2024, combined with a strong base of micro and small firms, suggests that Hart has a viable entrepreneurial environment that can support job creation if the right premises, infrastructure, skills, and commercial conditions are in place.

Office Market

- 1.4.5 The evidence points to a structurally changing office market in Hart, characterised by a shrinking stock of floorspace, relatively small premises, and tight vacancy in key size bands. Hart has seen a substantial reduction in office floorspace (around -28% between 2016 and 2026), markedly greater than the decline across the FEMA and Hampshire & Solent, and in contrast to growth at the national level. This signals both historic loss of stock (through redevelopment, conversion or demolition) and a local office market that has underperformed relative to England as a whole.
- 1.4.6 Hart's office supply is dominated by small and medium-sized premises, with a high proportion of units below 500 sqm and no buildings over 10,000 sqm³. Vacancy across the District is below the commonly accepted frictional benchmark of 8%, particularly for premises below 1,000 sqm where vacancy has been well below for a sustained period, pointing to constrained choice for smaller occupiers. This tightness is reflected in rental patterns, with relatively high rents for the smallest size band despite overall average rents in Hart sitting below FEMA and national levels. Such conditions can constrain the growth of SMEs and start-ups if the combination of limited supply and elevated rents in smaller units persists.
- 1.4.7 These local dynamics sit within wider structural shifts in office occupancy and workspace requirements driven by hybrid and home working, and by a "flight to quality" towards higher specification, amenity-rich locations. High home-working rates and lower average office utilisation suggest that future growth in office-based employment may not translate directly into proportional growth in floorspace requirements, and that occupiers may continue to consolidate

³ Following the loss of those larger premises over the past 10 years.

space or focus on higher quality stock. In Hart, where large units have experienced high vacancy and loss of stock, but smaller units are scarce and relatively expensive, any future demand is likely to be focused on flexible, good-quality space in accessible locations, rather than on significant new large-scale office parks.

Industrial Market

- 1.4.8 Hart's industrial market is relatively small in absolute terms, but it shows clear signs of underlying strength. The District contains a concentration of industrial activity around Blackbushe Business Park, Osborne Way, Bartley Wood, Murrell Green and the edge of Fleet town centre, but overall industrial floorspace in Hart accounts for only around 11% of the FEMA total.
- 1.4.9 The stock profile is notably skewed towards smaller premises. In both light industrial and general industrial uses, the majority of buildings are below 500 sqm, and Hart has very few larger units above 1,000 sqm, while there are no buildings over 10,000 sqm in the light industrial market. This suggests a market geared towards smaller occupiers, local businesses and more flexible space requirements rather than large-scale industrial or manufacturing operations. For storage and distribution, most premises fall within the 1,000–9,999 sqm range, but Hart still lacks the very largest logistics units found in comparator areas.
- 1.4.10 Light industrial and general industrial vacancy rates are extremely low in Hart, both below the 5% frictional benchmark, which indicates limited availability of occupied-ready space. By contrast, B8 storage and distribution space has a much higher vacancy rate, reflecting the delivery of new stock ahead of full market absorption. This means the District's industrial market is not uniform: there is evidenced pressure for smaller light and general industrial units, while logistics floorspace should be approached more cautiously and only supported where justified by evidence of demand.
- 1.4.11 Hart achieves relatively high rents across all industrial sub-sectors, particularly for light industrial and general industrial space, which points to the strength of demand relative to the limited stock available. Rental growth over the last decade has generally been positive, although the market remains small and therefore sensitive to individual transactions and changes in supply. In B8, rents are also strong, but vacancy is still relatively elevated, suggesting that the market may need time to absorb recent delivery before further large-scale developments are considered by investors.
- 1.4.12 These trends indicate that Hart should protect and, where appropriate, intensify existing industrial sites to maintain a supply of smaller units that are clearly in demand. The historical evidence supports a need for additional light industrial and general industrial floorspace, but this should be modest and carefully calibrated given the small size of the market and the risk that a limited amount of new space could quickly alter vacancy levels. In contrast, additional B8 provision should be more selective, with reliance on clear demand

evidence before allocating further land at scale. Overall, the market points to a need for flexible, good-quality employment space that supports SMEs, local supply chains and business retention.

Future Employment Land Demand

- 1.4.13 The assessment considers future employment floorspace and land requirements in Hart over the period 2026–2039, with an extended outlook to 2044. It applies three scenarios:
- Labour demand, using rebased Experian employment forecasts;
 - Labour supply, using ONS population projections; and
 - Past take-up, using CoStar market data.
- 1.4.14 The preferred scenario adopts a blended approach for office space and a market-led past take-up approach for industrial space. For office uses (E(g)(i) and E(g)(ii)), the assessment recommends carrying forward the average gross floorspace demand across all three scenarios. This results in a net requirement of approximately 8,300 sqm of office floorspace to 2039, increasing to 9,300 sqm to 2044, equivalent to 1.3 ha and 1.4 ha of employment land respectively. This blended outcome is considered a reasonable projection that balances forward-looking employment forecasts with observed market trends.
- 1.4.15 For industrial uses (E(g)(iii), B2 and B8), the preferred scenario is based on Scenario 3 (past take-up using the preceding ten-year average). This yields a net requirement of 3,000 sqm of industrial floorspace to 2039 and 8,600 sqm to 2044, equivalent to 0.7 ha and 2.2 ha of land respectively. This approach is favoured because it reflects observed historical demand and avoids reliance on uncertain forecasts of decline in wholesale employment, while supporting continued local economic growth and employment creation.
- 1.4.16 Qualitative evidence supports continued demand for modern, flexible offices and small-to-medium industrial units. Future provision should prioritise sustainable transport access, strategic highway connectivity, adequate power and digital infrastructure, and a balanced supply of starter and grow-on units.

2. Objectives and Outline

2.1 Introduction

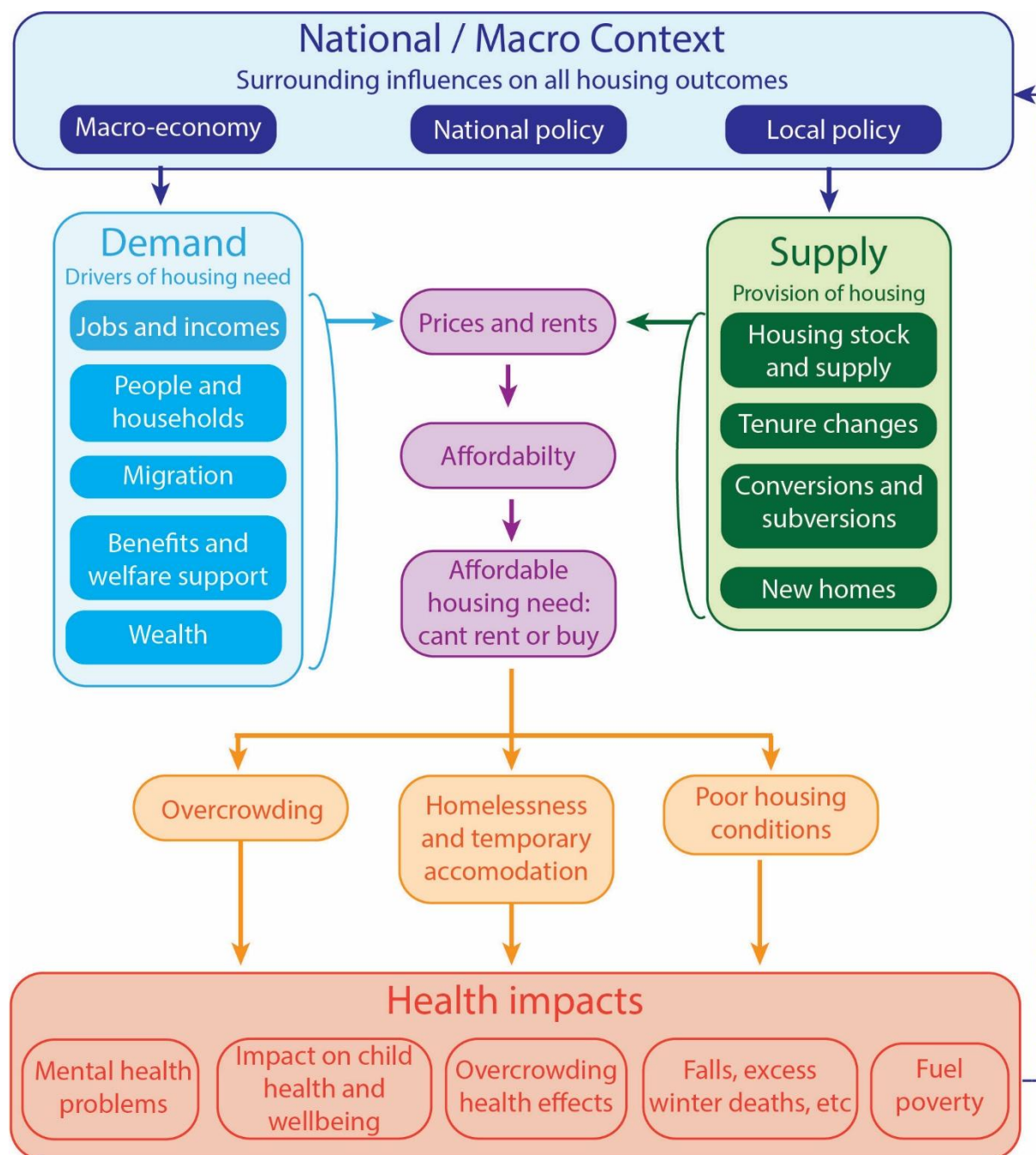
- 2.1.1 Hart District Council (HDC) are preparing a new Local Plan. This will be a key planning document that will shape, plan, and manage growth, regeneration, and development across the district. The new Local Plan will cover a minimum 10 year period from adoption between 2026 and 2039 (2039 being the end date). The evidence base in this report considers the period 2026 to 2039 and 2026 to 2044 with the latter period providing a longer term view.
- 2.1.2 This Housing & Economic Development Needs Assessment (HEDNA) is part of the evidence base for the new Local Plan. An employment land review is also in progress and its findings will be incorporated into the final report.

2.2 Approach

- 2.2.1 The HEDNA meets the requirements set out in the National Planning Policy Framework (NPPF) (December 2026) and is carried out in line with current practice guidance for housing and economic needs assessment (updated February 2025). To meet these requirements, the HEDNA builds the evidence through structured analysis of housing need and economic development needs.

Housing need analysis

- 2.2.2 To consider the demand and need for housing within Hart District and its sub-areas, it is useful to structure analysis and evidence in terms of the different components of the housing market and how they interact. Figure 2-1 provides our conceptual framework for the housing market. It identifies the different drivers on the demand for and supply of housing, including the growth of employment in the local economy and level of earnings and incomes associated with the available jobs. The interaction between the demand for and supply of homes determines prices, rents, and affordability and ultimately housing market outcomes such as housing need, poor housing conditions and impacts on health and wellbeing.

Figure 2-1: Conceptual Framework

Economic needs analysis

- 2.2.3 To consider the demand for employment land within Hart District, an analysis of the relationship between population, labour workforce, jobs and employment space is carried out. This is used to project sectoral changes to estimate how much employment space will be needed over the plan period.
- 2.2.4 The analysis also considers factors such as the past economic performance, labour market trends, commuting patterns and market signals to refine the assessment. The economic development needs assessment considers different growth scenarios and translates growth into a requirement for employment land and premises by employment use class. Projected

employment growth is also translated into the required labour supply and, in turn, the number of people and households required to fill new jobs.

2.3 Report Outline

2.3.1 The remainder of this report is structured as follows:

- **Section 3: Geographical Context for Housing and Economic Markets**
- **Section 4: Socio-Economic Profile**
- **Section 5: Local Housing Need**
- **Section 6: People and Households**
- **Section 7: Housing Stock & Supply**
- **Section 8: Prices, Rents, and Affordability**
- **Section 9: The Need for Affordable Housing**
- **Section 10: Specialist Housing for Older People**
- **Section 11: Supported Housing for Vulnerable Groups**
- **Section 12: Commercial Property Market Profile**
- **Section 13: Future Employment Land Demand**
- **Appendix A: Glossary**
- **Appendix B: Adopted Local Plan Policies**
- **Appendix C: Document Review**
- **Appendix D: Definition of Geographies**
- **Appendix E: Benefit Entitlement Scenarios**
- **Appendix F: Mapping**

3. Geographical Context for Housing and Economic Markets

3.1 Introduction

- 3.1.1 This section considers the geographical context of Hart and the extent to which there is a housing market area (HMA) and Functional Economic Market Area (FEMA) relating to the district. It also outlines how the district can be divided into meaningful sub-areas for analysis.

3.2 Geographical Context

- 3.2.1 Hart is a district in Hampshire, bordered by 7 other local authorities:

- Rushmoor Borough Council (Hampshire);
- Surrey Heath Borough Council (Surrey)
- Bracknell Forest Council (Berkshire);
- Wokingham Borough Council (Berkshire);
- Basingstoke & Deane Borough Council (Hampshire);
- East Hampshire District Council (Hampshire); and
- Waverley Borough Council (Surrey).

- 3.2.2 As part of Local Government Reorganisation (LGR), the Secretary of State for Housing, Communities, and Local Government (MHCLG) announced on 25th March 2026 that Hampshire, the Isle of Wight, Portsmouth, and Southampton will become 5 unitary authorities – North Hampshire Council, Mid Hampshire Council, South East Hampshire Council, South West Hampshire Council, and Isle of Wight Council. Hart will become part of North Hampshire Council alongside Rushmoor and Basingstoke & Deane. Elections will take place in May 2027, with the new authorities due to start delivering services in April 2028.

- 3.2.3 Government have recently consulted on areas for producing spatial development strategies (SDS), with decisions expected in Summer 2026. The proposed SDS area which Hart would become part of is Hampshire & the Solent, comprised of the Hampshire and the Solent Combined Authority area:

- Hampshire County (including Hart District);
- Isle of Wight;
- Portsmouth; and
- Southampton.

- 3.2.4 Hart includes 21 parished areas, with those with over 1,000 households at the time of the 2021 Census outlined below:

- Fleet – 10,002 households;

- Yateley – 8,175 households;
 - Church Crookham – 4,130 households;
 - Hook – 3,675 households;
 - Hartley Wintney – 2,606 households;
 - Odiham – 2,227 households;
 - Blackwater & Hawley – 2,222 households;
 - Elvetham Heath – 1,894 households; and
 - Crookham Village – 1,666 households.
 - There are also 11 Wards in Hart District.
- 3.2.5 The M3 is the main strategic road through the district, with the A30, A287, and A323 connecting the settlements in Hart, and settlements in neighbouring authorities. Transport throughout the district is dominated by private car use, with 92.2% of households having at least one car or van at the time of the 2021 Census, compared to 86.8% across the North Hampshire unitary authority area, and 76.5% nationally.
- 3.2.6 Public transport can be accessed from railway stations at Fleet, Hook, Winchfield, and Blackwater. These stations provide connections to London (Waterloo), Basingstoke, Woking, Surbiton, Clapham Junction, Winchester, Eastleigh, Fareham, Portsmouth, Guildford, Reading, Wokingham, and Gatwick Airport. The district is also served by bus services.

3.3 Reviewing the Housing Market Area

- 3.3.1 This HEDNA focusses on the Hart Local Plan area, but local authorities are not generally self-contained housing market areas. Housing markets are usually wider than local authority areas, often covering a number of districts or boroughs.
- 3.3.2 Previous planning policy and guidance recognised the importance of housing market areas and advised the development of evidence on the basis of the strategic housing market area, rather than at the individual authority area. The latest NPPF and PPG does not require housing market areas to be established, or for analysis to be undertaken at this strategic level. However, so that effective policies can be developed, it is important to understand how the district interacts with other authorities. This sub-section considers the evidence on the housing market that relates to Hart including previous research at the national level, the conclusions of the SHMA 2016 and updated household migration and travel to work data.

National Studies on Housing Market Areas

- 3.3.3 Former CLG (now MHCLG) guidance on HMA dates from 2010⁴. It states that “in order to assess the suitability of the recommended housing market area

⁴ <https://www.gov.uk/government/publications/housing-market-areas>

geographies to inform strategic planning issues in relation to housing delivery, there is an analysis of the relationship between the housing market areas and existing policy areas:

- travel-to-work areas;
- strategic housing market assessments;
- National Parks and Green Belt; and
- Growth Areas and Growth Points”.

3.3.4 It concluded that a tiered approach to housing market areas was appropriate with local housing market areas defined by migration patterns (based on 50% migration closure or self containment).

3.3.5 The CLG research (Paper A)⁵ draws on research by DTZ which identified 21 housing market areas across the of South East England. Hart fell into the Blackwater Valley sub-regional housing market. However, this area was identified as an area with overlapping housing markets, making it difficult to draw precise boundaries.

Hart, Rushmoor, and Surrey Heath SHMA 2014-2032 (2016)⁶

3.3.6 As noted above, the HMA for Hart is complex, with various relationships across Hampshire and Surrey influencing the market. The 2016 SHMA concluded a Housing Market Area of Hart, Rushmoor, and Surrey Heath was a reasonable proxy for the market area which related to Hart and this was used as the benchmark for analysis.

3.3.7 The 2016 SHMA identified that Hart and Surrey Heath’s most significant migration relationships were with Rushmoor, and Rushmoor’s with Hart, with the migration flows between Hart and Surrey Heath less significant. It is therefore useful to consider whether Hart and Surrey Heath maintain a significant relationship, with more up-to-date data outlined in the following sub-section.

Latest Migration and Commuting Data

3.3.8 Table 3-1 shows people moving in and out of Hart according to the 2021 Census. There were 9,244 Hart people who moved in the year before the Census, of which 3,602 moved within Hart and the remainder (5,642) moved to an authority area outside of Hart. A further 6,732 moved into Hart from another authority area.

5

<https://assets.publishing.service.gov.uk/media/5a7901cbcd915d0422067106/1775485.pdf>

⁶ https://www.hart.gov.uk/sites/default/files/2022-11/hrsh_shma_main_report_final_161125.pdf

- 3.3.9 The strongest in-migration flows into Hart are from Rushmoor, followed by people moving to Hart from outside of the UK, then broadly equal levels of in-migration from Surrey Heath and Basingstoke & Deane. Taken together, people moving within Hart and those moving into Hart from Rushmoor, Surrey Heath and Basingstoke & Deane account for just over 50% of moves to the district.
- 3.3.10 When looking at moves out of Hart, the strongest relationship is with Basingstoke & Deane, followed by Rushmoor, with Surrey Heath 4th behind Wokingham (and significantly lower in volume than Basingstoke & Deane and Rushmoor). Note that this data does not record moves of Hart residents outside of the UK.
- 3.3.11 This suggests that Hart retains strong relationships with Rushmoor but has stronger migration relationships with Basingstoke & Deane than Surrey Heath. Further, movement patterns confirm that Hart district is not a self contained housing market – just 35% of people who moved to Hart in the year to 2021 previously lived in Hart. The addition of moves from Rushmoor, Surrey Heath, Basingstoke & Deane and Bracknell would be needed to reach over 50% (typically considered containment for a local housing market area). However, this does not consider the market from the perspective of each of these authorities, which are likely to have stronger relationships with other neighbours.

Table 3-1: Migration to and from Hart (Top 10 relationships in terms of Volume)

Moves into Hart		Moves out of Hart	
Rushmoor	858	Basingstoke & Deane	481
Outside UK	678	Rushmoor	412
Surrey Heath	400	Wokingham	215
Basingstoke & Deane	398	Surrey Heath	214
Bracknell Forest	326	Bracknell Forest	210
Wokingham	267	East Hampshire	186
Waverley	198	Waverley	159
Guildford	190	Guildford	133
Shropshire	130	Wiltshire	128
Woking	118	Bournemouth, Christchurch, and Poole	122

Source: 2021 Census

- 3.3.12 It is useful to consider the age profile of people who move into and out of Hart as this sheds light on the reasons for migration and the nature of the relationships Hart has with neighbouring authorities (Table 3-2). Note that Census 2021 does not record the destination or age of people who have moved overseas and as such the 'moves out of Hart' and the net totals do not represent the complete picture. Nevertheless, Table 3-2 indicates that:

- There are net movements into Hart from both younger working age people and children, which is likely to be dominated by movements of families with children into the district.
- There is net movement of older working age people into Hart, but this is much more limited than in the younger working age group.
- There is net movement of older people aged 65-84 into Hart but very limited net movement of those in the oldest age group (85+).
- There is net movement of young people aged 15-25 out of Hart, driven by students moving out to attend University in other parts of the country.
- The largest numbers of move into Hart are from the 25-44 (young working age) group from Rushmoor (425 people). As the number of children (0-14) moving into Hart from Rushmoor is relatively large (162 people), this indicates moves of families from Rushmoor to Hart.
- The largest number of moves out of Hart are from younger working age people (25-44) to Basingstoke and Deane, (240 people) followed by the same age group to Rushmoor (177 people). This may be explained by moves associated with jobs, or younger families moving to access relatively more affordable housing. Average house prices within Rushmoor and Basingstoke and Deane are substantially below average prices in Hart which is likely to drive many of these moves.
- In net terms, the relationship between Hart and the other North Hampshire authorities is characterised by net movements of people from Rushmoor to Hart, largely in the young working age group (plus children) and net moves out of Hart to Basingstoke & Deane, largely comprised of young working age people. However, there is a small net movement of children (0-14) from Basingstoke & Deane, suggesting moves of families into the district. Overall, migration data suggests Hart district attracts families with children from neighbouring authorities and this is likely due to moves associated with jobs, schools and availability of family housing.

Table 3-2: Migration by Age, People, 2021

Age	Moves into Hart (including from overseas)	Moves out of Hart (excluding moves out of the UK)	Net~ Total
0-14	919	549	370
15-24	963	988	-25
25-44	2,450	1,542	908
45-64	811	716	95
65-84	271	211	60
85+	41	36	5
	5,455	4,042	~

Source: Census 2021, ODMG02EW-LTLA table ~ denotes not possible to calculate net figure because movements out the district overseas are not included.

- 3.3.13 Turning to travel to work patterns, Tables 3-5 and 3-6 show that the strongest travel to work relationships, both in and out of Hart, are with Rushmoor, with Surrey Heath and Basingstoke & Deane 2nd and 3rd, with their ranking dependent on the direction of travel.
- 3.3.14 Overall, travel to work relationships are stronger with Basingstoke & Deane, with much higher numbers of people travelling to work in Hart from Basingstoke & Deane than from Surrey Heath. As with migration patterns, this suggests a slightly stronger relationship for Hart with Rushmoor and Basingstoke & Deane than with Surrey Heath because of the volume of movements in both directions. These are considered in more detail in the next sub-section which reviews the functional economic market area (FEMA).
- 3.3.15 In summary, the review of the Housing Market Area which relates to Hart suggests the district's strongest relationships are with Rushmoor and Basingstoke & Deane, with relatively weaker links to Surrey Heath.

3.4 Reviewing the Functional Economic Market Area

- 3.4.1 The Planning Practice Guidance (PPG) requires local planning authorities (LPAs) to assess development needs working with other LPAs in the relevant Functional Economic Market Area (FEMA) in line with the duty to cooperate. It adds that local communities, partner organisations, businesses, business representative organisations and Higher Education Institutions, among others, should be involved in the preparation of the evidence base in relation to development needs.
- 3.4.2 It is stated that needs for economic uses should be assessed in relation to the functional economic area whilst identifying and recognising smaller sub-markets with specific features and 'market segments.'
- 3.4.3 The PPG notes in Paragraph 019 that:
- 'Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area.'*
- 3.4.4 However, it is possible to define them taking account of factors including:
- Housing market area (discussed above);
 - Travel to work areas;
 - Transport network.
 - Commercial Property Market Area; and
 - Economic governance and partnerships.
- 3.4.5 The methodology for defining the FEMA is therefore based on commuting data, administrative boundaries and housing and commercial property markets to identify an area that records the highest self-containment in terms

of commuting flows, and which also best fits the administrative boundaries, housing and commercial property markets.

Travel to Work Area

- 3.4.6 The PPG does not prescribe a threshold of self-containment (people who live and work in the same area) to help define the FEMA. AECOM has adopted the ONS's definition of Travel to Work Areas (TTWAs) that states that:
- 3.4.7 'The current criterion for defining the TTWAs is that generally at least 75% of an area's resident workforce work in the area and at least 75% of the people who work in the area also live in the area [...] however, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted.'
- 3.4.8 The lower 66.7% threshold for self-containment for origin and destination commuting is therefore appropriate in the case of Hart, which has a working population in excess of 25,000.
- 3.4.9 The ONS publishes Origin-Destination data (also known as flow data) as part of the Census, which includes the travel-to-work patterns of individuals. Table 3-4 provides a summary of total commuting inflows and outflows for Hart. The data indicates that in 2021, 11,270 people commuted into Hart, and 14,141 people commuted from Hart, generating an overall net outflow 2,872 people.
- 3.4.10 However, it is recognised that Census 2021 took place during the coronavirus (COVID-19) pandemic, a period of unparalleled and rapid change; the national lockdown, associated guidance and furlough measures. Generally, the 2021 Census data reflects the shift to home working seen during this period resulting in lower levels of overall commuting across the country. While the proportion of people travelling to work is widely reported as being below pre-pandemic levels, trends from the National Travel Survey⁷ and Opinions and Lifestyle Survey⁸ suggest that the long-term impact of the pandemic on commuting has brought about a shift toward hybrid work, rather than full-time homeworking, and the number of commuting trips has started to recover since the pandemic.
- 3.4.11 Given the potential uncertainty surrounding the 2021 data, both sets of commuting data (from Census 2021 and Census 2011) are presented. In 2011, 18,556 people commuted into Hart from a different local authority area for work, whilst 26,322 commuted from Hart to another local authority area for work, generating an overall net outflow 7,766.

⁷ Department for Transport (2024); National Travel Survey. Available at: <https://www.gov.uk/government/collections/national-travel-survey-statistics>

⁸ Office for National Statistics (2023); Opinions and Lifestyle Survey. UK Data Service. Available at: <https://beta.ukdataservice.ac.uk/datacatalogue/series/series?id=2000043>

Table 3-3: Hart worker inflows and outflows⁹

2021 Census			2011 Census		
Inflow	Outflow	Net change	Inflow	Outflow	Net change
11,270	14,142	-2,872	18,556	26,322	-7,766

Source: Office for National Statistics; Census 2011: Origin-Destination data; Office for National Statistics; Census 2021: Origin-Destination data.

Inflow Self-Containment

- 3.4.12 Detailed Origin-Destination data indicates that in 2021 Hart had an inflow self-containment rate – including those who worked at or from home at the time of the Census – of 76.3%, meaning that 76.3% of jobs in the local authority area were taken by people residing there. This is above the 66.7% threshold of ONS’s self-containment definition of travel to work areas. Therefore, according to the 2021 Census, Hart was considered to be self-contained as a travel to work area in regard to inflows.
- 3.4.13 In 2011, Hart had an inflow self-containment rate of 37.3%, which is lower than in Census 2021, and below the 66.7% threshold of ONS’s self-containment definition of travel to work areas. Therefore, according to the 2011 Census, Hart was not considered to be self-contained as a travel to work area in regard to inflows.
- 3.4.14 The main explanation for this shift was the increase in home working practices. Whilst home-working has become a norm following the Covid-19 pandemic, the exact share of home-working has been subject to variations over time and will potentially evolve over the next few years (i.e. “return to the office” policies being implemented by some companies; impact of technological advancements). This is discussed further in Section 12.2 (Changing Office Workspace Requirements).
- 3.4.15 Detailed Origin-Destination data (inflows) is presented in Table 3-5 for the top 10 origins, for both 2011 and 2021. The data indicates that 3,238 jobs in Hart are taken by residents of Rushmoor, with 2,894 from Basingstoke and Deane, with other key inflow locations including Surrey Heath and Bracknell Forest.
- 3.4.16 The 2011 Census data would suggest that Hart forms a TTWA with a wider range of local authorities including Rushmoor, Basingstoke and Deane, Surrey Heath, Bracknell Forest, and Wokingham.

⁹ Total, excluding workers who both live and work in Hart

Table 3-4: Hart worker top inflows¹⁰

2021 Census			2011 Census		
Usual Residence	Working in Hart	Self-containment ¹¹	Usual Residence	Working in Hart	Self-containment
Hart	36,308	76.3%	Hart	11,051	37.3%
Rushmoor	2,480	81.5%	Rushmoor	3,238	48.3%
Basingstoke and Deane	1,987	85.7%	Basingstoke and Deane	2,894	58.0%
Surrey Heath	672	87.1%	Surrey Heath	1,245	62.2%
East Hampshire	651	88.5%	Bracknell Forest	1,168	66.2%
Bracknell Forest	647	89.8%	Wokingham	920	69.3%
Wokingham	545	91.0%	East Hampshire	895	72.3%
Waverley	467	92.0%	Waverley	857	75.2%
Guildford	352	92.7%	Guildford	579	77.2%
Reading	242	93.2%	West Berkshire	467	78.7%

Source: Office for National Statistics; Census 2011: Origin-Destination data; Office for National Statistics; Census 2021: Origin-Destination data.

Outflow Self-Containment

- 3.4.17 Detailed Origin-Destination data indicates that in 2021, Hart had an outflow self-containment rate of 72.0%, meaning that 72.0% of working residents in Hart are employed within the local authority area. This is above the 66.7% threshold of ONS's self-containment definition of travel to work areas. Therefore, according to the 2021 Census, Hart was considered to be self-contained as a travel to work area in regard to outflows.
- 3.4.18 In 2011, Hart had an outflow self-containment rate of 29.6%, which is again lower than in Census 2021, and is below the 66.7% threshold of ONS's self-containment definition of travel to work areas. Therefore, according to the 2011 Census, Hart was not considered to be self-contained as a travel to work area in regard to outflows. The Census 2011 data suggests that Hart, and the local authority areas of Rushmoor, Surrey Heath, Basingstoke and Deane, Bracknell Forest, Westminster, and Guildford formed a TTWA from an outflow perspective.
- 3.4.19 Similarly to inflow self-containment, the increase in home working has primarily been driven by the impact of the Covid-19 pandemic but this trend is still evolving.

¹⁰ Note that the sum of inflows (excluding Hart residents) presented in this table will not match the total inflows presented in Table 3-5 as this table only presents the top inflows.

¹¹ Calculated as Hart's self-containment rate – cumulative of workers commuting from top inflow local authorities.

3.4.20 Detailed Origin-Destination data (outflows) is presented in Table 3-6 for the top ten destinations, for both 2011 and 2021.

Table 3-5: Hart worker top outflows

2021 Census			2011 Census		
Usual place of work	Residing in Hart	Self-containment	Usual place of work	Residing in Hart	Self-containment
Hart	36,308	72.0%	Hart	11,051	29.6%
Rushmoor	2,529	77.0%	Rushmoor	4,675	42.1%
Surrey Heath	1,969	80.9%	Surrey Heath	2,972	50.0%
Basingstoke and Deane	1,504	83.9%	Basingstoke and Deane	2,457	56.6%
Bracknell Forest	1,042	85.9%	Bracknell Forest	1,959	61.8%
Waverley	836	87.6%	Westminster, City of London	1,373	65.5%
Guildford	830	89.2%	Guildford	1,294	69.0%
Wokingham	694	90.6%	Wokingham	1,235	72.3%
East Hampshire	468	91.5%	Waverley	1,149	75.4%
Hillingdon	451	92.4%	Reading	756	77.4%

Source: Office for National Statistics; Census 2011: Origin-Destination data; Office for National Statistics; Census 2021: Origin-Destination data.

Transport Networks

3.4.21 Analysis of the transport network is a useful indicator of the potential size and shape of the FEMA for Hart. The average commute time can be applied to understand the catchment area (inflow commuting of workforce), as well as the extent of the area of potential employment for local residents (outflow commuting of workforce). This defines the employment market area.

3.4.22 The average commute time in the UK is 59 minutes per day¹², or 63 minutes by National Rail¹³, or the equivalent of circa 30 minutes' journey each way. It is recognised that some commuter journeys may be longer in duration than this.

3.4.23 However, for the purposes of developing a broadly representative FEMA, the principal employment market area is defined as the geographical area

¹² Safe Workers (2023). Long Commutes to Work What are UK Averages & How Far is Too Far? Available at: <https://www.safeworkers.co.uk/health-wellbeing/effects-of-long-commutes-to-work/#:~:text=The%20average%20commute%20in%20the,and%20from%20work%20each%20day>

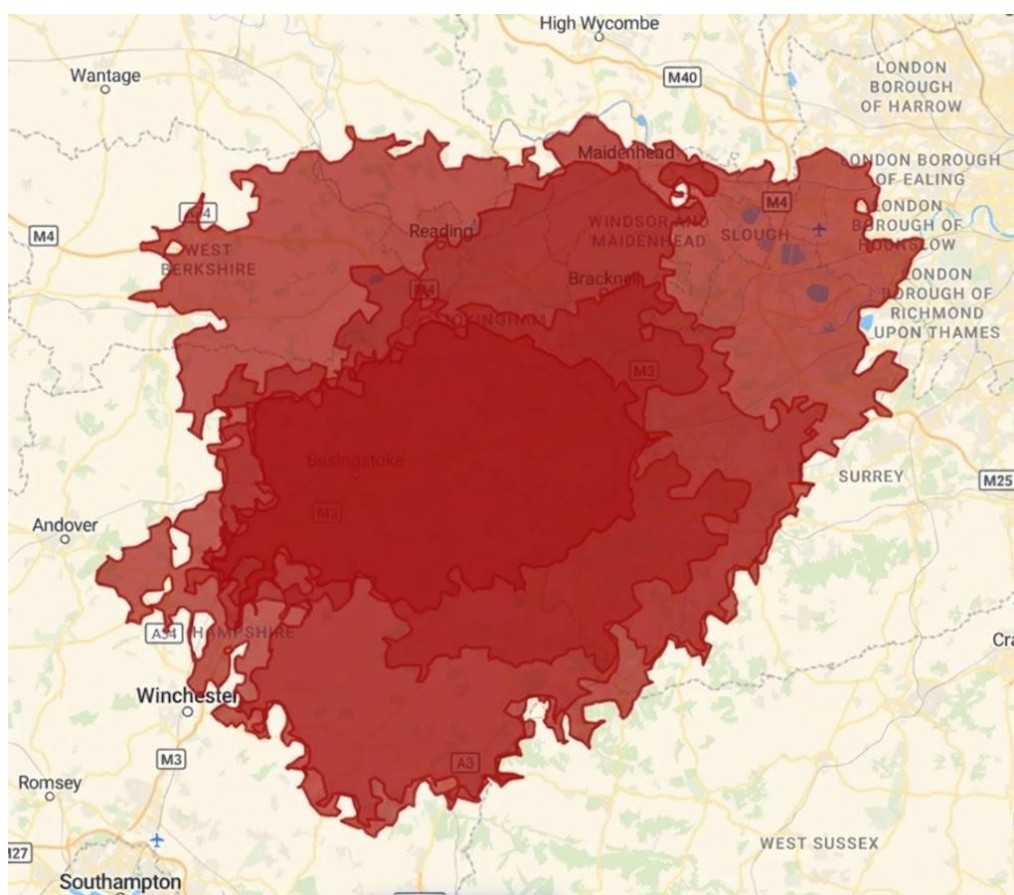
¹³ Statista (2023). Average commuting time in Great Britain in October to December 2020, by mode of transportation. Available at: <https://www.statista.com/statistics/300712/average-time-taken-to-travel-to-work-in-the-united-kingdom/>

reachable from Hart in the average commute time (from the outer boundaries of the local authority area by road, and from stations within Hart by rail).

Road

- 3.4.24 The Hart area benefits from strategic roads to London, the Midlands and the south coast. The M3 motorway runs through the district providing connectivity to the west of London and the south coast, including the urban centres of Portsmouth and Southampton. The district is also in proximity to the M4, M25, A339, A31 and A331, connecting the area to the strategic road network in all directions¹⁴.
- 3.4.25 Respecting speed regulation, 26 local authorities are reachable by car, within a 30-minute drive, from Hart. As shown in Figure 3-1, these are: Basingstoke and Deane, Bracknell Forest, Buckinghamshire, Chichester, East Hampshire, Elmbridge, Guildford, Mole Valley, Reading, Runnymede, Rushmoor, Slough, South Oxfordshire, Spelthorne, Surrey Heath, Test Valley, Waverley, West Berkshire, Winchester, Windsor and Maidenhead, Woking, Wokingham, Ealing, Hillingdon, Hounslow, and Richmond upon Thames.

Figure 3-1: Catchment area of 30-minute journey by road from Hart



Source: Smappen, How Far Can I Go?¹⁵

¹⁴ Hart District Council, (2020); Hart local plan (strategy and sites) 2032 (2020). Available at: <https://www.hart.gov.uk/sites/default/files/2024-08/Hart-Local-Plan-strategy-and-Sites-2032.pdf>

¹⁵ Smappen, How Fair Can I Go? Available at: <https://www.smappen.com/app>

Rail

3.4.26 Hart has four stations at Hook, Winchfield, Fleet, and Blackwater. Table 3-7 provides a list of stations which can be reached within 30 minutes (by rail) from a station within Hart, not including those listed within Hart.

Table 3-6: Railway stations accessible within 30-minute rail journey from a railway station in Hart

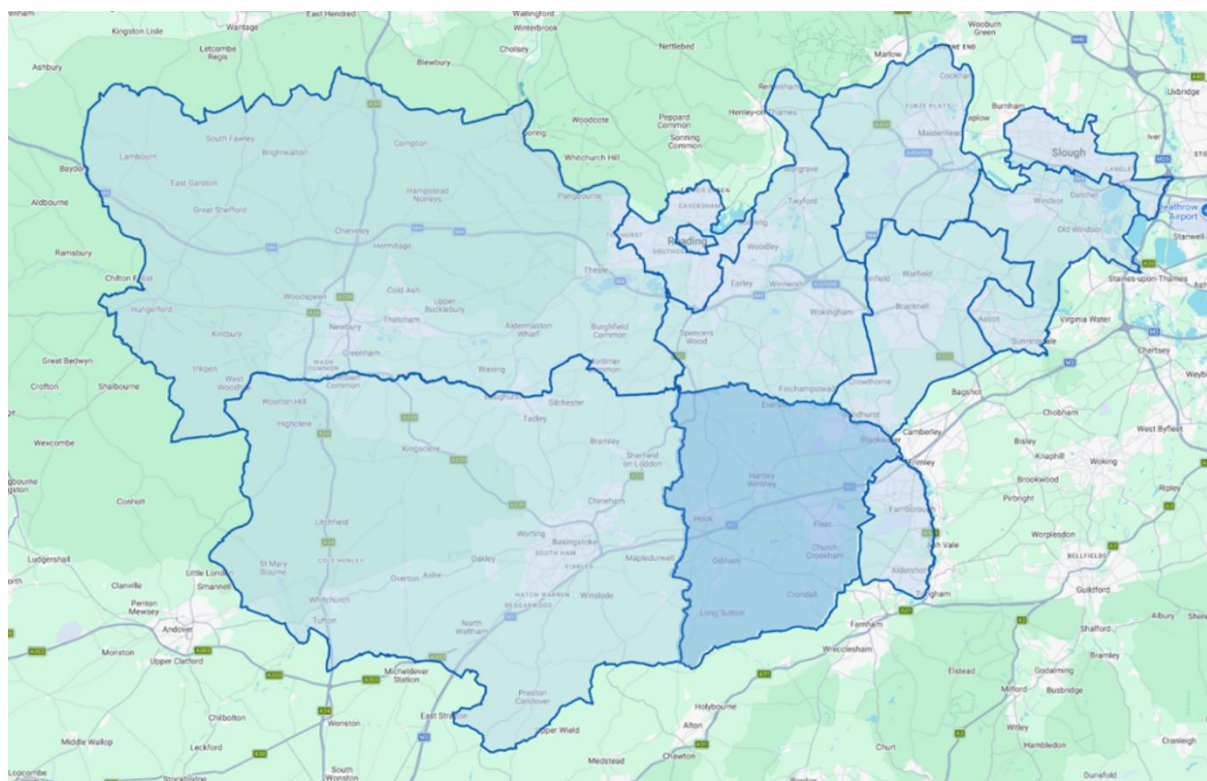
Stations	Local authority
Farnborough (Main)	Rushmoor
Farnborough North	Rushmoor
Aldershot	Rushmoor
Brookwood	Woking
Woking	Woking
Worplesdon	Woking
West Byfleet	Woking
Basingstoke	Basingstoke and Deane
Bramley	Basingstoke and Deane
Winchester	Winchester
Micheldever	Winchester
North Camp	Guildford
Ash	Guildford
Shalford	Guildford
Chilworth	Guildford
Wanborough	Guildford
Guildford	Guildford
Ash Vale	Guildford
Sandhurst	Bracknell Forest
Crowthorne	Bracknell Forest
Bracknell	Bracknell Forest
Wokingham	Wokingham
Twyford	Wokingham
Weybridge	Elmbridge
Walton-on-Thames	Elmbridge
Reading	Reading
Reading West	Reading
Surbiton	Kingston Upon Thames
Byfleet & New Haw	Runnymede
Mortimer	West Berkshire

Source: Trainline

Commercial Property Market Area

- 3.4.27 The FEMA is also influenced by the commercial property market area in which Hart sits. Commercial property market areas are geographic boundaries that serve to define core areas that are competitive with each other. Markets are defined by buildings presenting similar characteristics and are formed of non-overlapping areas (i.e. a place cannot be part of two property market areas at the same time).
- 3.4.28 For the purposes of this HEDNA, it is relevant to look at both the office and industrial property markets. CoStar, a comprehensive database of real estate data throughout the UK, is a useful source of information and provides pre-defined office and industrial property market areas for the entire UK. CoStar defined markets have therefore been assumed as part of the analysis. Both the industrial and office markets are defined as Berkshire and North Hampshire.
- 3.4.29 Hart is defined as its own office sub-market within the Berkshire and North Hampshire office market, as shown in Figure 3-2. The rest of the sub-markets forming the Berkshire and North Hampshire office property market include Basingstoke and Deane, Bracknell Forest, Maidenhead, Reading Central, Reading Fringe, Rushmoor, Slough, West Berkshire, Windsor, and Wokingham. Berkshire and North Hampshire Office Market

Figure 3-2: Berkshire and North Hampshire Office Market

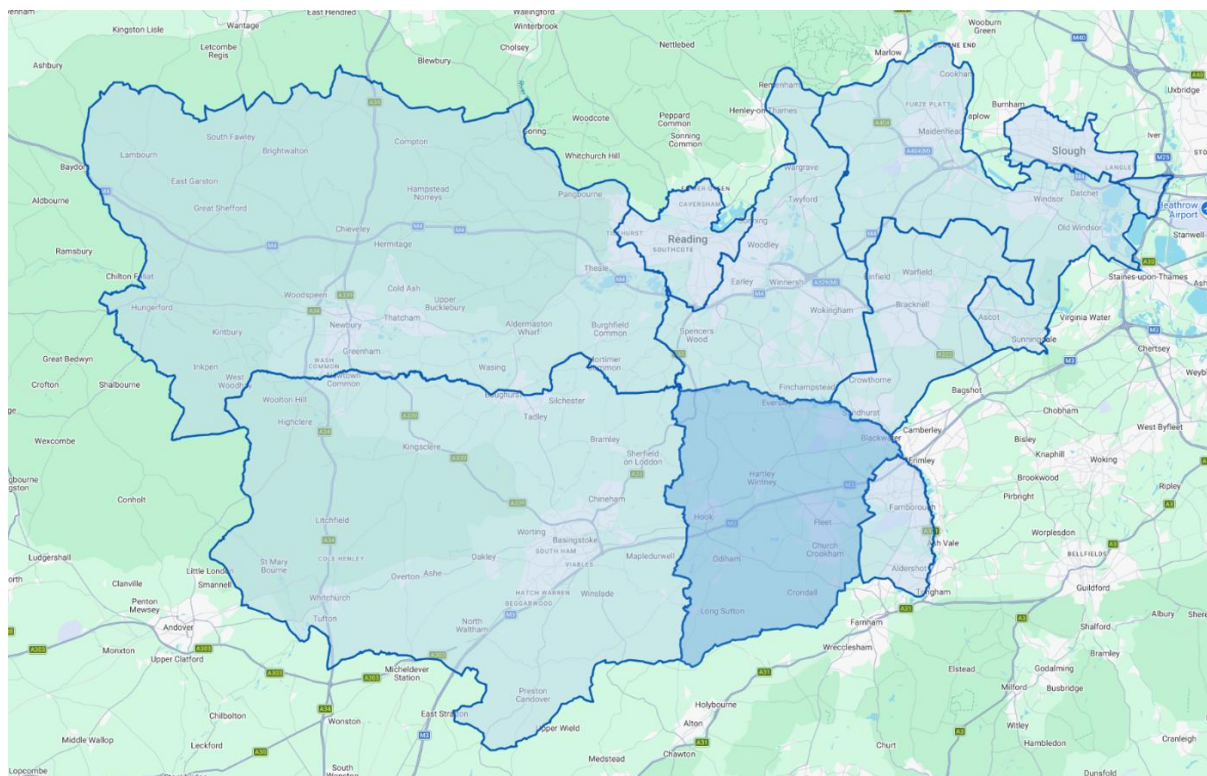


Source: CoStar 2026

- 3.4.30 Hart is also defined as its own industrial sub-market within the Berkshire and North Hampshire industrial market, as shown in Figure 3-3. The rest of the sub-markets forming the Berkshire and North Hampshire industrial property market include Basingstoke and Deane, Bracknell Forest, Heathrow West,

Reading, Rushmoor, Slough, West Berkshire, Windsor & Maidenhead, and Wokingham.

Figure 3-3: Berkshire and North Hampshire Industrial Market



Source: CoStar 2026

Economic governance and partnerships area

- 3.4.31 Hart's economic governance is currently overseen by Hampshire County Council. Following the dissolution of the Enterprise M3 Local Enterprise Partnership (LEP)¹⁶ in 2024, Hampshire County Council assumed responsibility for the LEP's strategic functions, including infrastructure investment, business support, and skills development. Hampshire County Council's economic strategy emphasises sustainable economic growth, jobs, and prosperity, with Hart.
- 3.4.32 As discussed earlier in this section, Hart will be joined with Basingstoke and Deane, and Rushmoor to form a new Unitary Authority and at the strategic scale, Hampshire County (including Hart), Portsmouth, Southampton and the Isle of Wight will form a new combined authority known as Hampshire and the Solent.¹⁷

¹⁶ Economic and Social Research Council (2020) Enterprise M3 Local Enterprise Partnership Profile. Available at: <https://lipsit.ac.uk/wp-content/uploads/2020/07/Enterprise-M3-LEP-Profile.pdf>

¹⁷ Ministry of Housing, Communities and Local Government, (2025); Local government reorganisation in Hampshire, Isle of Wight, Portsmouth and Southampton. Available at: <https://www.gov.uk/government/consultations/local-government-reorganisation-in-hampshire-isle-of-wight-portsmouth-and-southampton>

Summary of FEMA

3.4.33 Hart is relatively self-contained economically, with some important connections either from an economic governance perspective (administrative boundaries), market characteristics (housing and commercial property markets) and connectivity (travel to work and transport infrastructure).

3.4.34 Based on the assessment conducted in this section, and as summarised in Table 3-8, it can be reasonably concluded that Hart is particularly connected with two other local authority areas which form, with Hart, its FEMA:

- Rushmoor (by virtue of the road and rail network, the housing and property market areas, and economic governance area, and being a key location in relation to worker flows); and
- Basingstoke and Deane (by virtue of the road and rail network, the housing and property market areas, and economic governance area, and being a key location in relation to worker flows).

Table 3-7: Summary of FEMA analysis

	2011 Inflow self-containment	2011 Outflow self-containment	2021 Inflow self-containment	2021 Outflow self-containment	Road network	Rail network	Housing market area	Property market area	Economic Governance Area
Hart	X	X	X	X	X	X	X	X	X
Rushmoor	X	X			X	X	X	X	X
Basingstoke & Deane	X	X			X	X	X	X	X
Bracknell Forest	X	X			X	X		X	
Wokingham	X				X	X		X	
Surrey Heath	X	X			X		X		
Guildford		X			X	X			
Reading					X	X		X	
West Berkshire					X	X		X	
Westminster		X			X				
Elmbridge					X	X			
Runnymede					X	X			
Winchester					X	X			
Slough					X			X	
Windsor & Maidenhead					X			X	
Woking					X	X			

Source: AECOM

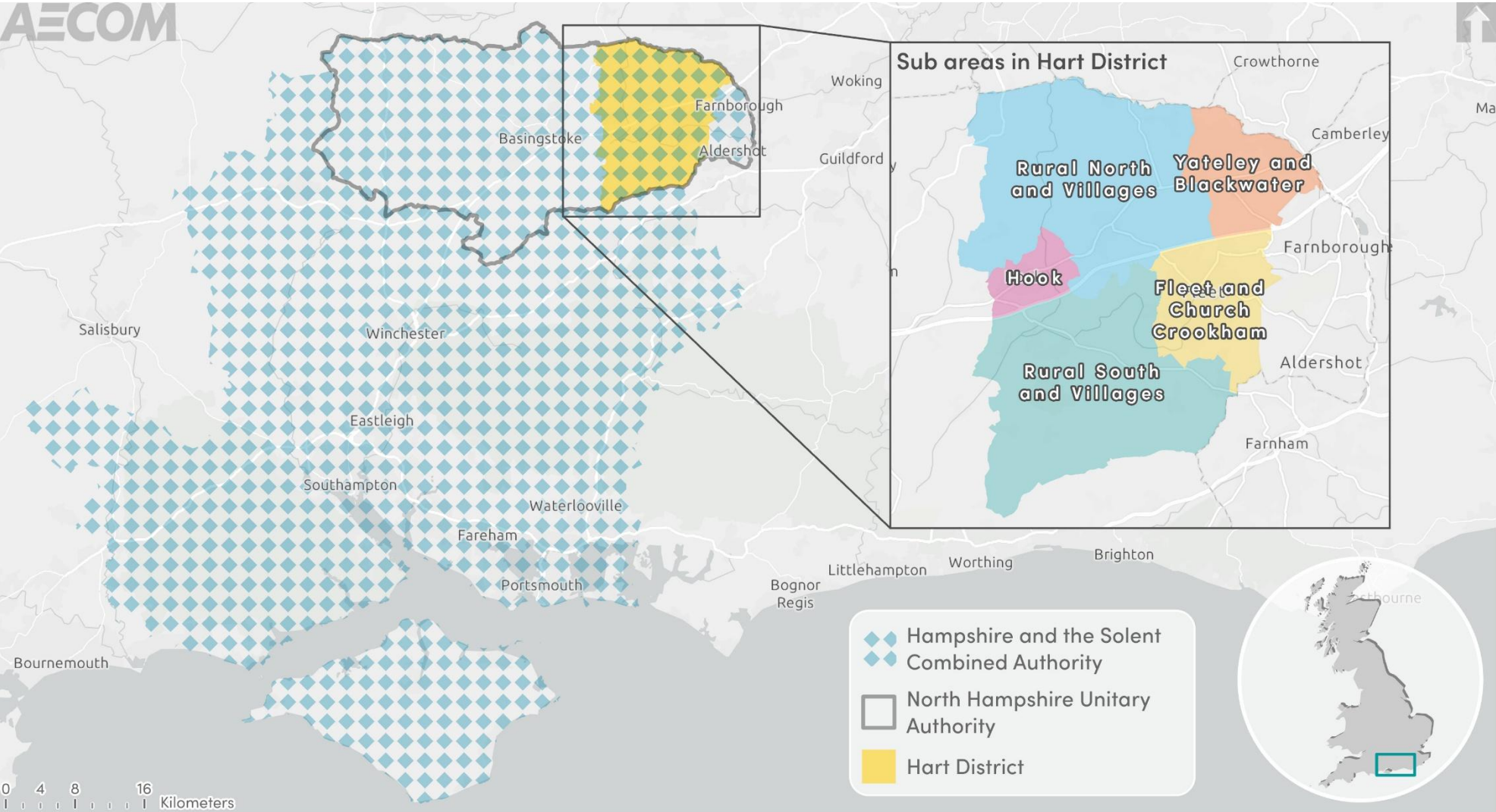
3.5 Study Geographies

- 3.5.1 A review of both the housing market and functional economic market area suggests that Hart's strongest relationships are with Rushmoor and Basingstoke & Deane.
- 3.5.2 Further, given the formation of the North Hampshire Unitary Authority in 2028, the grouping of Hart, Rushmoor and Basingstoke & Deane would broadly align with new administrative boundaries.
- 3.5.3 For the purposes of the HEDNA, the comparator geographies for analysis, alongside Hart District are:
- North Hampshire Unitary Authority – the new local authority covering Hart as part of Local Government Organisation. This also includes Rushmoor and Basingstoke & Deane and together the three authorities can be defined as the FEMA and a reasonable proxy for the local Housing Market Area.
 - Hampshire and the Solent Combined Authority – this is the proposed Spatial Development Strategies (SDS) for Hart. It covers the Hampshire County Council area, Isle of Wight, Portsmouth, and Southampton.
 - England.
- 3.5.4 These areas are carried through both the housing and economics elements of the report.

Sub-areas

- 3.5.5 From a housing perspective, it is also helpful to consider sub-areas for some elements of analysis, such as demographics and house price data. The sub-areas, as agreed with Hart District Council, are as follows, and shown in Figure 3-4:
- Fleet & Church Crookham;
 - Blackwater & Yateley;
 - Hook;
 - Rural North & Villages; and
 - Rural South & Villages

Figure 3-4: HEDNA Geographies



Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community. Contains public sector information licensed under the Open Government Licence v3.0. Contains Ordnance Survey data © Crown copyright and database right 2026. ©Hart District Council, 2026. Reproduced from the Ordnance Survey map with the permission of the Controller of Her Majesty's Stationery Office © Crown Copyright 2000. Unauthorised reproduction infringes Crown Copyright and may lead to prosecution or civil proceedings.

4. Socio-Economic Profile

4.1 Introduction

4.1.1 This section provides a baseline socio-economic profile for Hart, including an analysis of its demographic characteristics, economic performance over time and its labour market. Key indicators provided include:

- Population;
- Economic activity;
- Job density;
- Employment by industry sector;
- Business stock, size and demography;
- Qualifications and Occupations;
- Earnings; and
- Gross Value Added (GVA).

4.1.2 Hart is benchmarked against North Hampshire (the FEMA and a proxy for its housing market area), the Hampshire & Solent Combined Authority area and England.

4.2 Population

4.2.1 The 2021 Census recorded 99,408 individuals living in Hart. ONS 2022-based SNPP estimates a 2026 population of 103,058 individuals in Hart, an increase of 3,650 individuals, or 3.7% on the 2021 population. Looking to 2039, the 2022-based population projections suggest that by the end of the plan period there will be 108,595 individuals living in Hart, an increase of 5,537 (+5.4%) compared to 2026. In 2044, the same projections expect 111,017 individuals living in Hart, an increase of 7,959 individuals (+7.7%) when compared to the estimated 2026 population.

4.2.2 At the time of the 2021 Census, the age breakdown of the Hart population was as follows:

- 0-14 – 18.0%
- 15-24 – 10.2%
- 25-44 – 24.1%
- 45-64 – 28.1%
- 65-84 – 17.0%
- 85+ - 2.7%

4.2.3 Detailed demographic analysis is presented in Section 7.

4.3 Economic Activity

- 4.3.1 The Annual Population Survey (APS)¹⁸ provides the most recent economic activity, employment, and self-employment statistics for the UK.
- 4.3.2 Economic activity data measures the proportion of working age residents who are active members of the labour market in an area. As of September 2025 (the latest data available at the time of writing), the economic activity rate (aged 16-64) in Hart is 83.8%. This is lower than North Hampshire (84.2%), but higher than the Hampshire and Solent (80.5%), and England (79.3%) averages.
- 4.3.3 The economic activity rate in Hart has decreased since 2015 (as reported in the APS¹⁹) from 84.9% to 83.8%. This trend is reflective of the downward trend observed across North Hampshire, which saw its economic activity rate decrease from 86.4% to 84.2%, and Hampshire and Solent which saw its economic activity rate decrease from 81.9% to 80.5%. The decline in economic activity in the district is driven by a decline in employment locally²⁰. At the national level, the economic activity rate increased slightly from 77.8% to 79.3% over the same time period.
- 4.3.4 The employment rate in Hart, as of September 2025, is 80.3%, similar to the rate recorded in 2015. This is slightly lower than the average rate across North Hampshire (81.6%), but higher than Hampshire and Solent (77.7%), and England (75.8%). The self-employment rate in Hart (8.5%) is lower than the averages recorded across North Hampshire (11.0%), Hampshire and Solent (8.8%), and England (9.8%).
- 4.3.5 Economic activity, employment, self-employment, and unemployment rates for all geographies is summarised in Table 4-1 below.

Table 4-1: Economic Activity, 2025

	Hart	FEMA	Hampshire & Solent	England
Economic activity rate - aged 16-64	83.8%	84.2%	80.5%	79.3%
Employment rate - aged 16-64	80.3%	81.6%	77.7%	75.8%
% aged 16-64 who are self employed	8.5%	11.0%	8.8%	9.8%
Unemployment rate - aged 16-64	4.1%	3.1%	3.1%	4.4%

Source: ONS. Annual Population Survey (October 2024-September 2025)

¹⁸ ONS; Annual Population Survey (APS) (October 2024 to September 2025).

¹⁹ ONS; Annual Population Survey (APS) (October 2014 to September 2025).

²⁰ Part of the working population, particularly in low pay industries, may prefer to become economically inactive if local employment is not available and the cost of commute to other areas is prohibitive.

4.4 Job Density

- 4.4.1 Job density²¹, which is the number of jobs in an area divided by the working age resident population (aged 16 – 64), was estimated to be 0.69 in 2024 in Hart, which is lower than the average across North Hampshire (0.77), Hampshire and Solent (0.80) and England (0.86). This suggests a reliance of Hart on other local authorities (particularly in its FEMA) to provide employment opportunities and support its employment rate. This also shows the importance of transport connectivity within North Hampshire (the FEMA) in facilitating access to employment opportunities to Hart's residents.

4.5 Employment by Industry

- 4.5.1 The 2024 Business Register and Employment Survey (BRES)²² provides a detailed breakdown of employment in Hart by broad industrial sectors. This data shows the scale of employment by sector in Hart, the performance of the sectors between 2015 and 2024 and how Hart's profile compares with wider geographies.
- 4.5.2 Four broad industrial sectors in Hart provide over 50% of all employment. Two broad industrial sectors, relevant to this HEDNA account for over 30% (Wholesale and retail trade - repair of motor vehicles and motorcycles (16.5%); Administrative and support service activities (13.7%)). These two sectors have seen a growth in employment between 2015 and 2024.
- 4.5.3 The concentration of employment, and therefore the clustering of activities in Hart, can be assessed through the calculation of Location Quotients (LQs)²³. Hart's employment profile highlights a number cluster areas relative to North Hampshire (the FEMA), the Hampshire and Solent Combined Authority Area and England. The Administrative and support service activities sector, employing 5,000 people (13.7% of total), records an LQ of 1.7 compared to North Hampshire (FEMA), and 1.8 and 1.6 against Hampshire and Solent and England respectively. Other broad industrial sectors are also highly concentrated in Hart, such as Accommodation and food service activities and Water supply - sewerage, waste management and remediation activities.
- 4.5.4 A more detailed breakdown by industry is presented in Table 4-2.

²¹ Office for National Statistics (2024); Job Density

²² Office for National Statistics, (2025); Business Register and Employment Survey 2024.

²³ LQs are a statistical measure of relative concentration in one area compared to another area. An LQ of 1.0 indicates that a sector's share of employment is broadly in line with the wider area. An LQ greater than 1.0 indicates that the sector is more concentrated locally (i.e. within Hart), suggesting relative saturation, while an LQ below 1.0 suggests under-representation in the local area (Hart).

Table 4-2: Employment by Industry, 2024

Industry	Employment	Share of Total	2015 - 2024 Change (%)	Location Quotient		
				North Hampshire (FEMA)	Hampshire and Solent	England
A : Agriculture, forestry and fishing	350	1.0%	-12.5%	1.1	1.0	0.8
B : Mining and quarrying	20	0.1%	0.0%	1.3	1.1	0.8
C : Manufacturing	1,750	4.8%	-12.5%	0.9	0.7	0.7
D : Electricity, gas, steam and air conditioning supply	10	0.0%	-50.0%	0.1	0.1	0.1
E : Water supply; sewerage, waste management and remediation activities	400	1.1%	77.8%	1.3	1.4	1.6
F : Construction	2,500	6.9%	25.0%	1.2	1.3	1.4
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	6,000	16.5%	20.0%	1.0	1.0	1.2
H : Transportation and storage	800	2.2%	14.3%	0.6	0.4	0.4
I : Accommodation and food service activities	4,500	12.4%	-10.0%	1.7	1.5	1.6
J : Information and communication	2,250	6.2%	-55.0%	0.6	1.3	1.3
K : Financial and insurance activities	600	1.6%	-14.3%	0.6	0.7	0.5
L : Real estate activities	600	1.6%	-14.3%	0.8	0.9	0.7
M : Professional, scientific and technical activities	3,500	9.6%	-22.2%	0.9	1.2	1.0
N : Administrative and support service activities	5,000	13.7%	25.0%	1.7	1.8	1.6
O : Public administration and defence; compulsory social security	400	1.1%	-11.1%	0.5	0.2	0.2
P : Education	2,500	6.9%	-28.6%	1.1	0.8	0.8
Q : Human health and social work activities	3,500	9.6%	40.0%	0.9	0.7	0.7
R : Arts, entertainment and recreation	900	2.5%	12.5%	1.0	0.9	1.0
S : Other service activities	800	2.2%	-60.0%	0.5	1.0	1.1
Total	36,380	100.0%	-7.9%	N/A	N/A	N/A

Source: Business Register and Employment Survey: open access

- 4.5.5 It can be noted that that Data from the 2015 BRES²⁴ identified several sectors in Hart which had an LQ above 1 (compared to England). Notable changes include the drop in concentration in Information and communication (from a LQ of 2.9 to 1.3)²⁵; the drop in concentration in Professional, scientific and technical activities (from 1.3 to 1.0), the increase in concentration in Administrative and support service activities (from 1.1 to 1.6) and Construction (from 1.1 to 1.4). These changes indicate a small shift in the economy of Hart, with a decreasing reliance on jobs in the service industry (i.e. Information and communication and Professional, scientific and technical activities) and service activities (i.e. accommodation and food service activities and Other service activities) and a higher concentration of secondary activities (i.e. Construction).

Table 4-3: Employment LQ 2015-2024 (vs England)

	LQ 2015	LQ 2024
F : Construction	1.1	1.4
I : Accommodation and food service activities	1.8	1.6
J : Information and communication	2.9	1.3
M : Professional, scientific and technical activities	1.3	1.0
N : Administrative and support service activities	1.1	1.6
S : Other service activities	2.3	1.1

Business Register and Employment Survey: open access

4.6 Business Stock

- 4.6.1 ONS Business Count data²⁶ indicates that there were a total of 4,945 enterprises located in Hart in 2025. When broken down by employment size band, most businesses were classed as micro (defined as companies employing up to nine employees), with 87.2% of all businesses in Hart being of this size (4,320 businesses). This is higher than the rates recorded in the North Hampshire (83.9%), Hampshire and Solent 83.2%), and England overall (84.5%). This proportion of micro businesses highlights the likely importance of small size premises in the district in supporting economic activity.
- 4.6.2 As well as 4,320 micro businesses, Hart was home to 515 small businesses (10 to 49 employees), 95 medium businesses (50 to 249 employees), and 15 large businesses (250 employees or more in 2025. A breakdown by percentage can be seen in Table 4-4.

²⁴ Office for National Statistics, (2016); Business Register and Employment Survey 2015.

²⁵ This shift is partly explained by the closure of Virgin Media HQ which was located at Bartley Wood Business Park (HQ addressed changed to London in 2016, followed by a full relocation of all staff to Reading and closure of the Hook office in 2019).

²⁶ Office for National Statistics, (2025); UK Business Counts

Table 4-4: Business Counts by Employment Size Band, 2025

	Hart	FEMA	Hampshire and Solent	England
Micro (0 to 9)	87.4%	83.9%	83.2%	84.5%
Small (10 to 49)	10.4%	12.8%	13.7%	12.4%
Medium-sized (50 to 249)	1.9%	2.9%	2.8%	2.6%
Large (250+)	0.3%	0.4%	0.4%	0.4%

Source: UK Business Counts - local units by industry and employment size band

- 4.6.3 VAT registration and de-registration rates provide an indication of the entrepreneurial characteristics of a statistical area. Data on this indicator is sourced from the ONS business demography publication²⁷, which provides numbers for business ‘births’ and ‘deaths’ and is presented in Table 4-5. The data shows that from 2019 to 2024 business registrations in Hart decreased from 545 to 440, a decline of around 19.3%. The decline happened during the Covid-19 crisis, showing the difficulties faced by entrepreneurs during this period to start new businesses. During the same period, the FEMA, Hampshire and Solent, and England experienced a decrease in business registrations, by 20.2%, 27.4%, and 13.1% respectively.
- 4.6.4 Business de-registrations in Hart between 2019 and 2024 also declined (following a period of increase during the Covid-19 pandemic). The overall decline in de-registration in Hart over the period was 20%. De-registrations also declined across North Hampshire, Hampshire and Solent and England, but at lower rates (18.6%, 13.6%, and 7.5% respectively).
- 4.6.5 Since 2024, registrations in Hart have exceeded de-registrations and de-registrations in the district have declined faster than North Hampshire, Hampshire and Solent and England, suggesting that the entrepreneurial environment in Hart could be considered as positive.

Table 4-5: Business registrations and de-registrations in Hart (2019-2024)

Year	Registration	De-registration	Net Change
2019	545	500	45
2020	430	500	-70
2021	435	610	-175
2022	430	555	-125
2023	445	455	-10
2024	440	400	40

Source: Office for National Statistics, (2025); Business demography, UK.

4.7 Qualifications and Occupations

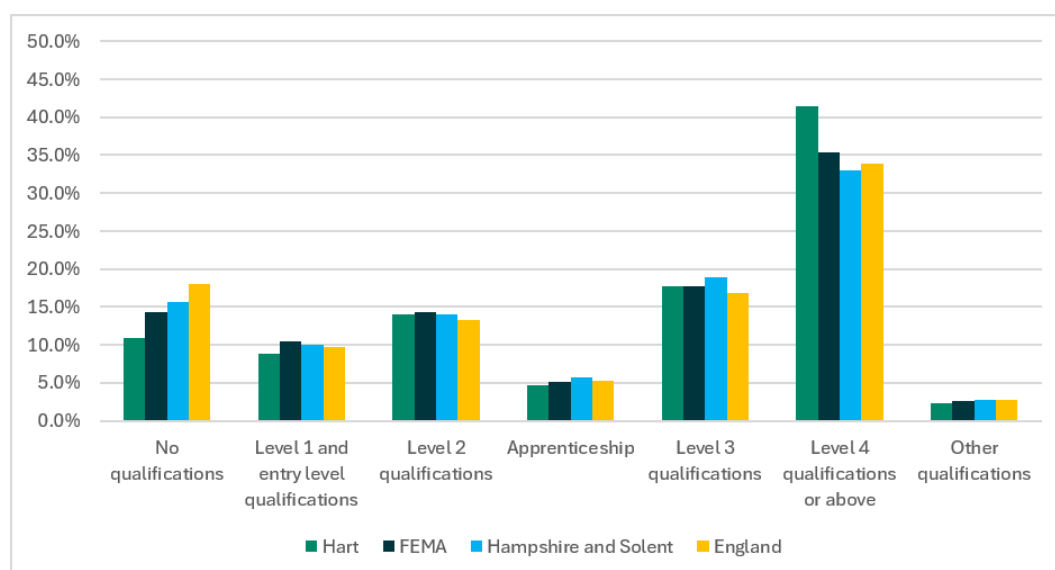
- 4.7.1 Figure 4-1 shows of breakdown of qualification levels across Hart, North Hampshire, Hampshire and Solent, and England. Hart has a highly skilled

²⁷ Office for National Statistics, (2025); Business demography, UK.

workforce compared to all other comparator areas. In 2021, 41.4% of residents in Hart held qualifications at Level 4 or above (degree level or equivalent), which was higher than the North Hampshire (35.4%) Hampshire and Solent (33.0%) and England (33.9%). A higher proportion of residents with advanced qualifications can attract businesses requiring skilled labour, drive innovation, and enhance productivity.

- 4.7.2 The share of residents in Hart holding qualifications at Level 4 or above has increased since 2011²⁸, from 37.5% to 41.4%, whilst it also increased across North Hampshire (from 30.7% to 35.4%), Hampshire and Solent (from 27.9% to 33.0% respectively) and England (27.4% to 33.9%).
- 4.7.3 Conversely, the proportion of residents with no formal qualifications in Hart (10.9%) is lower than in North Hampshire (14.4%), Hampshire and Solent (15.6%) and England as a whole (18.1%). Similarly, the share of the population qualified only to Level 1 (8.8%) is lower than in comparator areas, indicating a comparatively small proportion of residents with very limited qualifications.
- 4.7.4 The proportion of residents with no formal qualifications in Hart has decreased since 2011, from 13.5% to 10.9%. This follows the regional and national trends, which saw a decrease from 19.5% and 22.5% to 15.6% and 18.1% respectively.
- 4.7.5 The increase in the proportion of residents holding qualifications at Level 4 or above and the decrease in the proportion of residents with no formal qualifications highlights an increasing level in overall educational attainment.
- 4.7.6 Intermediate qualification levels (Levels 2 and 3, and apprenticeships) are broadly comparable with North Hampshire, Hampshire and Solent, and England. Apprenticeship attainment is consistent at 4.7% locally, marginally below the regional and national averages (FEMA 5.1%, Hampshire and Solent 5.8%, and England 5.3%).

²⁸ ONS (2012). Census 2011: Qualifications and students

Figure 4-1: Highest Level of Qualification

Source: ONS (2021). Census 2021: Highest Level of Qualification

- 4.7.7 Analysis of the occupational profile of Hart's residents shows that 51.0% are employed in managerial, professional and technical occupations (standard occupational classification (SOC) groups 1-3). This is marginally lower than the North Hampshire average (51.3%), and notably above Hampshire and Solent (47.0%) and England (46.5%). This correlates with the district's qualification profile, where the proportion of residents educated to Level 4 and above is significantly higher than regional and national benchmarks. The single largest occupational category is professional occupations (21.8%), followed by associate professional and technical occupations (14.9%) and managers, directors and senior officials (14.3%).
- 4.7.8 The share of residents in managerial, professional and technical occupations in Hart (51.0%) has decrease since the 2011 Census²⁹, which reported a total of 59.4% of residents in these occupations. This decrease suggests a notable shift towards support and service related occupations for residents of Hart.
- 4.7.9 The proportion of residents within SOC groups 4-5 (administrative, secretarial, and skilled trades) is 19.4%, which is broadly in line with the FEMA (19.3%) and England (19.5%) but slightly lower than Hampshire and Solent (20.3%). The proportion of residents employed within SOC groups 6-9 (which primarily comprise lower skilled occupations³⁰) is 29.7%, which is in line with North Hampshire (29.5%), but below both Hampshire and Solent (32.6%) and England (34.2%). Within this group, Hart records a lower proportion of residents in process, plant and machine operative roles (5.5%) and

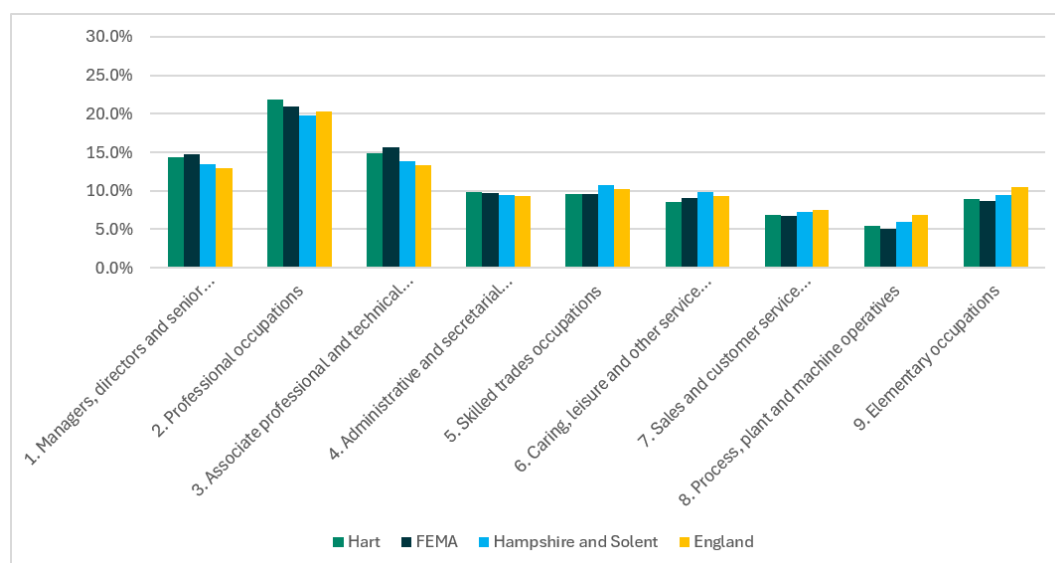
²⁹ ONS (2012). Census 2011: Occupation

³⁰ Lower skill occupations are defined as: elementary occupations; process, plant and machine operatives; sales and customer service occupations. Medium skill occupations are defined as: caring, leisure and other service; skilled trades occupations; administrative and secretarial. High skill occupations are defined as: associate prof & tech occupations; professional occupations; managers, directors and senior officials.

elementary occupations (8.9%) compared with the national average (6.9% and 10.5% respectively).

4.7.10 A more detailed breakdown across occupation type is seen in Figure 4-2.

Figure 4-2: Occupations



Source: ONS (2021). Census 2021: Occupation

4.8 Earnings

4.8.1 The ONS records the annual pay for employees, with the latest data available for 2025. Residence based annual pay for all employees, full time and part time, in Hart is as follows:

- Mean - £49,445
- Median - £39,341
- Lower quartile - £25,656

4.8.2 The estimated average household income in Hart in 2025 is £87,455, with a lower quartile household income of £45,385. This is discussed further in Section 7.

4.9 Gross Value Added

GVA per head

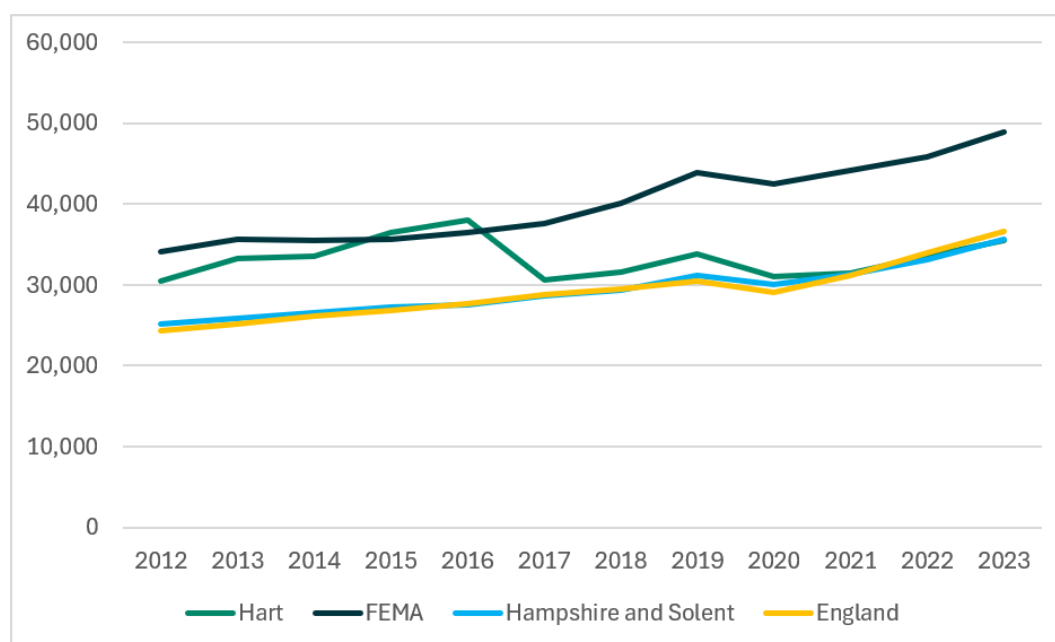
4.9.1 Productivity, as measured by GVA per head³¹, stood at £35,562 in Hart in 2023. This is lower than North Hampshire (£48,866), Hampshire and Solent (£35,671) and England (£36,632). This indicates that Hart underperforms its immediate economic area, and the regional and national averages in terms of productivity. Between 2012 and 2023, the data highlights a noticeable divergence between Hart and North Hampshire. Since 2012, Hart has experienced inconsistent growth and stagnation, growing from 2012 to 2016

³¹ ONS (2025). Regional Gross Value Added (Balanced) at Current Prices – which measures the output attributable to each resident of Hart.

to become the highest performing area, but then falling sharply between 2016 to 2017 and again between 2019 to 2020 to become the lowest performing of all areas on a relative basis in 2023. North Hampshire (the FEMA) has experienced gradual growth from 2015 to 2019 with further growth from 2020 to 2023. Both Hampshire and Solent and England have experienced gradual growth from 2012 to 2019 with more accelerated growth from 2020 to 2023, which resulted in Hampshire and Solent and England outperforming Hart by 2023.

- 4.9.2 Hart's underperformance could be explained by either a declining productivity of local businesses or a shift in employment in the local area, towards less productive jobs. Notably, the relocation of Virgin Media from Bartley Wood Business Park to London (More London) in 2016, and to Reading (Green Park (in 2019) have contributed to this shift, with the loss of circa 1,500 skilled jobs (including corporate functions, finance, legal, human resources, engineering and IT). This has contributed to the drop in GVA/head observed in Hart in 2017 and 2020.

Figure 4-3: GVA per Head Across Study Areas (£)

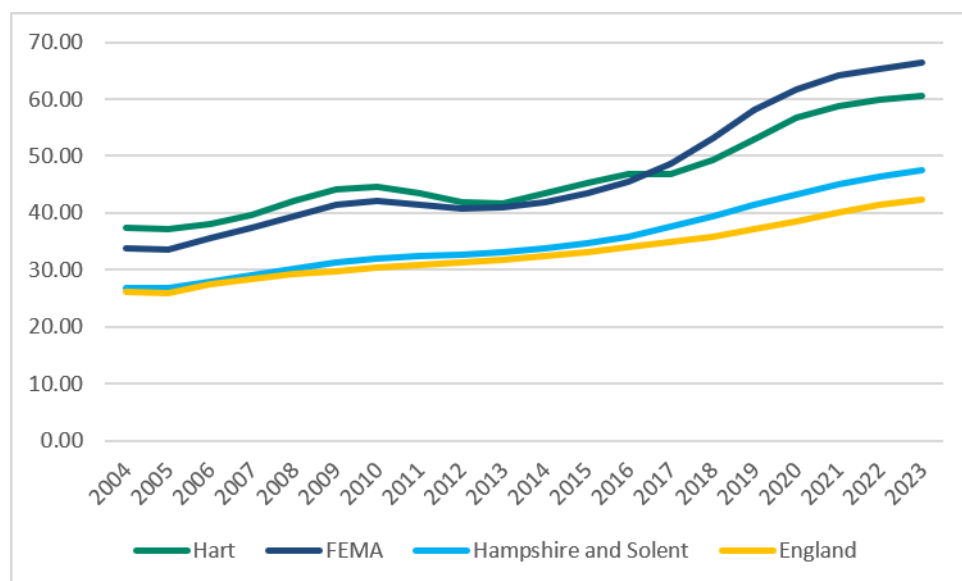


Source: Office for National Statistics, (2025), Regional Gross Value Added (Balanced) at Current Prices

GVA per hour worked

- 4.9.3 GVA produced per hour worked³² shows that Hart has performed well over time and generated 28% more per hour worked (£60.58/hour) than Hampshire and Solent in 2023 (£47.45/hour) and 48% more than England (£42.39/hour). However, despite being ahead of the productivity per hour for the FEMA, Hart fell slightly behind from 2017 (which reached £66.31 in 2023).

³² Which measures the output generated for each hour worked within Hart.

Figure 4-4: GVA per Hour Worked (£)

Source: Office for National Statistics (19 June 2025), Gross value added per hour worked

- 4.9.4 Looking at GVA per hour worked alongside GVA per head tells a more nuanced and more positive story about Hart's economic productivity (than looking at GVA per head alone). The jobs based in Hart appear to be high value per hour. That can reflect the local sector mix, including professional, scientific, technical, information/communications and some larger specialist employers.
- 4.9.5 As Hart has a substantial residential population relative to its local employment base, this negatively impacts on the GVA per head metrics. Additionally, out-commuting will negatively impact GVA per head in Hart.
- 4.9.6 Therefore, it could be concluded that Hart performs well on the quality/productivity of local work, but less strongly on the quantity of local workplace activity relative to its population.

4.10 Summary

- 4.10.1 Hart is projected to experience moderate population growth over the plan period, with the population expected to increase from 99,408 residents in 2021 to 108,595 in 2039 and 111,017 by 2044. The district benefits from a strong labour market, characterised by high levels of economic activity and employment relative to the Hampshire & Solent Combined Authority area and England. However, Hart's low job density indicates a reliance on employment opportunities elsewhere within the wider North Hampshire functional economic area, underlining the importance of strong transport connectivity and commuting links.
- 4.10.2 The local economy is dominated by service sector activities, with wholesale and retail, administrative and support services, accommodation and food services, and health and social care accounting for over half of all employment. While some sectors have recorded significant growth since 2015, overall employment has declined, reflecting structural changes within

the local economy, and notably a decline in industrial activities (manufacturing) and some knowledge based activities (such as information and communication, finance and insurance and professional, scientific and technical activities) and a growth in construction and service related activities (such as wholesale and retail trade, logistics, administrative and support service activities and health and social services). Hart continues to exhibit notable concentrations in administrative and support services, accommodation and food services, and construction-related activities.

- 4.10.3 The district is characterised by a highly qualified workforce, with above-average proportions of residents educated to degree level or higher and employed in managerial, professional and technical occupations. Earnings are also comparatively strong. Despite these characteristics, productivity as measured by GVA per head remains below comparator areas, whilst GVA per hour worked is slightly below the FEMA average, but notably above the average for Hampshire and Solent and for England. This suggests that Hart performs well on the quality/productivity of local work, but less strongly on the quantity of local workplace activity relative to its population.
- 4.10.4 These findings suggest that future employment growth in Hart is likely to depend not just on overall population growth, but on the district's ability to retain and attract higher value jobs, support business expansion, and improve productivity. At the same time, the positive business demography trend since 2024, combined with a strong base of micro and small firms, suggests that Hart has a viable entrepreneurial environment that can support job creation if the right premises, infrastructure, skills, and commercial conditions are in place.

5. Local Housing Need

5.1 Introduction

5.1.1 This section calculates the Local Housing Need (LHN) figure for Hart using the Standard Method. As noted in Planning Practice Guidance on housing and economic needs assessment (PPG), it is not a housing requirement, but rather the first step in the process of deciding how many homes need to be planned for.

5.1.2 This section sets out:

- Current Government policy on the Standard Method
- The calculation of Hart's local housing need using the Standard Method
- A comparison of the Standard Method LHN with other projections

5.2 Government Policy on the Standard Method

5.2.1 NPPF 2026 policy HO1: 'Assessing the need for homes' describes how the overall need for housing should be established through a housing need assessment, using the 'Standard Method', as set out in the planning practice guidance on housing and economic needs assessment (PPG)³³. In addition to this local need, once it is established, any needs that cannot be met within neighbouring areas should also be taken into account in the amount of housing to be planned for.

5.2.2 PPG states that "housing need is an unconstrained assessment of the number of homes needed in an area. Assessing housing need is the first step in the process of deciding how many homes need to be planned for. It should be undertaken separately from assessing land availability, establishing a housing requirement figure, and preparing policies to address this such as site allocations"³⁴.

5.2.3 It goes on to say that "once local housing need has been assessed, as set out in this guidance, authorities should then make an assessment of the amount of new homes that can be provided in their area. This should be justified by evidence on land availability, constraints on development, and any other relevant matters"³⁵.

³³ [Housing and economic needs assessment - GOV.UK](https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments)

³⁴ Paragraph: 001 Reference ID: 2a-001-20241212. Available at: <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

³⁵ Paragraph: 040 Reference ID: 2a-040-20241212. Available at: <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

5.2.4 A LHN figure is therefore a ‘policy-off’ figure. This means that, while it takes account of the factors as set out in the NPPF, it is an expression of total potential housing demand unconstrained by the limits of the land available to build on. It is also unconstrained by the impact of policies that either facilitate or constrain development. A policy-off figure can then be reviewed in light of further evidence, including environmental constraints, land availability, relevant Local Plan objectives and policies, and the unmet needs of neighbouring authorities to formulate a ‘policy-on’ housing requirement figure (HRF).

5.3 Hart’s Local Housing Need (Standard Method)

5.3.1 The baseline housing need figure for Hart District is calculated using the Standard Method outlined in PPG in December 2024, and updated (in part) in February 2025³⁶.

5.3.2 Step 1 is to set the baseline, which is 0.8% of the existing housing stock for the local authority. The most recent available dwelling stock estimates by local authority, published by the ONS³⁷, are to be used.

- According to the latest ONS estimated of the total number of dwellings for local authorities, accurate to 2025 and published in May 2026, Hart’s dwelling stock amounts to 43,108 dwellings.
- 0.8% of this figure is 344.86.

5.3.3 Step 2 is to adjust this baseline based on the affordability of housing in the area. The relevant indicator is the median workplace-based affordability ratios, published by the ONS³⁸. The average affordability ratio over the five most recent years for which the data is available should be used.

- The latest ONS affordability ratios, accurate to 2025 and published in March 2026, give a 5-year ratio of 12.00.

5.3.4 No adjustment is applied where the ratio is 5 or below. For each 1% the ratio is above 5, the housing stock baseline should be increased by 0.95%. The precise formula is as follows:

$$\text{Adjustment factor} = \left(\frac{\text{five year average affordability ratio} - 5}{5} \right) \times 0.95 + 1$$

³⁶ <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

³⁷ <https://www.gov.uk/government/statistical-data-sets/live-tables-on-dwelling-stock-including-vacants>

³⁸

<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoworkplacebasedearningslowerquartileandmedian>

- Applying this calculation to Hart’s affordability ratio of 12.00 results in an adjustment factor of 2.3300.
 - The baseline stock figure calculated in Step 1 above is 344.86. Multiplying this figure by the adjustment factor of 2.3300 produces a result of 803.53, which is rounded to 804.
- 5.3.5 In previous versions of the Standard Method calculation, a final step applied a cap to limit the affordability adjustment. This is no longer part of the current approach.
- 5.3.6 The result of this exercise is a minimum LHN figure for Hart district of 804 (rounded) net additional dwellings per annum. This equates to 10,456 (rounded) dwellings over the period 2026-2039 (end of the plan period) and 14,464 (rounded) dwellings over the longer study period 2026-2044.
- 5.3.7 The annualised figure is 110.3% higher than the result of 382 dwellings per annum as calculated in the Hart, Rushmoor, and Surrey Heath SHMA 2014-2032 (Wessex Economics, 2016). This figure was developed under guidance prior to the introduction of the Standard Method and is noted only to highlight the impact of the new Standard Method approach on the volume of housing needed in Hart and across many other local authorities.

5.4 Comparative Housing Projections

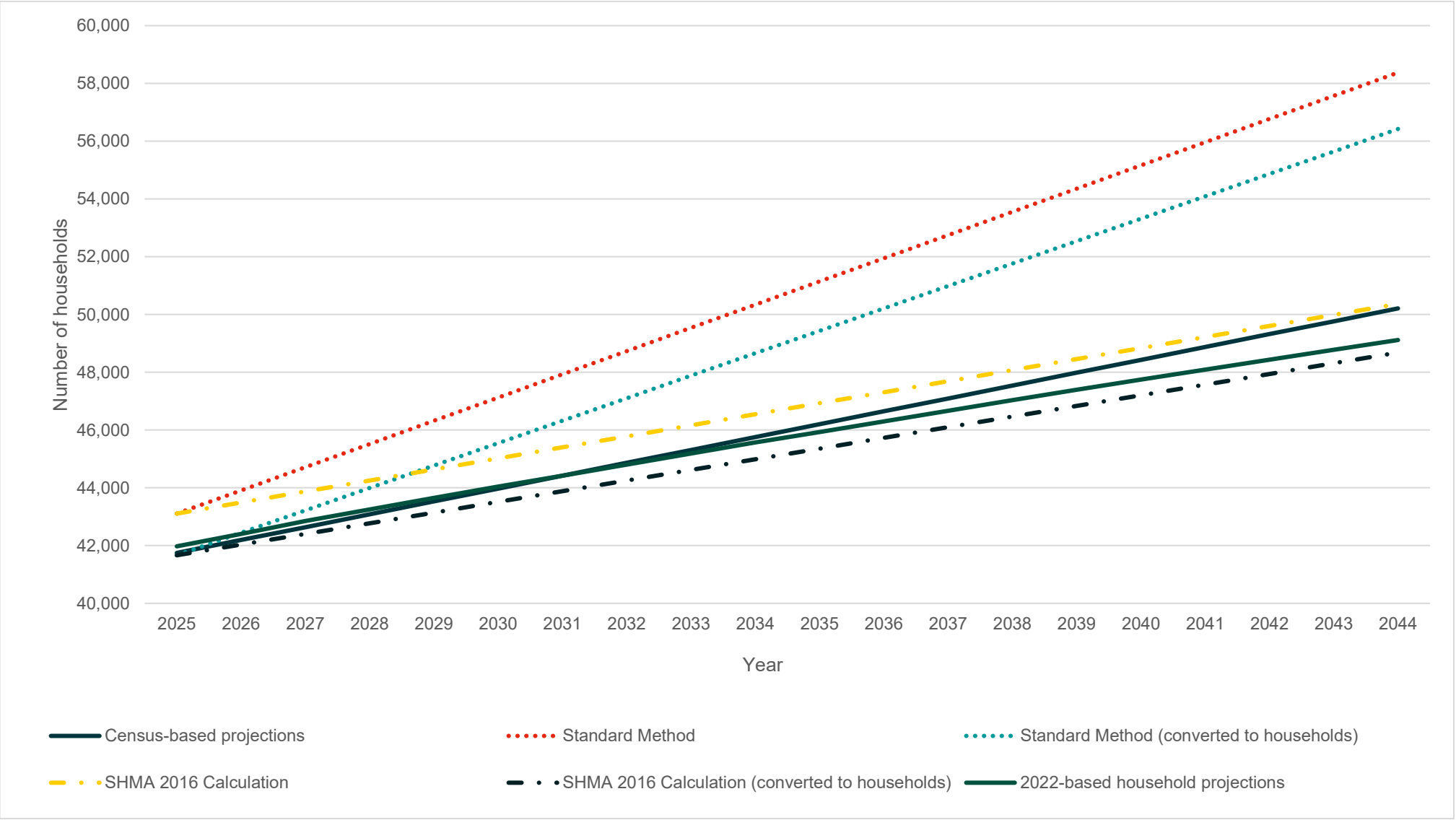
- 5.4.1 It is useful to consider how household projections compare to the Standard Method need figure. Figure 5-1 shows the household growth rate over the plan period if new housing supply is provided in line with the Standard Method and compares this to the latest ONS 2022 based household projections and the level of household growth in the past (between Census 2011 and 2021).
- 5.4.2 The starting point for comparing the Standard Method to household projections is to convert the Standard Method figure, which reflects dwelling growth, to household growth. The Standard Method figure of 804 additional dwellings per annum is estimated to accommodate 777 (rounded) households, taking account of the rates of unoccupied dwellings (3.34%) across Hart district at the time of the 2021 Census.
- 5.4.3 2022-based household projections³⁹ suggest average growth of 373 households per annum between 2026 and 2044.
- 5.4.4 For comparison, household growth can also be projected forward by applying the annualised change in households between 2011 and 2021 to the plan period. This method suggests annual household growth of 446 households , above growth levels associated with 2022-based population projections but still well below the Standard Method figure.

³⁹ 10 year migration variant

- 5.4.5 In terms of existing policy requirements, the Hart Local Plan (Strategies and Sites) 2032 sets a housing requirement across Hart of 423 dwellings per annum between 2014 and 2032.
- 5.4.6 Looking at past delivery rates (net additional dwellings)⁴⁰ in Hart over the last decade, between 2015/16 and 2024/24 there were 5,464 net additional dwellings in Hart. Over the decade the average number of net additional dwellings was 546 per year, with the average falling to 469 over the last 5 years, and 393 over the last 3.

⁴⁰<https://app.powerbi.com/view?r=eyJrIjoiazTE5YWQ3MDYtZmFjMC00N2YwLWlzM2EtYWY2NTk1NjExYjgwliwidCI6ImJmMzQ2ODEwLTljN2QtNDNkZS1hODcyLTl0YTJlZjM5OTVhOCJ9>

Figure 5-1: Standard Method and Household Projections, Hart



5.5 Implications of Increased Local Housing Need

- 5.5.1 The Standard Method figure outlined above is 110% higher than the figure calculated when the Hart, Rushmoor, and Surrey Heath SHMA was undertaken in 2016. This significant increase reflects the intention of the Standard Method to boost housing delivery across the country and is not a challenge exclusive to Hart.
- 5.5.2 To meet the uplifted overall housing need identified through the new Standard Method for Hart would therefore represent a notable step-change in its housing requirement and, ultimately, housing delivery. This raises a number of questions:
- What are the characteristics of the people and households who will occupy these additional homes? Where will they come from?
 - Is a different mix of new housing needed to achieve a higher housing requirement and a step-change in delivery?
 - How will a step-change in delivery of new homes impact Affordable Housing?
 - Will the additional housing be occupied by households who are economically active and able to fill new jobs created in the area?
- 5.5.3 Projections for the need for affordable housing and the mix of new homes in this report assume household growth and formation assumptions based on national household projections (2022-based), in line with PPG. However, if housing delivery in Hart was to be increased in line with the Standard Method result, this could have the effect of raising household growth above the level assumed by the projections, creating knock-on impacts on the mix of dwellings required to meet future needs.
- 5.5.4 It is not possible to predict from a higher potential number of new households alone what exactly they might look like and where they will come from. Strategy and policy will play a part in influencing the characteristics of the potential additional households that may form in Hart or move to the area, and the mix of housing they need.
- 5.5.5 One key distinction is between new households arising from within Hart, who may be ‘suppressed’ within the existing population (e.g. in overcrowded dwellings or living with parents or relatives), and new households arriving to the area through in-migration from elsewhere. For the former especially, affordability rather than simply the availability of additional new housing may be the deciding factor. For the latter, an important element that is difficult to predict concerns the actions of neighbouring authorities to respond to their own higher need figures. A local authority that sought to deliver a requirement in line with its new Standard Method figure while neighbouring areas declined or failed to do the same might expect to receive higher levels of inward migration. Depending on their source locations and reasons for moving, this will influence what tenure, type and size of housing they need. For Hart, the

actions of neighbouring Basingstoke & Deane Borough and Rushmoor District in relation to meeting their housing needs will be particularly important.

- 5.5.6 Another key distinction concerns the demographic and financial characteristics of the households that may be encouraged to move or form by the housing offer available. This raises the question of whether a local authority might give the market a free hand or ‘intervene’ to attract specific groups, meet gaps in provision, or create a specific vision of mixed and balanced communities. For example, additional housing delivery (assuming a higher housing requirement is deliverable) could be used as an opportunity to address unmet needs for Affordable Housing or address gaps in the choice of market housing, which could influence the mix of households taking up the new supply.
- 5.5.7 A further linked factor is employment. Additional housing attracting new households is likely to increase the labour supply. This may require the generation of economic and employment growth to ensure that the growing population can find work. If jobs growth does not match household growth within the area, out-commuting or low take-up (or slow build out) of the new housing may result. Equally, the employment position and trajectory of an area is likely to influence the volume of household formation and in-migration, as well as the makeup of the new households in terms of their age, income levels and need for financial and housing assistance – all of which influence the size, tenure and location of new homes required.
- 5.5.8 The following points provide high-level discussion on how the housing needs evidence arising from this HEDNA might be interpreted or adjusted to reflect the impact of the higher Standard Method figure and the strategic approach Hart may wish to take in response.

Affordable Housing

- 5.5.9 The Affordable Housing estimates set out in this HEDNA use household projections as an input for forecasting future levels of household formation and thus newly arising need. If a higher rate of new household formation than projected is achieved through increased housing delivery, the newly arising need for Affordable Housing is likely to rise – all else being equal. This scenario is tested in Section 9.
- 5.5.10 However, if Hart maintains a consistent target for the share of all new mainstream housing that is expected to be affordable on qualifying sites, higher overall housing delivery will also generate higher Affordable Housing supply. This would tend to erode the current backlog (a key input to the estimates in this report) more quickly, thus having a dampening impact on the volume of future need overall. This effect may be short term however, as the larger population might be expected to generate additional housing needs over time unless improvements in affordability more generally can be achieved.

5.5.11 The expanded delivery of market housing, particularly at a range of price points, may have the effect of improving affordability in the wider market – and there is some evidence that private rents generally react more elastically to supply levels. This may reduce the number and proportion of households needing subsidised housing. However, it is important to note that the Government’s own modelling of the impact of higher levels of housing supply nationally suggests this would have only marginal impacts on prices and is therefore unlikely to substantially improve market affordability⁴¹. It is difficult to predict how these various forces might interact in practice.

5.5.12 The impact of the Standard Method figure on the potential need for Affordable Housing, and the relationship between Affordable Housing need and the LHN is explored further in Section 9.

Housing mix: type and size

5.5.13 This study provides an indication of the size mix of new housing to accommodate demographic change and respond to imbalances in the existing stock, based on projected levels of household growth (Section 6). It is expressed in terms of percentages and applicable to any overall housing delivery requirement.

5.5.14 However, the modelling projects forward based on existing trends and patterns of occupancy. A step change in delivery (as implied by Standard Method local housing need) might be used to change the mix of homes provided in the district and influence the profile of households who live in Hart in the future. Whilst Local Plan policies are not able to control the occupancy of market homes, there are a number of ways in which planning for particular types and sizes of homes may impact on the characteristics of future households and the balance between household formation and in-migration:

- Provision of more Affordable Housing is likely to enable some households who are currently concealed or ‘suppressed’ e.g. young people or families who are currently living with family or friends, to form their own household.
- Provision of smaller market homes (1-2 beds) may provide relatively more affordable options for younger households to buy or rent within Hart. These properties are unlikely to have a strong influence on the ability of households in Hart to form and may be more likely to be filled by households moving in from other areas given the pattern of house prices and affordability across North Hampshire.

41

https://pure.hw.ac.uk/ws/portalfiles/portal/113960635/Bramley_G._HOUSING_REQUIREMENTS_IN_ENGLAND_REVISITED.pdf#:~:text=It%20used%20a%20unique%20housing%20market%20model%20in,intermediate%20rental%20and%20low%20cost%20home%20ownership%20products.

- Provision of more specialist housing for older people, or housing which is likely to be attractive to those seeking to downsize but maintain an attractive lifestyle, could increase inward migration of older households.

The relationship between jobs and homes

- 5.5.15 In most housing markets and local authority areas, including Hart, the level of housing supply implied by the Standard Method housing need figure would ensure sufficient expansion of the population and labour force to fill the projected increase in jobs over the plan period. In general, it is the affordability uplift in the Standard Method that drives the calculation of higher levels of need. This uplift is more than enough to meet employment needs (if this increased supply is delivered).
- 5.5.16 It is helpful to understand the relationship between expected jobs growth and the amount of housing that would be required to support these jobs. This subsection is a simple cross-check of employment figures with the Standard Method.
- 5.5.17 As part of the HEDNA (Section 13), AECOM projects employment growth of 2,950 jobs over the period 2026-2039, or 227 (rounded) per annum in Hart.
- 5.5.18 This projected job growth is converted to the potential need for homes by the following steps:
- Annualising the estimated annual jobs growth (227 pa) and the number of people required to fill these jobs (227 workers (including full and part time) per annum);
 - Determining the total population required to support the jobs growth (i.e. not just those filling the jobs, but the wider population – retired people, families of those employed, economically inactive households) – estimated as 449 people per annum based on current economic activity rates and the proportion of the population that is economically active;
 - The overall population is converted to households using the average household size in Hart (2.49) – equating to 180 households; and
 - The rate of empty dwellings in Hart (3.3%) is applied resulting in the need for 186 dwellings.
- 5.5.19 AECOM identifies that from the job growth expected in Hart, there would be a need for 3,356 dwellings between 2026 and 2039 to support this growth, or 186 per annum. This is a simple calculation which is sensitive to average household size – if household size fell significantly the number of dwellings required would increase. Population and household projections anticipated household size to fall to 2.29 by 2039. This would result in a need for 203 dwellings per annum to meet the same level of job growth.
- 5.5.20 The number of dwellings required to meet the expected employment growth over the plan period is well below the Standard Method figure of 804 dwellings per annum 2026-2039. Therefore, the increase in housing would comfortably

meet the needs of the increase in workers, if delivered. However, the mix of housing delivered (tenure, type and size) might impact on the ability of certain households to move to the area or remain living in Hart, for example in key worker professions where household incomes may be lower, demanding affordable home ownership options or relatively more affordable market housing.

- 5.5.21 The disparity between expected job and dwelling growth is likely to mean that a substantial number of workers in households living in Hart in the future will commute out of the district for work (if their job involves needing to be at their workplace) unless employment growth is higher than currently projected.

5.6 Summary

- 5.6.1 The Standard Method identifies a minimum Local Housing Need (LHN) of 804 dwellings per annum in Hart, equivalent to 10,446 dwellings over the period 2026-2039 or 14,464 dwellings over the longer period 2026-2044. This represents a significant increase compared with previous assessments of housing need, historic delivery rates, and projected household growth. The uplift is principally driven by the affordability adjustment within the revised Standard Method and reflects the Government's objective of increasing housing delivery across England.
- 5.6.2 The Standard Method figure substantially exceeds both the 2022-based household projections and the number of homes required to support forecast employment growth. While this demonstrates that the level of housing need identified is sufficient to accommodate future labour force requirements, it also raises important strategic questions regarding the composition of future growth, the balance between locally arising need and in-migration, and the nature of growth Hart wishes to support through the Local Plan.
- 5.6.3 Higher levels of housing delivery could provide opportunities to improve affordability, increase Affordable Housing supply, support younger households, and respond to identified housing needs across a range of tenures and household groups. However, the extent to which these benefits are realised will depend on the location, type, size, tenure and affordability of new homes, together with the district's wider economic strategy and the approach taken by neighbouring authorities in meeting their own housing needs.

6. People and Households

6.1 Introduction

- 6.1.1 This section examines demographics, including the number and age of residents, types of households, and change over time. Demographic change is a key driver of housing need and demand. Need and demand is not only linked to the number and type of households in the district, but also their life stage and circumstances (e.g. students, looked after children) and patterns of income and wealth, which are also explored in this section.
- 6.1.2 This section also models an indicative mix of housing for Hart households at the end of the plan period (2039) and the indicative mix of housing that would be required to be delivered over the plan period to meet this.
- 6.1.3 Section 6 is structured as follows:
- Demographics and demographic change
 - Mix of homes required to meet demographic needs
 - Needs of specific groups
 - Income patterns

6.2 Demographics and Demographic Change

- 6.2.1 The 2021 Census recorded 99,408 individuals living in Hart, accounting for 25.9% of the North Hampshire population and 5.0% of the Hampshire & the Solent Combined Authority area population. ONS 2022-based SNPP estimates a 2026 population of 103,058 individuals in Hart, an increase of 3,650 individuals, or 3.7% on the 2021 population.
- 6.2.2 By 2039 (end of plan period) the 2022-based population projections suggest there will be 108,595 individuals living in Hart, an increase of 9,187 (9.2%) compared to the Census 2021, or 5,537 individuals (5.4%) compared to the estimated 2026 population. Looking to 2044, the projections suggest that there will be 111,017 individuals living in Hart, an increase of 11,609 (11.7%) when compared to the 2021 Census, or 7,959 (7.7%) when compared to the estimated 2026 population.
- 6.2.3 Tables 6-1 and 6-2 present the age breakdown (2021) of the population in Hart and the wider geographies. They show that:
- The proportion of children aged 0-14 (18.0%) and young people aged 15-24 (10.2%) was the same in both Hart and the North Hampshire unitary authority area. Hampshire & the Solent Combined Authority area and England had slightly smaller proportions of children and slightly higher proportion of 15-24 year olds – the latter group impacted by the presence of Universities.

- Hart had a greater proportion of older individuals aged 65+ (19.7%) than North Hampshire (17.4%) and England (18.4%), but a smaller proportion than Hampshire & the Solent Combined Authority area (20.8%).
- The greatest proportion of the population in Hart was aged 45-64 (older working age people), at 28.1% of the population. This trend was also observed in the Hampshire & the Solent Combined Authority area, although to a lesser extent. The greatest proportion of the population in North Hampshire and nationally were aged 25-44 (younger working age people), at 27.7% and 26.6% respectively.

Table 6-1: Age profile of Hart and comparator geographies, 2021

Age	Hart	North Hampshire UA	Hampshire & the Solent Combined Authority	England
Total	99,408	384,316	1,998,282	56,490,048
0-14	17,844	69,019	330,926	9,838,977
15-24	10,122	39,110	230,628	6,633,345
25-44	23,969	106,521	499,670	15,043,659
45-64	27,899	102,951	526,866	14,572,764
65-84	16,909	58,446	353,195	9,029,002
85+	2,665	8,269	56,997	1,372,301

Source: 2021 Census

Table 6-2: Age profile of Hart and comparator geographies, %

Age	Hart	North Hampshire UA	Hampshire & the Solent Combined Authority	England
0-14	18.0%	18.0%	16.6%	17.4%
15-24	10.2%	10.2%	11.5%	11.7%
25-44	24.1%	27.7%	25.0%	26.6%
45-64	28.1%	26.8%	26.4%	25.8%
65-84	17.0%	15.2%	17.7%	16.0%
85+	2.7%	2.2%	2.9%	2.4%

Source: 2021 Census

6.2.4 Tables 6-3 and 6-4 present the same data for the sub-areas in Hart District. The following key observations can be made:

- Fleet & Church Crookham and Hook had the greatest proportion of children aged 0-14, at 19.3% of the sub-area population. Blackwater & Yateley had the smallest proportion, at 15.8%. Conversely, Blackwater & Yateley had the greatest proportion of young people aged 15-24, at 11.9%.
- Rural South & Villages had the greatest proportion of older individuals aged 65+, at 22.1%, with a significantly smaller proportion in Hook, at 15.8%.
- Rural North & Villages had the largest older working age population (45-64), at 31.2%, followed by Hook at 28.6%. Younger working age people (25-44) were more common in Hook (26.4%) than the other sub-areas.

Table 6-3: Age profile of Hart sub-areas, 2021

Age	Fleet & Church Crookham	Blackwater & Yateley	Hook	Rural North & Villages	Rural South & Villages
Total	44,146	26,201	9,063	9,867	10,107
0-14	8,536	4,131	1,749	1,725	1,702
15-24	4,187	3,128	894	870	1,045
25-44	10,958	6,287	2,395	2,027	2,315
45-64	12,426	6,950	2,589	3,082	2,818
65-84	6,763	5,064	1,278	1,918	1,897
85+	1,276	641	158	245	330

Source: 2021 Census

Table 6-4: Age profile of Hart sub-areas, %

Age	Fleet & Church Crookham	Blackwater & Yateley	Hook	Rural North & Villages	Rural South & Villages
0-14	19.3%	15.8%	19.3%	17.5%	16.8%
15-24	9.5%	11.9%	9.9%	8.8%	10.3%
25-44	24.8%	24.0%	26.4%	20.5%	22.9%
45-64	28.1%	26.5%	28.6%	31.2%	27.9%
65-84	15.3%	19.3%	14.1%	19.4%	18.8%
85+	2.9%	2.4%	1.7%	2.5%	3.3%

Source: 2021 Census

6.2.5 It is also helpful to look at how the age profile of Hart changed between the 2011 and 2021 Censuses. In this time, the population of Hart grew by 9.2%. The greatest growth was in the older population, with the number of people aged 65-84 increasing by 28.3%, and aged 85+ by 44.7%. There was a decline in the number of people aged 25-44 of 0.8%, or 201 people, which is likely to have been driven by the natural ageing of the existing population. Migration data suggests there are net movements of people aged 25-44 into Hart (see Section 3) which suggests the size of this group in the population has been kept broadly stable because of migration, without which it would have experienced a more substantial reduction in size.

Table 6-5: Age profile of Hart, 2011-2021

Age	2011	2021	Change	%
Total	91,033	99,408	8,375	+9.2%
0-14	17,192	17,844	652	+3.8%
15-24	9,449	10,122	673	+7.1%
25-44	24,170	23,969	-201	-0.8%
45-64	25,204	27,899	2,695	+10.7%
65-84	13,176	16,909	3,733	+28.3%
85+	1,842	2,665	823	+44.7%

Source: 2011 Census, 2021 Census

6.2.6 Turning to households, there were 39,966 households in Hart at the time of the 2021 Census, an increase of approximately 12.5% since the 2011 Census. ONS 2022-based household projections suggest that in 2026 there are 42,407 households in Hart (6.1% increase on 2021), with this projected to increase to 47,394 by 2039 (18.6% increase on 2021, or 11.8% on 2026). By 2044, the

projections anticipate there will be 49,117 in Hart (22.9% increase on 2021, or 15.8% on 2026).

6.2.7 Household size reflects the types of households that live in an area, with the average household size in Hart at 2.49 people per household at the time of the 2021 Census. Household sizes across the wider geographies and sub-areas are as follows:

- North Hampshire Unitary Authority – 2.46
- Hampshire and the Solent Combined Authority – 2.38
- England – 2.41
- Fleet & Church Crookham – 2.48
- Blackwater & Yateley – 2.53
- Hook – 2.46
- Rural North & Villages – 2.41
- Rural South & Villages – 2.54

6.2.8 This shows that Hart had a slightly larger average household size than the wider comparator geographies. Within the district, the largest average household size was in the Rural South & Villages sub-area, with the smallest in the Rural North & Villages sub-area.

6.2.9 Table 6-5 presents information from the 2021 Census on household composition - the types of households that are occupying housing in Hart. The most common household type in Hart at the time of the Census was families with dependent children, which comprised 29.8% of all households. 18.3% of households were couples with no children, whilst 24.4% were households (either single people or couples) where all occupants were over 66 years of age.

6.2.10 Comparing Hart to the wider geographies, the district has a larger proportion of family households with dependent children than North Hampshire (28.4%), Hampshire & the Solent (25.0%), and England (25.8%). Of the wider geographies, only Hampshire and the Solent had a greater proportion of older households (24.5%) than Hart. Households with no children were most common in North Hampshire (18.7%), and least common nationally (16.8%). Migration data in Section 3 confirms net movement of children into Hart suggesting it is an attractive destination for families moving from other areas, including the neighbouring authorities of Rushmoor and Basingstoke & Deane.

6.2.11 It is helpful to understand the household composition of the sub-areas within Hart:

- Blackwater & Yateley had the highest proportion of households aged 66 and over, at 27.0%, closely followed by the Rural North & Villages sub-area at 26.9%. Hook had the smallest proportion at 18.8%.

- Families with dependent children were most common in Hook (32.6%) and Fleet & Church Crookham (32.3%) and least common in Blackwater & Yateley (26.6%). Blackwater & Yateley had the greatest proportion of non-dependent children however, suggesting that this sub-area is more common with older families, with adult children living in the family home. This aligns with Blackwater & Yateley having the highest proportion of young people aged 15-24 in Table 6-7.
- Family households (e.g. couples) with no children were most common in Hook, at 20.8% of the population, followed by Rural South & Villages at 20.1%. A wide range of households could fall into this group, including couples without children (of any age under 66) and families with adult children that have left the family home, but where at least one member is aged under 66.

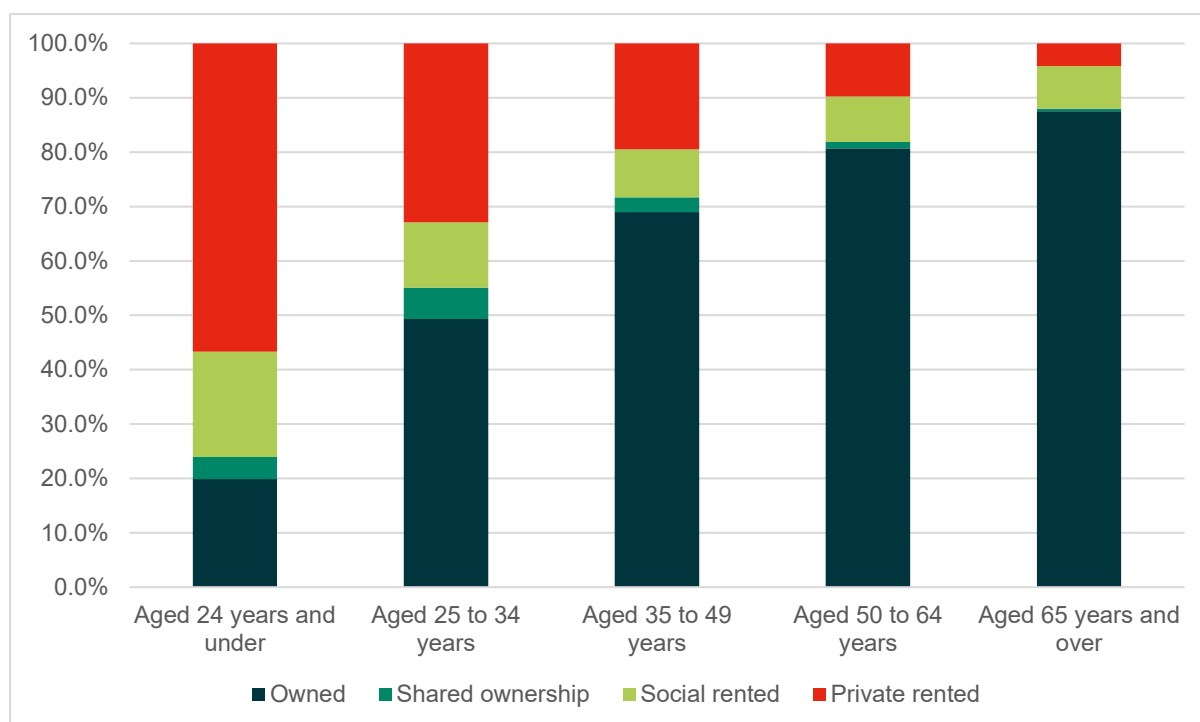
Table 6-6: Household composition, Hart and comparator geographies, 2021

Household composition	Hart	North Hampshire UA	Hampshire & the Solent Combined Authority	England	Fleet & Church Crookham	Blackwater & Yateley	Hook	Rural North & Villages	Rural South & Villages
Total: All households	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
One-person household	24.6%	26.1%	29.2%	30.1%	25.3%	23.4%	23.4%	25.7%	24.7%
One-person household: Aged 66 years and over	12.4%	11.0%	13.7%	12.8%	12.0%	13.1%	9.6%	14.4%	12.9%
One-person household: Other	12.2%	15.1%	15.5%	17.3%	13.4%	10.3%	13.9%	11.4%	11.8%
Single family household	71.0%	67.8%	64.6%	63.0%	70.5%	71.3%	73.1%	70.4%	71.4%
Single family household: All aged 66 years and over	12.0%	9.5%	10.8%	9.2%	10.9%	13.9%	9.2%	12.5%	13.7%
Single family household: No children	18.3%	18.7%	18.3%	16.8%	17.6%	17.3%	20.8%	19.7%	20.1%
Single family household: Dependent children	29.8%	28.4%	25.0%	25.8%	32.3%	26.6%	32.6%	27.8%	27.2%
Single family household: All children non-dependent	10.5%	10.7%	9.9%	10.5%	9.3%	13.2%	10.1%	10.2%	10.2%
Single family household: Other	0.4%	0.5%	0.6%	0.8%	0.4%	0.4%	0.4%	0.2%	0.4%
Other household types	4.4%	6.1%	6.3%	6.9%	4.1%	5.3%	3.5%	3.9%	3.9%
Other household types: With dependent children	1.7%	2.4%	2.1%	2.7%	1.5%	2.1%	1.4%	1.4%	1.4%
Other household types: Other, including all full-time students and all aged 66 years and over	2.7%	3.6%	4.2%	4.2%	2.6%	3.2%	2.1%	2.5%	2.4%

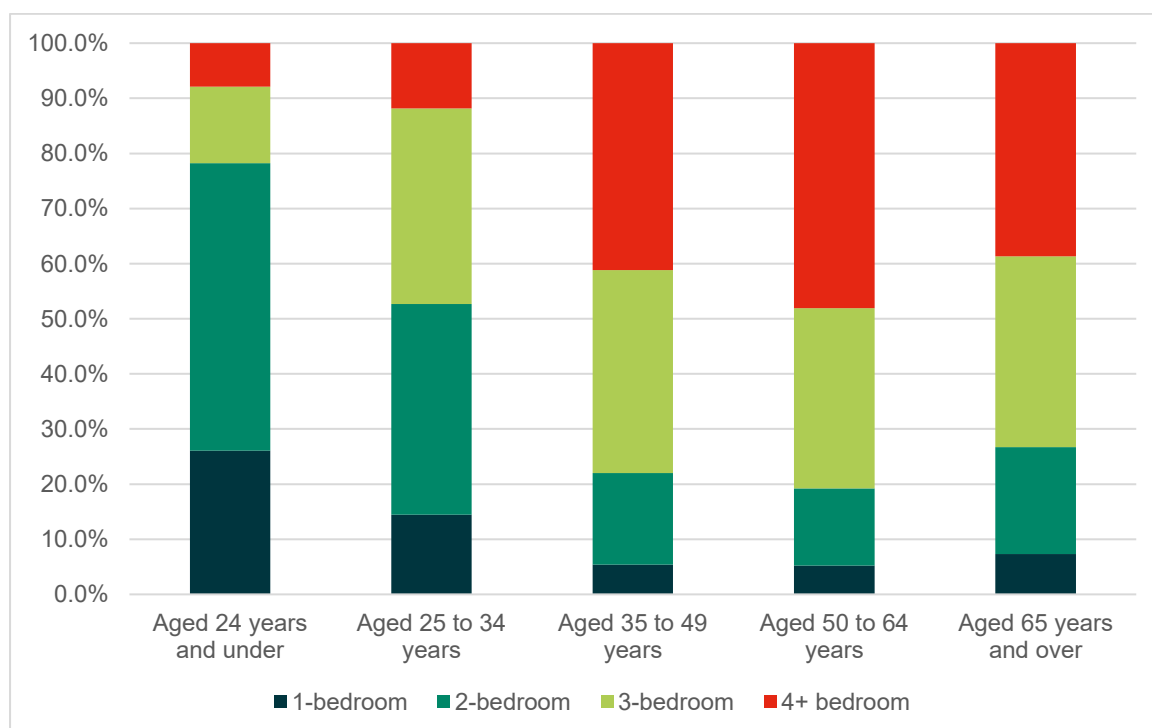
Source: 2021 Census, AECOM Calculations

6.3 Mix of homes required to meet demographic needs

- 6.3.1 This sub-section estimates the potential requirement for different sized homes, by tenure and broad type (house or flat) in Hart over the study period (to 2039). Modelling is based on the growth in different households over the plan period and how those types of households are expected to occupy their homes. This approach is common to many SHMAs, LHNAs, and HEDNAs as a way of estimating the size mix of homes that might be required. Importantly, it considers long term change and does not identify short term or acute pressures in different segments of the market. Section 9 considers current, acute needs, for different sized Affordable Homes. The indicative modelling in this section and the assessment of Affordable Housing needs in Section 9 should be considered together to develop appropriate policy.
- 6.3.2 AECOM modelling considers how households of different ages occupy their homes currently to estimate the likely need for different sizes, types (house or flat), and tenures of dwellings in the future, assuming that different age groups will continue to occupy their homes in the same way in future. This is a reasonable assumption to make since patterns of occupancy change slowly over time. Occupancy patterns for households in Hart observed from the 2021 Census show:
- Figure 6-1 shows that as households age, the rate of home ownership increases. Correspondingly, the rate of households living in the private rented sector decreases with age. The rate of social renting is greatest in the youngest households but remains broadly similar across the other age groups, indicating that this sector houses a full range of household types who occupy a range of dwelling sizes.
 - Figure 6-2 shows that generally in Hart, as households age they occupy larger dwellings, as families increase in size and incomes generally increase. This trend is observed up to households aged 50-64, with a decline in the proportion of households living in larger 4+ bedroom dwellings and the proportion living in smaller 1-2 bedroom dwellings increasing as some older households choose to downsize.
 - It is worth noting that the relationship between household size and dwelling size in the social/affordable rented sector is tied to local authority allocation policies and size eligibility.

Figure 6-1: Age of household reference person by tenure, Hart, 2021

Source: ONS

Figure 6-2: Age of household reference person by size, Hart, 2021

Source: ONS

6.3.3 Table 6-7 presents an indicative mix of housing for Hart, by size (number of bedrooms) and broad tenure at the end of the plan period (2039). This is based on modelling of household growth, applied to how households occupied their homes and the size mix in the stock at the time of the 2021 Census (latest available data). Projections for the market housing mix are based on occupancy trends in owner occupied dwellings in 2021, whilst projections for

affordable home ownership are based on occupancy patterns in the private rented sector⁴² and projections for social/affordable rented housing based on occupancy patterns for social renters.

6.3.4 Table 6-7 suggests that by 2039, based on these projections:

- Market housing in the district will be dominated by mid-sized 3-bedroom (35%) and larger 4+ bedroom (47%) dwellings, reflecting projected demographic needs and occupancy patterns of Hart households in the future.
- The stock of affordable home ownership dwellings is likely to be focused on smaller and mid-sized dwellings, at 38% 2-bedroom dwellings, 33% 3-bedroom dwellings, and 17% 1-bedroom dwellings. This size mix reflects households accessing affordable home ownership typically seeking smaller and mid sized starter homes and constrained by affordability.
- Social/Affordable Rent is likely to be skewed towards smaller dwellings, at 66% 1-2 bedroom dwellings. There is however still likely to be substantial longer term need for larger family-sized social and affordable rented dwellings (31% 3-bedroom and 3% 4+ bedroom). Note that the projections for the size mix in the Social/Affordable rented sectors are driven by the existing patterns which reflect allocation policies that only entitle households to the minimum amount of space they need (including children sharing bedrooms etc). This modelling does not take into account the current need expressed on the Council's housing register or the pattern of lettings in the social/affordable rented stock. This is considered in Section 9.
- In all sectors, the modelling embeds and reinforces existing occupancy patterns i.e. the propensity of households in the owner occupied sector to occupy more space than they need (if they can afford to do so) and the constraints on occupancy in the Social/Affordable Rented sector where households are limited to the size of property required to meet their basic needs. In this sense, the modelling shows what might happen if existing trends in household growth and occupancy continue.

6.3.5 Table 6-8 shows the mix of housing required between 2021 and 2039, based on current trends, to reach the projected mix by the end of the plan. Table 6-9 then simplifies the figures into a range to reflect the uncertainties in any modelling process. In broad terms, this suggests that if existing trends continue, long term demographic change is likely to require:

- Market homes focused on mid-sized and larger dwellings (30-40% 3-bedroom and 40-50% 4+ bedroom),

⁴² The private rented sector occupancy trends are used here as private renters are the key market for affordable home ownership dwellings, and the current number of shared ownership occupants is too small to base long-term trends on.

- Affordable home ownership dwellings across a broader range of sizes (10-20% 1-bedroom, 35-45% 2-bedroom, 30-40% 3-bedroom, and 10-20% 4+ bedroom).
- Delivery of Social/Affordable Rented homes focused on smaller and mid sized homes with 1-3 bedrooms but with some need for larger 4+ bed properties. Note that this projection is based on demographic change and current occupancy patterns and does not reflect current pressures on the Council's waiting list which observes significant pressure on the largest properties (4+ bedroom) due to the lack of availability of these homes for let (see Section 9).

6.3.6 There are limitations with these projections:

- They are designed to demonstrate what is likely to be required in the longer term if current demographic trends continue and households continue to occupy their homes in the same way.
- As they are based on household projections (2022 based), they do not necessarily predict what mix of homes might be required under Standard Method levels of housing growth. If Hart was to deliver 804 homes each year (in line with the Standard Method), this would support higher levels of household growth which are not reflected in official projections. It would be reasonable to assume that the type of households which form or move to Hart are broadly the same as those that are expected under household projections. However, the tenure, type and size of housing provided could also influence which households are able, or choose to, move to Hart.
- They do not factor in policy or strategy objectives which may wish to change the mix of homes in the district, either to offer wider choice locally or to play a different role within the wider market area. The modelling tends to reinforce existing patterns (i.e. a bias towards larger properties) which may or may not be desirable.
- They do not necessarily reflect what market developers wish to develop in the short term as this is often driven by the market cycle.
- They do not reflect urgent pressures in the Social/Affordable Rented which are likely to be better reflected by analysis of the needs of households on the waiting list (see Section 9).
- They do not take account of what it is viable to deliver on particular sites, or indeed what might be the most suitable mix on a specific site given its location, existing pattern of development and neighbourhood context.

Table 6-7: Indicative mix of homes needed in Hart in 2039 by broad tenure and size

Size (number of bedrooms)	Market	Affordable Home Ownership	Affordable Rent / Social Rent
1 bedroom	3.5%	16.6%	25.4%
2 bedroom	14.0%	37.6%	40.3%

3 bedroom	35.3%	32.6%	30.8%
4 or more bedrooms	47.2%	13.2%	3.4%

Source: AECOM modelling using Census 2021, bespoke ONS dataset, and ONS 2022-based household projections

Table 6-8: Indicative mix of homes needed between 2021 and 2039, Hart

Market	Affordable Home Ownership	Affordable Rent / Social Rent	
1 bedroom	3.7%	16.5%	31.6%
2 bedroom	15.3%	37.2%	39.7%
3 bedroom	35.8%	33.0%	26.3%
4 or more bedrooms	45.2%	13.2%	2.4%

Source: AECOM modelling using Census 2021, bespoke ONS dataset, and ONS 2022-based household projections

Table 6-9: Indicative mix of homes needed between 2021 and 2039, potential policy range, Hart

Market	Affordable Home Ownership	Affordable Rent / Social Rent	
1 bedroom	0-10%	10-20%	25-35%
2 bedroom	10-20%	35-45%	35-45%
3 bedroom	30-40%	30-40%	20-30%
4 or more bedrooms	40-50%	10-20%	0-10%

Source: AECOM modelling using Census 2021, bespoke ONS dataset, and ONS 2022-based household projections

6.3.7 It is useful to consider completions since 2021 and how this may impact the future size mix of housing in Hart. Table 6-10 shows that between 2021/22 and 2024/25 development in Hart has included a full range of sizes but with a focus on 2-bedroom (36.2%) dwellings. 26.0% of dwellings delivered had 3-bedrooms, 20.4% 4+ bedrooms, and 16.1% 1-bedroom. Note that this data covers all tenures and disguises the tendency for Affordable Housing to be delivered as smaller flats and houses with the majority of market housing delivered as 3-bedroom properties.

Table 6-10: Size mix of completions 2021/22 – 2024/25, Hart

General needs	2021-22	2022-23	2023-24	2024-25	Total
1-bedroom	108 (18.5%)	85 (15.7%)	64 (19.8%)	4 (2.4%)	261 (16.1%)
2-bedroom	210 (36.0%)	224 (41.3%)	109 (33.6%)	44 (25.9%)	587 (36.2%)
3-bedroom	140 (24.0%)	111 (20.4%)	99 (30.6%)	72 (42.4%)	422 (26.0%)
4+ bedroom	108 (18.5%)	118 (21.7%)	54 (16.7%)	50 (29.4%)	330 (20.4%)
Mobile	-1 (-0.2%)	0 (0.0%)	-1 (-0.3%)	0 (0.0%)	-2 (-0.1%)
Unknown	18 (3.1%)	5 (0.9%)	-1 (-0.3%)	0 (0.0%)	22 (1.4%)

Total	583 (100.0%)	543 (100.0%)	324 (100.0%)	170 (100.0%)	1,620 ⁴³ (100.0%)
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Source: Hart District Council

6.3.8 Turning to committed development, as of 1st April, 51.2% of planning permissions did not have a size of dwelling recorded. Of those that did, the greatest proportion of dwellings due to be delivered have 2-bedrooms, at 19.2% of the future mix. This is likely to reflect the fact that the delivery of Affordable Homes is skewed towards 2-bedroom sized properties. It is not possible to make judgements on the suitability of the size of commitments due to the large proportion being unknown.

Table 6-11: Size mix of commitments as of 1st April 2025, Hart

General needs	Dwellings	%
1-bedroom	206	10.8%
2-bedroom	365	19.2%
3-bedroom	239	12.5%
4+ bedroom	120	6.3%
Mobile	0	0.0%
Unknown	975	51.2%
Total	1,905 ⁴⁴	100.0%

Source: Hart District Council

6.4 Needs of Specific Groups

6.4.1 This sub-section considers the housing need of different groups within Hart, in line with the requirements of the NPPF.

Students

6.4.2 There are currently no dedicated Higher Education Institutions (HEIs) in Hart. The Hart Professional College Campus (part of Farnborough College of Technology) is located in Fleet town centre and offers courses in areas including accounting, counselling, HR, marketing, and teaching. As it primarily operates as an adult learning and professional development centre, there is no on-campus accommodation.

6.4.3 2021 Census data shown in Table 6-12 shows that there are students living in Hart, with 1,717 full-time students aged 18 and over, with the majority aged 18-20 (60.1%). The data shows that no students lived in university-owned communal establishments, in line with there being no HEIs in the district. The majority of full-time students aged 18 and over lived with their parents (74.5%), with this most common in 18-24 year-olds, suggesting that they attend local or semi-local universities outside of the district (e.g. University of Surrey, University of Reading, Royal Holloway) and commute from the family home. It

⁴³ Total completions (net gain) were 1,760. 1,620 are included here as general needs housing, with the additional 142 dwellings supported/elderly accommodation/close care.

⁴⁴ Total commitments are 1,936. 1,905 are included here as general needs housing, with the additional 31 dwellings supported/elderly accommodation/close care.

is important to note that the Census 2021 was undertaken during Covid Pandemic restrictions. At the time, many Universities transferred their teaching online and many students returned to the family home to avoid isolation. This is likely to have affected the location of students across the Country at the time and may have temporarily boosted the student population of Hart.

- 6.4.4 In the older age groups 'living in another household type' becomes more common, with this excluding those living alone and those living in all student households, suggesting it may be couples or groups of people where not all residents are student (e.g. a mix of young professionals and students).

Table 6-12: Full-time student accommodation type, Hart

	Total	Under 18	18-20	21-24	25-29	30+
Total	17,901	16,184	1,032	352	98	235
Living with parents	17,176 (95.9%)	15,897 (98.2%)	946 (91.7%)	279 (79.3%)	35 (35.7%)	19 (8.1%)
Living in a communal establishment	154 (0.9%)	113 (0.7%)	30 (2.9%)	9 (2.6%)	1 (1.0%)	1 (0.4%)
<i>Living in a communal establishment: University</i>	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
<i>Living in a communal establishment: Other</i>	154 (0.9%)	113 (0.7%)	30 (2.9%)	9 (2.6%)	1 (1.0%)	1 (0.4%)
Living in an all student household	39 (0.2%)	3 (0.0%)	7 (0.7%)	5 (1.4%)	4 (4.1%)	20 (8.5%)
Living alone	49 (0.3%)	2 (0.0%)	3 (0.3%)	5 (1.4%)	5 (5.1%)	34 (14.5%)
Living in another household type	483 (2.7%)	169 (1.0%)	46 (4.5%)	54 (15.3%)	53 (54.1%)	161 (68.5%)

Source: 2021 Census

- 6.4.5 There is unlikely to be demand for student housing in Hart, although there may be demand for shared living arrangements (e.g. Houses in Multiple Occupation (HMOs), Build to Rent, Co-living) for young professionals or graduates that have returned to Hart post-university.

Service Families

- 6.4.6 The NPPF 2026 (policy HO1, paragraph 2) outlines that the housing needs of different groups should be assessed and reflected in planning policies. This does not explicitly list the needs of service families but the list of groups under this policy is not exhaustive. Military affordable housing has also been added to the definition of Affordable Housing in Annex B of the NPPF 2026. It is defined as follows:
- 6.4.7 'Military affordable housing: meets all of the following conditions: (a) the rent is sub market military rent as determined by the Ministry of Defence; and (b) it includes provisions to remain as affordable housing for future eligible households, service personnel and veteran households (including widowed partners and spouses of service personnel), or for the subsidy to be recycled for alternative affordable housing provision.'

- 6.4.8 Section 9 considers the need for affordable housing in Hart. Whilst the estimates contained in Section 9 do not separate out the specific need for military affordable housing, households on Hart's housing register who are currently serving in the armed forces or served in the last 5 years are included in the estimates.
- 6.4.9 The Armed Forces Covenant applies to members of the UK Armed Forces, veterans, and family members (including bereaved family members) and focuses on ensuring members of these communities have the same access to services as other citizens⁴⁵ (e.g. housing, healthcare, education). The Covenant Legal Duty came into force in November 2022 and is a legal obligation on certain public bodies to have regard to the Covenant principles when carrying out certain functions in healthcare, education, and housing⁴⁶. Hart District holds a Gold certificate under the Armed Forces Covenant Employer Recognition Scheme.
- 6.4.10 There are a number of national housing related schemes to aid those specifically in the Armed Forces, including:
- Forces Help to Buy Scheme⁴⁷ – this enables service personnel to borrow up to 50% of their salary (up to £25,000) interest free towards the purchase of a property. This includes use towards a deposit as well as to cover costs (e.g. solicitor's and estate agent fees).
 - Some banks and building societies allow Armed Forces personnel to rent out their homes when posted overseas without having to change their mortgage or pay increased costs.
 - The Ministry of Defence (MOD) pays Council Tax Relief of 50% to some service personnel on specific operations or assignments, where the home they own is unoccupied and they have been posted abroad.
 - The 2018 Homelessness Reduction Act requires the Secretary of State for Defence to refer members of the Regular Forces that may be considered to be homeless or threatened with homelessness to a local authority of their choice, within 56 days.
 - In 2024 all veterans of the Regular Armed Forces were made exempt from local authority connection tests to facilitate their access to social housing. Prior to this, only those that had served within the previous 5 years were exempt⁴⁸. This also includes bereaved spouses of those serving in the Regular Forces where they will cease to be entitled to reside in MOD accommodation and the death was attributable to their service, and

⁴⁵ <https://www.armedforcescovenant.gov.uk/about-the-covenant/>

⁴⁶ <https://www.armedforcescovenant.gov.uk/covenant-legal-duty/>

⁴⁷ <https://www.gov.uk/guidance/forces-help-to-buy>

⁴⁸ <https://www.gov.uk/government/publications/improving-access-to-social-housing-for-members-of-the-armed-forces/improving-access-to-social-housing-for-members-of-the-armed-forces>

serving or former members of the Reserve Armed Forces who are suffering from serious injury, illness, or disability due to their service.

- The Secretary of State also “strongly encourages local authorities to exempt from any local connection requirements divorced or separated spouses or civil partners of Service personnel who need to move out of accommodation provided by the Ministry of Defence”⁴⁹.

6.4.11 There are also specialist providers of housing for veterans, such as the Haig Housing Trust, with properties available to qualifying beneficiaries at “*an affordable, charitable rent*”⁵⁰, and advice and support is also available. There are currently 15 properties in Hart, consisting of 10 2-bedroom dwellings and 5 3-bedroom dwellings. There are also nearby schemes outside of the district, with 22 dwellings in Farnborough (Rushmoor Borough).

6.4.12 There is armed forces activity in Hart and neighbouring authorities, with numerous units based at Gibraltar Barracks, Minley. RAF Odiham is also located within the district and has some on-site housing, both for families and single personnel. The neighbouring settlement of Aldershot (in Rushmoor district) is home to Aldershot Garrison and Military Town, which has a population of around 10,000 people, including roughly 4,000 soldiers. Although not located in Hart district, it is likely that military personnel linked to Aldershot will also live in Hart.

6.4.13 The UK Regular Armed Forces Annual Location Statistics (2025)⁵¹ show that as of 1st April 2025 there were 760 UK Regular Army personnel and 1,510 UK Regular RAF personnel in Hart district, with the figures for the Royal Navy/Royal Navy redacted, likely due to low numbers and maintaining confidentiality.

6.4.14 The 2021 Census records that there were 3,728 households in Hart with at least 1 person in the household that had previously served in the armed forces, 9.3% of all households in the district. The Census also breaks down the tenure households that previously served in the armed forces occupy (Table 6-13). This shows that households that had previously served in the armed forces were more likely to own their home, with this increasing further with the more household members that served. Whilst 8.8% of households lived in Social Rented housing in Hart, where the household had 1 person that had served in the armed forces this decreases to 6.9%, with it further decreasing to 3.5% where 2 or more people in the household served in the armed forces. Private renting was also less common in households where a member had served in the armed forces.

⁴⁹ <https://www.gov.uk/government/publications/improving-access-to-social-housing-for-members-of-the-armed-forces/improving-access-to-social-housing-for-members-of-the-armed-forces>

⁵⁰ <https://haighousing.org.uk>

⁵¹ <https://www.gov.uk/government/statistics/location-statistics-for-uk-regular-armed-forces-and-civilians-2025>

Table 6-13: Tenure by households previously serving in the armed forces, Hart

	Total	No individuals previously served in UK armed forces	1 person in household previously served in UK armed forces	2 or more people in household previously served in UK armed forces
Total	39,966 (100.0%)	36,238 (100.0%)	3,530 (100.0%)	198 (100.0%)
Owned (including shared ownership)	31,005 (77.6%)	27,889 (77.0%)	2,936 (83.2%)	180 (90.9%)
Social Rent	3,514 (8.8%)	3,264 (9.0%)	243 (6.9%)	7 (3.5%)
Private Rent or Living Rent Free	5,447 (13.6%)	5,085 (14.0%)	351 (9.9%)	11 (5.6%)

Source: 2021 Census

6.4.15 As of April 2026, the Hart Housing Register identified 17 applicant households with a member that is currently serving in the armed forces or served in the last 5 years.

6.4.16 Overall, it is not feasible to predict the potential demand from service families for accommodation generally in Hart. However, there is likely to be demand for market housing, both rented and ownership, from active and retired armed forces members due to the proximity of armed forces activities in neighbouring authorities. The Housing Register also demonstrates some need for affordable rented tenures from this group.

Looked After Children

6.4.17 The NPPF outlines that the needs of different groups in the community should be assessed and reflected in planning policies, and this now explicitly includes looked after children⁵². The Children Act 1989 outlines that a child is looked after by a local authority if they are provided with accommodation for a continuous period of more than 24 hours, are subject to a care order, or are subject to a placement order⁵³.

6.4.18 Department for Education (DfE) Statistics⁵⁴ show that as of 31st March 2025 there were 81,770 looked after children in England, a decrease of 1,760 (2%) on the previous year. Of the 81,770 looked after children nationally, 6,540 were unaccompanied asylum-seeking children as of 31st March 2025, a 12% decrease on 2024.

6.4.19 At a more localised level, there were 1,738 looked after children in Hampshire in 2025, 2.1% of all looked after children in England. This is compared to

⁵² 2026 NPPF Policy HO1: Assessing the need for homes, paragraph 2.

⁵³ <https://lordslibrary.parliament.uk/children-looked-after-by-local-authorities-in-england/>

⁵⁴ <https://explore-education-statistics.service.gov.uk/find-statistics/children-looked-after-in-england-including-adoptions/2025>

Hampshire's total population accounting for 2.5% of England's population at the time of the 2021 Census.

- 6.4.20 Table 6-14 shows the placement of looked after children across Hampshire, with the majority of looked after children living in foster placements (70.0%), followed by 12.3% in secure homes and children's homes, and 9.0% in independent and semi-independent living arrangements or supported accommodation. Less than 10% of looked after children lived in the remaining placement options. With the majority of looked after children living in foster placements, this means that they will mainly be residing in the mainstream housing stock. However, there is likely some demand for forms of supported accommodation and children's homes.

Table 6-14: Placement of looked after children, Hampshire, 2025

Placement	Number of Children	%
Foster placement	1,215	70.0%
Independent and semi-independent living arrangements / supported accommodation	157	9.0%
Placed for adoption	22	1.3%
Placed with parents or other person with parental responsibility	104	6.0%
Residential schools	0	0.0%
Secure homes and children's homes	214	12.3%
Other residential settings	14	0.8%
Other placements	12	0.7%
Total	1,738	-

Source: Department for Education

- 6.4.21 The placement location of looked after children is also important to consider, with Department for Education data showing whether children are placed inside or outside of the local authority (County) boundary. In Hampshire, 1,002 children were placed inside the County boundary (58%), with 736 (42%) children placed outside the local authority boundary. This may suggest that there is a lack of provision in Hampshire, although it is not clear whether this is housing-related (i.e. a lack of specialist supported housing) or due to a lack of suitable foster-carers in the county.
- 6.4.22 When looking at children that are placed within Hampshire, 1,002 (62%) of those are children from Hampshire, with 607 (38%) from other local authorities. This may suggest that children being placed outside of the local authority boundary in Hampshire is due to a lack of suitable placements locally rather than a lack of placements overall.
- 6.4.23 It is assumed that the aim is to increase the number of looked after children placed inside the county, and if this is the case then there will likely need to be increased placements made available, although it is important that these are the correct type to meet the needs of local looked after children. The majority of looked after children in Hampshire live in foster placements, Hart District Council works in partnership with HCC to support households who are seeking

to foster or adopt with an agreed joint protocol in place to enable suitably sized accommodation through the housing register.

- 6.4.24 Looking specifically at children's homes and semi-independent living, 371 looked after children in 2025 lived in some form of independent/semi-independent accommodation or secure homes and children's homes in Hampshire. Some insight can be gained into the potential future need for by looking at past trends. Table 6-15 shows that between 2021 and 2025 the number of looked after children in Hampshire that lived in these forms of accommodation increased by increase by 173 individuals, an average of 43 (rounded) per year. If this trend was to continue to the end of the plan period, there could be a significant increase in need, although this is unlikely as there will be an upper limit for the expected number of looked after children generally. This assumes a steady rate of growth in care home or independent living placements, which may not be the case. For example, if there is a loss in foster carers, with the ratio of foster homes to children may decrease, potentially leading to an increase in the need for other forms of accommodation, such as children's homes, or an increase in placements outside the county.

Table 6-15: Children's homes and secure homes, Hampshire, 2021-2025

	Number of looked after children in children's homes, secure homes, and semi-independent living accommodation	Proportion of looked after children in children's homes, secure homes, and semi-independent living accommodation
2021	198	11.9%
2022	217	12.6%
2023	235	12.7%
2024 ⁵⁵	304	15.8%
2025	371	21.3%

Source: Department for Education

- 6.4.25 2021 Census data is limited around looked after children, with the majority living in the mainstream housing stock and therefore 'hidden' in the Census data. However, for those children living in children's homes or other communal establishments, these can be quantified in the Census. 2021 Census data records no individuals living in communal establishments listed as 'children's home (including secure units)' in Hart, but 112 across Hampshire. The Department for Education data above shows 214 looked after children living in secure homes and children's homes in Hampshire in 2025, suggesting undercounting in the Census (i.e. some children's homes may have been counted in the mainstream housing stock).
- 6.4.26 The Hampshire Children's Residential Care Market Position Statement (May 2025) identifies 72 homes in the Hampshire boundaries, with 10 Hampshire County Council homes (including 1 secure home), 3 schools registered as residential care settings provided by the external market, and 59 residential

⁵⁵ Note that naming of categories changed slightly from 2024 which may account for some of the increase.

care settings provided by the external market. These homes include both longer term residential care and shorter-term placements (e.g. health and social care needs as well as looked after children). The MPS highlights that the increased demand for residential care placements has in part been driven by a shortage in foster care placements, particularly for young people with multiple complex needs. Hampshire County Council aims for all children to be able to be placed within their home county where appropriate and are looking to find appropriate homes within the county to make this achievable. The MPS does not provide district-level insight and so the role of Hart in the County's plans should be discussed by Hart District Council officers with Hampshire County Council.

Care Leavers

- 6.4.27 Care leavers are defined by the Children (Leaving Care) Act 2000 as a person who has been in the care of the local authority for a period of 13 or more weeks up to their 16th birthday. While a child stops being 'looked after' when they are adopted, return home, or turn 18, local authorities have a duty to support children leaving care at 18 until they are at least 21 under the Children (Leaving Care) Act 2000⁵⁶. This includes ensuring that care leavers have somewhere suitable to live. Young people with care experience can live in supported accommodation or alone from the age of 16, although they are not considered a care leaver until they reach 18 years of age.
- 6.4.28 The Department for Education (DfE) collects data on looked after children and care leavers, with the latest data published in November 2025⁵⁷. At this time there were 743 individuals considered care leavers across Hampshire. Table 6-16 shows 2025 DfE data outlining the accommodation type of care leavers aged 17-21 in Hampshire, with the information not known for a significant number of care leavers (66% of 17-18 year old and 51% of 19-21 year olds). Where information is recorded, the greatest proportion of care leavers aged 17 to 18 in Hampshire lived with former foster carers (11%), with this decreasing to 7% in those aged 19 to 21.
- 6.4.29 16% of 19 to 21 year olds were recoded as living independently (compared to 6% aged 17 to 18). Semi-independent living and transitional accommodation is a potential pathway for care leavers before living fully independently. This could take the form of purpose-built housing for young people leaving care (either local authority schemes or private/charity placements) which allow people to live independently, but with additional support and a supported shared living environment (e.g. shared kitchens/living spaces).

⁵⁶ <https://legislation.gov.uk/ukpga/2000/35/contents/>

⁵⁷ <https://explore-education-statistics.service.gov.uk/find-statistics/children-looked-after-in-england-including-adoptions/2025>

6.4.30 Semi-independent living schemes that support those in Hampshire include Phoenix House⁵⁸ and Andover Foyer⁵⁹.

6.4.31 Table 6-16 shows that in Hampshire 4% of 17 to 18 year olds lived in semi-independent or transitional accommodation, with this increasing to 7% in 19 to 21 year olds. It is however difficult to predict the need for care leaver accommodation from this data due to the living situation of a significant proportion not known.

6.4.32 The other most common forms of accommodation for 17-18 year old care leavers in Hampshire are individuals living with their parents/relatives (4%) and individuals living in a community home (3%). For 19-21 year olds, after independent living and semi-independent living, 7% of care leavers lived with family or with former foster carers, and 4% in supported lodgings.

Table 6-16: Accommodation type of care leavers, Hampshire, 2025

Age	Accommodation Type	Number of Care Leavers	%
17 to 18	Bed and breakfast	0	0%
	Community home	10	3%
	Deported	0	0%
	Emergency accommodation	c	c
	Foyers ⁶⁰	c	c
	Gone abroad	0	0%
	In custody	c ⁶¹	c
	Independent living	22	6%
	No fixed abode/homeless	0	0
	Ordinary lodging	c	c
	Other accommodation	c	c
	Residence not known	0	0%
	Semi-independent, transitional accommodation	16	4%
	Supported lodgings ⁶²	8	2%
	With former foster carers	42	11%
	With parents or relatives	16	4%
	Information not known	245	66%
	Total	371	-
19 to 21	Bed and breakfast	0	0%
	Community home	19	3%
	Deported	0	0%

⁵⁸ <https://phoenix-independence.co.uk/what-we-do/semi-independent-living/>

⁵⁹ <https://alabare.co.uk/our-services/young-people-housing/>

⁶⁰ A foyer is a form of supported living for people aged 16-21 with no secure place to stay. They tend to comprise of individual rooms, with shared living and kitchen space. The young people also have allocated Support Workers.

⁶¹ “c” is used to replace data for confidentiality reasons – e.g. where data sizes are too small and there is a risk of the identification of individuals

⁶² Where people and families rent a room to a young person aged 16-25 in need of accommodation or leaving care.

Emergency accommodation	9	1%
Foyers	c	c
Gone abroad	0	0%
In custody	c	c
Independent living	122	16%
No fixed abode/homeless	0	0%
Ordinary lodging	c	c
Other accommodation	13	2%
Residence not known	0	0%
Semi-independent, transitional accommodation	52	7%
Supported lodgings	31	4%
With former foster carers	53	7%
With parents or relatives	51	7%
Information not known	378	51%
Total	743	-

Source: Department for Education

- 6.4.33 Local authorities are not legally required to prioritise care leavers for social rented housing that becomes available, although guidance suggests that there should be prioritisation in allocation. The Centrepont ‘Care Leavers Access to Accommodation’ report 2017⁶³ found that 74% of local authorities surveyed had a housing allocation scheme that gave reasonable preference to care leavers. However, the lack of social housing stock in many local authorities can still cause challenges, even where there is prioritisation.
- 6.4.34 In June 2025 Government announced that care leavers under the age of 25 would not be penalised for not having a local connection in relation to social housing allocations⁶⁴. The Hart Allocations Policy (2025)⁶⁵ identifies that applicants to the Housing Register that are aged under 25 and were placed into care outside of the district by Hampshire County Council would gain a local connection to Hart. In addition, applicants under 25 that were placed into care in Hart by another local authority (for at least 2 years prior to turning 16) would gain a local connection to Hart.
- 6.4.35 The Hart Housing Register (April 2026) identifies approximately 10 applicants listed as a young person leaving care. 75% of these care leavers are listed as Band C, with 25% in Band B. Those applicants in Band B are currently noted as having an *urgent need to move on welfare grounds* and are both currently living in the private rented sector. The current housing situation of the care leaver applicants varies, with the largest proportion of applicants living in the private rented sector (general), with others either living in a room or lodging in the private rented sector, living in temporary accommodation or living with family.

⁶³ <https://centrepont.org.uk/sites/default/files/2023-06/from-care-to-where-centrepont-report.pdf>

⁶⁴ <https://www.gov.uk/government/news/vu>

⁶⁵ <https://www.hart.gov.uk/sites/default/files/2025-03/Housing-Allocations-Policy.pdf>

6.4.36 Another housing option for care leavers looking to live independently is the private rented sector. Centrepont found that 60% of local authorities surveyed had some form of rent deposit or guarantor scheme to support care leavers. Such a scheme is available in Hart for care leavers where appropriate. The following housing support is also available from Hampshire County Council⁶⁶:

- A leaving care personal adviser will support care leavers aged 16 to 21 (or 25 if in full-time education) to support with a variety of needs (wellbeing, relationships, education, employment, housing, etc.).
- A setting up home allowance or ‘Independent Living Fund’ of up to £2,000 for essential items, based on a single young person moving into a 1-bedroom flat. The Council will also pay for the first year of TV license.

6.4.37 In Hart, care leavers are entitled to Council Tax reductions if they are Hampshire County Council care leavers. Care leavers do not have to pay Council Tax if they meet the following criteria⁶⁷:

- Aged between 18 and 25;
- Have been in the care of Hampshire County Council for at least 13 weeks from the age of 14;
- Were in care on their 16th birthday; and
- Are liable for Council Tax or a share of Council Tax on a dwelling in the Hart District Council area.

6.4.38 Nationally, care leavers are entitled to 1-bedroom Local Housing Allowance (LHA) rate until they turn 22, after which they receive the shared accommodation rate until the age of 35 (ordinarily any single person aged under 35 is only eligible for the shared accommodation rate). The 1-bedroom LHA rate eligibility is extended further if the care leaver has previously lived in hostel accommodation⁶⁸. Although there is support available to care leavers, through charities and the County Council, transitioning into the private rented sector can be challenging, with Centrepont finding that 13% of care leavers surveyed were unable to find accommodation because of landlords being unwilling to accommodate care leavers. Hart has a Rent Bond scheme which can be used to assist care leavers to move into the private rented sector. The council also works with Step by Step to provide support and accommodation for young people including care leavers.

6.4.39 As well as knowing where care leavers are housed, it is also helpful to understand whether they are considered to be suitably housed. Table 6-17 shows that in Hampshire, 31.8% of care leavers aged 17 to 18 were

⁶⁶ <https://democracy.hants.gov.uk/documents/s65088/Appendix%20B%20-%20Local%20offer%20for%20Care%20Leavers.pdf>

⁶⁷ <https://www.hart.gov.uk/council-tax/discounts-and-exemptions>

⁶⁸

https://england.shelter.org.uk/housing_advice/benefits/benefits_for_under_35s_in_shared_housing

considered to be suitably housed, with 2.2% unsuitably housed. The proportion of 19 to 21 year old care leavers suitably housed was higher, at 45.5%, with 3.6% unsuitably housed. However, this does not provide much clarity due to, as above, significant numbers of care leavers' housing situation not being known (245 care leavers aged 17 to 18 and 378 aged 19 to 21). The data does highlight however that there are at least 35 care leavers in Hampshire that are unsuitably housed. It is important that this is addressed, most likely on a case-by-case basis, identifying the needs of the individual. It is not known how many of these individuals are located within Hart.

Table 6-17 Care leaver accommodation suitability, Hampshire, 2025

Age	Accommodation Suitability	Number of care leavers	%
17 to 18	Considered suitable	118	31.8%
	Considered unsuitable	8	2.2%
	No information	245	66.0%
	Total	371	-
19 to 21	Considered suitable	338	45.5%
	Considered unsuitable	27	3.6%
	No information	378	50.9%
	Total	743	-

Source: *Department for Education*

6.4.40 Overall, care leavers across Hampshire are housed in a variety of ways, although there are clear data limitations where the housing situation and suitability of a significant proportion of care leavers is not known. In order to have a clearer understanding of care leavers' housing needs, there needs to be an increase in the quality of data collection in this area by Hampshire County Council and the Department for Education. There is likely to be demand across the county for semi-independent transitional accommodation, as a stepping stone into other housing options (e.g. social/affordable rented housing and the private rented sector). The Housing Register shows there is some demand from care leavers in Hart, with 8 care leaver applicants as of April 2026.

6.5 Income Patterns

6.5.1 While demographic changes influence how much housing is needed and the mix of homes that might meet needs, the type of housing demanded is often more closely related to the income and wealth available to households. This is demonstrated by the fact that many small households choose to occupy larger properties if they can afford to do so.

6.5.2 It is important to keep in mind that household incomes are closely related to the macro economy, including overall economic growth and the particular type of employment opportunities available at the local level. Housing demand, therefore, which is strongly influenced by household income and income growth, is dependent on the performance of the local economy and the scale and nature of jobs created. A shift in some sectors to working from home or

hybrid working may result in some decoupling of the relationship between the jobs available locally and demand for housing since some households will be able to choose to live at an increased distance from their workplace, enabled by home working arrangements. Indeed, analysis in Sections 3 and 4 of this report demonstrate net commuting flows out of Hart with residents accessing jobs in a wide range of neighbouring areas.

Incomes and Earnings

- 6.5.3 It is helpful to understand both the income and earnings of households, as well as understanding the situation for households as a whole and for individuals. Local estimates of incomes and earnings provide benchmarks for understanding the affordability of different housing options including market sale and rent, affordable home ownership and, to some extent, social/affordable rented tenures. However, the affordability of social/affordable rented tenures is affected by eligibility for housing benefit/universal credit and how this interacts with earnings. This is considered further in Section 9.
- 6.5.4 The ONS records the annual pay for employees, with the latest data available for 2025. Residence based annual pay for all employees, full time and part time, in Hart is as follows:
- Mean - £49,445
 - Median - £39,341
 - Lower quartile - £25,656
- 6.5.5 Household income data is available from the ONS for small areas (MSOA level) rather than at a local authority level. The latest data is also available for 2023⁶⁹. Therefore, AECOM have undertaken calculations to estimate average household income for Hart as well as lower quartile incomes. This involved:
- Establishing the 2023 average household income for each MSOA in Hart and weighting the income data based on the number of households (2021 Census) to give a 2023 average income for the whole of Hart (£79,074).
 - Determining the uplift between the 2023 and 2025 ONS mean residence based earnings data (10.6%) and applying this to the 2023 average income for Hart to establish an estimate for the average Hart household income in 2025 (£87,455).
 - There is no lower quartile household income data but this was estimated by establishing the uplift between the 2025 mean residence based earnings and the estimated 2025 household income (76.9%) and applying this to the 2025 lower quartile residence based earnings to give an estimated 2025 lower quartile income for Hart (£45,385).

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<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkhours/datasets/smallareaincomeestimatesformiddlelayersuperoutputareasenglandandwales>

- 6.5.6 The estimated average (mean) household income in Hart in 2025 is therefore £87,455, with a lower quartile household income of £45,385.
- 6.5.7 A report prepared for Hart District Council by AECOM in 2024 ‘Social and Affordable Rent Affordability Assessment’ analysed incomes of households on the Council’s housing register at the time and households registered for ‘Help to Buy’. Whilst housing register applicant income data has some limitations because it is self reported and not verified until a household is successful in bidding for a property, and it is not always clear whether applicants have included their benefits in their income figures, it gives an indication of the incomes of these households. On average, applicants had incomes of around £21,200 per annum. This is consistent with these households being on very low incomes and broadly similar to lower quartile earnings for one individual.
- 6.5.8 ‘Help to Buy’ applicants were households interested in affordable home ownership/ intermediate options. Average household incomes of these applicants was around £41,200 at the time the data was collected (2023 was the latest available data as the register was closed soon after). These income levels are broadly consistent with lower quartile incomes estimated for households in Hart in 2026.
- 6.5.9 For the affordability analysis in Section 8, a range of income/earnings benchmarks reflecting this data are used to assess affordability of market sale, rent and affordable housing options.

6.6 Summary

- 6.6.1 Hart is expected to experience continued population and household growth over the plan period, with demographic change characterised by an ageing population alongside ongoing demand from families and working-age households. Between 2026 and 2039 the population is projected to increase by approximately 5%, whilst household growth is expected to be stronger, reflecting longer life expectancy, changing household structures and a growing number of smaller households. The district already has a higher proportion of older residents than many comparator areas, and this trend is expected to continue, creating demand for housing that meets the needs of older people while maintaining opportunities for younger households and families.
- 6.6.2 Household composition data demonstrates that Hart remains an attractive location for family households, with above-average proportions of households with dependent children and relatively large average household sizes. Housing mix modelling indicates a continued requirement for a broad range of homes across all tenures under current trends.
- 6.6.3 Long term trends in demographic change and occupancy patterns would expect that demand for new market housing is expected to be focused on three- and four-bedroom houses, affordable home ownership products on one, two and three-bedroom homes, and social/affordable rented housing on smaller one, two and three-bedroom dwellings, whilst maintaining some

provision for larger family accommodation. This modelling does not take into account current pressures in the Affordable Housing sector (see Section 9), or the viability or deliverability of different types and sizes of homes in the market.

7. Housing Stock & Supply

7.1 Introduction

- 7.1.1 The extent to which the housing supply meets the identified local need and demand, and the implications of an unbalanced housing market, are important considerations for housing policy.
- 7.1.2 This section examines the existing housing stock in Hart in relation to the tenure, type, and size of homes, as well as analysing the housing mix of the sub-areas. It is important to keep in mind that Hart will soon form part of North Hampshire Unitary Authority, as well as interacting with surrounding authorities and the wider combined authority area. The housing stock therefore not only contributes to the local mix, but also to the mix at the wider geographical scales presented in the report.
- 7.1.3 This section is structured as follows:
- Overall size of the dwelling stock
 - Tenure
 - Type and size
 - Community led development
 - Custom and self build housing

7.2 Overall Size of the Dwelling Stock

- 7.2.1 At the time of the 2021 Census there were 41,348 dwellings in Hart, with the following split between the sub-areas:
- Fleet & Church Crookham – 18,520 dwellings (44.8%)
 - Blackwater & Yateley – 10,616 dwellings (25.7%)
 - Hook – 3,789 dwellings (9.2%)
 - Rural North & Villages – 4,292 dwellings (10.4%)
 - Rural South & Villages – 4,131 dwellings (10.0%)
- 7.2.2 Completions data provided by Hart District Council identifies that between 2021/22 and 2024/25 there were 1,760 net dwellings delivered in the District. Added to the 2021 Census figure, this gives an estimated housing stock as of 31st March 2025 of 43,108 dwellings. Table 7-1 shows the breakdown of completions (net) by sub-area, and the estimated stock as of 31st March 2025. This shows that the greatest increase in dwellings was in Hook, at 12.6%, with the number of dwellings in Hook estimated to be greater than the Rural South & Villages sub-area, a change from 2021. The smallest increase in dwellings was in the Rural North & Villages sub-area, at 1.6%.

Table 7-1: Completions by sub-area, 2021/22 – 2024/25

Sub-area	2021 Census	2021/22 – 2024/25	31/03/25 Estimate	% Increase
Fleet & Church Crookham	18,520	836	19,356	+4.5%
Blackwater & Yateley	10,616	258	10,874	+2.4%
Hook	3,789	479	4,268	+12.6%
Rural North & Villages	4,292	69	4,361	+1.6%
Rural South & Villages	4,131	117	4,248	+2.8%

Source: 2021 Census, Hart District Council, AECOM Calculations

7.2.3 Of the completions between 2021/22 and 2024/25 in Hart, 47.5% were delivered in Fleet & Church Crookham, slightly above the proportional split of existing dwellings. A greater proportion of dwellings were also delivered in Hook (27.2% of completions) when compared to the existing dwelling stock split. Blackwater & Yateley (14.7%), Rural North & Villages (3.9%), and Rural South & Villages (6.7%) had a smaller proportion of delivery than the existing housing stock proportion. It appears that there was a notable focus on Fleet & Church Crookham and Hook between 2021/22 and 2024/25 reflect a number of sites delivering new homes in these areas over the period.

7.2.4 As of 1st April 2025 there were 1,936 (net) planning commitments in Hart for dwellings. The vast majority of these are for Fleet & Church Crookham, at 92.8% of commitments (1,797 dwellings). This is followed by Rural South & Villages (82 dwellings, 4.2%), Blackwater & Yateley (26 dwellings, 1.3%), Hook (16 dwellings, 0.8%), and Rural North & Villages (15 dwellings, 0.8%).

7.3 Tenure

7.3.1 Table 7-2 and Table 7-3 present the tenure households in Hart occupied at the time of the 2021 Census, in relation to the wider comparator geographies. It shows that 75.7% of households in Hart owned their own home, well above North Hampshire (66.5%), the Hampshire and Solent Combined Authority (65.0%), and national (61.3%) levels. The proportion of households living in shared ownership dwellings was the same in both Hart and North Hampshire (1.9%), but above national levels (1.0%). However, Hart had a significantly smaller proportion of households living in social rented dwellings than the comparator geographies, at 8.8%, compared to 15-17% in the wider geographies. Hart also had the smallest private rented sector, with 13.6% of households private renting, well below national levels of 20.5%.

Table 7-2: Tenure, Hart and comparator geographies, 2021

Age	Hart	North Hampshire UA	Hampshire and the Solent Combined Authority	England
Total	39,965	155,913	840,913	23,436,085
Owned	30,262	103,681	546,814	14,369,065
Shared ownership	742	2,896	10,650	235,951
Social rented	3,514	23,594	126,552	4,005,663
Private rented	5,442	25,691	156,178	4,794,889

Lives rent free	5	51	719	30,517
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Source: 2021 Census

Table 7-3: Tenure, Hart and comparator geographies, %

Age	Hart	North Hampshire UA	Hampshire and the Solent Combined Authority	England
Owned	75.7%	66.5%	65.0%	61.3%
Shared ownership	1.9%	1.9%	1.3%	1.0%
Social rented	8.8%	15.1%	15.0%	17.1%
Private rented	13.6%	16.5%	18.6%	20.5%
Lives rent free	0.0%	0.0%	0.1%	0.1%

Source: 2021 Census

7.3.2 Tables 7-4 and 7-5 present the tenure of households in the Hart sub-areas, with Figure 7-1 showing a heat map of tenures across the district (individual maps in Appendix). Notable findings include:

- Blackwater & Yateley had the highest rate of ownership, at 81.0%, whilst the Rural South & Villages sub-area had the smallest rate of ownership (68.5%). Fleet & Church Cookham was broadly in line with the district as a whole, with Hook and Rural North & Villages having lower rates of ownership than Hart.
- Shared ownership is most common in Hook (2.9% of households lived in shared ownership dwellings). The lowest rate of shared ownership was in the Rural South & Villages sub-area, at 0.9%, the only sub-area with a rate below national levels.
- Social renting was lowest in Fleet & Church Crookham (7.4%) and Blackwater & Yateley (7.3%), and highest in the rural sub-areas of Rural North & Villages (13.1%) and Rural South & Villages (12.9%).
- Rural South & Villages had the largest private rented sector, with 17.7% of households private renting. This is compared to just 10.2% of households private renting in Blackwater & Yateley.

Table 7-4: Tenure, Hart sub-areas, 2021

Age	Fleet & Church Crookham	Blackwater & Yateley	Hook	Rural North & Villages	Rural South & Villages
Total	17,832	10,369	3,681	4,093	3,986
Owned	13,477	8,398	2,716	2,955	2,731
Shared ownership	376	160	105	59	35
Social rented	1,328	757	365	538	514
Private rented	2,648	1,054	495	539	706
Lives rent free	3	0	0	2	0

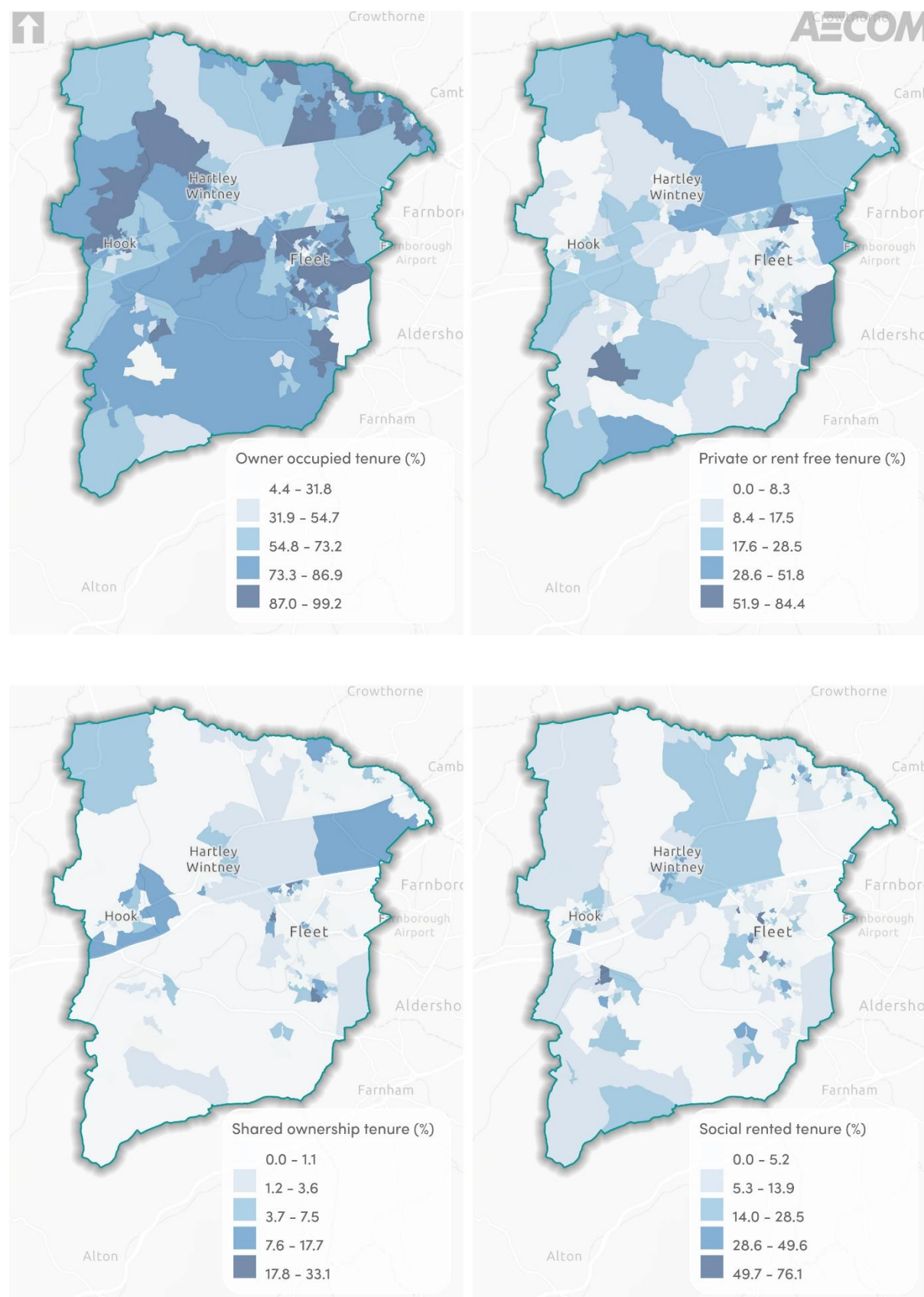
Source: 2021 Census

Table 7-5: Tenure, Hart sub-areas, %

Age	Fleet & Church Crookham	Blackwater & Yateley	Hook	Rural North & Villages	Rural South & Villages
Owned	75.6%	81.0%	73.8%	72.2%	68.5%
Shared ownership	2.1%	1.5%	2.9%	1.4%	0.9%
Social rented	7.4%	7.3%	9.9%	13.1%	12.9%
Private rented	14.8%	10.2%	13.4%	13.2%	17.7%
Lives rent free	0.0%	0.0%	0.0%	0.0%	0.0%

Source: 2021 Census

Figure 7-1: Heat map of tenure mix, Hart, 2021



Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community. Contains public sector information licensed under the Open Government Licence v3.0. Contains Ordnance Survey data © Crown copyright and database right 2026. ©Hart District Council, 2026. Reproduced from the Ordnance Survey map with the permission of the Controller of Her Majesty's Stationery Office © Crown Copyright 2000. Unauthorised reproduction infringes Crown Copyright and may lead to prosecution or civil proceedings.

7.3.3 It is also helpful to look at the change between 2011 and 2021, with the greatest increase in terms of number of households in home ownership, with an additional 2,515 households owning their own home in 2021 compared to 2011. The greatest percentage increase was in the number of households living in shared ownership dwellings, which increased by 82.8% and suggest that there is substantial demand for affordable home ownership. The number of households living in social rented and private rented housing increased by similar percentages (29.3% and 27.0% respectively), although the absolute number of households private renting increased substantially more.

Table 7-6: Tenure 2011-2021, Hart

Age	2011	2021	Change	%
Total	35,510	39,965	+4,455	+12.5%
Owned	27,747	30,262	+2,515	+9.1%
Shared ownership	406	742	+336	+82.8%
Social rented	2,718	3,514	+796	+29.3%
Private rented	4,286	5,442	+1,156	+27.0%

Source: 2011 Census, 2021 Census

7.3.4 The tenure profile in Hart reflects and influences the type of households that live in the district. Table 7-6 presents tenure by age in Hart in 2021. This shows that:

- Older households are much more likely to own their own home, with home ownership most common in households aged 65 and over (87.5%), and least common in households aged 24 and under (19.9%).
- Younger households are much more likely to live in the private rented sector, with 56.7% of households aged 24 and under and 32.9% of households aged 25-34 private renting in Hart.
- Social renting was most common in younger households, and remained broadly consistent across the 35+ age groups (8-9%), reflective of the fact that households of all age groups may need, and are entitled to, affordable rented housing.
- Shared ownership is most common in households aged 25 to 34, consistent with this being the most common age group for first time buyers, and declines as households age. This pattern reflect the availability and affordability of these products however. There may be demand from some older or larger households if products were available and affordable to them

Table 7-7: Tenure by age, Hart, 2021

	Aged 24 years and under	Aged 25 to 34 years	Aged 35 to 49 years	Aged 50 to 64 years	Aged 65 years and over
Owned	19.9%	49.3%	69.0%	80.7%	87.5%
Shared Ownership	4.1%	5.8%	2.7%	1.1%	0.5%

Social Rented	19.4%	12.0%	8.8%	8.4%	7.9%
Private Rented	56.7%	32.9%	19.5%	9.8%	4.2%

Source: ONS

7.3.5 It is also helpful to consider the size of home households live in by tenure, with Table 7-8 showing this for Hart in 2021:

- The most common dwelling size for households that own their home in the District is 4 or more bedroom (48.8%), followed by 3-bedroom (35.3%), likely to represent established family households with higher (and joint) incomes and older households whose children have left home.
- There is a skew towards 2-3 bedroom dwellings in the private rented sector, reflective of renters being more financially constrained and less likely to live in a property with additional bedrooms.
- Social/affordable renters are concentrated in smaller and mid-sized dwellings, with very little occupation in 4+ bedroom dwellings, potentially due to a lack of stock of larger social/affordable rented dwellings for large families as well as allocation policies which may limit larger families to smaller properties in some circumstances e.g. with children under a certain age being required to share bedrooms.

Table 7-8: Tenure by bedrooms, Hart, 2021

	1-bedroom	2-bedroom	3-bedroom	4+ bedroom
Owned	3.1%	12.8%	35.3%	48.8%
Shared Ownership	17.1%	49.3%	30.4%	3.2%
Social Rented	24.1%	40.5%	31.8%	3.6%
Private Rented	16.7%	37.6%	32.5%	13.2%

Source: ONS

7.4 Type & Size

7.4.1 The type of dwellings occupied across Hart is presented in Table 7-9, comparing the district to the wider geographies and sub-areas. This shows that the greatest proportion of households in Hart lived in detached dwellings, at 41.8%, with a quarter of households living in semi-detached dwellings, 18.2% in terraced dwellings, and 14.2% in flats.

7.4.2 The Census does not count bungalows as a separate category, instead counting them within the other categories (mainly detached and semi-detached). To understand the scale of bungalows across Hart, Valuation Office Agency (VOA) data can be used. 2025 VOA data shows that at this time there were 3,920 bungalows in Hart, 9.1% of all dwellings at that time. This is marginally above the 9.0% recorded across England.

7.4.3 Comparing Hart to the wider geographies, the district had a significantly higher proportion of households living in detached dwellings than both the wider

North Hampshire (29.5%) and Hampshire and Solent Combined Authority (28.0%) areas. The proportion of households living in semi-detached dwellings was broadly similar across the three geographies, with Hart having smaller proportions of households living in terraced dwellings and flats.

7.4.4 Turning to the sub-areas, observations to highlight include:

- Hook and the Rural North & Villages sub-areas had the highest proportion of households living in detached dwellings (47.7% and 47.3% respectively), whilst Blackwater & Yateley had the smallest, at 33.3%.
- Rural South & Villages had the highest proportion of households living in semi-detached dwellings, at 32.6%, followed by Blackwater & Yateley at 29.4%. Hook had the smallest proportion.
- Flats were most common in Fleet & Church Crookham, with 18.8% of households living in flats, compared to 7.5% of households in the Rural South & Villages sub-area. The larger proportion of flats in Fleet is likely to reflect the presence of a number of specialist schemes for older people.
- Blackwater & Yateley had the greatest proportion of households living in terraced dwellings. Alongside the high proportion living in semi-detached and lower proportion in detached dwellings and flats, this suggests mid-sized family housing. Fleet & Church Crookham had the smallest proportion of households living in terraced dwellings, with it likely that smaller or cheaper dwellings in this sub-area are flatted.

Table 7-9: Accommodation type, Hart and comparator geographies, 2021, %

	Detached	Semi-detached	Terrace	Flat	A caravan or other mobile or temporary structure
Hart	41.8%	25.3%	18.2%	14.2%	0.6%
North Hampshire UA	29.5%	27.0%	23.7%	19.3%	0.5%
Hampshire & the Solent Combined Authority	28.0%	25.6%	22.7%	22.9%	0.8%
England	22.4%	30.5%	22.8%	23.6%	0.7%
Fleet & Church Crookham	43.7%	22.6%	14.2%	18.8%	0.7%
Blackwater & Yateley	33.3%	29.4%	27.1%	9.8%	0.3%
Hook	47.7%	20.4%	16.3%	14.6%	1.0%
Rural North & Villages	47.3%	24.1%	17.5%	10.8%	0.4%
Rural South & Villages	43.8%	32.6%	15.7%	7.5%	0.3%

Source: 2021 Census

7.4.5 Table 7-10 presents the same geographies but considers the size of dwellings in Hart, based on the number of bedrooms. It shows that the greatest proportion of households in Hart lived in 4+ bedroom dwellings, at 38.9% of households, followed by 3-bedroom dwellings (34.3%), 2-bedroom dwellings (19.5%), and then 1-bedroom dwellings (7.2%). Hart had a significantly greater skew towards the largest 4+ bedroom dwellings than the wider unitary authority, combined authority, and country. Because of this skew towards larger dwellings, Hart had a smaller proportion of households living in 1-3 bedroom dwellings than the comparator geographies.

7.4.6 Again, it is also important to consider the sub-areas:

- Hook had the largest proportion of households living in 4+ bedroom dwellings, aligning with the high proportion of households living in detached dwellings. With the exception of Blackwater & Yateley, the remaining sub-areas had broadly similar proportions of households living in the largest dwellings. Blackwater & Yateley was notably lower, at 33.3%.
- Fleet & Church Crookham had the highest proportion of households living in 1-bedroom dwellings (8.6%), aligning with the higher proportion of households living in flats and the presence of specialist housing for older people. Rural South & Villages sub-area had the smallest proportion at 4.7%.
- Households living in 3-bedroom dwellings most commonly lived in Blackwater & Yateley, with 45.5% of households living in a dwelling of this size, 11.7 percentage points greater than the next sub-area (Rural South & Villages).
- The proportion of households living in 2-bedroom dwellings was broadly similar across the geographies, at 19-22%, with the exception of Blackwater & Yateley, where just 15.3% of households lived in a dwelling of this size.

Table 7-10: Number of bedrooms, Hart and comparator geographies, 2021, %

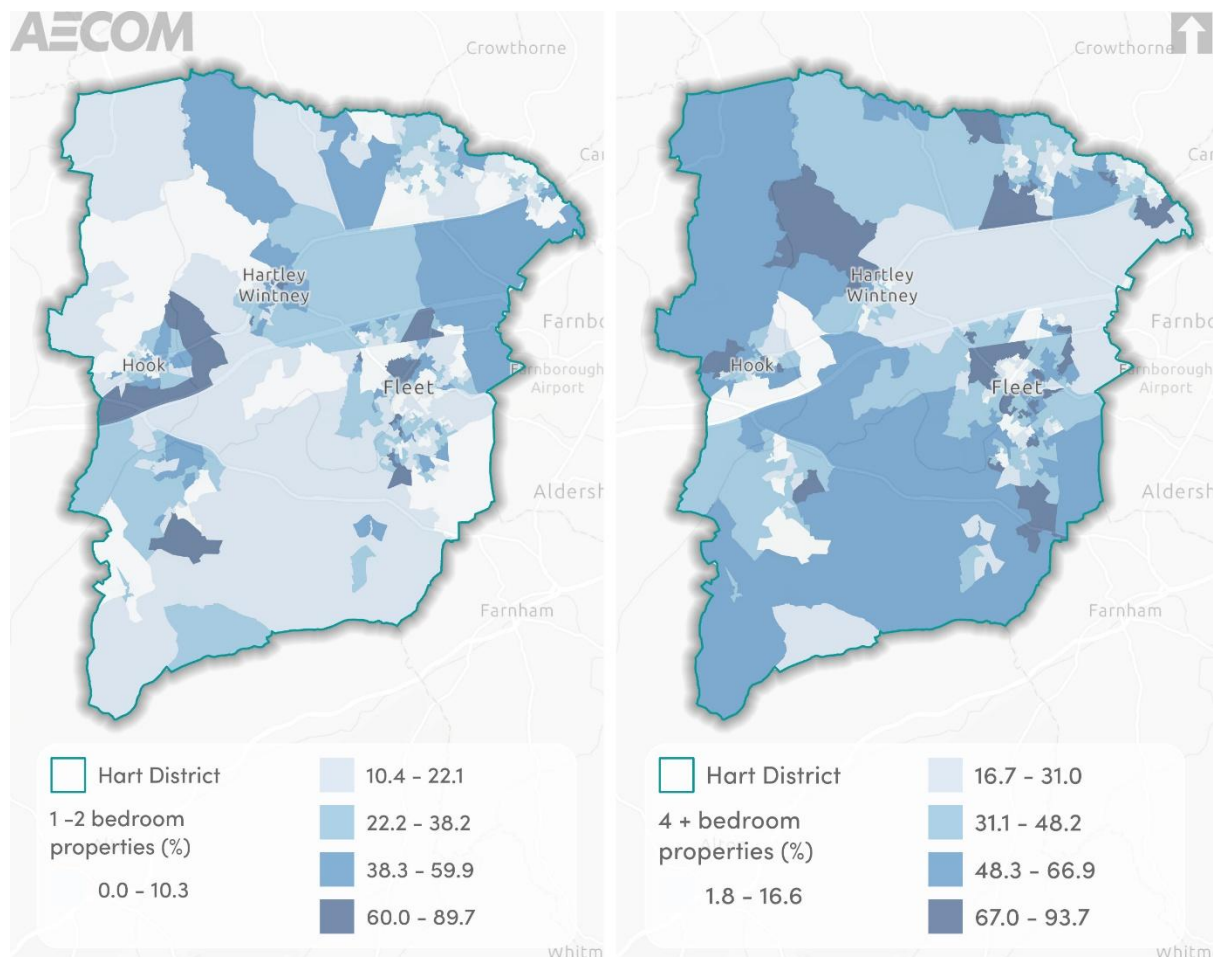
	1-bedroom	2-bedroom	3-bedroom	4+ bedroom
Hart	7.2%	19.5%	34.3%	38.9%
North Hampshire UA	10.1%	23.1%	39.1%	27.7%
Hampshire & the Solent Combined Authority	11.5%	25.9%	39.7%	22.9%
England	11.6%	27.3%	40.0%	21.1%
Fleet & Church Crookham	8.6%	21.0%	30.0%	40.5%
Blackwater & Yateley	5.9%	15.3%	45.5%	33.3%
Hook	7.4%	22.1%	27.3%	43.2%
Rural North & Villages	6.8%	19.6%	31.9%	41.6%

Rural South & Villages	4.7%	21.6%	33.8%	39.9%
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Source: 2021 Census

7.4.7 Figure 7-2 shows the size mix of dwellings across the district visually. Individual maps are shown in the Appendix.

Figure 7-2: Heat map of Hart District housing size mix, 2021



Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community. Contains public sector information licensed under the Open Government Licence v3.0. Contains Ordnance Survey data © Crown copyright and database right 2026. ©Hart District Council, 2026. Reproduced from the Ordnance Survey map with the permission of the Controller of Her Majesty's Stationery Office © Crown Copyright 2000. Unauthorised reproduction infringes Crown Copyright and may lead to prosecution or civil proceedings.

7.5 Community Led Development

7.5.1 Community-led development is a potential avenue for delivering housing in Hart. It is defined in the NPPF 2026 as:

“A development taken forward by, or with, a not-for-profit organisation, that is primarily for the purpose of meeting the needs of its members or the wider local community, rather than being a primarily commercial enterprise. The organisation should be created, managed, and democratically controlled by its members, and membership of the organisation should be open to all beneficiaries and prospective beneficiaries of that organisation. It may take any one of various legal forms, including a co-operative society, community benefit society, and company limited by guarantee. The organisation should own, manage, or steward the development in a manner consistent with its purpose, potentially through a mutually supported arrangement with a

registered provider of social housing. The benefits of the development to the community should be clearly defined and consideration given to how those benefits can be protected over time, including in the event of the organisation being wound up.”

7.5.2 Community-led development often, but not exclusively, takes the form of community-led housing, with the following most common types:

- Community Land Trusts (CLTs) – these are democratic, non-profit organisations that own and develop land for the benefit of the community⁷⁰ in perpetuity. This often takes the form of affordable housing for a local community, but can also include schemes to conserve landscapes, save or create community assets (e.g. cafes, shops, pubs), or develop community energy schemes. The ‘State of the Community Land Trust Sector 2023’⁷¹ report identified 350 active Community Land Trusts in England and Wales, with 106 of these located in small rural communities, 85 in small towns, and 159 in large towns and cities. It also identifies that at this time there were 209 CLTs in the process of forming. In terms of delivery, CLTs had delivered 1,711 affordable homes, with a further 5,413 homes in the pipeline. The report identifies that Community Land Trusts are common in areas protected in some way by the planning system, with 60% of CLTs located in these protected locations, such as conservation areas, AONBs, National Parks, and in the Green Belt.
- Cohousing – intentional communities run by residents, usually with shared ideals (i.e. eco living) or sometimes demographic groups (e.g. over 55s). Cohousing developments are comprised of self-contained homes with shared community space such as gardens, workshops, office space, communal kitchens (in addition to self-contained ones) for shared dining, and guest bedrooms.
- Co-operatives – not-for-profit democratic organisations run by the members, with membership limited to residents. This could also include mutual home ownership societies.
- Self and custom build – see below section on self and custom build housing.

7.5.3 The NPPF 2026, Policy HO5, paragraph c outlines that local planning authorities should identify sites which can provide specific types of accommodation where there is an identified need, including plots of self and custom build and community-led development. Policy HO10: Exception sites also states that development proposals for housing on land not already allocated for this purpose, and which are located outside settlements, should

⁷⁰ Community Land Trust Network – <https://communitylandtrusts.org.uk/about-clts/what-is-a-community-land-trust-clt>

⁷¹ <https://www.communitylandtrusts.org.uk/wp-content/uploads/2023/03/State-of-the-Sector-2023-PRESS-1.pdf>

be supported where they are... sites which comprise community-led development.

- 7.5.1 It is not possible to establish an accurate need or demand for community-led development (outside of self-build) as it requires high levels of community organisation and drive, which cannot be predicted. As community-led development often focuses on the delivery of local affordable housing in perpetuity, it can be linked to the overall need for affordable housing, with community-led housing products, particularly Community Land Trusts, a key delivery mechanism for affordable housing in some local authorities (e.g. East Cambridgeshire).
- 7.5.2 If Hart District Council are looking to encourage or pursue community-led development in the borough, it is advised that they liaise with organisations such as Action Hampshire and national organisations such as the national Community Land Trust Network⁷², UK Cohousing Network (UKCN)⁷³, and the Confederation of Co-operative Housing (CCH)⁷⁴. Engagement with potential community-led housing groups, Parish/Town Councils, and Neighbourhood Forums would also be advised

Self and Custom Build Housing

- 7.5.3 The NPPF 2026 defines self-build and custom-build housing as “housing built by an individual, a group of individuals, or persons working with or for them, to be occupied by that individual. Such housing can be either market or affordable housing...”. There is a scale of involvement from individuals, from undertaking all of the work themselves, to hiring a range of external contractors (e.g. builders, architects, etc.) whilst project managing, to simply making decisions regarding the final design/layout of the property.
- 7.5.4 The Self-Build and Custom Housebuilding Act 2015⁷⁵ placed a duty on local authorities to keep a register of individuals and groups of individuals with a desire to acquire a serviced plot of land within the local authority area. Local authorities must give suitable development permission to enough suitable serviced plots⁷⁶ of land to meet this demand.
- 7.5.5 In August 2021 former MP Richard Bacon undertook an independent review into scaling up self-build and custom build housing, with the Government publishing their response in June 2022⁷⁷. This response recognised that a key

⁷² <https://www.communitylandtrusts.org.uk/>

⁷³ <https://cohousing.org.uk/>

⁷⁴ <https://www.cch.coop/>

⁷⁵ <https://www.legislation.gov.uk/ukpga/2015/17/contents>

⁷⁶ A plot of land that either has access to a public highway and connection for electricity, water, and waste water, or where access and connections can be made before granted planning permission expires.

⁷⁷ <https://www.gov.uk/government/publications/government-response-to-the-independent-review-into-scaling-up-self-build-and-custom->

challenge for those looking to build their own home was the lack of supply of serviced plots.

7.5.6 Data provided by Hart District Council in Spring 2026 showed 7 households on the self-build register across the district. Key characteristics and needs of register applicants include:

- All of the applicants joined the register since 2020.
- 4 applicants are individuals (single households), with 3 groups.
- 6 applicants are looking to build detached houses, with 1 looking to build a detached bungalow.
- Most applicants selected multiple areas of interest, but 3 applicants only listed Odiham as their area of preference.
- 14.3% of applicants are looking to build a 3-5 bedroom dwelling, 42.9% a 4-bedroom dwelling, at 42.9% a 5+ bedroom dwelling.

7.5.7 MHCLG collates data on self-build and custom housebuilding in local authorities across England over the last 10 years⁷⁸. Table 7-11 shows that there were significantly more entries early in the register, and based on the current register information provided by Hart District Council, there have been a significant number of applicants removed from the register over the decade (although this data was not recorded by MHCLG for most of this time). The fewest new entries to the register were in 2022/23, with 10 applicants also being removed in this time. A local connection test was introduced in April 2018, which may have contributed to declining numbers of applicants joining the register. Planning permission for serviced plots began in 2020-21, with an average of 4-5 provided a year between 2018-19 and 2023-24, with 18 provided in total.

Table 7-11: Right to Build Register Monitoring, Hart

Year	Entries added (individuals and groups)	Entries removed (individuals and groups)	Planning permissions for serviced plots
At end of first base period (30/10/2016)	57	Data not recorded	Data not recorded
31/10/2016 – 30/10/2017	50	Data not recorded	0
31/10/2017 – 30/10/2018	22	Data not recorded	0
31/10/2018 – 30/10/2019	4	Data not recorded	0
31/10/2019 – 30/10/2020	No HDC data	No HDC data	No HDC data
31/10/2020 – 30/10/2021	7	Data not recorded	5
31/10/2021 – 30/10/2022	7	Data not recorded	3

[housebuilding/independent-review-into-scaling-up-self-build-and-custom-housebuilding-government-response](#)

⁷⁸ <https://www.gov.uk/government/publications/self-build-and-custom-housebuilding-data>

31/10/2022 – 30/10/2023	3	10	8
31/10/2023 – 30/10/2024	5	2	2

Source: MHCLG

7.5.8 Local authority registers provide a guide for the minimum level of demand for serviced plots. Hart District Council has fees to both join and remain on the register, as follows (2026/27)⁷⁹:

- Joining fee, individuals – £93
- Joining fee, associations - £154
- Annual fee, individuals – £36
- Annual fee, associations - £36

7.5.9 This indicates why current self-build register numbers are lower than at the beginning of the recording period however this is more likely to reflect the scale of serious interest in pursuing self-build.

7.6 Summary

7.6.1 Hart's housing stock is characterised by high levels of home ownership, a predominance of larger family housing, and relatively limited affordable and private rented provision compared with wider comparator areas. Owner occupation remains the dominant tenure, accounting for over three-quarters of households, while the proportion of social/affordable rented housing is substantially below regional and national averages. The district also has a comparatively small private rented sector, reflecting its strong owner-occupier profile.

7.6.2 The existing stock is heavily weighted towards detached properties and larger homes, with almost 40% of households occupying dwellings with four or more bedrooms. This distinguishes Hart from comparator areas and reflects the district's attractiveness to families and higher-income households. However, the relative lack of smaller homes and affordable homes may present challenges for younger households, first-time buyers, lower-income residents and those seeking to downsize.

7.6.3 It is important to keep in mind that Hart sits within a wider housing market area and has particularly close relationships with Rushmoor. The neighbouring authority provides a complimentary mix of housing to some extent so the choice of properties within the stock needs to be viewed within this wider context.

⁷⁹ <https://www.hart.gov.uk/planning-and-building-control/planning-policy/self-build-and-custom-build-housing/fees-join-self>

8. Prices, Rents, and Affordability

8.1 Introduction

- 8.1.1 There is a broad academic and political consensus, since the publication of the Barker Review of Housing Supply in 2004, that the undersupply of homes in relation to need and demand is largely responsible for house price growth over recent decades, growth which has far outstripped the growth in earnings and incomes over the same period and contributed to declining affordability of housing.
- 8.1.2 Government has committed to expanding housing supply, underpinned by national policy including the introduction of the Standard Method for calculating local housing need (as set out in Section 5).
- 8.1.3 Prices and rents can provide an indication of demand pressure on particular types of housing. These can be used to examine the affordability of homes to rent or buy, helping to inform policies around affordable housing. This section examines prices and rents in Hart, and ultimately the affordability of housing options (to buy or rent) to local households. The rest of this section is structured as follows:
- House prices
 - Private rents
 - Social and Affordable rents
 - Affordability of different tenures

8.2 House Prices

- 8.2.1 The median house price in Hart in 2025 was £460,000, a £5,000 decrease on the previous year, but a 19.5% increase since 2016 (£385,000). The lower quartile house price increased by 20.0% over the decade, to £348,000 in 2025, an £8,000 increase on 2016. Median and lower quartile prices over the decade are shown in Table 8-1, with lower quartile prices give an indication of the cost of entry-level housing, typically smaller homes and flats or terraces that may not be suitable for all households but may be well-suited to first-time buyers.
- 8.2.2 Looking at the wider comparator geographies, Table 8-2 shows the median house price for the new LGR area of the proposed North Hampshire Unitary Authority area, the Hampshire & the Solent Combined Authority area, and England for comparison to Hart. It shows that in 2025 Hart house prices were significantly higher than the comparator geographies, 19.5% higher than the next highest median price of £385,000 for North Hampshire Unitary Authority area. Both the Hampshire & the Solent Combined Authority area and England had median house prices of £300,000 in 2025. Although house prices were

lower in these geographies, they experienced the greatest growth over the decade, with 31.6% and 33.4% growth over the decade respectively.

8.2.3 Turning to the Hart district sub-areas, Table 8-3 and Figure 8-1 show the median house prices for these geographies over the decade:

- The highest median house price was recorded in the Rural North & Villages sub-area, at £540,000.
- The Rural South & Villages sub-area (£510,000) and Fleet & Church Crookham (£482,500) both had higher median house prices than Hart, with lower median prices in Yateley & Blackwater (£421,500) and Hook (£417,500).
- Fleet & Church Crookham and Hook experienced price growth when compared to 2024, with median house prices in Yateley & Blackwater, Rural North & Villages, and Rural South & Villages falling between 2024 and 2025.
- Looking over the longer term, between 2016 and 2025 median house prices increased at a greater rate in Fleet & Church Crookham and Yateley & Blackwater (27.0% and 26.4% respectively) than across Hart as a whole. These areas have experienced new housing development which is likely to have a price premium which may have contributed to increases in average prices. Prices increased in Hook in this time period, although to a lesser extent (5.7%). Both the Rural North & Villages and Rural South & Villages sub-areas experienced a decline in median house prices between 2016 and 2025.

Table 8-1: House prices, Hart, 2016-2025

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025 ⁸⁰	Growth	% Growth
Mean	£453,079	£471,781	£460,101	£473,457	£535,201	£516,986	£598,595	£540,859	£535,321	£521,365	+£68,285	+15.1%
Median	£385,000	£390,000	£395,000	£395,000	£420,000	£425,000	£470,000	£455,000	£465,000	£460,000	+£75,000	+19.5%
Lower Quartile	£290,000	£300,000	£292,500	£300,000	£320,000	£315,000	£339,000	£340,000	£340,000	£348,000	+£58,000	+20.0%
Count	2,006	1,871	1,876	1,797	1,657	2,470	1,991	1,486	1,544	1,485	-	-

Source: Land Registry, AECOM Calculations

Table 8-2: Median house prices, Hart and comparator geographies, 2016-2025

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Growth	% Growth
Hart	£385,000	£390,000	£395,000	£395,000	£420,000	£425,000	£470,000	£455,000	£465,000	£460,000	+£75,000	+19.5%
North Hampshire	£305,000	£325,000	£325,000	£317,500	£342,500	£350,000	£380,000	£375,000	£375,000	£385,000	+£80,000	+26.2%
Hampshire & the Solent Combined Authority	£228,000	£245,000	£249,500	£255,000	£267,000	£282,500	£300,000	£290,000	£300,000	£300,000	+£72,000	+31.6%
England⁸¹	£224,950	£235,000	£240,000	£245,000	£263,000	£281,500	£295,000	£292,000	£295,000	£300,000	+£75,050	+33.4%

Source: Land Registry, AECOM Calculations, ONS

⁸⁰ Land Registry data for 2025 was collected in April 2026. However, it should be noted that backlogs in registrations at the Land Registry may mean that some 2025 transactions are not recorded until mid-2026.

⁸¹ Data for England is the ONS median price paid for administrative geographies, year ending December 20XX, except 2025 which is year ending September 2025 due to data availability.

Table 8-3: Median house prices, Hart and sub-areas⁸², 2016-2025

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Growth	% Growth
Hart	£385,000	£390,000	£395,000	£395,000	£420,000	£425,000	£470,000	£455,000	£465,000	£460,000	+£75,000	+19.5%
Fleet & Church Crookham⁸³	£380,000	£406,000	£398,270	£390,000	£432,500	£404,250	£460,000	£460,000	£467,000	£482,500	+£102,500	+27.0%
Blackwater & Yateley⁸⁴	£333,500	£345,000	£350,000	£355,500	£373,500	£405,000	£436,800	£412,000	£430,000	£421,500	+£88,000	+26.4%
Hook⁸⁵	£395,000	£373,000	£316,000	£414,995	£387,000	£405,000	£464,500	£425,000	£380,000	£417,500	+£22,500	+5.7%
Rural North & Villages⁸⁶	£548,998	£520,000	£455,000	£510,000	£588,600	£567,500	£550,000	£595,000	£564,000	£540,000	-£8,998	-1.6%
Rural South & Villages⁸⁷	£525,000	£445,000	£500,000	£540,000	£555,000	£530,000	£635,000	£615,750	£600,000	£510,000	-£15,000	-2.9%

Source: Land Registry, AECOM Calculations

⁸² House prices for the sub-areas are based on parish areas (best-fit to OA-defined sub-areas).

⁸³ Parish areas of Fleet, Church Crookham, Crookham Village, and Elvetham Heath

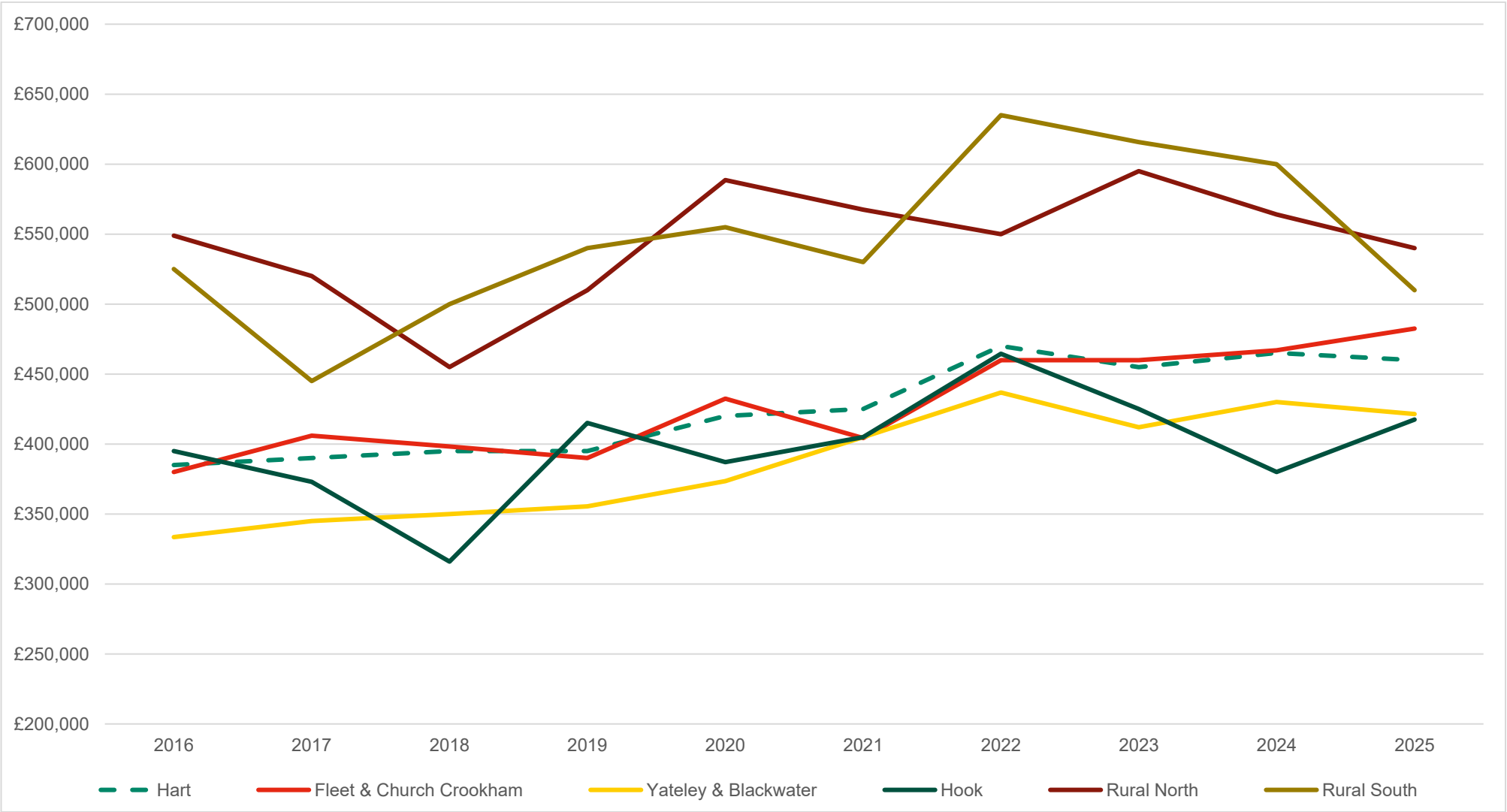
⁸⁴ Parish areas of Blackwater & Hawley and Yateley

⁸⁵ Parish of Hook

⁸⁶ Parish areas of Bramshill, Eversley, Hartley Wintney, Heckfield, Mattingley, and Rotherwick

⁸⁷ Parish areas of Crondall, Dogmersfield, Ewshot, Greywell, Long Sutton, Odiham, South Warnborough, and Winchfield

Figure 8-1: Median house prices, Hart and sub-areas, 2016-2025



Source: Land Registry, AECOM Calculations

- 8.2.4 It is important to consider the price of new build homes alongside the price of housing generally as they best represent the cost of housing that will be built in the future.
- 8.2.5 New build house prices are generally higher than house prices in the existing stock. The Barker Review of Housing Supply⁸⁸ in 2003/04 examined the reasons for this, concluding that the premium on new build homes was partly a factor of location, with new developments generally delivered in places people want to live. The new build premium is also in part due to new homes providing new fixtures and fittings, including kitchens, bathrooms, and flooring, with buyers willing to pay more for this. Less is known about the willingness of buyers to pay more for homes which have improved energy efficiency and which have improved adaptability or accessibility. These features clearly add value to some new homes.
- 8.2.6 There were 2,878 new build transactions in Hart between 2016 and 2025, with the highest numbers delivered in 2021 (400), 2019 (369), and 2018 (355). Table 8-4 shows the uplift in median new build prices compared to the overall median house price for Hart between 2016 and 2025. The new build uplift was greatest in 2024 (20.4%) and 2025 (17.4%), with new build prices below the overall median in 2018 and 2021. This could be for a variety of reasons, including:
- New build dwellings at this time being smaller than the overall mix of housing transactions, with larger transactions in existing dwellings bringing up the overall median.
 - New build dwellings at this time being of a cheaper type (e.g. flats) than the overall mix of housing transactions, with higher numbers of detached or semi-detached transactions from existing dwellings bringing up the overall median.
 - A short term surplus of new build stock in the market, , leading to delays selling and developers reducing the price to ensure cashflow. This may be the case in parts of Hart where anecdotal evidence suggests new build flats have been slow to sell.
- 8.2.7 Although new build prices are generally found to be higher, they are also more volatile than overall house prices, as shown by the variation in uplifts shown in Table 8-5. New build prices tend to be more responsive to a housing market downturn, with new build prices often falling more rapidly in these circumstances. The price premium is then effectively reversed so that homes in the existing stock can be higher priced than new build properties. This is because developers often need to cut prices substantially or offer incentives (e.g. stamp duty payments) to ensure sales and cashflow. Unlike properties in the existing stock, new build homes do not contain owners who may be willing to 'sit out' a downturn. Therefore, price falls in the new build homes are realised, whereas price falls of homes in the existing stock may not be realised

⁸⁸ <https://www.gov.uk/government/publications/barker-review-of-land-use-planning-final-report-recommendations>

as homeowners wait for an improving market. The result for the existing market is large falls in the number of transactions rather than prices. During housing market downturns, there are some instances where housing associations buy open market properties from developers where these are struggling to sell. The homes then become housing association stock either for sale as shared ownership or rented as social/affordable rent. This was widespread during the housing market downturn that followed the credit crunch (c.2008-2012) but has also happened in recent years within Hart.

Table 8-4: New build house prices, Hart, 2016-2025

	Median New Build Price	Median Price Overall	New Build Uplift	New Build Count
2016	£390,000	£385,000	+1.3%	437
2017	£430,000	£390,000	+10.3%	348
2018	£369,000	£395,000	-6.6%	355
2019	£409,995	£395,000	+3.8%	369
2020	£426,250	£420,000	+1.5%	328
2021	£420,000	£425,000	-1.2%	400
2022	£530,000	£470,000	+12.8%	321
2023	£485,875	£455,000	+6.8%	166
2024	£560,000	£465,000	+20.4%	115
2025	£540,000	£460,000	+17.4%	39 ⁸⁹

Source: Land Registry, AECOM Calculations

8.2.8 Table 8-5 shows the breakdown in median new build prices by type in 2024 and 2025 (to obtain a more robust sample size) compared to overall (new and existing) house prices in the same period. This shows that across all dwelling types there is a new build premium, with this the highest when looking at flats (+42.8%) and terraced dwellings (+41.3%).

8.2.9 New build terraced dwellings are on average £154,950 more expensive than the existing stock of terraced dwellings. This may reflect a disparity between the condition and age of existing and new build terraced dwellings, potentially high demand for this dwelling type (as one of the more affordable housing types generally), the location of the new build dwellings (i.e. more desirable, closer to rail links, etc.), or the specification of new build dwellings. T

8.2.10 The smallest uplift is observed between existing and new build detached dwellings (+1.7%). This is likely to be because many existing detached dwellings have larger plots, established gardens and other features and have often been extended over time, whereas new build detached dwellings may be smaller in size or in plot. There is much more variability in the range of

⁸⁹ Note that 2025 Land Registry data was collected in April. Backlogs at the Land Registry means that transaction registrations are likely several months behind and so the final figure for 2025 is not likely to be up to date until mid-2026.

detached properties because of plot sizes and number of bedrooms which makes comparisons of prices more difficult.

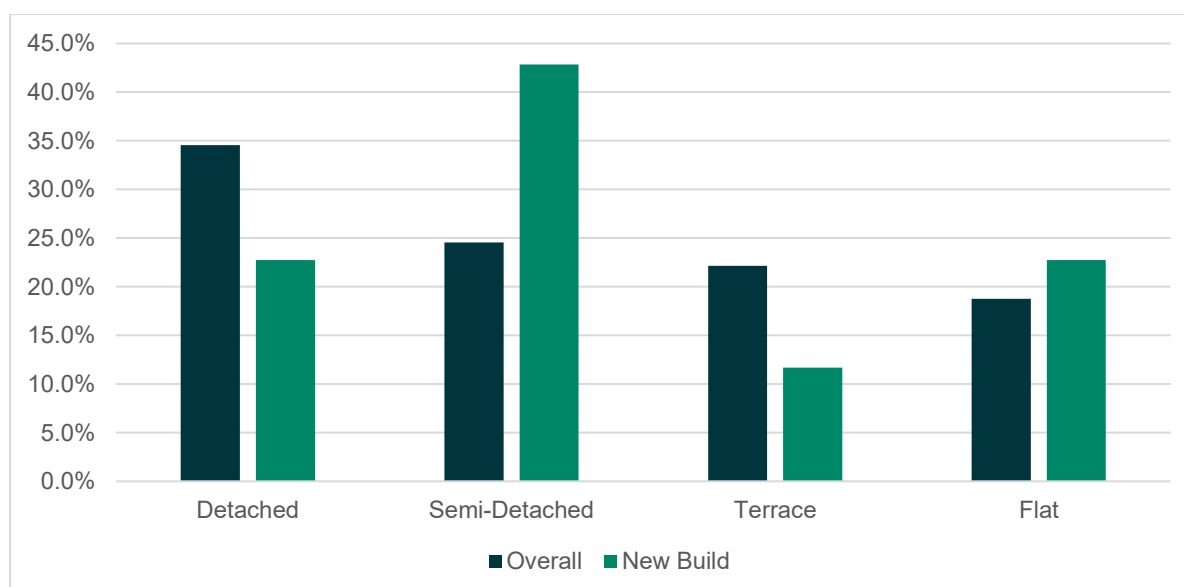
Table 8-5: New build house prices by type, Hart, 2024-2025⁹⁰

	Overall Median	New Build Median	Uplift	%
Detached	£660,000	£671,300	+£11,300	+1.7%
Semi-Detached	£470,000	£587,500	+£117,500	+25.0%
Terrace	£375,000	£529,950	+£154,950	+41.3%
Flats	£230,250	£328,710	+£98,460	+42.8%

Source: Land Registry, AECOM Calculations

8.2.11 Figure 8-2 shows the breakdown of transactions in the overall housing stock (existing and new build) and in solely new build transactions. This shows that the highest proportion of new build transactions were for semi-detached dwellings (42.9%), with the smallest proportion terraced dwellings (11.7%), potentially reflecting the higher price uplift in terraced dwellings (i.e. a smaller stock leading to higher demand than supply, increasing prices). When looking at transactions overall, the greatest proportion were detached dwellings (34.6%), followed by semi-detached (24.5%). There was a higher proportion of new build transactions of flats (22.7%) than within the overall market (18.8%), suggesting that there has been some focus on flatted development in the most recent years. Anecdotally, some sites within Hart have been redesigned to reduce the proportion of flats in recent years due to lower demand. Hart District Council officers also report instances of blocks of flats which were intended for open market sale being sold to housing associations.

Figure 8-2: Proportions of transactions by dwelling type, Hart, 2024-2025



Source: Land Registry, AECOM Calculations

⁹⁰ Data is for multiple years to create a robust sample size

8.3 Private Rents

- 8.3.1 Table 8-6 shows average private rents in Hart between 2015 and 2026. This shows that in this time rental prices in the district increased by 41.7%, or by +£408 in absolute terms. The average private rent in Hart in January 2026 was £1,386 per month. Increases in rents have been greater in the period 2022-2025 which is likely to reflect a bounce back from flatter prices during the Covid pandemic and is a trend that is common across England.

Table 8-6: Average private monthly rent, Hart, 2015-2026

Time period	Average rent
Jan-15	£978
Jan-16	£1,015
Jan-17	£1,042
Jan-18	£1,060
Jan-19	£1,061
Jan-20	£1,065
Jan-21	£1,079
Jan-22	£1,091
Jan-23	£1,142
Jan-24	£1,250
Jan-25	£1,344
Jan-26	£1,386

Source: ONS

- 8.3.2 Table 8-7 shows average private rents in Hart between 2015 and 2026 by size (number of bedrooms). This clearly shows an increase in rents as the number of bedrooms increases with the largest percentage increase observed between 3-bedroom and 4-bedroom properties. This may reflect attributes such as plot sizes, gardens, parking etc in the largest properties which some renters are willing to pay for. The monthly rental prices in Hart in January 2026 were:

- 1-bedroom - £1,002;
- 2-bedroom - £1,276 (a 27.3% increase on 1-bedroom rents);
- 3-bedroom - £1,548 (a 21.3% increase on 2-bedroom rents);
- 4+ bedroom - £2,267 (a 46.4% increase on 3-bedroom rents).

Over the decade the percentage increase in rents was broadly similar across the dwelling sizes, with the greatest increase in 1-bedroom rents, at 44.0%, and the smallest increase in 4+ bedroom rents, at 39.4%. The greatest actual price increase was in 4+ bedroom rents, with an increase of £641 a month between 2015 and 2026. The pattern of rent increases over the last decade suggests relatively even demand across all sizes of properties within the district as a whole. It could be expected that particular sizes of rental properties in shorter

supply compared to other sizes would experience more rapid price increases over time. As this has not been the case, it could be concluded that there is similar demand pressure across all sizes of rental properties. Table 8-7: Average monthly private rent by size, Hart, 2015-2026

Time period	1-bedroom	2-bedroom	3-bedroom	4+ bedroom
Jan-15	£696	£909	£1,087	£1,626
Jan-16	£721	£944	£1,129	£1,690
Jan-17	£739	£968	£1,162	£1,741
Jan-18	£756	£983	£1,182	£1,764
Jan-19	£757	£984	£1,183	£1,769
Jan-20	£767	£987	£1,186	£1,762
Jan-21	£778	£999	£1,202	£1,776
Jan-22	£780	£1,006	£1,221	£1,828
Jan-23	£815	£1,050	£1,279	£1,920
Jan-24	£894	£1,150	£1,398	£2,093
Jan-25	£967	£1,236	£1,505	£2,225
Jan-26	£1,002	£1,276	£1,548	£2,267
Change	+£306	+£367	+£461	+£641
%	+44.0%	+40.4%	+42.4%	+39.4%

Source: ONS

8.3.3 Table 8-8 shows average private rents in Hart between 2015 and 2026 by type. This shows that year-on-year detached rental prices were the greatest, followed by semi-detached dwellings, terraced dwellings, and flats. Over the decade the percentage increase in rents was broadly similar across the dwelling types, with the greatest increase in terraced rental prices (+42.2%) and the smallest in detached rental prices (40.7%). The greatest actual increase in rents was in detached rental prices, which increased by £599 between 2015 and 2026. The monthly rental prices in Hart in January 2026 were:

- Flat - £1,136;
- Terrace - £1,361 (a 19.8% increase on flat rents);
- Semi-detached - £1,462 (a 7.4% increase on terraced rents);
- Detached - £2,069 (a 41.5% increase on semi-detached rents).

Table 8-8: Average monthly private rent by type, Hart, 2015-2026

Time period	Detached	Semi-detached	Terrace	Flat
Jan-15	£1,470	£1,031	£957	£803
Jan-16	£1,527	£1,070	£992	£834
Jan-17	£1,571	£1,100	£1,017	£856
Jan-18	£1,595	£1,119	£1,034	£872
Jan-19	£1,596	£1,121	£1,035	£872
Jan-20	£1,595	£1,125	£1,042	£876
Jan-21	£1,612	£1,139	£1,057	£887

Jan-22	£1,645	£1,150	£1,072	£892
Jan-23	£1,727	£1,202	£1,123	£932
Jan-24	£1,889	£1,317	£1,225	£1,021
Jan-25	£2,022	£1,421	£1,317	£1,099
Jan-26	£2,069	£1,462	£1,361	£1,136
Change	+£599	+£431	+£404	+£333
%	+40.7%	+41.8%	+42.2%	+41.5%

Source: ONS

8.3.4 This ONS data on local authority rents does not show lower quartile rents. The latest up-to-date information on lower quartile rents is an ONS dataset discontinued in 2022/23. Local Housing Allowance (LHA) rates are set at the 30th percentile of market rents and will therefore be close to lower quartile rent levels. As LHA rates are updated annually, they can be used in place of lower quartile rents for Hart affordability analysis.

8.3.5 Local Housing Allowance rates are set at Broad Rental Market Area (BRMA) level. Hart is covered by 3 BRMAs – Basingstoke BRMA⁹¹, Blackwater Valley BRMA⁹², and Reading BRMA⁹³. However, the latter only covers a small area north of Eversley so is excluded. Table 8-9 shows the average BRMA rates for Basingstoke and Blackwater Valley BRMAs in April 2026 in place of lower quartile rents for Hart.

Table 8-9: Estimate of LQ rents using average of Basingstoke BRMA and Blackwater Valley BRMA LHA rates, Hart, 2026

	Weekly	Monthly	Annual
Shared Accommodation	£101.76	£440.94	£5,291.26
1-bedroom	£181.81	£787.84	£9,454.12
2-bedroom	£224.39	£972.34	£11,668.02
3-bedroom	£281.35	£1,219.16	£14,629.94
4-bedroom	£356.71	£1,545.74	£18,548.92

Source: VOA, AECOM Calculations

⁹¹ <https://lha-direct.voa.gov.uk/DownloadHelper.aspx?file=%2fDocsTemp%2fMAPS%2fMAP%7e80%7eBlackwater%2bValley%7e2024-04-01.pdf> – includes settlements of Hartley Wintney, Winchfield, Dogmersfield, South Warnborough, Hook, Rotherwick, Odiham, and Long Sutton.

⁹² <https://lha-direct.voa.gov.uk/DownloadHelper.aspx?file=%2fDocsTemp%2fMAPS%2fMAP%7e80%7eBlackwater%2bValley%7e2024-04-01.pdf> – includes the settlements of Eversley, Yateley, Blackwater, Hawley, Church Crookham, Fleet, Crookham Village, and Ewshot.

⁹³ <https://lha-direct.voa.gov.uk/DownloadHelper.aspx?file=%2fDocsTemp%2fMAPS%2fMAP%7e31%7eReading%7e2011-04-01.pdf>

8.3.6 It is also useful to consider rental prices in the Hart's sub-areas. Table 8-10 shows the median and lower quartile rents in the sub-areas in April 2026. It shows that median rents were highest in the Rural North & Villages sub-area, which aligns with house price data in 2025. The lowest median rental prices were in Fleet & Church Crookham and Blackwater & Yateley, at £1,300, with Fleet & Church Crookham having the greatest number of properties available for rent in April 2026, at 81. Figure 8-3 shows the sub-area median rental prices by size. As there were relatively fewer properties for rent in Hook and the rural areas, price data for these areas is less reliable. Nevertheless, Table X-X gives an indication of the price of available properties in 2026.

Table 8-10: Sub-area rents, Hart, April 2026

Sub area	Median	Lower quartile	Count
Fleet & Church Crookham	£1,300	£1,175	81
Blackwater & Yateley	£1,300	£1,050	25
Hook	£1,400	£1,113	12
Rural North & Villages	£2,045	£1,625	12
Rural South & Villages	£1,750	£1,000	17

Source: *Rightmove.co.uk, AECOM Calculations*

Figure 8-3: Median rents by size, Hart sub-areas, April 2026



Source: *Rightmove.co.uk, AECOM Calculations*

8.4 Social/Affordable Rents

8.4.1 Table 8-11 sets out the gross monthly Affordable and Social Rent in Hart based on the size of the dwelling. Affordable Rent overall is 46% greater than Social Rent.

Table 8-11: Affordable and Social Rents, Hart, 2025

Bedrooms	Affordable Rent ⁹⁴	Social Rent ⁹⁵
1-bedroom	£737	£531
2-bedroom	£928	£626
3-bedroom	£1,123	£693
4-bedroom	£1,237	£768
All self-contained	£933	£637

Source: SDR 2025

8.5 Affordability of Different Tenures

8.5.1 The relationship between prices, rents, and local incomes determines how affordable homes are to households in Hart. This section examines affordability, specifically whether average and lower quartile income households and individual earners can afford to rent or buy in the district (Table 8-12). It then presents affordability analysis based on affordable home ownership products (Discounted Market Sale (including First Homes) and shared ownership) at varying discounts/equity levels (Table 8-13), and Social and Affordable Rents (Table 8-14).

Affordability of Market Housing to Buy and Rent

8.5.2 Table 8-12 presents the cost of home ownership and renting on the open market in Hart, alongside the income required by household to buy or rent these properties. There are a number of key assumptions which should be noted:

- Households have a 10% deposit. Although some households may be able to secure a mortgage with a smaller deposit (e.g. 5%), they would then need higher incomes to access the same property.
- Households can borrow 3.5 times their income when they are purchasing a home. Whilst some lenders may offer higher multiples (e.g. 4 or 4.5 times income), mortgage options narrow at these higher multiples and they will not be available to all households. Therefore, AECOM uses 3.5 times income as a reasonable assumption based on the common multiple available to most households.
- Renters can spend up to one third of their gross income on their rent. This does not factor in any service charges, and these can add substantial additional costs in some cases. The picture becomes more complex when benefits are factored into incomes. Benefits are not included in the incomes/earnings presented in Table 8-14, but are discussed further on in this section when discussing need for Social Rent/Affordable Rent. Where households claim full or partial housing benefit or Universal Credit (housing entitlement), applying a threshold that relates to one third of their income may not be appropriate. This is because a large portion of their

⁹⁴ General needs

⁹⁵ General needs, large PRPs

income can only be spent on rent and this flexes (to a limit) dependent on the rental cost.

- Shared ownership households pay a rent of 2.5% per annum of the value of the rented share of the property. This varies depending on the Registered Provider but 2.5% is a suitable benchmark.

- 8.5.3 Table 8-12 shows that to afford a median priced property on the open market in Hart, households would need an income of £134,065, 53.3% greater than the estimated average household income across the district. Alongside average household incomes in the district (£87,455), lower quartile household incomes (£45,385) are benchmarked, as well as median and lower quartile individual earnings (£39,341 and £25,656 respectively) to account for affordability to single person households.
- 8.5.4 Lower quartile properties to purchase on the open market are also marginally out of reach to households on average incomes, with an income requirement of £89,486. In addition to this, households would require a deposit (if a 10% deposit is assumed) of £34,800, with this increasing to £46,000 for median priced dwellings. While cheaper properties will be available in the district (i.e. the smallest flats) and may offer an option for ownership for some households, these properties will not be suitable for all households (e.g. families with children looking to buy for the first time).
- 8.5.5 As discussed previously, new build properties are generally more expensive than existing market housing. Table 8-12 demonstrates that, in Hart, median priced new build dwellings require an income of £138,857 (£20,571 above median priced dwellings as a whole), with lower quartile new build dwellings requiring an income of £121,500 (£32,014 above lower quartile priced dwellings as a whole).
- 8.5.6 Households with access to a higher than 10% deposit would reduce the income requirements for purchasing. While wealthier households may have access to higher deposits through savings or existing equity, first time buyers tend to have more limited deposits and are therefore likely to face a particularly high barrier to home ownership in Hart.
- 8.5.7 Turning to market rents, Table 8-12 shows that households on average incomes in Hart are generally able to afford market rents, with the exception of the largest properties (average 4+ bedroom rents). Households on lower quartile incomes are much more limited in terms of the size of property they can afford to rent i.e. 1-2 bedroom properties.
- 8.5.8 Turning to individuals, those on median or lower quartile earnings are unable to afford average rents of any size. Individuals on median earnings can afford the same rental properties as households on lower quartile incomes and so will also have limited choice in the market. Individuals on lower quartile earnings are only able to afford lower quartile room rents, unsuitable for many household types (e.g. single parents with children).

Many households on lower quartile incomes and single earning households will require subsidy (e.g. Housing Benefit or Universal Credit (housing entitlement)) to access market rents. It is important to note that the lower quartile rents (all sizes) set out in Table 8-12 are not covered by LHA rates applicable within the district. This means that households on housing benefit would not be able to afford lower quartile private rents without ‘topping up’ the cost from other sources of income (including benefits intended for food and other essentials). Some households may be able to access cheaper housing outside of the district, but this may involve commuting into the district to access work, family, or education, with added transport costs.

Table 8-12: Affordability of market purchase and rent, Hart

Tenure	Price	Mortgage Value	Deposit	Rent	Income Required	Affordable on estimated average household incomes? (£87,455)	Affordable on estimated LQ household incomes? (£45,385)	Affordable on median individual earnings? (£39,341)	Affordable on LQ individual earnings? (£25,656)
Market Purchase									
Mean	£521,365	£469,228	£52,136	-	£134,065	No	No	No	No
Median	£460,000	£414,000	£46,000	-	£118,286	No	No	No	No
Lower Quartile	£348,000	£313,200	£34,800	-	£89,486	Marginal	No	No	No
Median (new build)	£540,000	£486,000	£54,000	-	£138,857	No	No	No	No
Lower quartile (new build)	£472,500	£425,250	£47,250	-	£121,500	No	No	No	No
Market Rent									
Average - Room	-	-	-	No data	-	-	-	-	-
Average - 1-bed	-	-	-	£12,024	£40,080	Yes	Yes	Marginal	No
Average - 2-bed	-	-	-	£15,312	£51,040	Yes	No	No	No
Average - 3-bed	-	-	-	£18,576	£61,920	Yes	No	No	No
Average - 4+ bed	-	-	-	£27,204	£90,680	No	No	No	No
Est. LQ - Room	-	-	-	£5,291	£17,638	Yes	Yes	Yes	Yes
Est. LQ - 1-bed	-	-	-	£9,454	£31,514	Yes	Yes	Yes	No
Est. LQ - 2-bed	-	-	-	£11,668	£38,893	Yes	Yes	Yes	No
Est. LQ - 3-bed	-	-	-	£14,630	£48,766	Yes	No	No	No
Est. LQ - 4+ bed	-	-	-	£18,549	£61,830	Yes	No	No	No

Source: ONS, Land Registry, AECOM Calculations

Affordability of Affordable Home Ownership Products

- 8.5.9 Table 8-13 estimates the cost of affordable home ownership products in Hart. These have been priced in relation to median house prices as it is not realistic to assume that affordable home ownership products will be priced at a discount to existing entry-level/lower-quartile priced properties due to new build premiums. Lower-quartile prices have been used as a benchmark for comparison and may reflect the discount on smaller, cheaper dwellings, such as flats.
- 8.5.10 Any affordable home ownership product priced below the wider market lower quartile house prices have the potential to extend home ownership in Hart. However, unless the cost of affordable home ownership properties is substantially below the cost of buying on the open market, it is unlikely to extend home ownership very far. Demand is also likely to be subdued if buyers can choose between affordable home ownership products and lower-quartile open market homes.
- 8.5.11 Shared ownership has been the main model of affordable home ownership in recent years, with households purchasing an equity share of a property and paying rent on the remaining portion. Households are expected to purchase the highest share that they are assessed as being able to afford. Table 8-13 shows the affordability of properties at 10%, 25%, 50%, and 75% equity levels, with median and lower quartile benchmarked prices. It shows that when using median benchmarked prices, households on average incomes are able to afford shared ownership at 10%, 25%, and 50% equity, extending home ownership for this group. However, households on lower quartile incomes, and median and lower quartile individual earners are not able to afford any shared ownership properties. If lower quartiles prices were used as the benchmark, and therefore likely to represent the smallest, cheapest dwellings (often flats), then home ownership through shared ownership may be able to extend to households on lower quartile incomes (at 10% and 25% equity) and median individual earners (at 10% equity).
- 8.5.12 Table 8-13 also assesses the affordability of other forms of affordable homeownership, including discounted market sale and First Homes (the latter being a form of discounted market sale). In May 2021 Government introduced First Homes, which were required to be offered with a minimum discount of 30% below full market value, but if suitably evidenced this discount can be set at 40% or 50%. Table 8-13 assesses the affordability of the discounted market sale homes from 20-50% discounts.
- 8.5.13 Using median priced dwellings in Hart as the benchmark, discounts of 30-50% would make home ownership accessible to households on average incomes, although discounted market sale dwellings at a 20% discount are not affordable to this group. This, along with the shared ownership analysis, shows that affordable home ownership products could successfully extend home ownership to households on average incomes, who cannot currently afford median or lower quartile house prices on the basis of a 10% deposit.

Households and individuals in the other income/earnings groups cannot afford home ownership through discounted market sale (including First Homes). If lower quartiles prices were used as the benchmark, and therefore likely to represent the smallest, cheapest dwellings (often flats), households on average incomes would also be able to afford discounted market sale properties at a 20% discount. Households on lower quartile incomes would be able to afford at a 50% discount, but individual earners would still not be able to access this form of affordable home ownership.

- 8.5.14 It is also relevant to note that First Homes have a discounted price cap of £250,000 outside of London. When using median house prices as the benchmark, First Homes at a 30% and 40% discount have a discounted value above this threshold in Hart (£322,000 and £276,000 respectively). Therefore, to meet the First Homes criteria in Hart, they would need to be delivered at a 50% discount, or First Homes would need to be delivered as cheaper dwellings (i.e. flats, smaller terraced dwellings). If First Homes could be offered at lower quartile house prices, the discounted values across all First Homes discount levels would be below the £250,000 price cap. This is unlikely given the price premium associated with new build properties, but it may be possible to achieve lower prices on smaller properties including flats.
- 8.5.15 The Planning Practice Guidance (PPG) for First Homes implicitly targets households with savings sufficient only for a 5% deposit mortgage and therefore reliant on 95% loan to value mortgages⁹⁶. Therefore, the calculations for First Homes in Table 8-13 were repeated with an assumed 5% deposit as opposed to 10% deposit. Although this decreases the deposit requirements for households, which may be beneficial for some, it increases the income required to afford a property, another key limiting factor in purchasing, particularly for first-time buyers. Overall, there is little change to affordability, but households on lower quartile incomes are no longer able to afford First Homes at a 50% discount (based on lower quartile house price benchmarks) when there is a 5% deposit.
- 8.5.16 A further affordable home ownership product potentially available to households in Hart is Rent to Buy. The Rent to Buy scheme allows households to rent at a discount on market rents (20%), with the saving accumulated and designed to be used as a deposit so that the household has the option to buy the home in the longer term. There is usually a 5-year commitment required. This is likely to present an attractive option for some households, particularly those who lack sufficient deposits to access mortgages, even for discounted market sale and shared ownership. The affordability of this product is considered to be in line with market rents (as households are expected to be able to afford market rents), with Table 8-12 outlining the affordability of market rents. Table 8-12 shows that households with incomes of approximately £40-60,000 would be able to afford average market rents (for 1-3 bedroom

⁹⁶ Paragraph 008 – <https://www.gov.uk/guidance/first-homes>

properties) and may therefore be eligible for Rent to Buy products which could offer a route to affordable home ownership.

Table 8-13: Affordability of affordable home ownership, Hart

Discount	Price	Mortgage Value	Deposit	Rent	Income Required	Affordable on estimated average household incomes? (£87,455)	Affordable on estimated LQ household incomes? (£45,385)	Affordable on median individual earnings? (£39,341)	Affordable on LQ individual earnings? (£25,656)
Discounted Market Sale / First Homes									
Median 20%	£368,000	£331,200	£36,800	-	£94,629	No	No	No	No
Median 30%	£322,000	£289,800	£32,200	-	£82,800	Yes	No	No	No
Median 40%	£276,000	£248,400	£27,600	-	£70,971	Yes	No	No	No
Median 50%	£230,000	£207,000	£23,000	-	£59,143	Yes	No	No	No
Lower quartile 20%	£278,400	£250,560	£27,840	-	£71,589	Yes	No	No	No
Lower quartile 30%	£243,600	£219,240	£24,360	-	£62,640	Yes	No	No	No
Lower quartile 40%	£208,800	£187,920	£20,880	-	£53,691	Yes	No	No	No
Lower quartile 50%	£174,000	£156,600	£17,400	-	£44,743	Yes	Yes	No	No
Shared Ownership									
Median 10%	£46,000	£41,400	£4,600	£10,350	£46,329	Yes	Marginal	No	No
Median 25%	£115,000	£103,500	£11,500	£8,625	£58,321	Yes	No	No	No
Median 50%	£230,000	£207,000	£23,000	£5,750	£78,310	Yes	No	No	No
Median 75%	£345,000	£310,500	£34,500	£2,875	£98,298	No	No	No	No
Lower quartile 10%	£34,800	£31,320	£3,480	£7,830	£35,049	Yes	Yes	Yes	No
Lower quartile 25%	£87,000	£78,300	£8,700	£6,525	£44,121	Yes	Yes	No	No
Lower quartile 50%	£174,000	£156,600	£17,400	£4,350	£59,243	Yes	No	No	No
Lower quartile 75%	£261,000	£234,900	£26,100	£2,175	£74,364	Yes	No	No	No

Source: ONS, Land Registry, AECOM Calculations

Affordability of Affordable Rent and Social Rent

- 8.5.17 Table 8-14 presents the affordability of social rent and affordable rent to different income groups in Hart. Lower quartile income households and median earning individuals may struggle to afford larger affordable rented properties as they do not have the income required to afford 3-bedroom or 4+ bedroom affordable rents. Lower quartile earners (individuals) cannot afford affordable rented dwellings of any size, and can only afford smaller 1-bedroom and 2-bedroom social rented dwellings. This is likely to cause problems for lower quartile earning single-parent or single-earning family households with multiple children. In practice, households on Hart's housing register have substantially lower incomes/ earnings than average households. However, the overall income of households on low incomes is complicated by the addition of benefits.
- 8.5.18 Many households eligible for social/affordable Rented housing will be supported by housing benefit so it is important to compare the Local Housing Allowance (maximum housing benefit that can be claimed) to the level of the rent. A comparison of LHA rates in Table 8-9 and the actual social/affordable rents in Table 8-14 would be covered by the maximum LHA rates (housing benefit). However, it is important to note that not all households receive the full LHA rate because some households have their overall benefits capped. This is discussed further in Section 9 but particularly affects families with children.
- 8.5.19 The relationship between Affordable Rent and Social Rent in terms of affordability to households is explored in more detail in Section 9.

Table 8-14: Affordability of Social Rent and Affordable Rent, Hart

Tenure	LHA Rate	Monthly Rent	Rent	Income Required	Rent covered by LHA rate?	Affordable on estimated LQ household incomes? (£45,385)	Affordable on median individual earnings? (£39,341)	Affordable on LQ individual earnings? (£25,656)
Affordable					Rent			
1-bedroom	£788	£737	£8,846	£29,486	Yes	Yes	Yes	No
2-bedroom	£972	£928	£11,134	£37,114	Yes	Yes	Yes	No
3-bedroom	£1,219	£1,123	£13,474	£44,914	Yes	Yes	No	No
4+ bedroom	£1,546	£1,237	£14,850	£49,499	Yes	No	No	No
Social					Rent			
1-bedroom	£788	£531	£6,368	£21,226	Yes	Yes	Yes	Yes
2-bedroom	£972	£626	£7,517	£25,057	Yes	Yes	Yes	Yes
3-bedroom	£1,219	£693	£8,315	£27,718	Yes	Yes	Yes	No
4+ bedroom	£1,546	£768	£9,219	£30,730	Yes	Yes	Yes	No

Source: ONS, AECOM Calculations

8.6 Summary

- 8.6.1 The evidence demonstrates that housing in Hart is relatively expensive compared to the rest of North Hampshire and the other comparator areas and that affordability pressures remain significant across both the owner-occupied and private rented sectors. House prices are substantially above national averages, with the median house price £460,000 in 2025 and lower quartile prices at £348,000. While price growth has moderated in recent years, the cost of home ownership remains beyond the reach of many local households, particularly those with below average incomes and single-income households. New build homes generally command a premium over the existing housing stock, creating additional barriers to entry for prospective purchasers.
- 8.6.2 Private rents have increased considerably over the past decade, rising by more than 40% since 2015. Private rents currently range from around £1,000 pcm for a 1-bedroom property to £2,300 pcm for a 4-bedroom property. Although households on average incomes in Hart can generally afford market renting, lower-income households and many single earners have much more limited housing choices, particularly for larger dwellings. Private rents (even at lower quartile levels) are not covered by Local Housing Allowance (housing benefit) rates within Hart. This indicates an ongoing need for Affordable Housing and, for some households, support through housing benefit to access Social/Affordable rented tenures. The affordability of these tenures is considered further in Section 9.
- 8.6.3 Affordable home ownership products such as shared ownership and discounted market sale can improve access to home ownership for households on average incomes, but they are less effective in meeting the needs of lower-income households without substantial discounts or lower equity shares. Overall, the affordability analysis highlights a continued need for a broad range of affordable housing products, with particular importance attached to the delivery of social/affordable rented housing to address the district's most acute affordability challenges.

9. The Need for Affordable Housing

9.1 Introduction

- 9.1.1 This section assesses the scale of need for affordable housing to rent and affordable housing to buy in Hart. This assessment is designed to meet the requirements of NPPF policy and PPG for estimating affordable housing needs.
- 9.1.2 Given the price of housing to buy and rent and the pattern of affordability within Hart, as discussed in the previous sections, it is unsurprising that a proportion of households are unable to meet their needs within the market. These households are likely to need subsidised homes, either to rent or buy.
- 9.1.3 It is AECOM's practice to produce two estimates of the need for affordable housing:
- **Households who cannot afford to rent in the market and largely need Social/Affordable rented homes** - These are the households that are traditionally counted in affordable housing need assessments. They often lack their own homes, live in unsuitable or overcrowded housing, or have urgent social or medical needs; and,
 - **Households who can afford to rent but cannot afford to buy and may need affordable home ownership products** - These households often do not lack their own housing. They typically live in the private rented sector but would prefer to own their own home. They are sometimes referred to as 'intermediate households'. These households represent potential demand for affordable home ownership products. It is important to acknowledge that these households have more choice within the market than those who cannot afford to rent. Therefore, addressing their needs is generally less urgent.
- 9.1.4 The NPPF 2026 policy HO1 (paragraph 2) requires local authorities to identify the need for housing overall and specifically includes those who require affordable housing as one of the groups in the community for which housing need should be assessed. Furthermore, the NPPF policy HO5 states that development plans should set out the requirements for the type and mix of affordable housing.
- 9.1.5 Affordable housing is defined in Annex B of the NPPF. This includes both affordable rented and affordable home ownership tenures. The NPPF therefore includes households requiring affordable home ownership in the total need for affordable housing.
- 9.1.6 Planning practice guidance is not explicit in identifying how to assess the need for affordable home ownership, with the focus being on identifying the more urgent needs of those who need affordable rent. However, PPG (see Box 9-1) does recognise the need to identify these households. PPG on housing needs of different groups explicitly states that those who cannot afford to own

a home, where that is their aspiration, are considered as in need of affordable housing.

Box 9-1: PPG on Housing Needs of Different Groups

What types of households are considered to be in affordable housing need?

All households whose needs are not met by the market and which are eligible for one or more of the types of affordable housing set out in the definition of affordable housing in Annex 2 of the National Planning Policy Framework are considered to be in affordable housing need.

Paragraph: 005 Reference ID: 67-005-20190722

Revision date: 22 07 2019

How can affordable housing need be calculated?

Strategic policy-making authorities will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market.

The unmet (gross) need for affordable housing by assessing past trends and current estimates of:

- the number of homeless households;
- the number of those in priority need who are currently housed in temporary accommodation;
- the number of households in over-crowded housing;
- the number of concealed households;
- the number of existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and
- the number of households from other tenures in need and those that cannot afford their own homes, either to rent, or to own, where that is their aspiration.

Care should be taken to avoid double-counting, which may be brought about with the same households being identified on more than one transfer list, and to include only those households who cannot afford to access suitable housing in the market.

Suggested data sources: Local authorities will hold data on the number of homeless households, those in temporary accommodation and extent of overcrowding. The Census also provides data on concealed households and overcrowding which can be compared with trends contained in the English Housing Survey. Housing registers and local authority and registered social landlord transfer lists will also provide relevant information.

Paragraph: 006 Reference ID: 67-006-20190722

Revision date: 22 07 2019

How can the current total affordable housing supply available be calculated?

There will be a current supply of housing stock that can be used to accommodate households in affordable housing need. As well as future supply. Therefore, assessing the total affordable housing supply requires identifying:

- the number of affordable dwellings that are going to be vacated by current occupiers that are fit for use by other households in affordable housing need;
- suitable surplus stock (vacant properties); and the committed supply of new net affordable homes at the point of the assessment (number and size).

Sources of data: Ministry of Housing, Communities and Local Government affordable housing supply statistics to show recent trends, and local authority and Registered Social Landlord records including housing register, transfer lists, demolition and conversion programmes, development programme of affordable housing providers.

Paragraph: 007 Reference ID: 67-007-20190722

Revision date: 22 07 2019

How is the total annual need for affordable housing calculated?

The total need for affordable housing will need to be converted into annual flows by calculating the total net need (subtract total available stock from total gross need) and then converting total net need into an annual flow based on the plan period.

9.2 Approach

- 9.2.1 This section provides an assessment of the need for Affordable Housing in Hart. It draws on information from the Hart District Council Housing Register, lettings data on the stock of Social/Affordable Rented homes in the district, data on prices and rents set out in Section 8 of this report, household incomes set out in Section 6, and the demographic projections set out in Section 6.
- 9.2.2 The rest of this section sets out the inputs and assumptions at each stage in estimating the need for affordable housing. A separate estimate is provided for a) households who cannot afford to rent in the market; and b) households who can afford to rent but are unable to afford to buy.
- 9.2.3 It is important to emphasise that this analysis presents estimates of the need for affordable housing based on the available data and evidence-based assumptions. This is not a precise science; rather it is about identifying the broad scale and nature of needs. This section does not make policy recommendations about how affordable housing needs should be met, since this is a matter for Hart District Council in its policy development role.

9.3 Households in Need of Social/Affordable Housing

- 9.3.1 This sub-section provides an assessment of the need for Affordable Housing amongst those unable to rent in the market. Table 9-1 sets out the calculations to estimate the need for social/affordable rented tenures. Every effort has been taken to avoid double counting of households.

Table 9-1: Need for Social/Affordable Rented Housing in Hart (Baseline Estimate)

Stage and Step in Calculation	Total	Source & Assumptions
STAGE 1: Current Need		
1.1 Current households in need	1,483	Total household on Housing Register, all bands (A-D), April 2026
1.2 Additional overcrowded households	0	565 overcrowded households as per 2021 Census, lower than total Housing Register so no additional households added
1.3 Living in insecure accommodation in private rented sector	863	Number of households in PRS claiming Housing Benefit/Universal Credit (housing entitlement) in February 2026, excluding those in 1.1.
1.3 Total current need	2,346	1.1 + 1.2 + 1.3
1.4 Per annum	180.5	1.3 / plan period 2026-2039
STAGE 2: Newly Arising Need		
2.1 New household formation	383.6	Net household growth per annum (2026-2039), 2022-based projections (10-year migration estimate)
2.2 Proportion of new households unable to rent in the market	31.0%	Proportion of new households with incomes insufficient to afford to rent 30 th percentile property – income required £51k
2.3 Existing households falling into need	85.0	Average annual increase in Housing Benefit/Universal Credit (housing entitlement), last 5 years
2.5 New households unable to rent (per annum)	203.9	(2.1 * 2.2) + 2.3
STAGE 3: Supply of Affordable Housing		
3.1 Supply of social/affordable lets (including transfers) (per annum)	202.0	Average lettings (3 years)
NET SHORTFALL		
Overall shortfall (or surplus) over the plan period	182	(1.4 + 2.5) – 3.1
Overall shortfall (or surplus) per annum	3,283	Above * plan period

Source: As per 3rd column in table

9.3.2 AECOM estimate that there is a need for around 183 social/affordable rented homes per annum over the plan period (2026-2039). The estimate for the longer period (2026-2044) is lower at 129 (rounded) per annum because this assumes the backlog of need (housing register) is addressed over a longer time period (18-years) and household projections are slightly lower in the later years.

9.3.3 This is a baseline estimate, assuming that household growth over the plan period is in line with ONS 2022-based household projections. These projections expect an additional 384 (rounded) households in Hart each year and this figure feeds into the estimate of newly arising need.

9.3.4 Under the scenario where the Standard Method housing need figure is adopted as the housing requirement and then delivered over the plan period,

this would imply household growth of around 777 households each year. If this level of household growth feeds into the estimate of newly arising need, the shortfall of social/affordable rented housing would be 304 households per annum (2026-2039). Over the longer study period (2026-2044) the figure would be 254 households (per annum), again due to spreading the backlog on the housing register over a longer time period. The need for social/affordable rented homes over 2026-2039 would equate to around 38% of the Standard Method figure.

- 9.3.5 The estimates exclude supply from the delivery of new affordable housing in the future since this is uncertain. The estimates also exclude the supply of private rented properties that could be released when some of these households are housed in affordable housing. At present, these properties play a role in meeting some housing needs.
- 9.3.6 The need for homes of those who are able to pay market rents but are unable to access home ownership is considered separately later in sub-section 9.6. The following sub-sections set out the estimate of the need for social/affordable rent in more detail including data sources and assumptions.

Stage 1: The Current Need for Affordable Rented Homes

- 9.3.7 Stage 1 of the assessment considers the number of existing and hidden households who are currently in housing need.
- 9.3.8 The inputs to this assessment are based on a variety of data sources which, in most cases, represent actual numbers and the real circumstances of individual households who have approached the Council for assistance regarding their housing situation. This approach reflects the recommendation in PPG that this assessment is undertaken using secondary data.
- 9.3.9 The estimates set out in Table 9-1 include only those applicant households whose circumstances fall within the housing need criteria set out in the PPG. This includes the following:
- the number of homeless households;
 - the number of households in priority need who are currently housed in temporary accommodation;
 - the number of households in over-crowded housing;
 - the number of concealed households;
 - the number of existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and
 - the number of households from other tenures in need, including those that cannot afford their own homes, either to rent, or to own, where that is their aspiration.

- 9.3.10 Hart District Council maintains a Housing Register which makes it possible to identify applicants with these needs. The exception is the number of

households from other tenures who cannot afford to own (final bullet point). These households are considered separately in the estimate of need for affordable home ownership. It is also possible that the Housing Register does not fully reflect the number of concealed or overcrowded households since not all will register with the Council. AECOM has therefore cross checked the Housing Register figures with the numbers of overcrowded households recorded in the Census 2021, which (at 565) was below the number of households on the Housing Register in 2026 and so does not support the addition of further overcrowded households.

9.3.11 Table 9-2 shows that in April 2026 there were 1,483 households on the Housing Register in Hart, segmented into four priority bands with Band A representing households with the most acute urgent need. This forms a key input to the calculation in Table 9-1 above. Households recorded on the Housing Register meet one or more of the PPG criteria outlined above.

9.3.12 The Hart Housing Allocations Policy⁹⁷ sets an income threshold for joining the register. Households with a combined income of under £60,000 (including means tested welfare benefits) and savings and assets of less than £30,000 are eligible to join the register. Where applicants have incomes or savings/assets greater than this threshold, a financial assessment takes place to assess whether housing costs would exceed 30% of the household's combined income. If housing costs exceed 30% then the household would be eligible for the Housing Register. A summary of the bands is as follows:

- **Band A** – Only granted in exceptional circumstances and reviewed every 3 months.
- **Band B** – Reasonable preference cases with a higher priority and reviewed every 6 months.
- **Band C** – Reasonable preference (other)
- **Band D** - Reasonable preference with reduced priority criteria

9.3.13 Table 9-2 shows the breakdown of applicant households by band and number of bedrooms they are eligible for. This shows that the greatest proportion of households were in Band C (77.4%), with 13.5% in Band B, 7.2% in Band D, and 1.9% in the highest priority Band A. The greatest proportion of applicant households needed a 1-bedroom dwelling (49.2%), followed by 2-bedroom (25.3%), 3-bedroom (19.6%), and 4+ bedroom (5.9%). However, there may be greater pressures on larger dwelling sizes, discussed later in the section when considering lettings. The large proportion of households needing 1-bedroom properties includes older households who may be interested in specialist housing. It also includes young single people who may only be eligible for the single room rate under housing benefit (LHA rates) which may mean they cannot afford 1-bedroom properties and would need shared accommodation.

⁹⁷ <https://www.hart.gov.uk/sites/default/files/2025-03/Housing-Allocations-Policy.pdf>

Table 9-2: Households on Hart Housing Register by band and size of home needed

	Band A	Band B	Band C	Band D	Total
1-bedroom	14	63	559	90	726
2-bedroom	5	32	322	15	374
3-bedroom	6	68	214	1	289
4+ bedroom	3	36	48	0	87
Total	28	199	1,143	106	1,476

Source: Hart District Council

Stage 2: Newly Arising Need for Social/Affordable Rented Housing

9.3.14 Stage 2 of the assessment considers the number of new and existing households who are likely to fall into housing need in the future. This stage of the assessment is based upon:

- Projected household formation and the proportion of these newly forming households unable to rent in the market; and
- Existing households falling into need during the plan period.

9.3.15 The 2022-based household projections estimate the addition of 4,987 new households between 2026 and 2039, or 384 each year. The assessment then estimates the number of these households unable to afford private rent. It assumes the following:

- The cost of renting a 2-bed 30th percentile (proxy for lower quartile) dwelling is used, as this represents a good proxy for all households on the Housing Register.
- It has been assumed that households can spend up to 30% of their gross household income on rent. In practice, households may be able to spend more or less to retain sufficient funds for other essentials (e.g. food and fuel). The addition of Housing Benefit further complicates this assumption, since households who are wholly reliant on benefits for their incomes will spend substantially more than 30% on their rent.
- The range of household incomes in Hart has been modelled using ONS MSOA income data, local authority earnings data, and English Housing Survey data. The range applies to all households in the district and has been adjusted to reflect the incomes of new households which are likely to be lower on average.

9.3.16 On this basis, 31% of new households are unable to afford to rent in the market in Hart. This equates to 204 (rounded) additional households expected to form each year over the plan period and need social/affordable rented housing because they cannot afford market rents.

9.3.17 The second component of the estimate of newly arising need is the number of existing households falling into need. PPG does not provide any guidance on how to calculate this element, or how to ensure that double counting between

new households and existing households does not occur. The two commonly used sources for estimating the number of existing households falling into need are changes in Housing Register figures over time and changes in the number of Housing Benefit or Universal Credit (housing entitlement) claimants.

- 9.3.18 The number of households claiming Housing Benefit or the housing element of Universal Credit provides an indicator for growth in need. The data suggests that over the last 5 years (2021-2026), the number of households claiming benefits relating to housing costs has increased on average by 85 households each year. This figure is used as a proxy estimate of the number of existing households falling into need.

Stage 3: Social/Affordable Rented Housing Supply to Offset Need

- 9.3.19 Stage 3 in the assessment establishes the supply of affordable housing that can be used to offset need. According to the guidance (paragraph 22 of PPG on housing and economic needs assessment, last updated September 2018) this takes into account:

- the number of affordable dwellings that are going to be vacated by current occupiers and are fit for use by other households in need;
- suitable surplus stock (vacant properties); and
- the committed supply of new net affordable homes at the point of the assessment (number and size). Note that this supply is not included in the estimate of need here for reasons discussed below.

- 9.3.20 Table 9-3 sets out the average number of lettings in Hart in the last three years of available data. This data includes both social and affordable rent lettings and includes relets as well as new lettings. Overall, 202 homes were re-let on average between 2023/24 and 2025/26. It is assumed that this supply can be used to offset the needs identified in Stages 1 and 2 of the assessment.

- 9.3.21 Table 9-3 shows that the number of annual lettings decreased between 2023/24 and 2025/26. The greatest proportion of lets over the 3-year period were 2-bedroom properties (45.7%), followed by 1-bedroom (35.0%) and then 3-bedroom (14.9%) dwellings. Just 9 lets of 4+ bedroom dwellings took place over the 3 years.

Table 9-3: Lettings, Hart, 2023/24 – 2025/26

	2023/24	2024/25	2025/26	Total
Studio	4	10	4	18
1-bedroom	101	66	45	212
2-bedroom	89	89	99	277
3-bedroom	27	32	31	90
4+ bedroom	2	4	3	9
Total	223	201	182	606

Source: Hart District Council, AECOM Calculations

- 9.3.22 The PPG does not give any detail on how vacant properties should be treated. Previous government SHMA guidance stated that ‘a certain level of voids is normal and allows for transfers and works on properties. However, if the rate is in excess of approximately 3% and properties are vacant for considerable periods of time, these should be counted as surplus stock.’ As vacant properties account for less than 3% of the affordable/social rented stock in Hart, they are not considered as part of the available supply.
- 9.3.23 The estimated supply of affordable units in AECOM’s calculation (Table 9-1) does not contain the committed supply of affordable units over the assessment period. The PPG is misleading in this respect since the aim is to establish the need for affordable homes so that Local Plans can develop appropriate policies. If future supply is included and used to offset identified need it risks confusing the picture. This would mean the assessment only identified net *additional* affordable housing needs, over and above those provided for by the application of current policies. In practice, LPAs need to know their full affordable housing need and to consider what level and mix of affordable housing is required to meet it. Furthermore, future commitments are uncertain – not all planning permissions will be built out – so the inclusion of future commitments risks underestimating overall needs.
- 9.3.24 The estimate of need for social/affordable rented housing (in Table 9-1) also excludes any supply of affordable home ownership products such as shared ownership. These options are likely to be unaffordable to the households identified in this part of the affordable housing needs assessment, who are in acute housing need and likely to need some form of rented accommodation. The need for affordable home ownership is considered separately in this section.
- 9.3.25 Finally, our estimate of need for social/affordable rented housing also excludes the supply of private rented properties which may provide affordable rented accommodation when households are in receipt of Housing Benefit or Universal Credit (housing entitlement). Unlike the re-lets within the social/affordable rented sector, these private rented dwellings are not used to offset identified need. Whether the PRS should play an active role in meeting housing needs, either by addressing the need for subsidised rental accommodation or by deeming it as a suitable alternative for those who aspire to home ownership or both, is a policy decision for the Council.
- 9.3.26 The gap between PRS rents and what households can claim in housing benefit under Local Housing Allowance rates means that where households are living in the PRS, many are likely to be topping up their rent, stretching themselves further financially and reducing disposable income for other essentials such as food and energy costs. This is analysed further when considering the interaction of rents, incomes, and benefits in the assessment of the split between Social Rent and Affordable Rent.

9.4 Size of Social/Affordable Rented Homes Needed

- 9.4.1 Section 6 provides a top down estimate of the need for different sizes of home by tenure based on expected long term demographic change and occupancy patterns.
- 9.4.2 Analysis of the Hart Housing Register and pattern of lettings in recent years provides bottom up evidence of the need for social/affordable rented homes by size. This provides evidence of the actual current needs of applicants and their likelihood of securing housing based on the pattern and frequency of lettings within the stock. AECOM consider this a strong indication of the mix of social/affordable rented housing that is needed in the short term to meet current pressures.
- 9.4.3 Table 9-4 presents data on the number and proportion of households on the housing register by the size of property they need to meet their basic needs. Across all applicants, the largest number of households need 1-bedroom properties (49.2%), followed by 2-bedrooms (25.3%). It is important to note that the need for these small properties includes single people and couples (1 bedroom). Families with up to two young children are only likely to be eligible for 2-bedroom properties. The apparent high need for the smallest properties therefore reflects strict allocation policies which limit households to properties that meet their basic needs. It also include older households, some of whom do not have immediate needs but anticipate the need to move in the short-medium term, and young single people (under 35) who need a 1-bedroom property but may only be eligible for the single room rate under the Local Housing Allowance and so may need shared accommodation.
- 9.4.4 The need is skewed most greatly towards the smallest properties in Band D, with 84.9% of Band D applicants eligible for a 1-bedroom property. Band A and Band C have similar proportions of 1-bedroom need (c.50%), with Band A having a greater proportional need for 3+ bedroom dwellings (32.1%) than Band C applicants (22.9%). There is a more balanced split across the bedroom sizes for Band B applicants, with the greatest need for 3-bedroom dwellings (34.2%), followed by 1-bedroom dwellings (31.7%).

Table 9-4: Housing Register number of bedrooms required, April 2026

	Band A	Band B	Band C	Band D	Total
1-bedroom	14 (50.0%)	63 (31.7%)	559 (48.9%)	90 (84.9%)	726 (49.2%)
2-bedroom	5 (17.9%)	32 (16.1%)	322 (28.2%)	15 (14.2%)	374 (25.3%)
3-bedroom	6 (21.4%)	68 (34.2%)	214 (18.7%)	1 (0.9%)	289 (19.6%)
4+ bedroom	3 (10.7%)	36 (18.1%)	48 (4.2%)	0 (0.0%)	87 (5.9%)
Total	28 (100.0%)	199 (100.0%)	1,143 (100.0%)	106 (100.0%)	1,476 (100.0%)

Source: Hart District Council

- 9.4.5 For comparison, Table 9-5 presents data on the pattern of lettings in the social/affordable rented stock by size of property. The greatest proportion of lettings over the last 3 years have been for 2-bedroom dwellings (45.7%), suitable for small families or families with young children. This was followed by 1-bedroom dwellings (35.0%), with 14.9% of lettings for 3-bedroom dwellings. On average, there were just 3 lets per year of larger family housing with 4 or more bedrooms.

Table 9-5: Lettings by size of property (3-year average)

Lettings	Number	%
Room/Studio	6	3.0%
1-bedroom	71	35.0%
2-bedroom	92	45.7%
3-bedroom	30	14.9%
4+ bedroom	3	1.5%
Total	202	-

Source: Hart District Council

- 9.4.6 It is useful to compare the size profile of need with the pattern of lettings to calculate a ratio of households to available homes (Table 9-6). This gives a good indication of the pressure on different sized properties and can be used to inform policies on size mix, particularly in the short term. Table 9-6 shows the ratio of households in each band to the number of all properties let by size. It is important to note that the need in each band is compared to the totality of lettings rather than just the number of lettings that might be expected for a given band. Across all applicants, there are around 8 households waiting for every property that becomes available.

Table 9-6: Ratio of households to lettings by size of property

	Band A	Band B	Band C	Band D	A +B	All
1-bedroom	0.2	0.8	7.3	1.2	1.0	16.1
2-bedroom	0.1	0.3	3.5	0.2	0.4	3.8
3-bedroom	0.2	2.3	30.0	0.0	2.5	9.3
4+ bedroom	1.0	12.0	16.0	0.0	13.0	29.0
All Sizes						8.3

Source: Hart District Council, AECOM Calculations

- 9.4.7 However, this pressure is not evenly distributed across the bands and dwelling sizes. Both 1-bedroom and 4+ bedroom dwellings have 16 and 29 households waiting for every property that becomes available, a common pattern in many authorities. This reflects the bunching of households eligible for 1-bedroom dwellings due to allocation policies that limit households to properties that meet their minimum requirements. The pressure on 4+ bedroom properties reflects the fact that very few larger properties become available for relet or are built, meaning that larger family households may wait many years to be housed.

- 9.4.8 It is also useful to consider the level of bidding from households on the housing register for each property that becomes available. In 2025/26, the highest number of bids on average were for 3-bedroom properties, with 1,2 and 4 bedroom properties experiencing similar levels. This does not reveal the priority of bidders, rather the volume of bids, but gives an indication of where the pressures are from those who are actively bidding.
- 9.4.9 Focusing on households in the highest priority bands (A and B), which are those households most likely to be housed in the short term, suggests that the greatest pressure remains on 4+ bedroom properties. Even though the number of lettings in any year is likely to be sufficient to house those in Band A and B, very few of these lettings are 4-bed properties and as such, there are 13 larger family households waiting for every suitable property. As the ratio of households to lettings is at or below 1 for both 1-beds and 2-beds, assuming all are allocated to Band A and B households, this suggests limited pressure on these properties from the highest priority band applicants.
- 9.4.10 It is important to stress that the largest number of applicant households fall into Band C. Whilst this is a lower priority band than A and B, households still experience housing needs which need to be addressed, including overcrowding. There is substantial pressure on all sizes of properties when compared to Band C needs. However, the highest pressure is on 3-bed properties, with 30 households waiting for every available property available through lettings.

9.5 Distinguishing Between the Need for Social and Affordable Rented Homes

- 9.5.1 The NPPF 2026 policy HO5 includes the requirement that development plans set out the minimum proportion of Social Rent to be provided as part of the mix of affordable housing. To develop policy in this area it is helpful to look at the affordability of Social Rent and Affordable Rent to different households. AECOM undertook a detailed study on this subject in 2024 which informed Hart District Council's Affordable Homes in New Developments SPD (March 2025).
- 9.5.2 This sub-section summarises the available evidence to inform Local Plan policy on the proportion of Social Rented housing that might be needed within Hart. It considers the need for Social Rent from the perspective of affordability. It does not take into account the viability of delivering Social Rented housing in comparison to Affordable Rented housing or other tenures. It also does not consider the appetite for Registered Providers or others to develop and manage Social Rented housing. These wider considerations would need to feed into any policy on the proportion of Social Rented housing which is sought through Local Plan policy.
- 9.5.3 AECOM's Social and Affordable Rent Affordability Assessment (October 2024) found that just over 50% of households on Hart's housing register at the time cannot afford Affordable Rent for the dwelling size they need when spending

up to 40% of their income on rent. Whilst income data for households on the waiting list is not comprehensive and needs to be verified by detailed financial assessment of the applicant this nevertheless gives an indication of the low incomes of these households and the challenge in affording even Affordable Rent. Alongside this analysis, AECOM developed hypothetical scenarios which demonstrate how different households may or may not be able to afford social or affordable rents in Hart. These scenarios allowed for a detailed assessment of how earnings and benefits interact under different rent levels.

9.5.4 An important factor to consider when discussing income from benefits is the benefits cap, which is a limit on the total amount of benefit anyone can receive and impact on the amount of housing benefit that households can claim. It applies to most people aged 16 or over who have not yet reached State Pension age. The benefit caps outside of Greater London are:

- For a couple (with or without children) – £423.46 per week (£22,020 per annum);
- For a single parent (with children in the home) – £423.46 per week (£22,020 per annum); and
- For a single adult - £283.71 per week (£14,753 per annum)

9.5.5 AECOM has developed scenarios based on typical household types to demonstrate in more detail the interaction between earnings and benefits, and how the affordability of different rented tenures varies within these scenarios. The analysis is not exhaustive as household circumstances are varied. Case studies for hypothetical households are necessary because the permutations are endless and generalisations will be inaccurate. This analysis presents scenarios including families with children, single people, and older couples. In each scenario three rented tenures are compared (social rent, affordable rent, private rent) to examine affordability under the same earnings and benefits entitlements. Each household circumstance has two paired scenarios to look at the impact of earnings in addition to benefits as well as households solely reliant on benefits.

9.5.6 There are three Broad Rental Market Areas (BRMAs) which cover Hart District – Blackwater Valley, Basingstoke, and Reading. Local Housing Allowance rates, discussed in Section 8, are set within these geographic areas and so the interaction of rents and benefits will vary between them. As Reading BRMA only covers a very small part of the district, the scenarios have been undertaken for Blackwater Valley BRMA and Basingstoke BRMA.

9.5.7 As an example, Table 9-7 shows the results a single parent household with two children, with the parent not working/earning in the first scenario (1b), and the second scenario (1b) showing the same household but where the parent is currently earning lower quartile wages. Within each sub-scenario the impact of different tenure costs on the proportion of the household's income spent on rent and their disposable income after rent is shown. The remaining scenarios

– a couple with three children, a single person (aged 30), and an older couple (aged 65+) are presented in Appendix E (Tables E1 to E3).

9.5.8 There are a number of assumptions made within the scenarios and subsequent calculations:

- Overall net income is used rather than gross as benefit income is a net figure. This enables the different sources of income to be added together where households are working and claiming benefits.
- It is assumed that the hypothetical household in question can claim for the LHA rate for the size of home they need. A benefits calculator is then used to take benefit caps and other flexibilities into account.
- Whilst the key rental affordability threshold discussed in the analysis in previous sections of this report is that affordability is broadly achieved when households spend a maximum of 30% of their gross income on housing, in these scenarios it is more realistic to use 40% due to the use of net (rather than pre-tax) incomes.
- It is assumed that individuals in each household are not disabled or caring for others (thereby entitled to other benefits). This is to limit the variables and reduce complexity for these illustrative scenarios. Ultimately, some households will have more complex needs, with increased benefits entitlements reflecting them. This is particularly the case with some disability benefits, some of which are not subject to the benefits cap. Households with increased benefits (e.g. through disability benefits) are not necessarily better off due to increased costs associated with disabilities.
- To attempt to understand the implications of the disposable income after rent to households, the average spend on food and energy for the relevant household size has been estimated. For the household in illustrative scenario 1, it is estimated that energy bills would be £33.83⁹⁸ a week and food bills £54.40⁹⁹ a week, totalling a minimum £88.23 a week for food and energy. There are other essential costs which have not been factored in here (e.g. transport, clothing, broadband, water).

⁹⁸ British Gas average between direct debit, pay on receipt, and pay as you go - <https://www.britishgas.co.uk/energy/guides/average-bill.html>

⁹⁹ Average weekly household expenditure, 2023, ONS

Table 9-7: Benefit Scenario 1 – Single Parent Household with 2 Children

	Blackwater Valley BRMA						Basingstoke BRMA					
	Scenario 1a: Single parent, 2 children, no earnings			Scenario 1b: Single parent, 2 children, LQ earnings			Scenario 1a: Single parent, 2 children, no earnings			Scenario 1b: Single parent, 2 children, LQ earnings		
	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS
Bedroom entitlement	2	2	2	2	2	2	2	2	2	2	2	2
Earnings (gross, weekly)	£0.00	£0.00	£0.00	£493.38	£493.38	£493.38	£0.00	£0.00	£0.00	£493.38	£493.38	£493.38
Earnings (net, weekly)	£0.00	£0.00	£0.00	£422.92	£422.92	£422.92	£0.00	£0.00	£0.00	£422.92	£422.92	£422.92
LHA rate (max)	£230.14	£230.14	£230.14	£230.14	£230.14	£230.14	£218.63	£218.63	£218.63	£218.63	£218.63	£218.63
Actual rent (weekly)	£214.12	£144.56	£302.33	£214.12	£144.56	£302.33	£214.12	£144.56	£301.16	£214.12	£144.56	£301.16
Total benefit income, of which:	£454.44	£454.44	£454.44	£318.97	£249.41	£335.62	£454.36	£454.36	£454.36	£318.97	£249.41	£324.08
- Universal Credit ¹⁰⁰	£378.51	£378.51	£378.51	£274.02	£204.46	£290.67	£378.51	£378.51	£378.51	£274.02	£204.46	£279.13
- Child benefit	£44.95	£44.95	£44.95	£44.95	£44.95	£44.95	£44.95	£44.95	£44.95	£44.95	£44.95	£44.95
- Council Tax Support	£30.98	£30.98	£30.98	£0.00	£0.00	£0.00	£30.90	£30.90	£30.90	£0.00	£0.00	£0.00
Total net income (earnings and benefits excluding CTS ¹⁰¹)	£423.46	£423.46	£423.46	£741.89	£672.33	£758.54	£423.46	£423.46	£423.46	£741.89	£672.33	£747.00
% net income spent on rent	51%	34%	71%	29%	22%	40%	51%	34%	71%	29%	22%	40%
Disposable income after rent (weekly)	£209.34	£278.90	£121.13	£527.77	£527.77	£456.21	£209.34	£278.90	£122.30	£527.77	£527.77	£445.84

Source: ONS, VOA, Rightmove.co.uk, AECOM Calculations

¹⁰⁰ Universal Credit is used in these scenarios as they are assumed to be new claims. Some households in Hart will be claiming legacy benefits and will not yet be moved on to Universal Credit. The amount claimed should be the same overall.

¹⁰¹ Council Tax Support amount is excluded from the net income + benefit amount as it is assumed this would be spent directly on Council Tax and would not be available for other living expenses.

9.5.9 Key observations from the analysis of the interaction of household type, earnings, and benefits presented in Table 9-7 above and other scenarios in Appendix E are outlined below:

- There are a number of scenarios where households spend a greater proportion of their income on rent in Affordable Rented homes compared to Social Rented housing. However, in some cases, this does not mean those in Social Rented homes are better off, rather their benefit flexes according to the rent, resulting in the same disposable income as the household in Affordable Rented housing. This highlights that focusing on the proportion of income spent on rent may be misleading in determining the affordability of different tenures.
- Social Rented housing does improve the financial circumstances of households affected by the benefit cap. These households are reliant on benefits (they do not have other income e.g. from earnings) and when these benefits are capped, it leaves them with insufficient income to afford their rent and other living costs. This is particularly the case for family households, illustrated by Scenarios 1 and 2.
- All of the households living in the private rented sector would be better off in Social Rented housing. Each type of household would see an improvement in their disposable income if they were able to move from the private rent to Social Rent. This is also true for a move from private rented to Affordable Rented housing but in some cases the impact would be more limited.
- The scenario of the older couple who are reliant on the state pension but have no other income suggests that there is no difference in disposable income between Social and Affordable Rent. This is because housing benefit flexes according to the rent level and they are not subject to the benefit cap.

9.5.10 Using the evidence in the AECOM study in 2024 alongside viability testing, Hart District Council published an Affordable Homes in New Developments SPD. The SPD requires that all affordable housing for rent is provided as Social Rent. The SPD allows some flexibility where this requirement is not financially viable and allows the council to negotiate with the application to secure the optimum quantify and mix of affordable housing that is viable and meets identified housing needs. There are a number of benefits with this approach:

- In an ideal world it would be advantageous to deliver the lowest rents possible. This option is likely to be the best way to ensure those that need Social Rent can access it.
- It would increase the stock of Social Rented housing over time, future-proofing the stock by allowing more households to potentially benefit in the long run. This may be relevant if households are able to raise their

earnings, gain more disposable incomes and become less reliant on benefits.

- It would provide clarity in planning policy to developers and Registered Providers so that they can factor this into their business models.

9.6 Households in Need of Affordable Home Ownership

- 9.6.1 There is no policy in NPPF or guidance in PPG on how to quantify need or demand from households who can rent but would prefer to buy. However, products aimed at these households are included in the definition of affordable housing in Annex B of the NPPF. AECOM has developed a model for estimating the scale of need from these households. It is based on the approach to estimating more traditional forms of housing need – i.e. households who need social/affordable rent. This includes a process of identifying a backlog, estimating newly arising needs over the plan period, and offsetting these against any suitable affordable housing supply through resales and surplus stock (not including commitments for new supply to be build).
- 9.6.2 AECOM's estimate suggests that under our baseline estimate there may be around 282 households each year in Hart who can afford to rent but cannot afford to buy and would prefer to do so (over the period 2026-39). The annual figure would equate to 221 over the period 2026-2044 as this would allow the current backlog to be spread over a longer period and reflects slightly lower projected household growth over this longer period. It is important to remember that most of these households are likely to be adequately housed in the private rented sector. They do not lack housing in the same way as those households who cannot afford to rent.
- 9.6.3 This is a baseline estimate, assuming that household growth over the plan period is in line with ONS-2022 based household projections. These projections expect an additional 384 households in Hart each year and this figure feeds into the estimate of newly arising need.
- 9.6.4 Under the scenario where the Standard Method housing need figure is adopted as the housing requirement and then delivered over the plan period, this would imply household growth of 777 households each year. If this level of household growth feeds into the estimate of newly arising need, the shortfall of affordable home ownership homes would be 412 households per annum (2026-2039) or 355 households (per annum), over the longer period 2026-2044.
- 9.6.5 The estimate in Table 9-8 suggests there is substantial potential demand from households for affordable home ownership products. However, this potential demand does not necessarily equate to the need or demand for 282 affordable home ownership homes each year as these households have some options within the market. For example, they may decide to stay in the PRS for longer

to save funds for a deposit, with the expectation of being able to buy in the open market at a later date or with the support of family. Alternatively, they may choose to move to a cheaper location where they are able to buy in the open market. The Government's recent announcement that a new first time buyer support scheme 'Your First Home' will allow households to access home ownership with a 2.5% deposit through access to a loan worth 20% of the property value. Once introduced, as with other first time buyer support schemes e.g. New Build Home Buy, this is likely to extend home ownership to some of the households identified in this assessment and, in turn, reduce the estimated level of potential demand for affordable home ownership. As such, the estimates of the potential demand for affordable home ownership can be regarded as a maximum.

Table 8-8: Need or Potential Demand for Affordable Home Ownership (Baseline)

Stage and Step in Calculation	Total	Description and sources
STAGE 1: CURRENT NEED		
1.1 Current number of private renters in Hart	5,447	2021 Census – includes those living rent free (5 households)
1.2 Number of private renters on housing benefit in LA	1,303	February 2026 PRS households claiming Housing Benefit or Universal Credit (housing entitlement)
1.3 Number of private renters outside home buying age group	565	Renters aged 24 and under and 65+ not on Housing Benefit or Universal Credit (housing entitlement)
1.4 Renting by choice	895	$(1.1 - 1.2 - 1.3) * 25\%$
1.4 Current potential demand (households)	2,684	$1.1 - 1.2 - 1.3 - 1.4$
1.5 Per annum	206	1.4 / plan period 2026-2039
STAGE 2: NEWLY ARISING NEED		
2.1 New household formation (per annum)	383.6	Net household growth per annum 2026-2044, 2022-based household projections (10-year migration dataset)
2.2 % of households unable to buy but able to rent	33.0%	Proportion of households who can afford 2-bedroom 30 th percentile rents but not lower quartile purchase (income range £51k - £89k)
2.3 Total newly arising need per annum	127	$2.1 * 2.2$
STAGE 3: SUPPLY OF AFFORDABLE HOUSING		
3.1 Stock of affordable home ownership	1,017	742 2021 Census stock + 275 completions 2021/22 – 2025/26
3.2 Supply - resales	51	Supply through resales each year assuming 5% of stock sold each year
NET SHORTFALL PER ANNUM		
Overall shortfall per annum	282	$(1.5 + 2.3) - 3.2$
Overall shortfall over the plan period	5,080	Above * plan period 2026-2039

Source: As per table

- 9.6.6 It is important to state that most of those households identified as unable to afford to buy are living in the private rented sector. As with the estimate of households unable to rent, any PRS properties released as these households access affordable housing are not counted as supply which can be offset to meet need.

- 9.6.7 The Council may make policy decisions to use these properties to meet needs, either for those who cannot afford to rent or those unable to buy. It is important to note that these PRS properties may provide suitable housing for other groups (those that rent out of choice) or may be sold on the open market in future and so become available for home buyers. This assessment does not take account of these potential market adjustments, some of which may improve affordability in the market more generally (and in turn reduce affordable housing needs).
- 9.6.8 The rest of this section sets out how the estimate of the need for affordable home ownership products is calculated.

Current Households Who Cannot Afford to Buy

- 9.6.9 Stage 1 in Table 9-8 identifies the level of ‘current need’ in a similar way to how the assessment in Table 9-1 identifies current need for affordable rented homes. This step recognises that the majority of households living in the private rented sector would prefer to access home ownership. This is supported consistently in national surveys, most recently one undertaken by IPSOS Mori that confirmed that 80% of all households aspire to own their own home. At the national level, home ownership rates have fallen in recent years as affordability has declined, particularly amongst younger households, and there is a significant backlog of households who have been priced out of home ownership.
- 9.6.10 The approach taken here to estimate this backlog is to identify the current size of the private rented sector in Hart using Census data from 2021. There are 5,447 households living in private rented accommodation or living rent free (the latter group is just 5 households).
- 9.6.11 It would be inappropriate to assume all the PRS households identified in Table 9-8 are potential homeowners. The estimate of current need, or potential demand, subtracts households who are Housing Benefit or Universal Credit (housing entitlement) claimants. It also discounts households in the youngest and oldest age groups (that are not claiming housing related benefits as this group has already been discounted) because they are unlikely to be able to buy. Finally, a proportion of households will rent out of choice for the flexibility it provides. In summary the following households were discounted:
- Housing Benefit / Universal Credit (housing entitlement) claimants: there were 1,303 households supported by these benefits in the private rented sector in Hart in 2026 according to StatXplore data. These households are unable to afford market rents and so cannot be considered as part of the group who ‘can rent but can’t buy’ and are unlikely to represent potential demand for affordable home ownership.
 - Youngest and oldest households: AECOM has assumed that households in the PRS age 24 and under are unlikely to be able to buy at the present time. Some of these households are students and others will not have had sufficient time to build a deposit. The average age of first-time buyers

nationally is 30+. Whilst it might be desirable for younger households to afford to buy, AECOM consider it is reasonable to discount the youngest group. This does not mean some of these households should not access affordable home ownership. Rather, it is a reasonable assumption that most will not yet be in a position to do so. In 2021 this group included to 237 households. AECOM has also discounted households living in the PRS who are aged 65 and over. The vast majority of these households will not be seeking to buy and may not be able to obtain a mortgage. It is assumed that these households will remain in the PRS (506 households). The total number of renting households discounted due to age is therefore 565 and those within these age groups estimated to be claiming Housing Benefit or Universal Credit (housing entitlement) are removed to avoid double counting with the above deduction.

- Some households rent out of choice: whilst national studies suggest that the vast majority of households aspire to own a home, around 20-25% of households generally do not wish to buy. Households will rent out of choice at certain stages of their lives for flexibility, or because they are recent in-migrants to the area (particularly if moving from overseas). This would mean that of the remaining 3,579 PRS households (after the above deductions are applied), 895 might be expected to rent by choice.

9.6.12 When these groups are discounted from the total number of households in the PRS in Hart, this suggests there are 2,684 households who may be considered potential homeowners. They can afford private rents but are unable to afford home ownership. A substantial proportion are likely to have savings which are insufficient to afford a deposit. These households represent 'current need' for affordable home ownership. If their needs were addressed over the plan period (2026-2039) this would equate to 206 households each year.

9.6.13 Table 9-8 also estimates newly arising need for affordable home ownership as households form over the plan period. 384 households are estimated to form each year over the plan period according to household projections. AECOM has estimated that 33% of these new households are able to afford to rent but unable to buy on the basis of rents, house prices, and local incomes, as presented in Section 8. As such, there may be 127 households forming each year who need or want affordable home ownership.

9.6.14 The estimate then discounts the annual supply of affordable home ownership property resales from the annual need (or potential demand). Supply is assumed to be around 51 homes per annum based on an assumed level of resales (5%) within the existing stock of affordable home ownership properties in Hart (1,017 largely shared ownership properties).

9.6.15 It is important to emphasise that private rented properties are not considered suitable supply to meet this need because it is assumed these households would prefer home ownership. However, these households do have other

choices in the market and do not lack housing. Rather, they would prefer a different tenure.

- 9.6.16 It is also possible that some of the households identified in this estimate would be able to afford to buy in the open market if they are able to access properties priced below lower quartile levels. The supply of properties at the cheapest end of the market may therefore meet some of this need. It is difficult to quantify this accurately without more detailed data on the incomes and savings of households living in the PRS. Indeed, savings are likely to be a key barrier amongst many of these households given the requirement for deposits to access home ownership. It is also uncertain to what extent the cheapest properties for sale would be a suitable size or condition to meet these needs. As such, lower quartile prices are used as the benchmark for affordability for this group and this is considered a reasonable assumption to make. This may, however, result in some over-estimation of the scale of potential demand for affordable home ownership. However, AECOM would emphasise that this should be expressed as potential demand rather than a precise level of need. Therefore, the estimate may be regarded as an upper estimate of potential demand.
- 9.6.17 The Hampshire Share to Buy Register (March 2026) gives some indication of demand for affordable home ownership options. Across the district there were 584 active registrants, with 78.86% of those living in Hart (c. 461 registrants). However, details around current living circumstances, income, and savings are only available at county level.
- 9.6.18 Vivid (the main registered provider in Hart) record the number of applicants on their database with an interest in shared ownership in Hart. It is not clear whether these households would have the means to purchase a shared ownership property (income or savings) or how the database is maintained (e.g. whether applicants are removed when they find suitable housing). However, it still provides an indication of demand, and the type of demand, with 790 applicants interested in shared ownership in the district. This figure can be seen as the scale of the active market for affordable homeownership, compared to the full potential market (2,684 households identified within the PRS who may be eligible).
- 9.6.19 This is broken down by type and size (although applicants were able to select multiple options) in Table 9-9 below. Houses are clearly favoured, but there is also considerable demand for shared ownership bungalows. In terms of dwelling size, demand appears to be for smaller and mid-sized family homes with 2-3 bedrooms. This aligns with AECOM's size mix modelling in Section 6, which suggests a focus on these dwelling sizes, with an indicative range of 35-45% 2-bedroom and 30-40% 3-bedroom affordable home ownership dwellings between 2021 and 2044.

Table 9-9: Vivid shared ownership applicant database

Type	Bedrooms
Any – 263 – 33.3%	Any – 127 – 16.1%
Bungalow – 169 – 21.4%	1-bedroom - 127 – 16.1%
Flat/Maisonette – 225 – 28.5%	2-bedroom – 459 – 58.1%
House – 527 – 66.7%	3-bedroom – 409 – 51.8%
	4-bedroom – 116 – 14.7%

Source: Hart District Council

The Role of the Private Rented Sector

- 9.6.20 AECOM has excluded supply from any private rented properties that would be released by households identified in this assessment. However, Hart District Council may decide that it is appropriate to use this supply to offset need for social/affordable or affordable home ownership or both.
- 9.6.21 A substantial proportion of households in housing need as defined above (in both groups) are accommodated in the PRS. If households currently living in the PRS who have been identified by this assessment as potential affordable homeowners were to be able to access affordable home ownership, this would release 149 private rented properties each year. An additional 97 PRS properties might be released each year if households living in the PRS identified in the estimate of the need for social/affordable rent are provided with affordable housing. Together, this PRS supply might equate to around 246 properties each year if all households who need some form of affordable housing are provided with it.
- 9.6.22 These properties could either be let to other households needing rented housing, resold on the market for owner occupation, or even sold to registered providers for letting at affordable/social rents. It is not possible to be certain what the precise effect would be, but the release of PRS properties will have a role in meeting overall needs.

9.7 Overall Need for Affordable Housing

- 9.7.1 It is estimated that there is a need for at least 182 social/affordable rented homes each year in Hart over the plan period (2026-2039) to meet the needs of households that are unable to afford to rent in the market.
- 9.7.2 Within the district, it is additionally estimated that there are 282 households each year who are able to afford market rents but are unable to access home ownership. This is an annualised figure which takes account of potential homeowners currently living in the private rented sector and new households likely to form in the future. These households largely aspire to home ownership, in part, to achieve greater tenure security, particularly for families, but also because of the financial stability and ability to build up equity through home ownership.
- 9.7.3 Taken together, these estimates suggest the need for 465 (rounded) affordable homes per annum over the plan period (2026-2039). This

represents the baseline estimate which uses 2022-based household projections as the input into newly arising need.

- 9.7.4 The overall housing need figure for Hart as calculated by the Government's Standard Method is 804 homes per annum (see Section 5). This is not the housing requirement for the district, rather the starting point for determining a requirement. However, if the Standard Method figure was delivered as a housing requirement this would result in a higher level of household growth (777 households each year) which would feed through into additional need for affordable housing. Under the scenario where Standard Method levels of housing supply are delivered over the plan period, this would result in an estimated need for 716 affordable homes each year, equating to 89% of the Standard Method figure. This is comprised of need for 304 social/affordable rented homes (38% of the Standard Method figure) and potential demand for 412 affordable home ownership homes (51% of the Standard Method figure). This is broken down in Table 9-10.

Table 9-10: Overall Need for Affordable Housing and Standard Method Comparison (per annum, rounded figures))

	Baseline Scenario: Household Projections (384 households)			Standard Method Scenario (777 households)		
	Affordable / Social Rent	Affordable Home Ownership	Total	Affordable / Social Rent	Affordable Home Ownership	Total
Current Need	181	206	387	181	206	387
Newly Arising Need	204	127	331	326	256	582
Supply	202	51	253	202	51	253
Net Shortfall	182	282	465	304	412	716
Net Shortfall (2026-2039)	3,283	5,080	8,362	5,476	7,415	12,891

Source: AECOM Calculations

- 9.7.5 If it were possible to deliver 716 new affordable homes each year through new development, this would release a substantial number of properties in the private rented sector which are currently occupied by households in need of affordable housing. AECOM estimate that around 246 PRS properties would be released each year. It is possible that some of this PRS supply could be used to accommodate households in need of affordable rented housing supported by Housing Benefit / Universal Credit, or could be sold in the open market to increase the supply of properties available to potential home-owners, or sold to social landlords looking to buy up existing properties to let at affordable rents.
- 9.7.6 If all of the 246 PRS properties could be used to address identified affordable housing needs, the net effect would be to reduce the need for affordable housing to 219 homes per annum (baseline estimate) or 470 homes per annum (Standard Method estimate). It is important to emphasise that this is a theoretical illustration and it is unlikely that the PRS will be a suitable housing

solution for many households in acute need because of the insecurity of this tenure and the fact that housing benefit (LHA rates) does not cover the cost of private rents in Hart.

9.8 Summary

- 9.8.1 The assessment identifies a significant need for Affordable Housing in Hart across both social/affordable rented and affordable home ownership tenures. Based on projected household growth (ONS 2022 based household projections), there is a net requirement for approximately 182 social/affordable rented homes per annum and a potential demand for around 282 affordable home ownership properties per annum, resulting in a total Affordable Housing need of approximately 465 homes per annum over the 2026–2039 plan period. This is the baseline estimate based on projected household growth.
- 9.8.2 Under the Standard Method scenario, household growth would be higher and would translate into an estimated need for 304 social/affordable rented homes and 412 affordable home ownership homes per annum. Social/affordable rented needs under this scenario would equate to 38% of Hart's Standard Method figure (804 dwellings per annum). The potential demand for affordable home ownership would equate to an additional 51% of Hart's Standard method figure.
- 9.8.3 These estimates underline the need to maximise the delivery of Affordable Homes over the plan period. Hart's adopted Local Plan policy H2 requires 65% of new Affordable Housing to be delivered as social/affordable rent within the overall quota of 40% Affordable Housing on qualifying sites. The evidence in this HEDNA suggests that to deliver the estimated need for social/affordable rented homes from households in acute housing need, the majority of new Affordable Housing will need to be delivered as this tenure.
- 9.8.4 The size and mix of new Affordable Homes (particularly social/affordable rented) needs to consider both the long term projections of need (Section 6) which indicate higher proportions of smaller and modest sized homes (1-3 beds) as well as Hart's Housing Register data which indicates current pressure on larger family-sized homes. The latter reflects bidding pressures (highest on 3 bedroom properties) and the limited turnover of affordable housing stock (lowest for 4 bedroom properties). The limited availability of larger affordable rented homes creates significant challenges for families requiring three and four-bedroom accommodation.
- 9.8.5 The analysis also indicates that households on the lowest incomes, particularly larger households affected by welfare benefit caps may experience affordability challenges even in Affordable Rented housing. The analysis in this report and a more detailed study undertaken for Hart by AECOM in 2024 'Social and Affordable Rent Affordability Assessment' provides evidence to support the Council's approach outlined in its Affordable Homes in New Developments SPD (2025) which seeks all new affordable housing which is provided for rent as Social Rented housing.

10. Specialist Housing for Older People

10.1 Introduction

- 10.1.1 This section considers the specific housing needs of older people in Hart, focusing on specialist housing for older people, but recognising that the majority of older people will live in the mainstream housing stock. As well as examining the need for specialist housing for older people in different tenures, it also briefly explores the need for care home accommodation

10.2 Older People and Older Persons' Housing

- 10.2.1 The analysis of specialist older persons housing need presents data on people aged 65 and over, reflecting traditional retirement age in the past as well as aged 75 and over (in line with the Housing Learning Improvement Network's SHOP toolkit). However, it is also relevant to examine the size of the oldest population (aged 85 and over) as the need for support and care typically increases with age, with most of those in the latter age group likely to need care or support at some stage.
- 10.2.2 People's experience of aging depends on a number of factors, including their health, lifestyle, and relationship with work. Some people live healthy and active lives into old age, whilst others may require support and much earlier in their lives. In addition, some individuals or households will look to age independently and remain in their own home, whilst others will be interested in moving to a suitable home closer to services or family.
- 10.2.3 Because of the wide variation in the level of support required by the older population, as well as differing financial capabilities, the estimates of need presented should be treated with caution. They are a broad representation of the scale of potential need rather than a requirement that should be met.
- 10.2.4 There is a spectrum of accommodation that may be suitable for older people, depending on their needs. The level of care associated with different specialist housing schemes is broadly categorised, from highest to lowest level of care, as follows:
- Specialist schemes that have 24-hour on-site care and support, typically including on-site catering (e.g. extra-care, assisted living, flexicare, enhanced care);
 - Specialist housing designed with a relevant group in mind, typically not including care or support on-site at all times of day (e.g. sheltered housing);
 - Mainstream housing that is adaptable or capable of adaption to enable independent living. Mainstream housing can often be used as a substitute for specialist housing where appropriate care or support can be provided in the home.

10.2.5 This section focuses on the need for housing (i.e. Use Class C3 (private dwellings) in the planning system). Use Class C2 residences (institutions which can include some care homes for older people) are largely outside the scope, although are briefly touched on, with estimates for the likely need for residential care beds and nursing care beds over the plan period.

10.2.6 There can be some blurring between Use Class C2 and C3 with care accommodation. As a general guide, the characteristics of C3 specialist accommodation private dwellings (as opposed to C2 institutional accommodation) usually include:

- A self-contained dwelling with its own front door;
- Care is made available on an individual basis with care and support staff attending an individual's personal dwelling;
- Some residents may live in the accommodation without having care needs or accessing care; and
- The units could be offered for sale on the open market¹⁰²

10.3 Older People in Hart

10.3.1 The starting point for understanding the need for specialist housing for older people in Hart is understanding the size of the older population in Hart and the characteristics of that population. Table 10-1 shows the age of individuals in Hart, aged 65+, 75+, and 85, at the time of the 2021 Census and projected to 2039 and 2044. This shows that the older population is projected to grow significantly during the plan period (to 2039).

10.3.2 It is projected that by 2039, just over a quarter of the Hart population will be aged 65 and over, compared to under 20% in 2021. The number of people aged 75+ is projected to increase by 57.8% between 2021 and 2039, whilst those aged 85+ are expected to more than double. This increase in the older population is likely to correspond with a greater need for specialist housing for older people, although this is dependent to an extent on the health of the population.

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https://www.housinglin.org.uk/assets/Resources/Housing/Support_materials/Viewpoints/Viewpoint_20_Planning_Use_Classes.pdf

Table 10-1: Current and projected older population, Hart

Age Group	2021	2039	2044
All ages	99,408	108,595	111,017
65+	19,574 (19.7%)	27,463 (25.3%)	28,395 (25.6%)
75+	9,665 (9.7%)	15,254 (14.0%)	16,735 (15.1%)
85+	2,665 (2.7%)	5,512 (5.1%)	5,928 (5.3%)

Source: 2021 Census, ONS SNPP 2022-based

10.3.3 Comparing the older population in Hart to the comparator geographies in Table 10-2 shows that Hart had a slightly older bias to the population, across all three age groups, than the North Hampshire Unitary Authority area and England. However, the Hampshire & the Solent Combined Authority area had a slightly older population than Hart.

10.3.4 Amongst the Hart sub-areas, the greatest proportion of over 65s, 75s, and 85s lived in the Rural South & Villages sub-area, with the largest number of people in these age groups living in Fleet & Church Crookham. This is likely to reflect the distribution of specialist older persons housing schemes across the district. Hook had the smallest number and proportion of older people across all three age groups.

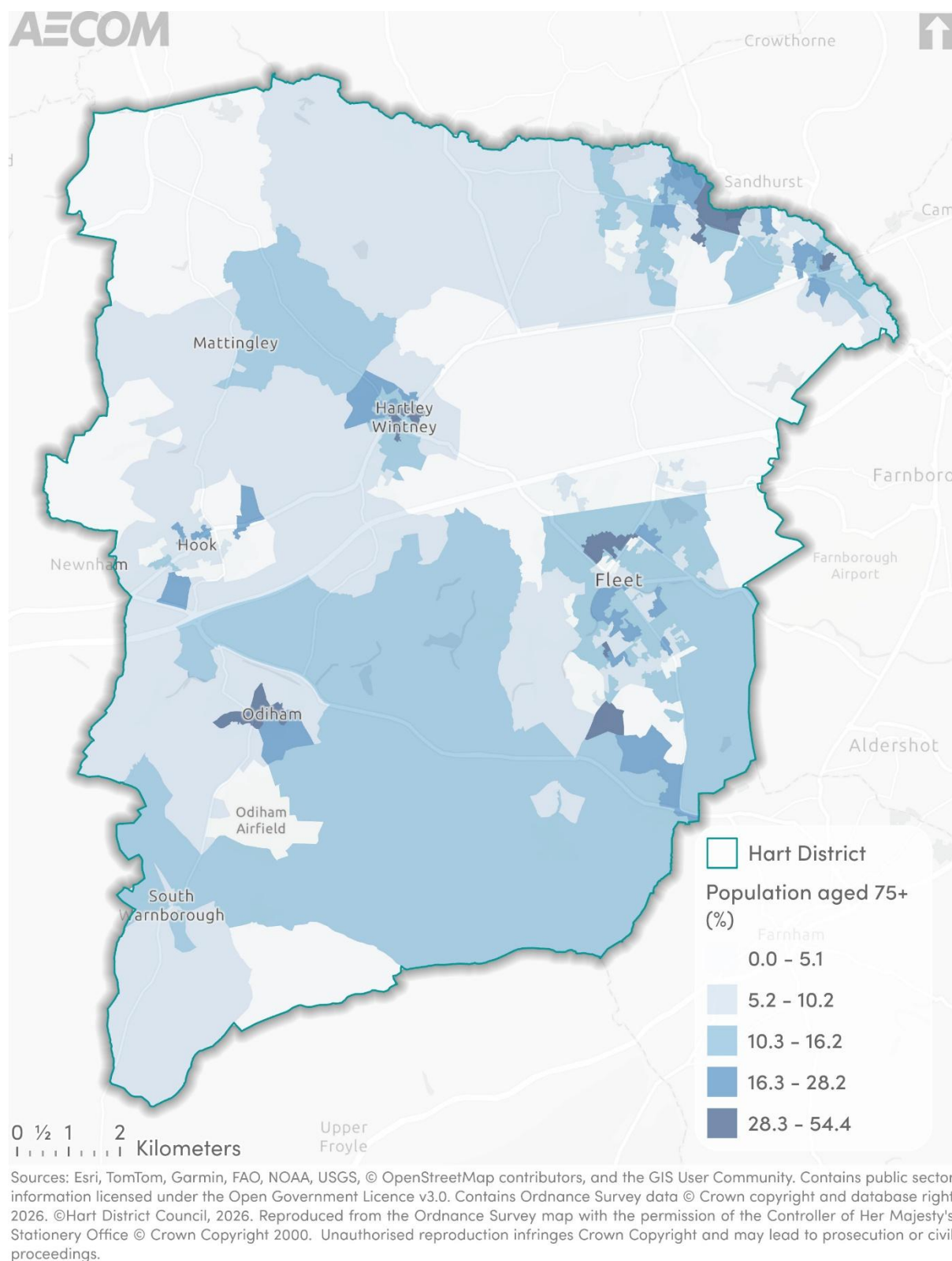
Table 10-2: Older population in Hart and comparator geographies, 2021

	65+	75+	85+
Hart	19,574 (19.7%)	9,665 (9.7%)	2,665 (2.7%)
North Hampshire UA	66,715 (17.4%)	31,075 (8.1%)	8,269 (2.2%)
Hampshire & the Solent Combined Authority	410,192 (20.5%)	196,289 (9.8%)	56,997 (2.9%)
England	10,401,303 (18.4%)	4,837,160 (8.6%)	1,372,301 (2.4%)
Fleet & Church Crookham	8,039 (18.2%)	4,219 (9.6%)	1,276 (2.9%)
Blackwater & Yateley	5,705 (21.8%)	2,717 (10.4%)	641 (2.4%)
Hook	1,436 (15.8%)	598 (6.6%)	158 (1.7%)
Rural North & Villages	2,163 (21.9%)	1,022 (10.4%)	245 (2.5%)
Rural South & Villages	2,227 (22.0%)	1,092 (10.8%)	330 (3.3%)

Source: 2021 Census

10.3.5 Figure 10-1 shows the distribution of the older population, aged 75+, across Hart at the time of the 2021 Census.

Figure 10-1: Map showing distribution of 75+ population, Hart, 2021



10.3.6 Turning to the projected health of the older population in Hart, Table 10-3 shows that between 2025 and 2045¹⁰³ the number of individuals aged 65 and over with a disability that limits their day to day activities a little is likely to

¹⁰³ POPPI projection periods are in 5 year bands which do not correspond precisely to the Local Plan period. However, they are included here to give an indication of the scale of growth.

increase by 36.6%, with those with their day to day activities limited a lot projected to increase by 47.8%. This may be reflective of aging populations and people living longer and therefore being more susceptible to age related health conditions.

Table 10-3: Projected individuals aged 65+ with a disability or limiting long-term illness, Hart

	2025	2045	Change	%
Disabled under the Equality Act: Day-to-day activities limited a little aged 65-74	1,352	1,625	+273	+20.2%
Disabled under the Equality Act: Day-to-day activities limited a little aged 75-84	1,612	2,086	+474	+29.4%
Disabled under the Equality Act: Day-to-day activities limited a little aged 85 and over	744	1,354	+610	+82.0%
Total Population aged 65 and over Disabled under the Equality Act: Day-to-day activities limited a little	3,709	5,065	+1,356	+36.6%
Disabled under the Equality Act: Day-to-day activities limited a lot aged 65-74	560	673	+113	+20.2%
Disabled under the Equality Act: Day-to-day activities limited a lot aged 75-84	969	1,254	+285	+29.4%
Disabled under the Equality Act: Day-to-day activities limited a lot aged 85 and over	977	1,777	+800	+81.9%
Total Population aged 65 and over Disabled under the Equality Act: Day-to-day activities limited a lot	2,506	3,703	+1,197	+47.8%

Source: POPPI

10.3.7 Looking specifically at individuals aged 65 and over with dementia, the number in Hart is projected to increase by 60.1% between 2025 and 2045, with this potentially impacting on the demand for care home bedspaces and extra-care housing (if suitable for people with dementia) to provide care and support.

Table 10-4: Projected individuals aged 65+ with dementia, Hart

	2025	2045	Change	%
People aged 65-69 predicted to have dementia	88	98	+10	+11.4%
People aged 70-74 predicted to have dementia	140	183	+43	+30.7%
People aged 75-79 predicted to have dementia	300	354	+54	+18.0%
People aged 80-84 predicted to have dementia	389	576	+187	+48.1%
People aged 85-89 predicted to have dementia	378	631	+253	+66.9%
People aged 90 and over predicted to have dementia	342	778	+436	+127.5%
Total population aged 65 and over predicted to have dementia	1,636	2,620	+984	+60.1%

Source: POPPI

10.4 The Scale of Need for Specialist Housing

10.4.1 The specialist housing needs of older people in Hart are estimated in this HEDNA using two methods. The first is a tenure-led estimate, based on rates of health problems and mobility limitations of the older population and the

tenure of housing they occupy. The second, included for the purposes of comparison, is based on the Housing Learning and Improvement Network (HLIN) Strategic Housing for Older People (SHOP) toolkit¹⁰⁴, which is based on the best practice nationally and sets a recommended level of provision for different types of housing per 1,000 head of the population aged 75+.

Tenure-led estimate

- 10.4.2 The starting point for developing a tenure-led estimate for the need for specialist housing for older people is understanding the tenure older households occupy in Hart. Table 10-5 shows the tenure mix of households aged 65 and over at the time of the 2021 Census, with this age group used as the best proxy available for those likely to need specialist housing over the plan period.
- 10.4.3 Table 10-5 shows that the vast majority of households aged 65 and over in Hart owned their own home, at 89.9%, with the remaining 10.1% renting their home. When looking at households that rent, households aged 65 and over are much more likely to live in social rented housing than private rented housing, at 6.3% and 3.8% respectively. The rate of social renting and private renting is higher in the population as a whole (8.8% and 13.6% respectively) than in households aged 65+.

Table 10-5: Tenure of households aged 65+, Hart, 2021

All owned	Owned outright	Owned with a mortgage or loan or shared ownership	All rented	Social rented	Private rented & living rent free
89.9%	81.3%	8.6%	10.1%	6.3%	3.8%

Source: ONS

- 10.4.4 The next step is to project how the overall number of older people (aged 75+) in Hart is likely to change in the future, by comparing ONS sub-national population projections (SNPP) to the end of the plan period (2039) with estimates for 2026.
- 10.4.5 Table 10-6 shows that between 2026 and 2039 the proportion of the population aged 75+ in Hart is projected to increase from 11.6% to 14.0%. There is a notably greater increase in the number of people aged 75+ (27.1%) than the population as a whole (+5.4%), indicative of an aging population.

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<https://www.housinglin.org.uk/Topics/browse/HousingExtraCare/ExtraCareStrategy/SOP/SHOPv2/>

Table 10-6: Modelled projection of Hart 75+ population, 2026-2044

Age Group	2026	2039	Change
All ages	103,058	108,595	+5.4% (+5,537)
75+	12,005	15,254	+27.1% (+3,249)
%	11.6%	14.0%	-

Source: ONS SNPP 2022-based, AECOM Calculations

10.4.6 A key assumption in understanding the future need for specialist housing for older people is that older people currently living in Hart are suitably accommodated, either because they occupy the existing stock of specialist accommodation, have made appropriate adaptations to their own homes, or do not require support. It is likely that this is not entirely the case, but it is not possible to determine how many individuals are inadequately housed without primary evidence, such as a survey, although this still may not give a complete picture.

10.4.7 The needs analysis in this section therefore focuses on the needs of the 3,249 additional individuals expected to join the 75+ age group between 2026 and 2039. This figure is then converted into households, with reference to the average number of people per household aged 75+ at the time of the 2011 Census, with this specific information not determinable from 2021 Census data. It can be assumed that there has been little change in household size of those aged 75+ over the decade. Based on this, it can be estimated that the increase of 3,249 individuals aged 75+ in Hart between 2026 and 2044 would equate to an additional 2,021 households.

10.4.8 The next step is to multiply the number of additional households aged 75+ over the plan period by the percentages of households aged 65+ occupying each tenure. The outcome of this is presented in Table 10-7 below, showing the tenure older households are likely to need between 2026 and 2039.

Table 10-7: Projected tenure of households aged 75+, Hart, 2026-2039

All owned	Owned outright	Owned with a mortgage or loan or shared ownership	All rented	Social rented	Private rented & living rent free
1,817	1,643	173	204	128	76

Source: ONS, AECOM Calculations

10.4.9 It is also important to take into consideration rates of disability in the older population in Hart. Table 10-8 shows rates of disability by tenure for the district from the 2011 Census, with this information not available in the 2021 Census, although broad trends are likely to remain constant. Note that the 65+ age group is the closest available data to the 75+ age group.

10.4.10 The tendency for people in rented housing to have higher disability levels is well established, with this arising partly because people with more limiting disabilities tend to have lower incomes. It also reflects the fact that as people develop support and care needs, they may find that the only suitable accommodation affordable to them is in the social rented sector.

Table 10-8: Rates of long term health problems or disabilities by tenure, aged 65+, Hart, 2011

	All categories – long term health problem or disability	Day to day activities limited a lot		Day to day activities limited a little		Day to day activities not limited	
All categories: Tenure	14,620	2,244	15.3%	3,481	23.8%	8,895	60.8%
<i>Owned or shared ownership: Total</i>	12,923	1,777	13.8%	3,001	23.2%	8,145	63.0%
Owned: Owned outright	11,475	1,543	13.4%	2,686	23.4%	7,246	63.1%
Owned: Owned with a mortgage or loan or shared ownership	1,448	234	16.2%	315	21.8%	899	62.1%
<i>Rented or living rent free: Total</i>	1,697	467	27.5%	480	28.3%	750	44.2%
Rented: Social rented	1,153	365	31.7%	329	28.5%	459	39.8%
Rented: Private rented or living rent free	544	102	18.8%	151	27.8%	291	53.5%

Source: 2011 Census

10.4.11 Disability by age is available in the 2021 Census (it just cannot be compared to tenure). For comparison to the above, 5,124 individuals aged 65+ in Hart were disabled under the Equality Act, 26.7% of the population falling into that age group. This is compared to 39.2% in 2011, as shown in Table 10-8. However, the 2011 census includes households with a disability or long-term health condition, whilst the categories in 2021 were more prescriptive, only counting those disabled under the Equality Act. Fewer people are likely to have self-reported in 2021 compared to 2011 based on the wording of the question and categories given.

10.4.12 Using both projected tenure and existing rates of disability or long term health problems, a tenure-led estimate for specialist housing for older people can be determined. It is assumed that those whose day to day activities are limited a lot may need housing with care (e.g. extra-care housing), whilst those with their day to day activities limited a little potentially only needing sheltered housing, retirement housing, or adaptations to their existing home.

10.4.13 The number of households falling into potential need for specialist accommodation over the plan period in Hart is estimated at 786. This equates to 60 (rounded) units per annum over the period 2026-2039.

10.4.14 Table 10-9 presents the breakdown of this need between market and affordable provision, as well as the level of care required. It shows that there is a greater need for market provision, at 85.5% of the need, compared to 14.5% of the need being for affordable units. There is also a greater estimated need identified for sheltered housing (61.0%) than extra-care housing (39.0%). However, it is important to keep in mind that these figures are estimates and are dependent on the level of support or care that can be provided in different settings.

Table 10-9: AECOM estimate of specialist housing for older people, Hart, 2026-2039

Type	Affordable	Market	Total
Housing with care (e.g. extra care)	<i>Includes: enhanced sheltered housing for rent + extra care housing for rent + housing based provision for dementia</i>	<i>Includes: enhanced sheltered housing for sale + extra care housing for sale</i>	306 (39.0%)
	56 (7.2%)	250 (31.8%)	
Sheltered housing	Conventional sheltered housing for rent	Leasehold sheltered housing	698 (61.0%)
	58 (7.3%)	422 (53.7%)	
Total	114 (14.5%)	672 (85.5%)	786

Source: ONS SNPP (2022-based), Census 2011 and 2021, AECOM Calculations

Housing LIN estimate

10.4.15 It is helpful to compare the above estimates with those derived from the HLIN, one of the simplest and widely used models for estimated the housing needs of older people. Instead of projecting forward based on household trends and health and disability factors, this model applies an 'ideal' rate of provision for different forms of accommodation to the size of the over 75 population. The 'ideal' rates are outlined in Table 10-10 and can be considered aspirational rates in the provision of specialist housing supply.

Table 10-10: Recommended provision of specialist housing for older people

Form of provision	Estimate of demand per 1000 of the relevant 75+ population
Conventional sheltered housing to rent	60
Leasehold sheltered housing	120
Enhanced sheltered housing (divided 50:50 between rent and sale)	20
Extra care housing for rent	15
Extra care housing for sale	30
Housing based provision for dementia	6

Source: HLIN SHOP toolkit

10.4.16 Hart is forecast to see an increase of 3,249 individuals aged 75+ between 2026 and 2039, with the HLIN SHOP toolkit projecting demand on the basis

of population size rather than households. According to the HLIN tool, this translates into need as follows:

- Conventional sheltered housing to rent = $60 \times 3.249^{105} = 195$
- Leasehold sheltered housing = $120 \times 3.249 = 390$
- Enhanced sheltered housing (50:50 rent to sale) = $20 \times 3.249 = 65$
- Extra care housing for rent = $15 \times 3.249 = 49$
- Extra care housing for sale = $30 \times 3.249 = 97$
- Housing based provision for dementia = $6 \times 3.249 = 19$

10.4.17 This produces an overall total of 815 (rounded) specialist dwellings for older people that may be required from 2026 to the end of the plan period in 2039 to meet the need of the projected increase in the older population over this time. It is assumed that existing households are already suitably housed. This translates to approximately 66 specialist dwellings for older people per annum over this period.

10.4.18 Table 10-11 sets out the HLIN recommendations in the same format as the AECOM estimates.

Table 10-11: HLIN estimate of specialist housing for older people, Hart, 2026-2044

Type	Affordable	Market	Total
Housing with care (e.g. extra care)	<i>Includes: enhanced sheltered housing for rent + extra care housing for rent + housing based provision for dementia</i>	<i>Includes: enhanced sheltered housing for sale + extra care housing for sale</i>	231 (28.3%)
	102 (12.4%)	130 (15.9%)	
Sheltered housing	Conventional sheltered housing for rent	Leasehold sheltered housing	585 (71.7%)
	195 (23.9%)	390 (47.9%)	
Total	296 (36.2%)	520 (63.8%)	815

Source: ONS, HLIN SHOP, AECOM Calculations

10.4.19 The AECOM tenure-led estimates and HLIN SHOP toolkit suggest there is a need for between 786 and 815 units of specialist housing for older people over the period 2026 to 2039. This could be annualised to 60-63 units per annum. It is important to note that the need or demand for these homes falls within the overall need for housing – this is the estimated need for C3 older persons housing. It is important to note:

¹⁰⁵ Note that 3.249 stands for the 3,249 additional older people between 2026 and 2039, divided by 1,000 as the HLIN SHOP toolkit is based on provision per 1,000 of the population.

- The figures given in Table 10-10 and Table 10-11 are estimates rather than a precise science, and are based on a number of assumptions. They provide a useful indication of the potential scale of need for specialist accommodation for older people based on the age, circumstance, and health needs of the local population.
- The needs identified may also be able to be met through other forms of housing or accommodation. Some households, particularly those with limited care or support needs, may be able to be supported to remain living in mainstream housing (i.e. where accessible and adaptable). Some households with higher care and support needs may instead be accommodated in residential care homes rather than extra-care. However, this situation is generally undesirable, and it is likely to be much more costly. However, if sufficient specialist accommodation cannot be provided it may be the only option available to some individuals (and if mainstream housing cannot be appropriately modified or care brought to the home).
- The estimates do not capture aspirations for different forms of accommodation or the complex decisions around moving home in later life.

10.4.20 The Hart Housing Register can also provide an indication of the need for specialist housing for older people (social and affordable rented). It shows that there are 246 households (16.6% of all household on the Housing Register) categorised as either 'elderly single' or 'elderly couple'. Within this, 22 applicants are in the 'extra-care' sub-category, with 14 listed as low, 3 as medium, and 5 as high needs/priority. This demonstrates that although the assumptions in the estimates above assume existing households are adequately housed, there is demand in Hart from existing households for affordable extra-care housing. Hart District Council has indicated that the level of households registered for extra care fluctuates and at points it is difficult to fill vacancies. This may be attributed to insufficient referrals to extra care via the waiting list rather than a reflection of the scale of underlying need but it serves to highlight the complexity in estimating the need or demand for particular types of specialist schemes.

10.5 Current Supply of Specialist Housing for Older People

10.5.1 It is also helpful to consider the current stock of specialist housing for older people in Hart. Table 10-13 shows the schemes in Hart District, including the type of accommodation, level of care, tenure, and number of units, as recorded by the Elderly Accommodation Council.

10.5.2 This shows that there are 41 schemes in Hart solely providing specialist housing for older people. This and following analysis excludes 3 Almshouses, which although provide some specialist housing for older people, allocations are not solely for older people and the proportion is not known. These schemes are included in Table 10-13 below, in italics.

- 10.5.3 The 41 schemes provide around 1,340 units of specialist housing for older people. A small number of additional older persons (55+) schemes which provide retirement/age exclusive accommodation for social/affordable rent have been identified, but the total number of units is unknown and so these schemes (5 in number) are not included in the overall total number of units.
- 10.5.4 It is assumed that retirement housing and age exclusive housing would both fall under the umbrella of 'sheltered housing' for the purposes of this report, totalling 36 schemes (88% of schemes), with extra-care housing and housing with care making up 5 (12%) of schemes.
- 10.5.5 The current mix is predominately age exclusive or retirement housing. These schemes account for approximately three quarters of the stock. Nevertheless, extra care accommodation accounts for a substantial proportion of the stock of specialist housing for older people with 5 schemes totalling 365 units in the district, of which the majority are for leasehold (private) sale. There are 2 schemes for social/affordable rent with a total of 111 units.
- 10.5.6 Specialist housing for older people in Hart generally comprises of schemes that offer 1-bedroom (84.8% of schemes) or 2-bedroom (90.9% of schemes) dwellings, with few (9.1%) delivering 3-bedrooms. The majority of schemes deliver flats (84.8%), with 21.2% delivering bungalows and 12.1% houses. In terms of the tenures available, 26 (63%) of schemes include the option for leasehold market purchase, with 2 of these schemes also containing shared ownership or market rent properties. 34% (14) of schemes offer social/affordable rented accommodation for older households on low incomes or with limited savings.
- 10.5.7 The schemes are also split across the sub-areas as shown in Table 10-12. This shows that the greatest number of schemes and homes are located in Fleet & Church Crookham, at over half of all schemes. This is compared to 43.7% of the Hart population aged 75+ living in this sub-area. The proportional split of units of specialist housing for older people in the sub-areas broadly aligns with the proportion of the older population living there, with Fleet & Church Crookham having a higher proportion of units than older population, whilst Blackwater & Yateley, Hook and Rural South & Villages have slightly larger older populations than their share of homes.

Table 10-12: Location of specialist housing for older people schemes, Hart

Sub area	Schemes	%	Units	%	% of Hart Population aged 75+
Fleet & Church Crookham*	23	56%	645	50%	43.7%
Blackwater & Yateley	7	17%	297	23%	28.1%
Hook*	3	7%	98	8%	6.2%
Rural North & Villages*	4	10%	152	12%	10.6%
Rural South & Villages	4	10%	115	9%	11.3%

Source: *Elderly Accommodation Council*, 2021 Census, AECOM Calculations *Total units for some schemes are unknown so the figures will undercount total.

- 10.5.8 In terms of recent development, completions data provided by Hart District Council shows that between 2021/22 and 2024/25 there were 142 completions of supported housing, elderly accommodation, or close care accommodation in the district, 8.1% of all completions in this time. These were all delivered in 2022/23 (31) and 2023/24 (111).
- 10.5.9 ONS 2022-based population estimates suggest that there are 12,005 individuals aged 75 and over in Hart in 2026. It can be estimated that the current provision of 1,291 units of specialist housing for older people across the district equates to 108 units per 1,000 of the 75+ population. This is a common measure of specialist housing supply, with the average rate for England around 136 units per 1,000 of the 75+ population. This suggests that provision in Hart is below national levels although there are 5 schemes of social/affordable rented accommodation where totals are not known and so the rate of provision is likely to be higher than reported here. This can also be compared to the level of provision recommended by the HLIN model, which is 251 units per 1,000 of the 75+ population. This would suggest a significant under-provision in Hart compared to the 'ideal' rate, as is the case in most locations around the country.

Table 10-13: Specialist Housing for Older People Provision, Hart District

Scheme	Settlement	Number of units	Type	Leasehold?	Shared ownership?	Private rent?	Social rent?	Licence?	24-hour care staff onsite?	Careline alarm?
Albany Court	Fleet		Retirement Housing				✓			
Argyll Court	Fleet	31	Retirement Housing	✓	x	x	x	x	x	✓
Ash Lodge	Hartley Wintney	54	Retirement Housing	✓	x	x	x	x	x	✓
Bartons Court	Odiham	13	Retirement Housing	✓	x	x	x	x	x	✓
Beacon Gardens	Fleet	3	Age Exclusive Housing / Close Care Housing	✓	x	✓	x	x	?	?
Berry Court	Hook	25	Retirement Housing	✓	x	x	x	x	x	✓
Branksome Walk Manor	Fleet	14	Retirement Housing	✓	x	x	x	x	x	x
Cadogan Court	Fleet	33	Retirement Housing	✓	x	x	x	x	x	✓
<i>Calthorpe Houses¹⁰⁶</i>	<i>Elvetham</i>	9	<i>Age Exclusive Housing</i>	x	x	x	✓	x	x	✓
Campbell Place	Fleet	74	Extra Care Housing	x	x	x	✓	x	✓	✓
Clare Court	Fleet	34	Retirement Housing	✓	x	x	x	x	x	✓
Clare Park	Crondall	41	Retirement Housing	x	x	✓	x	x	x	x
Clearwater House	Fleet		Retirement Housing				✓			
Cotswold Court	Fleet	20	Retirement Housing				✓			
<i>Cottrell Court</i>	<i>Church Crookham</i>	16	<i>Age Exclusive Housing</i>	x	x	x	✓	x	x	x
Curtis Court	Church Crookham		Retirement Housing				✓			
Fiske Court	Yateley	61	Retirement Housing	x	x	x	✓	x	x	✓
Gayton House	Yateley	22	Retirement Housing	✓	x	x	x	x	x	x
Gregory House	Hook		Retirement Housing				✓			
Hampshire Lakes	Yateley	119	Extra Care Housing / Close Care Housing	✓	x	x	x	x	✓	✓

¹⁰⁶ Those in italics are Almshouses, which are not solely available for older people

Hanover Close	Yateley	18	Retirement Housing	x	x	x	✓	x	x	✓
Hedge Croft	Yateley	39	Retirement Housing	x	x	x	✓	x	x	✓
Jubilee Lodge	Fleet	31	Retirement Housing	✓	x	x	x	x	x	✓
Keble Court	Church Crookham	72	Extra Care Housing	✓	x	x	x	x	✓	✓
Kings Place	Fleet	63	Extra Care Housing	✓	x	x	x	x	✓	✓
<i>Odiham Almshouses</i>	<i>Odiham</i>	26	<i>Retirement Housing</i>	x	x	x	x	✓	x	x
Palace Gate	Odiham	43	Retirement Housing	✓	x	x	x	x	x	x
Pauls Field	Eversley Cross		Retirement Housing				✓			
Pegasus Court	Fleet	37	Retirement Housing	✓	x	x	x	x	x	✓
Pinewood Court	Fleet	38	Retirement Housing	✓	x	x	x	x	x	✓
Renaissance Hartley Wintney	Hartley Wintney	23	Age Exclusive Housing	✓	x	x	x	x	x	✓
Rosefield Court	Hartley Wintney	75	Retirement Housing	x	x	x	✓	x	x	✓
Roslin Place	Hook	36	Retirement Housing	✓	✓	x	x	x	x	✓
Russell Lodge	Fleet	46	Retirement Housing	✓	x	x	x	x	x	✓
Seymour Place	Odiham	18	Retirement Housing	✓	x	x	x	x	x	✓
Silver Wood Court	Fleet	21	Retirement Housing	✓	x	x	x	x	x	✓
Stockton Park	Fleet	17	Age Exclusive Housing	✓	x	x	x	x	x	✓
St Philips Court	Fleet	16	Retirement Housing				✓			
Sycamore Grange	Fleet	24	Retirement Housing	✓	x	x	x	x	x	✓
The Elms	Blackwater	24	Retirement Housing	✓	x	x	x	x	x	✓
The Signals	Hook	37	Housing with Care	x	✓	x	✓	x	✓	✓
Tockington Court	Yateley	14	Retirement Housing	✓	x	x	x	x	x	x
Waters Edge	Fleet	14	Age Exclusive Housing	✓	x	x	x	x	x	x
Wickham Court,	Church Crookham	41	Retirement Housing				✓			

Source: Elderly Accommodation Council

10.6 The Need for Care Home Accommodation

- 10.6.1 Residential and nursing care homes are not defined as housing as they do not provide self-contained accommodation where an older person can live independently. Care home accommodation is defined as institutional accommodation rather than housing. However, some residents of care home may have similar care or support needs to those living in specialist housing for older people (i.e. extra care) or those receiving higher level support in mainstream housing. Therefore, there may be some scope for older people that would have otherwise been accommodated in care homes to have their needs met in specialist accommodation or their own home if sufficient appropriate accommodation or care can be provided. Care homes are however likely to remain an important element of the mix for older individuals to meet more intensive care needs and to offer choice.
- 10.6.2 It is helpful to look at the current stock of accommodation and number of individuals living in care home accommodation. Table 10-14 shows the number of people living in care homes in Hart at the time of the 2021 Census, with 345 individuals living in care home accommodation across the district. Of those living in care home accommodation in Hart, 32.2% lived in a care home with nursing, with the remaining 67.8% living in care home accommodation without nursing. A greater proportion of individuals in care homes living in a care home with nursing in Hart than across the wider Unitary Authority area.

Table 10-14: Number of people living in care homes, 2021

	Care home with nursing	Care home without nursing	Combined care home
Hart	111	234	345
North Hampshire UA	975	676	1,651
Hampshire and the Solent Combined Authority	6,580	6,323	12,903
England	151,559	172,875	324,434

Source: 2021 Census

- 10.6.3 The Elderly Accommodation Counsel identifies 14 care homes in Hart, providing 721 bedspaces (see Table 10-16). Table 10-15 below presents how these are located across the district's sub-areas. This shows that the majority of care home beds are located in Fleet & Church Crookham, with 459 bedspaces, or 63.7% of the district's share. Blackwater & Yateley and Rural North & Villages both only have 1 care home, although the latter has significantly more bedspaces.

Table 10-15: Location of care homes, Hart sub-areas

Sub area	Schemes	%	Units	%
Fleet & Church Crookham	8	57.1%	459	63.7%
Blackwater & Yateley	1	7.1%	36	5.0%
Hook	2	14.3%	74	10.3%
Rural North & Villages	1	7.1%	60	8.3%
Rural South & Villages	2	14.3%	92	12.8%

Source: Elderly Accommodation Council, AECOM Calculations

10.6.4 Looking at the level of care provided by the care homes in Hart, 6 of the care homes, or 42.9%, include nursing care. 4 of those providing nursing care are located in Fleet & Church Crookham, with 1 in Hook, and 1 in Rural South & Villages.

Table 10-16: Care Home Accommodation, Hart District

Scheme Name	Settlement	Bedspaces	Includes nursing care?	Long term care?	Respite care?
Beacon House	Fleet	23	×	✓	✓
Bourley Grange	Church Crookham	60	✓	✓	✓
Derriford House	Fleet	34	×	✓	✓
Elm Lodge	Hartley Wintney	60	×	✓	×
Fleet Hall Care Home	Fleet	78	×	✓	✓
Freelands Croft Care Home	Church Crookham	64	✓	✓	×
Heron Manor Care Home	Fleet	120	✓	✓	×
Hill Brow	Ewshot	32	×	✓	✓
Hill House	Ewshot	60	✓	✓	×
Marlborough House Nursing Home	Church Crookham	40	✓	✓	✓
Maryfield Care Home	Hook	31	✓	×	✓
Old Raven House	Hook	43	×	✓	✓
Willow Gardens Care Home	Yateley	36	×	✓	✓
Woodlands	Church Crookham	40	×	✓	✓

Source: Elderly Accommodation Council

10.6.5 The greater number of care home bedspaces available in Hart in 2026 (721) than individuals living in care homes in the 2021 Census (345) may be due to a number of reasons, including under-reporting in the Census, an increase in the available bedspaces between 2021 and 2026, and the potential under-occupancy of schemes at the time of the 2021 Census.

10.6.6 In estimating the potential need for care home accommodation, there are 3 scenarios presented below which demonstrate the likely need for care home beds in Hart between 2026 and 2039:

- The HLIN SHOP toolkit prevalence rates for residential and nursing care homes for older people (aged 75+) can be applied in the same way as with specialist housing for older people. The toolkit suggests that 65 residential care beds per 1,000 of the population aged 75+ and 45 nursing care beds per 1,000 of the population aged 75+ are appropriate rates of provision. Applying these to the projected increase in population aged 75+ between 2026 and 2044 (+3,249 individuals) in Hart, there could be an estimated additional need for 211 residential care beds and 146 nursing care beds (totalling 357 care beds) over the plan period. This equates to 27 care beds per annum (16 residential and 11 nursing).
- POPPI data estimates that the current population aged 75 and over living in care homes with or without nursing in Hart was 370 in 2025, projected to increase to 569 in 2040 (the dates closest to the start and end of the plan period). This implies an increase of 199 individuals in need of care home beds over this 15-year period or 15 per annum.
- An estimate can also be calculated using the number and rate of older people living in care homes in 2021 (based on the population of those living in care homes), and applying this to the projected older population over the plan period. The 2021 Census recorded 111 individuals living in a care home with nursing and 234 individuals living in a care home without nursing in Hart. It should be noted that the 2021 Census does not cross reference communal establishment type with age (as the 2011 Census did), but it can be assumed that the majority of those living in care homes are likely to be aged 75 and over.
- This means that it can be estimated that of the population aged 75+ in 2021, 1.1% lived in a care home with nursing, and 2.4% lived in a care home without nursing. These rates are then applied to the projected population of over 75s in 2026 and 2039 to estimate the number of care home beds that might be required in the plan period. This equates to 138 care home beds with nursing and 291 without nursing in 2026, and 168 and 366 respectively in 2039. Together, this totals a need for 429 care home beds (with or without nursing) in 2026 and 534 in 2039, implying an increase in need of 105 over the plan period (or 8 per annum).

10.6.7 Table 10-17 summarises the results of these 3 approaches.

Table 10-17: Estimated need for care home beds, Hart, 2026-2039

	2026	2039	Change	Per annum
HLIN total	-	-	357	27
Residential care	-	-	211	16
Nursing care	-	-	146	11
AECOM total	429	534	105	8
Residential care	291	366	108	6
Nursing care	138	168	30	2
POPPI (total)	370 (2025)	569 (2040)	199	15

Source: *HLIN SHOP toolkit, Census 2021, POPPI, AECOM Calculations*

10.6.8 It should be noted that the estimates of the need for care home beds are in addition to the overall need for housing in Hart. However, some of the need for care home beds may be able to be met through independent housing accommodation (e.g. extra care or adapted mainstream housing) and vice versa.

10.6.9 These estimates can be compared to the current stock of care home accommodation in Hart, detailed in Table 10-16. Under AECOM's current estimates, the current care home provision of 721 bedspaces would appear to be sufficient to meet the need in 2026 (429) and 2039 (597). It is unlikely to be sufficient however to meet the increase in need identified through the HLIN SHOP toolkit. These estimates do not take account of capacity within the existing stock, including the extent to which existing care homes are full or whether there is a degree of vacancy which could accommodate growth in need.

10.6.10 The Hampshire Residential and Nursing Market Position Statement (MPS)¹⁰⁷ for older adults aged 65+ identifies that longer term trends suggest a need for residential and nursing placements, but there is not a material increase expected in the next few years (following the 2025 report). It also identifies that the County is aware of demand particularly for both residential and community-based dementia services.

10.7 The Role of Mainstream Housing

10.7.1 Whilst this section focuses on the need for specialist housing for older people, it is important to acknowledge that most older people live in mainstream housing and will continue to do so all of their lives. Analysis of existing specialist housing and care home accommodation suggests that there are 1,214 units of specialist housing for older people and 721 care home beds. By implication, around 83.9% of the 2026 population (2022-based SNPP) aged 75 or over are likely to live in the mainstream housing stock¹⁰⁸. Some older

¹⁰⁷ <https://documents.hants.gov.uk/adultservices/market-position-statements/Residential-and-Nursing-Market-Position-Statement-2025.pdf>

¹⁰⁸ The 2022-based SNPP projects 12,005 individuals aged 75 and over in Hart, with 1,214 living in specialist older persons housing and 721 living in care homes, leaving

households also move within the mainstream housing stock to more suitable accommodation e.g. smaller or manageable properties with better accessibility features. This is reflected in the occupancy patterns in Section 6. These moves also have knock on implications for the rest of the housing market as they often allow other households to move into larger accommodation – particularly within the affordable housing stock where the supply of these properties is very limited.

- 10.7.2 It is not possible to determine exactly how suitably older people are accommodated within the mainstream housing stock, both in terms of adaptations required to the home and the level of care available in the home.
- 10.7.3 An indication of the scale of care and support within mainstream sector is the scale of unpaid care provided by family members. POPPI data suggests that 1,960 individuals aged 65 and over in Hart provided unpaid care to a partner, family member, or other person in 2025, with this projected to increase to 2,570 in 2045.
- 10.7.4 In order to ensure that mainstream housing in future is suitable for ageing households, policies around accessible and adaptable housing are relatively common. Many Local Plans require all or the majority of new housing to meet Category M4(2) standards in response to demographic shifts being observed nationwide, and the evidence gathered here would further justify this. While not all buyers of new homes will need M4(2) standards when they purchase or rent a home, they may need the accessibility and adaptability features later in life. In the market sector, it is also difficult to ensure accessible homes are available to those that need them, rather than just those that can afford them. Therefore, there is a case that all new mainstream housing should be built to M4(2) standards to ensure that sufficient homes are available to the people that need them over time. As flexibility may sometimes be required on specific schemes, this can be set out in policy whilst still maintaining the expectation that new housing is delivered to this standard.
- 10.7.5 Category M4(3) standards relate to housing that might accommodate individuals or households using wheelchairs. Table 10-18 sets out the proportion of wheelchair users in England as a whole (all tenures), and applies this percentage to the Standard Method figure for Hart, suggesting that between 2026 and 2039 there should be around 28 wheelchair accessible homes delivered each year across all tenures. The rates of wheelchair use are higher amongst people in social housing according to the same data set, with rates of 6.6% in housing association homes and 7.8% in local authority social housing. This suggests that whilst provision of 3.5% wheelchair accessible homes would be a reasonable quota to aim for across all new housing, provision in Affordable Housing properties will need to be higher, at around 6-8% based on these national rates.

10,070 living in mainstream housing. This is approximate since some people in specialist housing and care homes will be under the age of 75.

Table 10-18: Wheelchair use nationally applied to Hart

	Percentage in England	Applied to Hart LHNF (804 per annum)
Wheelchair users in the household (English Housing Survey 2018 rates)	3.5%	28

Source: *EHS 2017/18, MHCLG, AECOM Calculations*

- 10.7.6 Another indicator of potential need for wheelchair accessible dwellings is with reference to the Housing Register for Hart. As of April 2026, there were 10 applicants (0.7% of Housing Register applicants) that required fully wheelchair accessible accommodation, with 14 (0.9%) requiring a level access shower or wet room, and a further 94 (6.3%) requiring a ground floor property.
- 10.7.7 There were no wheelchair accessible properties which became available to let in the last two years (2024-2026). In the two previous years (2022-24) only 3 wheelchair properties were available for let. Two were 2-bedroom properties and received 50-60 bids each and one was a 1-bedroom property which only received one bid. The lack of availability of wheelchair accessible properties within social/affordable rented lettings means that households who need them are likely to have to wait a long time. Securing a proportion of new wheelchair accessible homes through new social/affordable rented development is likely to be a priority for the Council to meet these needs.

10.8 Summary

- 10.8.1 Hart is projected to experience substantial growth in its older population over the plan period, with particularly strong increases in the number of residents aged 75 and over and those aged 85 and over. This demographic change is expected to generate increased demand for a range of housing and care options, including specialist housing for older people, housing with care, and accommodation capable of supporting residents with age-related disabilities, mobility limitations and dementia.
- 10.8.2 The evidence suggests a need for approximately 786–815 additional units of specialist housing for older people between 2026 and 2039, equivalent to around 60–63 units per annum. This figure falls within the overall need for housing and it not additional to it. This need is expected to be concentrated primarily in the owner-occupied sector, reflecting the tenure profile of older households in Hart, although there is also a requirement for affordable specialist accommodation. Demand is anticipated across a spectrum of provision, including sheltered housing, retirement living and extra care housing, with sheltered and other lower-support models accounting for the largest share of need.
- 10.8.3 The analysis also identifies continuing demand for residential and nursing care accommodation, although estimates vary depending on the methodology applied.

- 10.8.4 The need for specialist provision should be considered alongside the important role of mainstream housing, in which most older people will continue to live. Ensuring that new homes are accessible and adaptable, including the delivery of M4(2) dwellings and an appropriate supply of wheelchair-accessible homes, will be critical to supporting independent living, enabling residents to age in place, and reducing pressure on specialist housing and care services over time.

11. Housing for Vulnerable Groups

11.1 Introduction

11.1.1 This section examines evidence on vulnerable people in Hart and the types of housing they might require. This includes identifying potential gaps in the availability of suitable accommodation, including some forms of supported housing.

11.1.2 AECOM was commissioned to undertake a Supported Housing Needs Assessment for Hart District Council to support the development of a Local Supported Housing Strategy. This study considers the size of the vulnerable population, their potential need for supported housing, the current stock of supported housing in the district, and the potential future need for supported housing (5-10 years) across the following client groups (which cover a broader range of groups than the NPPF requires for HEDNAs):

- Older people
- People with physical disabilities
- People with learning disabilities
- People with mental health conditions
- People with autism
- Looked after children and care leavers
- Households experiencing homelessness
- People fleeing domestic abuse
- Veterans
- Prison leavers
- Asylum seekers and refugees
- People with substance misuse issues
- People with multiple complex needs

11.1.3 The Supported Housing Needs Assessment and Local Supported Housing Strategy should be referred to when considering the need for housing for vulnerable groups. However, it should be noted that this looks across 5- and 10-year periods, to 2031 and 2036, which differs from the Local Plan period of 2039 and longer study period to 2044.

11.1.4 There is limited guidance on how to develop the evidence of needs for these groups in practice guidance with the guidance on housing for older and disabled people focusing on older persons needs rather than a wider assessment of the needs of working age people with physical disabilities, learning disabilities or mental health needs.

11.1.5 This section considers a wider range of needs than required by NPPF but does not go as far as providing a full needs assessment, for which the Supported Housing Needs Assessment should be referred to. The groups considered in this HEDNA and this section specifically are:

- People with learning disabilities;
- People with physical disabilities;
- People with mental health needs; and
- People experiencing homelessness.

11.1.6 The following groups are examined elsewhere in the HEDNA:

- Older people needing care or support (Section 10);
- Looked After Children and care leavers (Section 6); and
- Veterans (Section 6).

11.1.7 Within these groups the experiences and needs of individuals will also vary, potentially requiring bespoke forms of support, especially where individuals have multiple complex needs.

11.1.8 This section summarises evidence on the groups needing supported housing and the stock of accommodation within Hart to meet their needs. Further detail, and information on further client groups, can be found in the Supported Housing Needs Assessment (2026). It is important to keep in mind that the Supported Housing sector is fragmented, with different organisations responsible for supporting different groups.

11.1.9 This analysis is focused on the need for accommodation and does not attempt to investigate their specific support or care needs. However, the two are inherently interdependent. Those with significant care and support needs may be more likely to need to be supported within a care home setting rather than within independent accommodation. The balance between the need for specialist accommodation versus mainstream housing is a function of the severity of care and support needs, and the approach to care and support, including the resources available and the cost to the public purse.

11.1.10 It is important to note that there is a much wider population of people in each client group than the number receiving support from the Council(s). Those with mild learning disabilities are unlikely to need care or accommodation, although they might receive support from families or other organisations to live independently. Similarly, the vast majority of those with physical disabilities live within mainstream housing and the majority are in employment. They may have care or specific accommodation needs but the majority are able to arrange these themselves, using their own resources or financial support provided by Personal Independence Payments (PIP) or similar benefits.

11.2 Vulnerable Groups in Hart

- 11.2.1 This section provides details on specific vulnerable groups, but there are limitations. Whilst it is possible to set out the number of people in particular client groups, most people in these groups will not need care or support or supported accommodation to live independent lives. Therefore, it is less easy to calculate the scale of need for care, or support, or for supported housing as distinct from other forms of accommodation or care. In addition, the need for supported housing is a strategy decision to an extent, with some local authorities looking to reduce supported housing and increase in-home care provision, or vice versa. Nevertheless, the data gives an indication of and detail on overall likely need.

People with Learning Disabilities

- 11.2.2 **Broad population:** It is estimated that in 2025 there were 1,903 individuals aged 18 and over with a learning disability in Hart, with 390 of these (20.5%) people with a moderate or severe learning disability. POPPI and PANSI data (Table 11-1) estimates the total adult population aged 18+ predicted to have a moderate or severe learning disability, and therefore likely to require support, in 5-year bandings. Table 11-1 shows that there is projected to be a 10.5% increase in the number of people aged 18+ in Hart with a moderate or severe learning disability between 2025 and 2045.
- 11.2.3 As these individuals have a moderate or severe learning disability, they are likely to be in receipt of care or support services.

Table 11-1: Projected individuals with a moderate or severe learning disability, Hart

	2025	2030	2035	2040	2045
People aged 18-24 predicted to have a moderate or severe learning disability	40	40	40	38	36
People aged 25-34 predicted to have a moderate or severe learning disability	62	63	64	66	65
People aged 35-44 predicted to have a moderate or severe learning disability	85	92	95	96	99
People aged 45-54 predicted to have a moderate or severe learning disability	77	75	80	84	86
People aged 55-64 predicted to have a moderate or severe learning disability	68	68	65	66	70
People aged 65-74 predicted to have a moderate or severe learning disability	35	40	43	43	42
People aged 75-84 predicted to have a moderate or severe learning disability	18	18	18	21	23
People aged 85 and over predicted to have a moderate or severe learning disability	6	7	9	10	11
Total population aged 18 and over predicted to have a moderate or severe learning disability	390	404	414	424	431

Source: POPPI and PANSI

11.2.4 Supported housing: Hampshire County Council commission 4 schemes with 43 units/bedspaces in Hart District for people with learning disabilities or autism. This would account for 3.9% of Hampshire's commissioned units/bedspaces for people with learning disabilities.

11.2.5 Future trends: The Supported Housing Needs Assessment identifies that based on the proportion of people in Hart District with a learning disability living in extra care or supported housing in 2025/26, 34-35 people with learning disabilities in 5 and 10 years would live in supported housing. It is unlikely that the turnover in existing HCC commissioned stock would meet this need as supported housing to meet the needs of people with learning disabilities is generally long term, with all of the HCC commissioned stock long-term.

11.2.6 Hampshire County Council's preferred supported living model for those with learning disabilities is 'extra care' accommodation, delivered in small blocks of flats or cluster accommodation which include some communal space but with individuals having their own front door. Despite this, the majority of supported housing is delivered as shared housing (generally 4-6 bedrooms).

People with Physical Disabilities

11.2.7 Broad population: the analysis in this section refers to adults with physical disabilities aged 18-64 (working age population), with those aged 65+ accounted for within the older people client group and those under the age of 18 assumed to be primarily accommodated within their family household.

11.2.8 PANSI data presented in Table 11-2 shows that there are estimated to be 3,526 individuals in Hart aged 18-64 with impaired mobility in 2025, with this

projected to increase to 3,763 by 2045, a 6.7% increase. Whilst there is projected to be an increase over the 20-year period in people with impaired mobility aged 25+, there is a projected decrease in impaired mobility in those aged 18 to 24.

Table 11-2: Projected individuals aged 18-64 with impaired mobility, Hart

	2025	2030	2035	2040	2045
People aged 18-24 predicted to have impaired mobility	63	64	63	60	57
People aged 25-34 predicted to have impaired mobility	116	118	119	123	122
People aged 35-44 predicted to have impaired mobility	685	740	765	775	795
People aged 45-54 predicted to have impaired mobility	730	710	755	795	815
People aged 55-64 predicted to have impaired mobility	1,932	1,932	1,862	1,862	1,974
Total population aged 18-64 predicted to have impaired mobility	3,526	3,564	3,564	3,615	3,763

Source: PANSI

11.2.9 Supported housing: although there is a notable population of working age adults with physical disabilities, the majority of individuals will be supported in their own home, often with adaptations (e.g. level-access, walk-in showers, etc.). Those with physical disabilities supported by the County Council are likely to have very high levels of physical disability and therefore require bespoke accommodation suited to their individual needs. The suitability of supported accommodation would therefore need to be determined on a case-by-case basis.

11.2.10 Hart District Council's Housing Register (April 2026) identified 118 individuals (8.0% of applicants) with some kind of mobility need, with this broken down:

- Level access shower / wet room – 14 (0.9%)
- Ground floor required – 94 (6.3%)
- Wheelchair accessible – 10 (0.7%)

11.2.11 Not all of those with a mobility need will need supported housing, with many needs able to be met through general needs housing, particularly where this meets M4(2) and M4(3) standards. It is also likely there will be overlap with other client groups, particularly older people, looking for adapted social/affordable rented properties.

11.2.12 Future trends: It is likely that people with physical disabilities will be offered support in their own homes, or in supported living accommodation where suitable and available.

People with Mental Health Needs

11.2.13 Broad population: PANSI data presented in Table 11-3 predicts that in 2025 there were 11,294 working age people experiencing a common mental disorder, with this projected to increase to 12,100 by 2045 (+7.1%). The vast majority of these people will live independently and will not require supported housing.

11.2.14 Looking at more severe mental disorders, there are projected to be 4,620 working age individuals in Hart with two or more psychiatric disorders in 2045, an increase of 7.3%, or 315 individuals since 2025. These individuals are more likely to require care and support than those with common mental disorders, although this could be through a variety of ways, including support in their own mainstream home, supported housing, and inpatient hospital admissions.

Table 11-3: Projected individuals aged 18-64 with a mental health problem, Hart

	2025	2030	2035	2040	2045
People aged 18-64 predicted to have a common mental disorder	11,294	11,483	11,747	11,913	12,100
People aged 18-64 predicted to have a borderline personality disorder	1,434	1,458	1,492	1,513	1,537
People aged 18-64 predicted to have an antisocial personality disorder	2,006	2,040	2,087	2,119	2,163
People aged 18-64 predicted to have psychotic disorder	419	426	435	442	449
People aged 18-64 predicted to have two or more psychiatric disorders	4,305	4,377	4,478	4,542	4,620

Source: PANSI

11.2.15 **Supported housing:** Hampshire County Council commissions 1 scheme, of 5 bedspaces, of short-term (less than 2 years) supported housing for working-age adults with mental health conditions in Hart District.

11.2.16 **Future trends:** The Hart Supported Housing Needs Assessment undertook consultation with homelessness officers, which identified increases in mental health needs over time, with this likely to increase the need for supported housing for those with mental health conditions. This was also identified through stakeholder consultation. This client group should be monitored, alongside overlapping client groups (such as people experiencing homelessness) to establish whether turnover in existing stock is sufficient to meet needs or whether demand is growing at a faster rate than projecting current levels suggests.

11.2.17 Reductions in the budgets available to address mental health needs may result in losses in supported accommodation, which will feed through to acute pressures elsewhere in the future, including increased homelessness and acute health crises.

People experiencing homelessness

11.2.18 **Broad population:** it is difficult to accurately establish the wider homeless population as individuals are generally only identified by approaching the Council or other support organisations for support and/or being registered on the Housing Register. In addition, this group will likely overlap with other client groups, particularly those with mental health needs.

11.2.19 The Hart Housing Register (April 2026) identifies the current housing situation of households. In relation to homelessness, this shows:

- No fixed abode – 24 applicants (1.6%);
- No fixed abode (has never slept rough) – 12 applicants (0.8%);
- No fixed abode (not rough sleeping on approach but has slept rough at least once in the last year) – 6 applicants (0.4%);
- Homeless on release from institution (custody) – 4 applicants (0.3%);
- Rough sleeping (in judgement of assessor – 3 applicants (0.2%);
- Homeless on discharge from institution (hospital, general) – 2 applicants (0.1%);
- Homeless on discharge from institution (hospital, psychiatric) – 1 applicant (0.1%).

11.2.20 This totals 52 applicants, 3.5% of applicant households. In addition, 31 applicants (2.1%) were listed as 'living with friends' and 9 (0.6%) in temporary accommodation, potentially indicating an unstable housing situation.

11.2.21 MHCLG collects data on statutory homelessness¹⁰⁹, with the latest data available for October to December 2025. At this time there were 44 households owed a duty in Hart, 25 of which were homeless with relief duty¹¹⁰ owed (56.8%) and 19 (43.2%) owed prevention duty¹¹¹.

11.2.22 Of the households owed a relief duty in Hart (25), they form the following households:

- Households with children (families) – 2 (8.0%)
- Single adults (male) – 15 (60.0%)
- Single adults (female) – 5 (20.0%)
- Couple / two adults without dependent children – 3 (12.0%)

11.2.23 The Hart Supported Housing Needs Assessment presents further detail on the potential support needs of those owed a duty in Hart. This identifies overlaps with other vulnerable groups, including people with mental health conditions, people with substance misuse issues, and people that have experienced domestic violence.

11.2.24 **Supported housing:** The Hart Homelessness and Rough Sleeping Strategy (2022-2027)¹¹² identifies that Hart District Council does not have access to its own housing stock for use as temporary accommodation, with the exception

¹⁰⁹ <https://www.gov.uk/government/statistical-data-sets/live-tables-on-homelessness>

¹¹⁰ Relief duty requires local authorities to help people who are homeless (and eligible for assistance) to secure accommodation.

¹¹¹ Prevention duty requires local authorities to work with people who are threatened with homelessness within 56 days to help prevent them from becoming homeless.

¹¹² https://www.hart.gov.uk/sites/default/files/2022-11/hart_homelessness_and_rough_sleeping_strategy_2022-2027.pdf

of Heathlands Court (Yateley), which is managed and let by Vivid Housing Association. This scheme comprises of 23 1-bedroom and 2-bedroom flats, with residents staying an average of 36 months, with support provided for households to move on (generally to the private rented sector) provided by the Housing Solutions Team. It is unclear whether this accommodation would fall under exempt supported accommodation. Outside of Heathlands Court, the Council use B&B accommodation for emergency accommodation, although limits this where possible.

11.2.25 Future trends: The Hart Supported Housing Needs Assessment suggests that based on projected population growth, there is a likely to be a small increase in the number of households experiencing homelessness in Hart over the next 5 and 10 years. However, it is important to stress that factors other than population growth are likely to drive trends in the scale of this group, including the operation of the housing market (e.g. improving or worsening affordability), welfare policy (which may impact on the ability of households to afford their current accommodation) and the availability of social housing (influenced by new housing development as well as turnover within the existing stock).

11.3 Implications

11.3.1 Accessibility and adaptability standards in new homes are likely to be beneficial, if not essential, to all of the vulnerable groups discussed, as well as the older population of Hart. Planning policies for housing can set out the proportion of new housing that will be delivered to the following standards.

- M4(1) Category 1: Visitable dwellings (the minimum standard that applies where no planning condition is given unless a plan sets a higher minimum requirement);
- M4(2) Category 2: Accessible and adaptable dwellings; and
- M4(3) Category 3: Wheelchair user dwellings.

11.3.2 Planning policies for accessible housing need to be based on evidence of need and viability, and consideration of site-specific factors.

11.3.3 It is not AECOM's role to develop Local Plan policy. However, it is the study team's view that all new housing should be built to M4(2) standards (with any exceptions determined on a scheme by scheme basis), with a proportion of new homes built to M4(3), in line with local need on the Waiting List or national wheelchair use (3%).

11.3.4 The Hart Supported Housing Needs Assessment presents further detail on the supported housing needs of these vulnerable groups, and further groups, highlighting areas of potential future need. In summary, this identifies a likely additional supported housing need for people with learning disabilities and people with mental health needs (overlapping with homelessness and complex needs), with ongoing support (although the volume of supported

housing less clear) needed for care leavers, domestic abuse survivors, veterans, and people experiencing homelessness. There is likely to be some ongoing need for supported housing for people with physical disabilities but this is not expected to grow significantly, particularly amongst the working age population. The majority of people are currently supported within their own home. Nevertheless, this adds weight to the need to ensure future housing provision is accessible and adaptable.

- 11.3.5 When planning for the needs for vulnerable groups, this HEDNA should be read in conjunction with the Hart Supported Housing Needs Assessment and associated Local Supported Housing Strategy.

11.4 Summary

- 11.4.1 This section presents summarised evidence on the groups needing supported housing and the stock of accommodation within Hart to meet their needs. Further detail, and information on further client groups, can be found in the Supported Housing Needs Assessment (2026).
- 11.4.2 Hampshire County Council commission 4 schemes with 43 units/bedspaces in Hart District for people with learning disabilities or autism. It is unlikely that the turnover in existing HCC commissioned stock would meet this need as supported housing to meet the needs of people with learning disabilities is generally long term, with all of the HCC commissioned stock long-term.
- 11.4.3 Although there is a notable population of working age adults with physical disabilities in Hart, the majority of individuals will be supported in their own home, particularly where this meets M4(2) and M4(3) standards.
- 11.4.4 Hampshire County Council commissions 1 scheme, of 5 bedspaces, of short-term (less than 2 years) supported housing for working-age adults with mental health conditions in Hart District. The Hart Supported Housing Needs Assessment identified increases in mental health needs over time, with this likely to increase the need for supported housing for those with mental health conditions.
- 11.4.5 The Hart Housing Register (April 2026) identifies 52 applicants with a current housing situation relating to homelessness. MHCLG data on statutory homelessness (October – December 2025) shows 44 households owed a duty in Hart. Heathlands Court in Hart provides temporary accommodation through 23 1-bedroom and 2-bedroom flats.
- 11.4.6 All new housing should be built to M4(2) standards (with any exceptions determined on a scheme by scheme basis), with a proportion of new homes built to M4(3), in line with local need on the Waiting List or national wheelchair use.
- 11.4.7 When planning for the needs for vulnerable groups, this HEDNA should be read in conjunction with the Hart Supported Housing Needs Assessment and associated Local Supported Housing Strategy.

12. Commercial Property Market Profile

12.1 Introduction

- 12.1.1 This section presents an analysis of the commercial property market in Hart. The assessment makes reference to comparator geographies, namely the FEMA as identified in Section 3, the Hampshire and Solent Combined Authority area, and England. This reflects the fact that the commercial property market in Hart is not self-contained, and instead forms part of a wider market area encompassing the FEMA, county, and region to some extent, varying somewhat by type of floorspace.
- 12.1.2 Data presented in this section is derived from CoStar which represents a comprehensive database of up-to-date property market data¹¹³. Trends are presented where applicable, otherwise data for 2026 Quarter 1 (Q1) is shown, being the most recent period for which complete data is available.
- 12.1.3 Employment-generating properties comprised of office, light industrial, general industrial, and storage and distribution types are considered, in line with the definition of employment land. The relationship between historic and new planning use classes, their relationship to CoStar property primary and secondary classification, and the nomenclature adopted for this report, are shown in Table 12-1 below¹¹⁴.

Table 12-1: Property Type Classification

Pre-2021 Planning Use Class	New Planning Use Classes	CoStar Primary Type	CoStar Secondary Type
B1a (revoked) – Offices	E(g)(i) – Offices to carry out any operational or administrative function	Office	All
B1b (revoked) – Research and Development (R&D)	E(g)(ii) – Research and Development	Industrial	R&D
B1c (revoked) – Industrial Processes	E(g)(iii) – Uses which can be carried out in a residential area without detriment to its amenity: industrial processes	Light Industrial	• Light distribution • Light manufacturing • Showroom (light industrial)
B2 – General industrial (other than E(g))	B2 – General industrial (other than E(g))	Industrial	• Food Processing • Manufacturing • Service
B8 – Storage and Distribution	B8 – Storage and Distribution	Industrial	• Distribution • Warehouse

¹¹³ All data presented reflects that which is available, and reported by commercial agents, and therefore is subject to gaps and inaccuracies.

¹¹⁴ It is recognised that there are other property types which may contribute to employment use activity, but these will not be analysed for the purposes of this evidence base.

Pre-2021 Planning Use Class	New Planning Use Classes	CoStar Primary Type	CoStar Secondary Type
			• Haulage Depot • Refrigeration/ Cold storage • Showroom (Industrial)

Source: AECOM

12.1.4 In this section, we refer to use classes using the Planning Use Class Order: E(g)(i) and E(g)(ii)¹¹⁵ (office market); E(g)(iii), B2 and B8 (industrial market).

12.2 Office market [E(g)(i) uses]

12.2.1 This section presents findings related to the office property market in Hart, along with comparisons to the FEMA, Hampshire and Solent Combined Authority, and England. The principal concentrations of office stock in Hart are in Fleet town centre, Ancell's Business Park, Bartley Wood Business Park and Osborne Way.

Buildings and floorspace

12.2.2 CoStar data indicates that the office market in Hart is comprised of 237 properties, i.e. buildings in office use or an office component within a mixed-use building, accommodating 194,504 sqm net internal area (NIA) floorspace, including existing space, and space under renovation.

12.2.3 Table 12-2 shows the number of office properties and the corresponding floorspace (in sqm) for Hart, the FEMA, the Hampshire & Solent Combined Authority Area and England. Hart accommodates 29.4% of office properties within the FEMA, and accounts for 18.5% of the FEMA's total office floorspace. The data also shows that the average building size in Hart (821 sqm) is below the average in the FEMA (1,304 sqm), Hampshire and Solent (965 sqm), and England as a whole (1,107 sqm). This indicates that the supply of office floorspace in Hart is generally centred around small and medium sized premises.

Table 12-2: Office Properties – Buildings and Floorspace

	Number of Buildings	Floorspace (sqm)	Average Building Size
Hart	237	194,504	821
FEMA	806	1,051,132	1,304
Hampshire and Solent	3,359	3,240,597	965
England	105,562	116,809,988	1,107

Source: CoStar, (2026)

12.2.4 Table 12-3 presents the change in office floorspace in Hart, the FEMA, Hampshire and Solent and England for the period between 2016 and 2026. It

¹¹⁵ This section does not cover properties in E(g)(ii) uses due to the small number of relevant properties reported in CoStar.

shows that the supply of office floorspace in Hart experienced a large reduction (-27.8%). The loss of office space is also observed across the FEMA and Hampshire & Solent, but to a lesser extent (-11% and -4.4% respectively). Inversely, the office market has increased across England (+8%). This suggests that the office market in the entire region has been underperforming the national average, with Hart demonstrating the largest decline.

12.2.5 Whilst this decline, in Hart, started before 2020 (Covid-19), the downward trend is more acute from 2020 onwards. Several reasons could explain this trend:

- a greater shift towards home working in Hart compared to the rest of the country;
- a poor economic performance in Hart, leading to a decline in business activities (and requirement for space in the District);
- an excess of office space that has been redeveloped, converted, or demolished.

12.2.6 Based on available evidence, the most likely justification is a combination of all three. Whilst there is no local data (local authority level) about the share of home-working, in March 2025, the South East region had the highest share of home-working in England (36.5%), above London (34%)¹¹⁶. Hart also experienced a drop in office-related employment between 2015 and 2024 (as shown in Section 4.5), particularly in Information and communication (-55.0%); Financial and insurance activities (-14.3%); Real estate activities (-14.3%); Professional, scientific and technical activities (-22.2%); and Public administration and defence (-11.1%). These have contributed to an excess of office space in Hart and driven the conversion/redevelopment of some of the office stock, particularly to residential use. Some examples of conversion include Fleet House, Lorica House and Infineon House (former office buildings on Ancells Business Park); NTT House (former office building, on Waterfront Business Park).

Table 12-3: Change in office floorspace stock between 2016 and Q1 2026

	Hart	FEMA	Hampshire & Solent	England
Floorspace in 2016 (sqm)	269,240	1,181,460	3,388,221	108,199,542
Floorspace in 2026 (sqm)	194,504	1,051,132	3,240,597	116,809,988
Change (%)	-27.8%	-11.0%	-4.4%	8.0%

Source: CoStar, (2026)

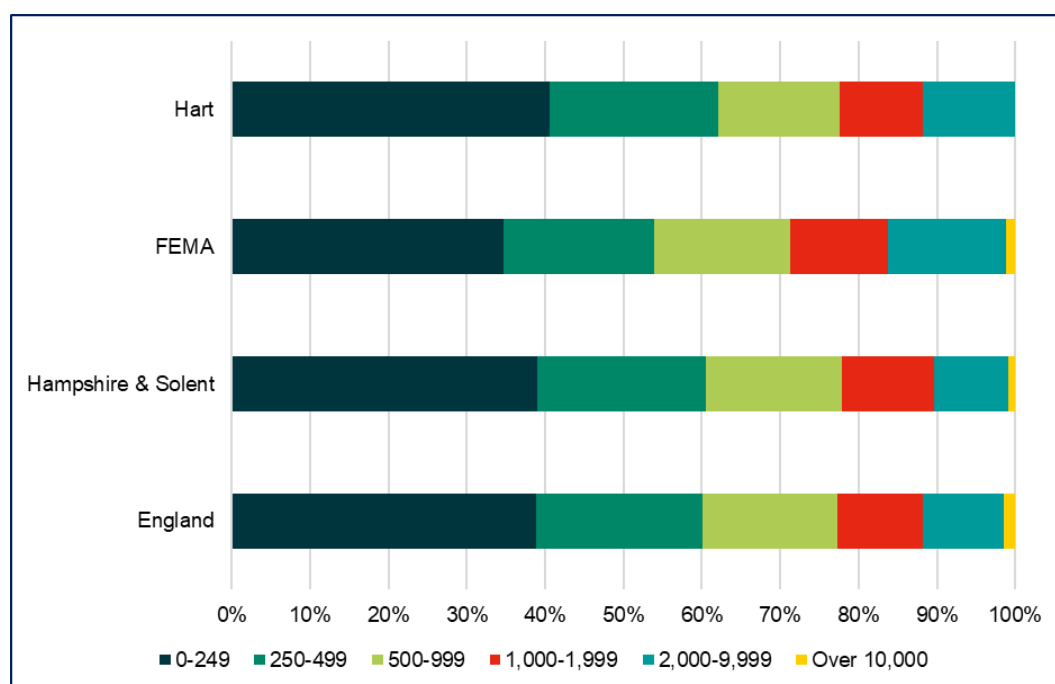
¹¹⁶ ONS, Home working by region and month, UK, April 2017 to March 2025

Premises

12.2.7 Figure 12-1 shows that 40.5% of all office units in Hart are less than 250 sqm in size. Approximately 37.1% of all units are between 250 and 1,000 sqm, 22.4% between 1,000 and 10,000 sqm and no buildings are larger than 10,000 sqm.

12.2.8 In general, Hart, is typified by a concentration of small office buildings, with buildings less than 500 sqm accounting for 62.0% of total stock. This is however comparable to Hampshire and Solent (60.5%) and England as a whole (60.0%). In contrast, office buildings less than 500 sqm account for only 53.8% across the FEMA.

Figure 12-1: Office properties - Stock by premises size in Q1 2026 (% of total sqm)



Source: CoStar, (2026)

Vacancy and Absorption Rates

12.2.9 MHCLG guidance requires employment land studies to consider evidence of market failure such as physical or ownership constraints that prevent employment sites being used effectively. Therefore, this section presents data on vacancy and absorption rates of office E(g)(i) premises in Hart, the FEMA, Hampshire and Solent and England.

12.2.10 CoStar records 'vacancy' in terms of space which is unoccupied and marketed. Table 12-4 shows the vacancy rate for office floorspace in Hart, along with the FEMA, Hampshire and Solent and England. Hart has a lower vacancy rate (5.9%) than the FEMA (9.2%), Hampshire and Solent (7.3%) and the England (8.9%) averages. Providing that the demand for office space in Hart does not decline further, the low vacancy rate in the District could support the retention of the existing stock.

12.2.11 Hart brings down the vacancy rate in the FEMA, and accounts for only 11.9% of the vacant office floorspace in the area. The good performance of Hart has to be put into perspective with the reduction in office floorspace (since 2016) presented in Table 12-4.

12.2.12 The office floorspace vacancy rate in Hart is currently below the optimal 8% frictional level¹¹⁷. This optimal rate is commonly used in the industry to indicate a balanced market in terms of demand and supply. The rate of 5.9% may suggest that the size of the office market in Hart may slightly constrained economic growth (as businesses will have fewer properties to choose from in case of relocation and/or need for alternative space to accommodate the expansion/contraction of their activities).

12.2.13 However, in response to the impact of Covid-19 on demand for office space, landlords have adopted a more flexible position on short-term let arrangements and rent concessions to retain occupiers. These arrangements are assumed to be temporary, and it is therefore possible that demand for office space in the longer term may decrease (potentially leading to a higher vacancy rate in Hart).

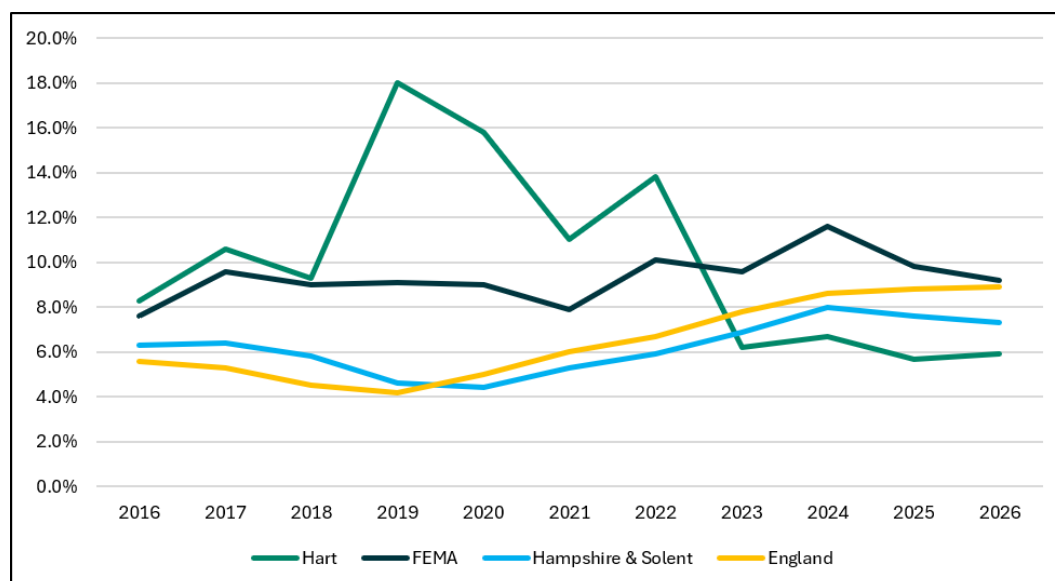
Table 12-4: Vacancy rates of office floorspace in Q1 2026

	Hart	FEMA	Hampshire and Solent	England
Office floorspace				
Vacancy rate (%)	5.9%	9.2%	7.3%	8.9%
Vacancy (sqm)	11,476	96,704	236,564	10,396,089

Source: CoStar, (2026)

12.2.14 Figure 12-2 shows the change in office floorspace vacancy rates between 2016 and 2026 for Hart, the FEMA, Hampshire and Solent and England. The vacancy rate in Hart has decreased from 8.3% in 2016 to 5.9% in 2026 (principally due to the loss of office space in Hart over the period) after having increased up to 13.8% in 2022. Meanwhile, the FEMA has seen an increase in vacancy rate, which is driven up by higher vacancy rates in Rushmoor and Basingstoke and Deane.

¹¹⁷ It should be noted that vacancy will be distorted, particularly over the short-term, following a rapid reduction or augmentation of the stock. In this case of Hart, Vacancy is relatively low following the loss of office stock over the past few years, including through the reconversion of obsolete and surplus office stock to residential use though permitted development rights.

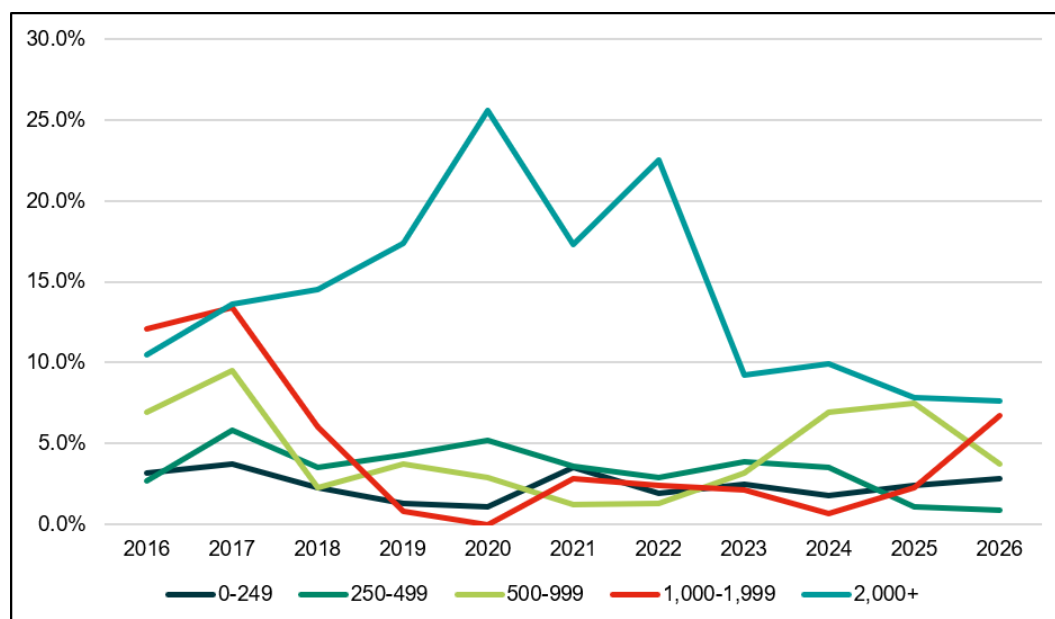
Figure 12-2: Vacancy rate (%) of office floorspace

Source: CoStar, (2026)

12.2.15 Figure 12-3 shows the change in vacancy rates by size band. This highlights that premises over 2,000 sqm have had the highest vacancy rate consistently since 2017. Vacancy data for this size band suggests that there is no undersupply of large office units. The current vacancy rate of 7.6% came down from 25.6% (in 2020) mainly due to the loss (demolition / conversion) of office space.

12.2.16 Office premises between 1,000 and 1,999 sqm have seen the greatest drop in the vacancy rate, from 12.1% in 2016 to 6.1% in 2026. This is slightly under the frictional rate of 8%.

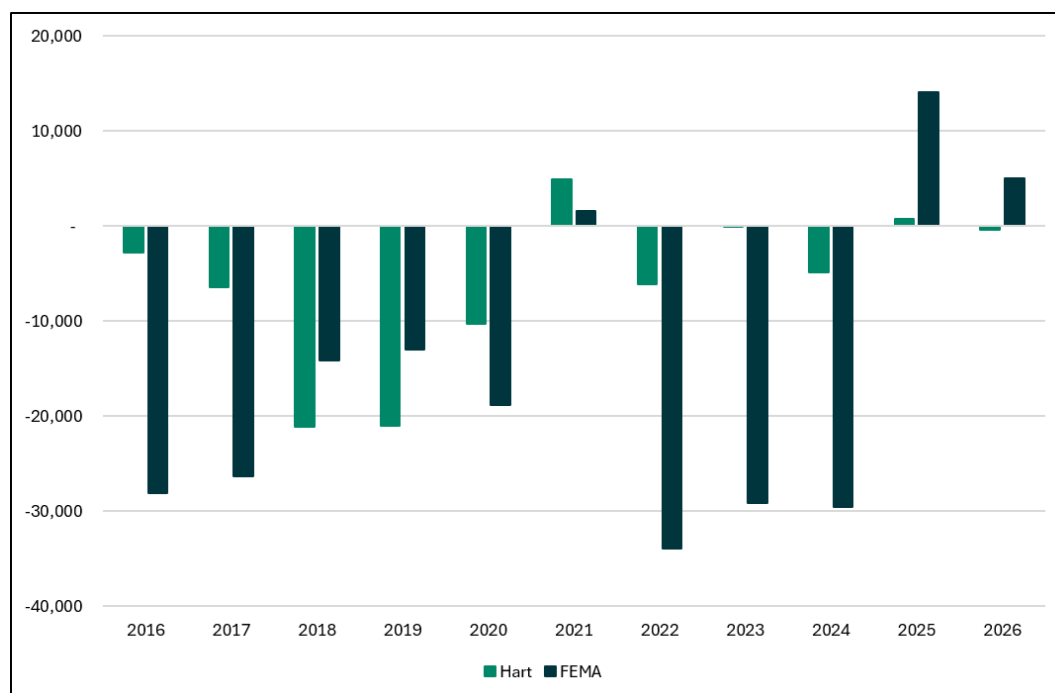
12.2.17 Both office premises between 0 and 249 sqm and between 250 and 500 sqm have had vacancy rates well below 8% since 2016. This would suggest a high demand for this type of properties and a lack of stock in these size ranges. This is also true for office premises between 500 and 999 sqm, which have had low vacancy rates since 2016 (with the exceptions of 2024 and 2025).

Figure 12-3: Vacancy rate (%) of office floorspace, by premises size (sqm)

Source: CoStar, (2026)

12.2.18 Net absorption provides another angle on demand. The measure expresses the change in the overall quantum of occupied floorspace, typically recorded year on year. Positive annual net absorption means that a greater amount of space has been occupied from a given year to the next. Net absorption is not the reverse of vacancy as vacancy is an expression of the level of non-occupancy against total stock. In office markets where stock may be in decline, for example due to the conversion of offices to residential use, vacancy may reduce but net absorption would be negative.

12.2.19 Figure 12-4 presents the net absorption of office floorspace in Hart and the FEMA. Both areas have experienced negative net absorptions in most years since 2017, with the exceptions of 2020 and 2025. This is mainly driven by the loss of office space in Hart, whilst increasing vacancy rates in the FEMA have also impact net absorption rates in this area.

Figure 12-4: Net absorption of office floorspace, in sqm

Source: CoStar, (2026)

Rental Values

12.2.20 Table 12-5 presents the average rental values recorded in Q1 2026 for office floorspace in Hart, the FEMA, Hampshire and Solent and England. It shows that the average rental value for office floorspace in Hart (£229 per sqm) is 7.3% lower than the FEMA average (£247 per sqm). Rental values in Hart and the FEMA are above the average for Hampshire and Solent (£217 per sqm), but lower than the average for England (£342 per sqm).

12.2.21 This would suggest that the FEMA has an important office market within the wider region (Hampshire and Solent) but lags behind the national average which is partly driven up by the office markets in major cities such as London or Manchester. Hart provides more affordable office space within the FEMA, which may be attractive to businesses seeking more affordable spaces (generally a consideration for smaller businesses).

Table 12-5: Average rental values for office floorspace

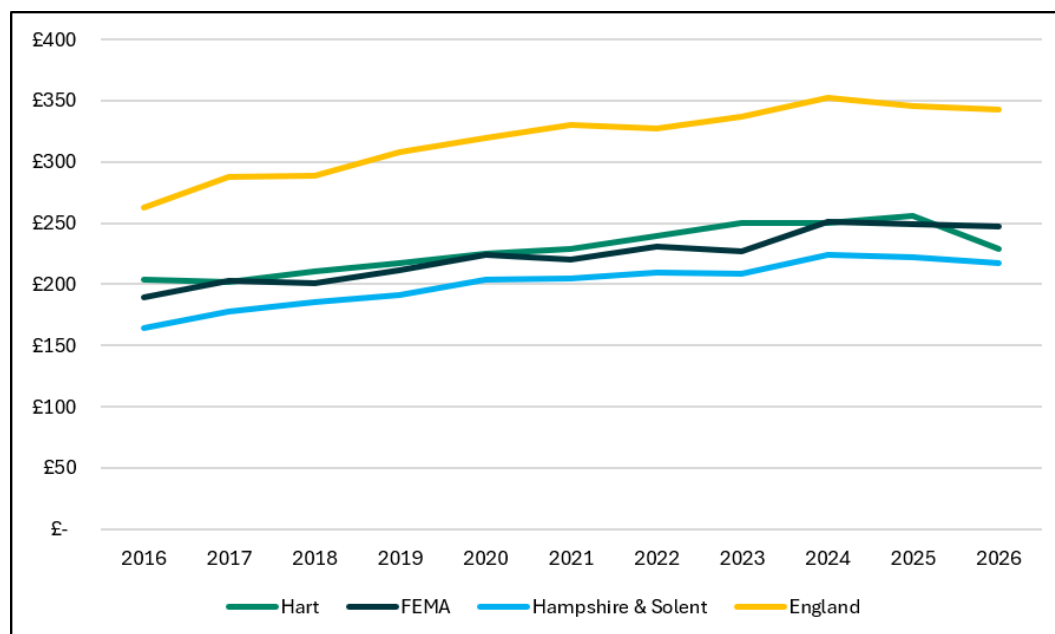
Location	Average £ per sqm
Hart	229
FEMA	247
Hampshire and Solent	217
England	342

Source: CoStar, (2026)

12.2.22 Figure 12-5 presents the change in rental values in Hart, the FEMA, Hampshire and Solent and England between 2016 and Q1 2026. The average rent per sqm has increased in Hart by an average of 1.2% per annum over this period, lower than the rate across the FEMA (2.7%), Hampshire & Solent

(2.8%) and England (2.7%). The lower growth in Hart can be partly justified by the loss of large office premises on the District, which tend to attract higher rental values. However, this could also suggest a declining attractiveness of Hart for office occupiers comparatively to the attractiveness of the other geographies.

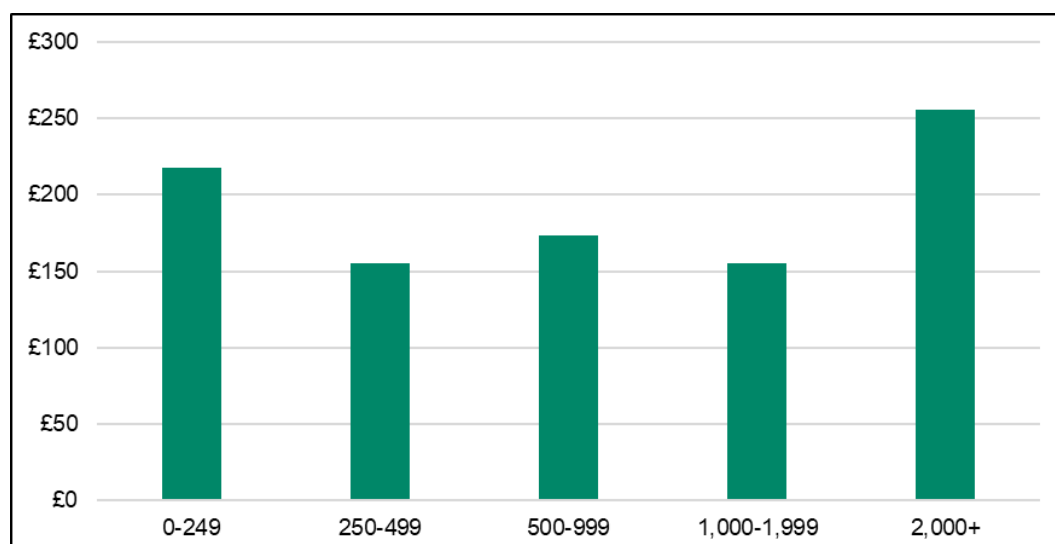
Figure 12-5: Average rent for office floorspace (£ per sqm)



Source: CoStar, (2026)

12.2.23 Figure 12-6 provides a breakdown of rental values in Hart, in 2026, by size band. Generally, rental values tend to increase alongside the size of office premises (large premises generally attracting higher rental values). However, this table shows that rental values for office premises below 250 sqm are the second highest (£218/sqm/annum). This is likely driven by the consistent lack of vacant space within this size band since 2016 (consistently below 5%). High rental values on small size band office premises could be a barrier to growth for small businesses and start-ups.

Figure 12-6: Average rent for office floorspace in Q1 2026 (£ per sqm)



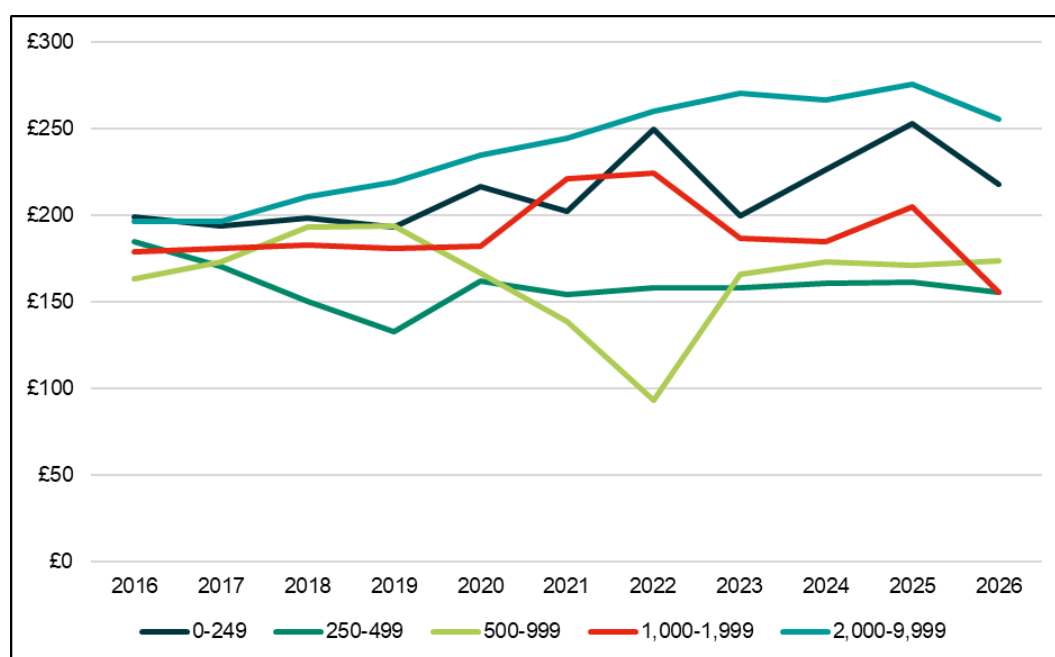
Source: CoStar, (2026)

12.2.24 Over the period between 2016 and Q1 2026, as shown in Figure 12-7, the market rental values of office properties have increased across three of the five size bands:

- 0-249 sqm: +0.9% in average annually, likely driven by low vacancy. However, this growth rate remains limited (i.e. below general inflation).
- 500-999 sqm: +0.6% in average annually. This growth is also limited and likely driven by low vacancy. It is worth noting the sharp drop in rental values in 2022 for this size band, which could be linked to the impact of Covid-19 and flexible working practices, with businesses relocating to smaller premises or renegotiating their lease with landlords.
- 2,000-9,999 sqm: +1.8% in average annually, likely driven up by the loss of some large office premises (expected to be the less valuable stock).

12.2.25 Rental values have decreased across the other two size bands (250-499 sqm: -1.7% annually in average; and 1,000-1,999 sqm: -1.4% annually in average).

Figure 12-7: Average rent for office floorspace (£ per sqm)



Source: CoStar, (2026)

Changing Office Workspace Requirements

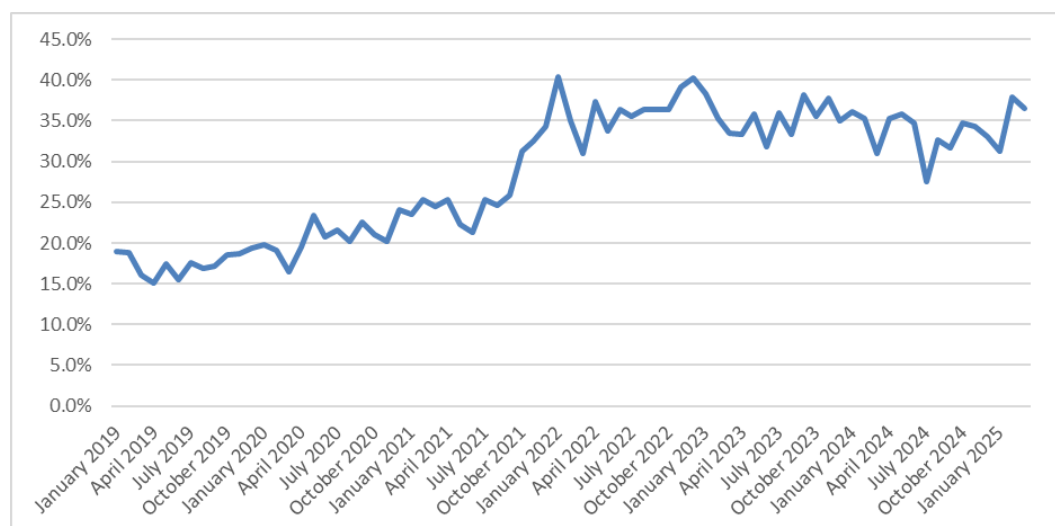
12.2.26 This sub-section delves into the recent evolution of changing space requirements for office and knowledge work.

12.2.27 The work-from-home shift is a key driver of the evolving landscape in the UK. Data published by the Office for National Statistics¹¹⁸ highlighted that 58% of workers in the South East embraced either “home or hybrid work” in 2023, reshaping models, and foretelling a lasting change, with 75% anticipating transformed in-person work approaches. The latest available data from the

¹¹⁸ ONS Characteristics of homeworkers, Great Britain February 2023

ONS, from March 2025¹¹⁹, shows that the proportion of the workforce in the South East “mainly” working from home has remained high since the end of 2021 and fluctuates in the region of 35%. In March 2025, 36.5% of the workforce in the South East was reported as “mainly” working from home. By way of comparison, Annual Population Survey data from before the Covid-19 pandemic shows that around 17.6% of working adults reported working from home at some point in the week before the interview.

Figure 12-8: Home Working, South East (“Mainly Work from Home”), January 2019-March 2025



Source: ONS Home Working by Region and Month, March 2025

12.2.28 The future of office spaces is set to be shaped by intricate dynamics involving employee attendance rates and the broader economic landscape. Survey data from February 2026¹²⁰ indicated that office occupancy rates across the UK averaged around the 40% mark. This compares with pre-pandemic occupancy rates estimated at 80%. Further research from 2025¹²¹ indicates that the rate of office utilisation has increase and stabilised at 66%. Tuesdays, Wednesdays, and Thursdays are the busiest days of the week for staff to be at their desks, with Friday remaining the quietest day. Faced with this new reality, employers are confronted with challenges to entice employees back to the office environment, thus influencing decisions related to office expansion, right-sizing office spaces, and delaying real estate investments.

12.2.29 The context within the office market, characterised by extended leases held, suggests that a time lag will occur before a decrease in demand for office space is fully evident. This delay provides a window during which office job numbers might increase, employee attendance rates could experience a

¹¹⁹ ONS Home Working by Region and Month, March 2025

¹²⁰ Remit Consulting (2026) News Release: UK office occupancy stabilises above 40% as sector divide widens. Available at: <https://return.remitconsulting.com/resource-centre/57-uk-office-occupancy-stabilises-above-40-as-sector-divide-widens>

¹²¹ <https://www.bco.org.uk/bco-report-calls-for-new-approach-to-space-planning-as-office-use-reaches-critical-shift>

partial recovery, and a pursuit of high-quality office environments may persist, collectively contributing to a relatively gradual and controlled transition for office providers. It is worth to note that locations with limited premium office offerings, away from amenities, might experience a more pronounced impact due to the variable nature of the “flight to quality”¹²².

- 12.2.30 This trend of downsizing of requirements by office occupiers is already driving decisions by businesses to reduce their premises size with impacts on vacancy rates. In turn this may potentially result in new office floorspace being of lower average employment density (i.e. more space per employee) than has been typical.

12.3 Industrial Market [E(g)(iii); B2 and B8 uses]

- 12.3.1 This section presents findings related to the industrial (E(g)(iii); B2 and B8 uses) property market in Hart, along with comparisons to the FEMA, the Hampshire and Solent Combined Authority area and England. Industrial properties, comprising industrial, manufacturing, light industrial, and storage and distribution functions are predominantly located around Blackbushe Business Park, Osborne Way employment sites, Bartley Wood Business Park, Murrell Green Business Park, and on the edge of Fleet town centre (Waterfront Business Park, Redfields Business Park).

Buildings and Floorspace

- 12.3.2 There are 27 light industrial (E(g)(iii) use) properties in Hart, comprising 16,851sqm of floorspace. The light industrial floorspace across Hart represents approximately 12.0% of the light industrial floorspace in the FEMA. Light industrial uses account for the smallest proportion of floorspace across all industrial use classes.
- 12.3.3 Hart is home to 53 general industrial (B2 use) properties, accounting for 22,505 sqm of floorspace. The general industrial floorspace across Hart represents 11.1% of the general industrial floorspace in the FEMA.
- 12.3.4 There are 46 storage and distribution (B8 use) properties in Hart, comprising 103,969 sqm of floorspace. Storage and distribution floorspace across Hart represents 11.2% of the storage and distribution floorspace in the FEMA.
- 12.3.5 Table 12-6 presents a profile of properties and floorspace by industrial use class and geographical area. In total, CoStar reports 143,325 sqm of industrial floorspace (all industrial use classes) in Hart, representing only 11.2% of the total floorspace in the FEMA. This confirms that Hart is a relatively small industrial market compared to its wider FEMA.

¹²² <https://www.cbre.co.uk/insights/viewpoints/the-flight-to-quality-quantified>

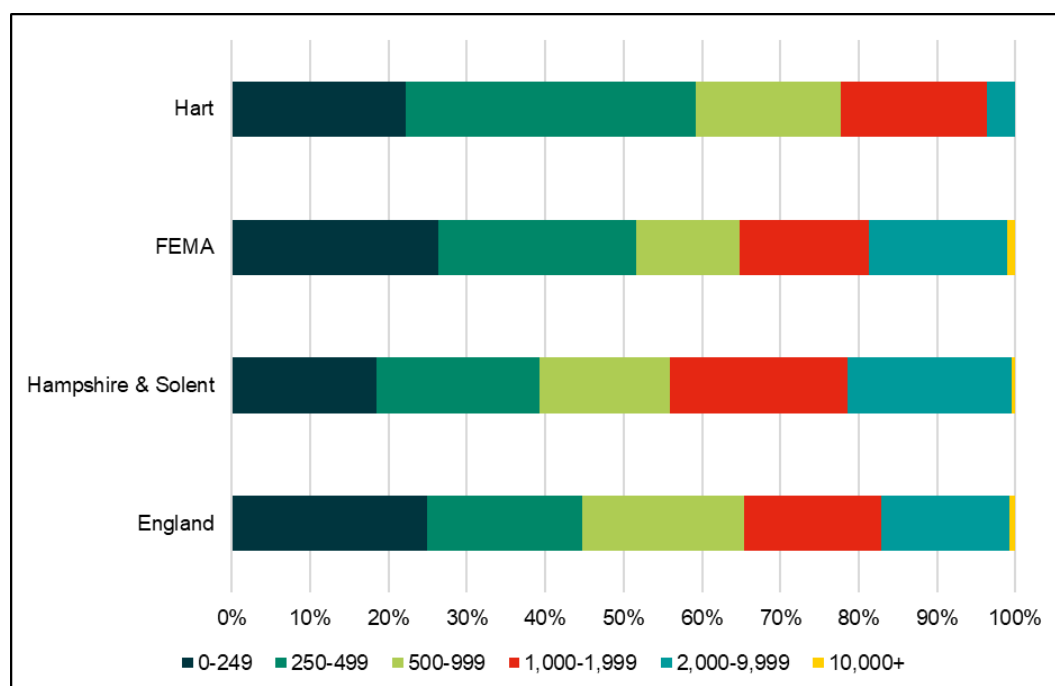
Table 12-6: Industrial properties – buildings and floorspace (Q1 2026)

	Hart	FEMA	Hampshire & Solent	England
Light Industrial [E(g)(iii)]				
Number of Properties	27	92	437	15,274
Floorspace (sqm)	16,851	140,556	648,268	19,825,271
General Industrial [B2]				
Number of Properties	53	238	1,295	46,008
Floorspace (sqm)	22,505	203,118	1,668,768	81,063,313
Storage and Distribution [B8]				
Number of Properties	46	330	1,755	58,965
Floorspace (sqm)	103,969	931,006	4,941,424	204,646,466
Total				
Number of Properties	126	660	3,487	120,247
Floorspace (sqm)	143,325	1,274,680	7,258,475	305,535,050

Source: CoStar, (2026)

Premises

12.3.6 Light industrial properties in Hart tend to be relatively small in size, whereby over half of buildings (59.3%) in this use are less than 500 sqm, compared to 51.6% in the FEMA, 39.3% in the Hampshire and Solent, and 44.7% in England. There are no properties over 10,000 sqm in Hart. This is shown in Figure 12-9.

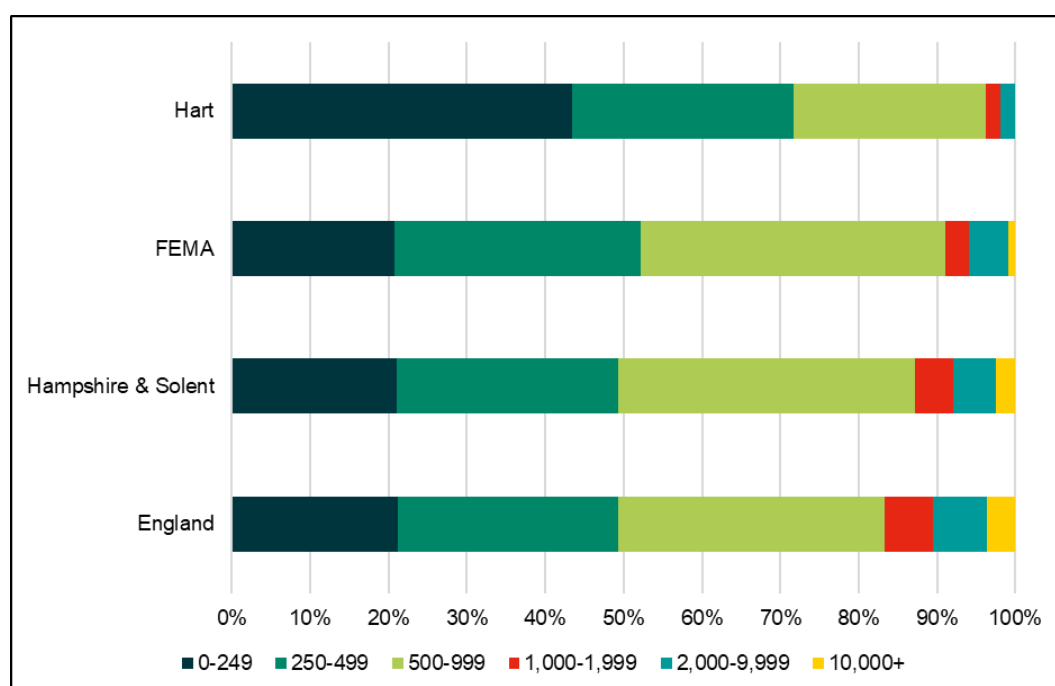
Figure 12-9: Industrial properties - Light industrial [E(g)(iii)] - Stock by premises size in Q1 2026 (% of total sqm)

Source: CoStar, (2026)

12.3.7 General industrial properties in Hart are also typically less than 500 sqm in size, accounting for 71.1% of properties, a higher proportion than recorded for the FEMA (52.1%), Hampshire and Solent (49.3%) and across England (49.2%). This is shown in Figure 12-10. Noticeably, there are very few premises above 1,000 sqm in Hart in general industrial use.

12.3.8 The large concentration of small general industrial premises suggests that businesses in Hart tend to be small businesses, catering for the local and regional market, and using those premises for activities that could be associated with light industrial use rather than general/heavy industrial use. This is not uncommon in more rural economies.

Figure 12-10: Industrial properties - General Industrial [B2] - Stock by premises size in Q1 2026 (% of total sqm)



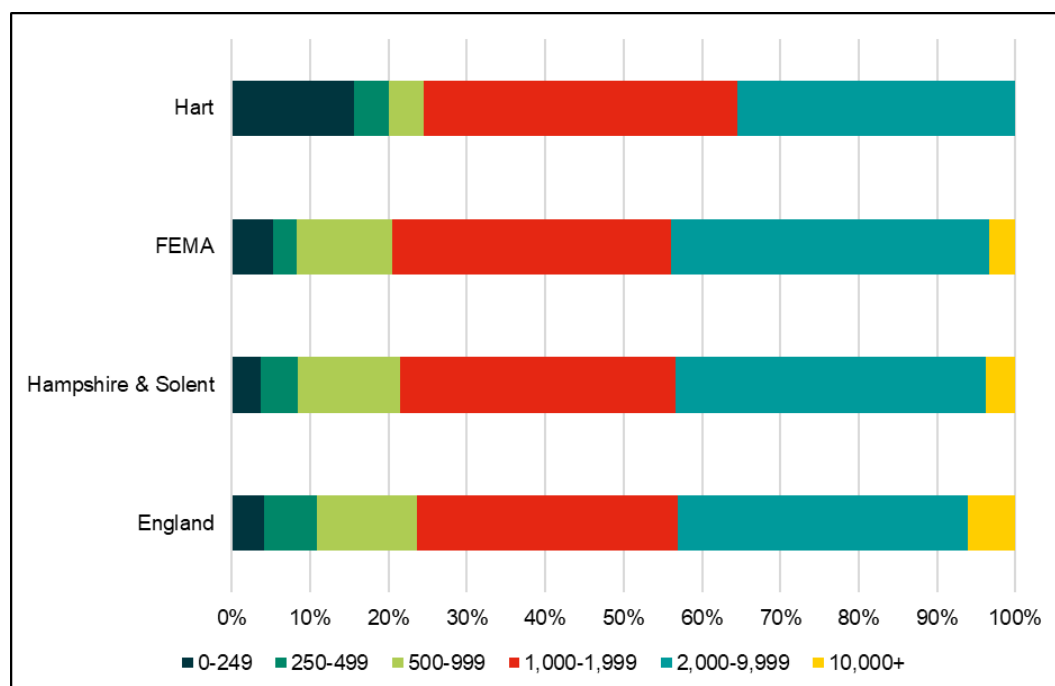
Source: CoStar, (2026)

12.3.9 Storage and distribution properties typically have larger floorspaces. In Hart, the majority of properties (75.6%) sit within the 1,000 – 9,999 sqm size band, slightly lower than the FEMA (76.2%) but higher than Hampshire and Solent (74.8%) and England (70.2%).

12.3.10 There are no storage and distribution properties in Hart that have floorspaces over 10,000 sqm unlike the proportion in the FEMA (3.4%), Hampshire and Solent (3.8%) and England (6.1%). This is shown in Figure 12-11

12.3.11 It is worth noting that there is also a large proportion of premises under 500 sqm in Hart (20.0%) compared to the other geographies (8.2% in the FEMA; 8.4% in Hampshire and Solent; and 10.9% in England). Additional medium-sized premises (500 to 1000 sqm) in Hart could provide more flexibility to businesses and be attractive to the market.

Figure 12-11: Industrial properties - Storage and distribution [B8] - Stock by premises size in Q1 2026 (% of total sqm)



Source: CoStar, (2026)

Vacancy and Absorption Rates

12.3.12 Table 12-7 presents a breakdown of industrial floorspace vacancy (in terms of vacancy rate and vacant floorspace) by type (light industrial, general industrial, and storage and distribution).

12.3.13 The light industrial floorspace vacancy rate in Hart (1.1%) is lower than the vacancy rate in the FEMA (2.2%), Hampshire and Solent (4.1%), and England (4.3%). It can be noted that the vacancy rates across all geographies is below the optimal frictional rate of 5% for industrial premises. This is particularly true in Hart and the FEMA and would suggest that the additional floorspace could be delivered to respond to demand and ensure some reasonable frictional vacancy exists.

12.3.14 General industrial floorspace records a very low vacancy rate in Hart (0.7%) and the FEMA (0.8%). These rates are lower than across Hampshire and Solent (3.8%) and England (2.3%). As with light industrial, vacancy rates in Hart and the FEMA are well below the optimal frictional vacancy rate of 5%, therefore additional delivery could be beneficial to growth.

12.3.15 It should however be noted both the light industrial and general industrial markets in Hart (in terms of existing floorspace) are small. Therefore, small incremental increases in floorspace could increase vacancy rapidly¹²³.

12.3.16 The vacancy rate for storage and distribution space in Hart is much higher than for the other use classes, at 15.9%. This is higher than across the FEMA

¹²³ An additional 2,000 sqm of new floorspace between the two use classes could increase vacancy to 5%.

(12.3%), Hampshire and Solent (9.5%) and England (7.3%). Unless supported by evidence of future needs, additional floorspace for B8 use should not be delivered at scale in Hart.

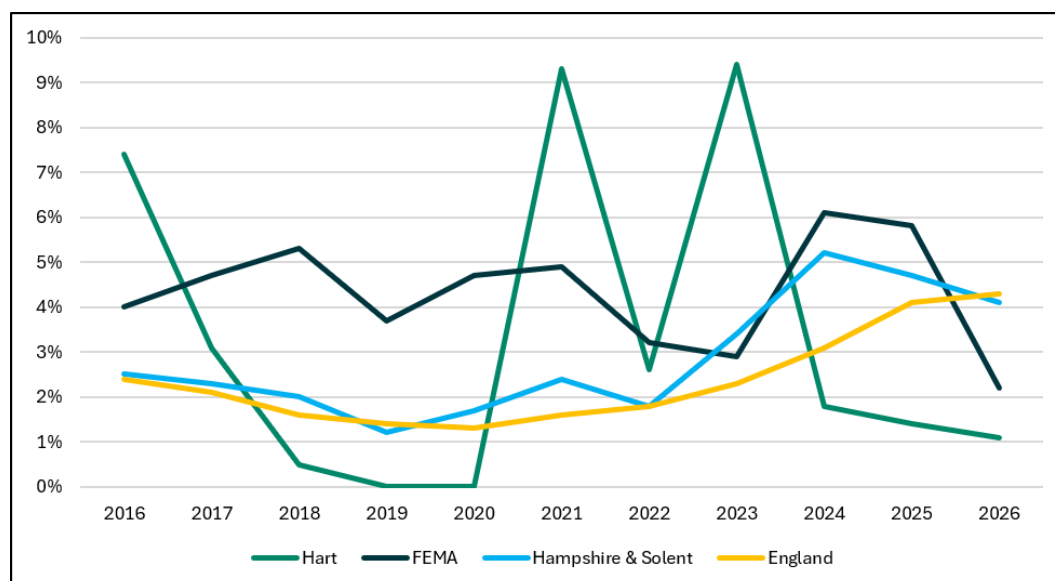
Table 12-7: Industrial properties – Vacancy (2026 Q1)

	Hart	FEMA	Hampshire and Solent	England
Light industrial [E(g)(iii)]				
Vacancy rate (%)	1.1%	2.2%	4.1%	4.3%
Vacant floorspace (sqm)	185	3,092	26,580	852,487
General industrial [B2]				
Vacancy rate (%)	0.7%	0.8%	3.8%	2.3%
Vacant floorspace (sqm)	158	1,625	63,413	1,864,456
Storage and Distribution [B8]				
Vacancy rate (%)	15.9%	12.2%	9.5%	7.3%
Vacant floorspace (sqm)	16,531	113,583	469,435	14,939,192
Total				
Vacancy rate (%)	11.8%	9.3%	7.7%	5.8%
Vacant floorspace (sqm)	16,874	118,300	559,428	17,656,135

Source: CoStar, (2026)

12.3.17 When considering the trend in vacancy rate of light industrial floorspace, the vacancy rate in Hart has fluctuated erratically from 2016 to 2026, likely due to having a smaller number of only 27 buildings. Since 2023, Hart has experienced a decrease in light industrial vacancy rate until reaching 1.1% in Q1 2026, which is lower than all other comparators.

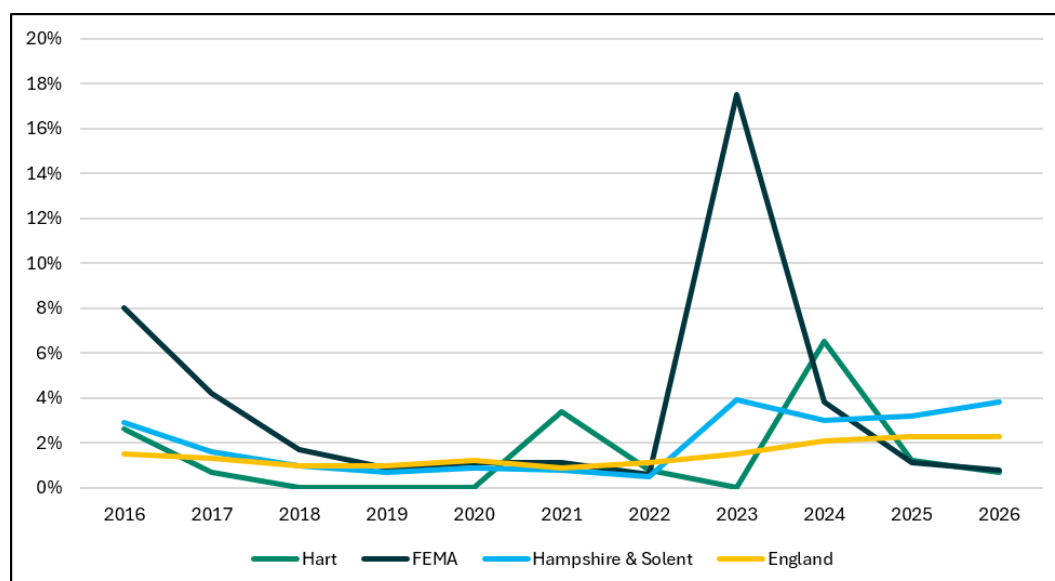
12.3.18 The 10-year average vacancy rate for the light industrial properties in Hart (2.9%) is lower than in the FEMA (4.4%), comparable to Hampshire and Solent (2.9%), and higher than England (2.4%). This is shown in Figure 12-12.

Figure 12-12: Vacancy rate (%) of Light industrial [E(g)(iii)] floorspace in Q1 2026

Source: CoStar, (2026)

12.3.19 The vacancy rate of general industrial properties in both Hart and the FEMA has also fluctuated significantly between 2016 to 2026. The vacancy rate in Hart, however, remained relatively low over the entire period, reaching a maximum of 6.5% in 2024 before dropping back to 0.7%. The sharp fluctuations are not surprising given the small size of the market (therefore, any new lease or vacancy has a large impact on vacancy rate).

12.3.20 As shown in Figure 12-13, vacancy rates across all geographies are below the frictional vacancy rate (5%) in 2026. This could suggest a constrained market where the delivery of additional floorspace would benefit businesses.

Figure 12-13: Vacancy rate (%) of General industrial [B2] floorspace in Q1 2026

Source: CoStar, (2026)

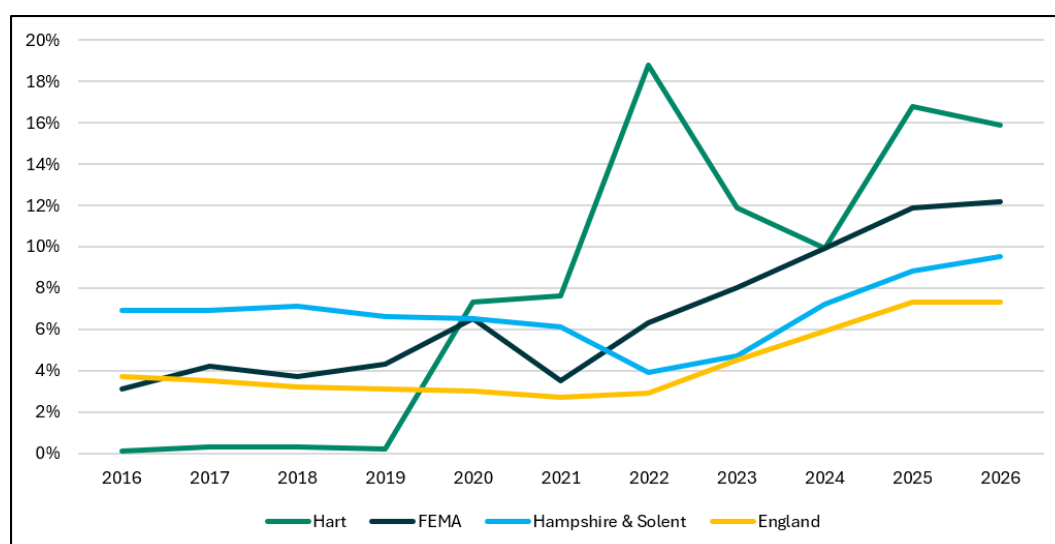
12.3.21 Vacancy rates for storage and distribution properties have increased in Hart, the FEMA, Hampshire and Solent and England over the ten-year period to 2026 as shown in Figure 12-14. From 2016 to 2019, vacancy rates in Hart

remained very low (close to 0%) before increasing in 2020 to 7.3% and in 2022 to 18.8%. Since, the vacancy rate in Hart has dropped back to 15.9% but remains higher than across the FEMA (12.2%), Hampshire and Solent (9.5%) and England (7.3%).

12.3.22 The sharp increase in vacancy of B8 space in Hart can be explained by the additional floorspace that has been delivered over the period (with over 40% of additional floorspace in stock), and the delay between delivery and absorption of the new premises.

12.3.23 The average 10-year vacancy rate in Hart (8.1%) is the highest when compared to the FEMA (6.7%), Hampshire and Solent (6.7%) and England (4.3%).

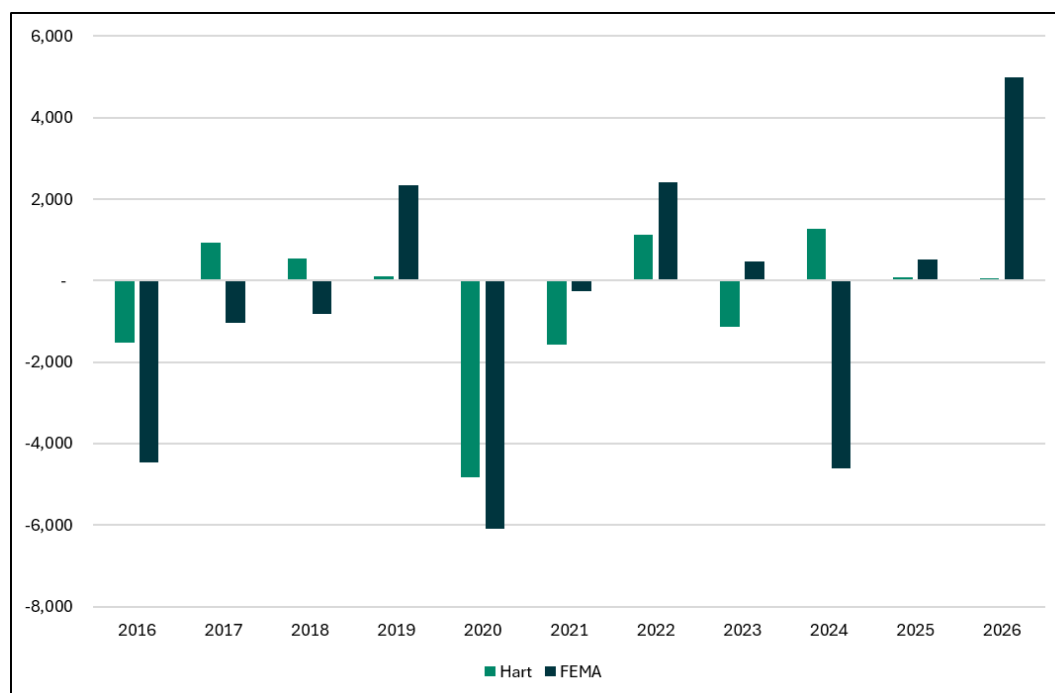
Figure 12-14: Figure 6 14 Vacancy rate (%) of Storage and distribution [B8] floorspace in Q1 2026



Source: CoStar, (2026)

12.3.24 As discussed previously in paragraph 12.2.18, net absorption provides another angle on demand. Positive annual net absorption means that a greater amount of space has been occupied from a given year to the next.

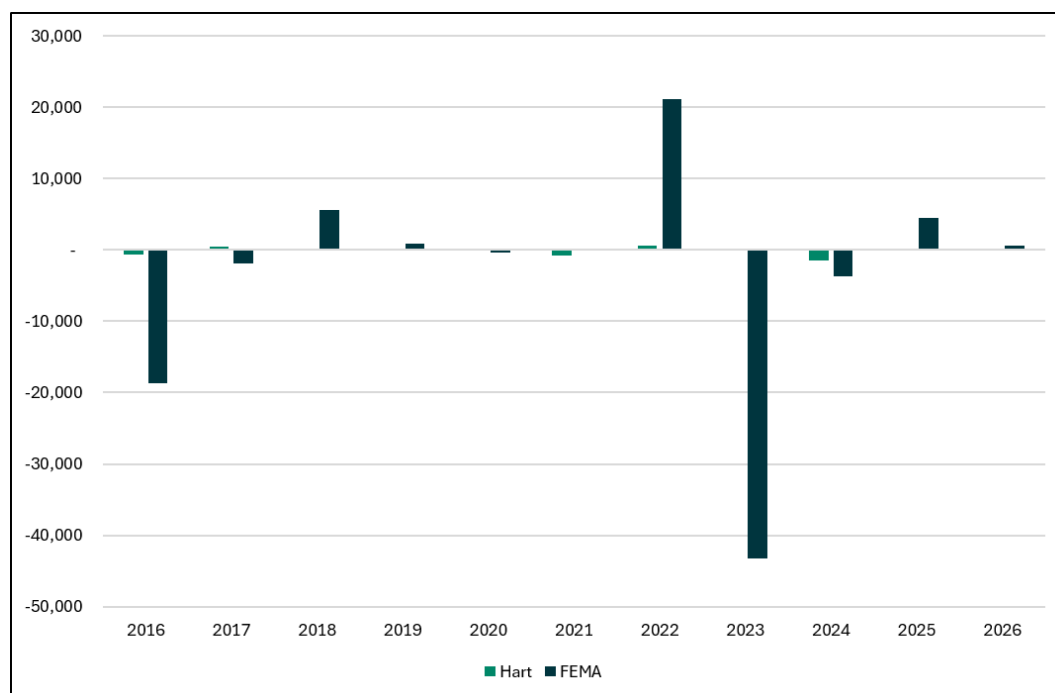
12.3.25 With regard to light industrial floorspace, net absorption has fluctuated across Hart and the FEMA over the past 10 years, as seen in Figure 12-15. Overall, net absorption in both Hart (-4,914 sqm) and the FEMA (-6,552 sqm) has been negative over the period. With Hart representing 75% of the (negative) net absorption in the FEMA, the District has been underperforming the rest of the FEMA on this market.

Figure 12-15: Net absorption - Light industrial [E(g)(iii)] floorspace (in sqm)

Source: CoStar, (2026)

12.3.26 Net absorption on general industrial floorspace has experienced a similar variable pattern over the past ten years in both Hart and the FEMA, as shown in Figure 12-16. However, absorption rates in Hart were limited compared to rates in the FEMA, which indicates a less dynamic market. This is either because of a lack of economic growth in industrial activities in Hart or because of a lack of available space (businesses have no opportunities to move around) – or both.

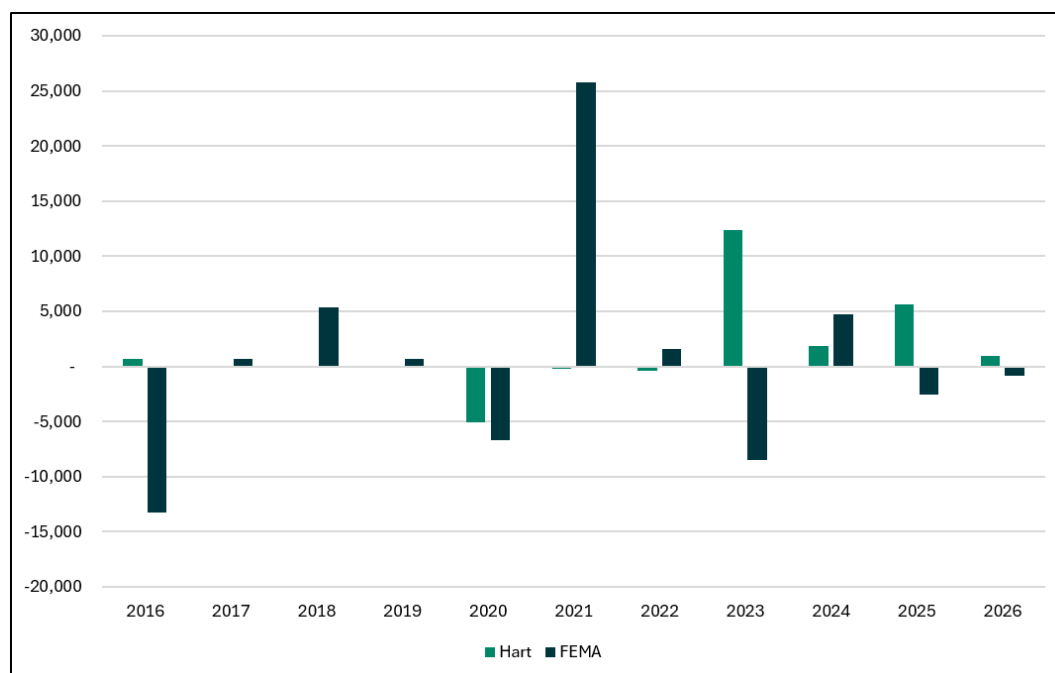
12.3.27 Over the past 10-year period, net absorption has been negative in both geographies, with Hart only representing 4% (-1,277 sqm) of the change in the FEMA (-35,361 sqm). This suggests that Hart's general industrial market has been more stable and resilient than across the rest of the FEMA.

Figure 12-16: Net absorption - General Industrial [B2] floorspace (in sqm)

Source: CoStar, (2026)

12.3.28 Net absorption of storage and distribution floorspace, shown in Figure 12-17, has generally been positive over the past 10 years in Hart (+15,557 sqm) and the FEMA (+6,834 sqm) despite increasing vacancy rates. This is due to the delivery of a large amount of new floorspace, and a delayed up-take of this new space.

12.3.29 Overall, Hart has been supporting positive net absorption in the wider FEMA, demonstrating strong demand for B8 space in the District. With the last three years of positive net absorption reported in Hart, and expected up-takes in 2026, the vacancy rate for storage and distribution floorspace is expected to reduce. The good performance of the market in recent years is partly driven by the ongoing growth of online shopping as well as the impacts of Covid-19 and the war in Ukraine on international logistics (increasing the requirement to help stock locally).

Figure 12-17: Net absorption - Storage and distribution [B8] floorspace (in sqm)

Source: CoStar, (2026)

Rental Values

12.3.30 Table 12-8 presents a breakdown of industrial properties' market rent by type (light industrial, general industrial, and storage and distribution).

12.3.31 As of Q1 2026, light industrial properties attracted an average market rental value of £158 per sqm per annum in Hart; higher than the rate for the FEMA (£106 per sqm per annum), Hampshire and Solent (£113 per sqm per annum) and England (£123 per sqm per annum). High rental values in Hart are likely driven by the small quantum of stock and lack of vacancy.

12.3.32 General industrial properties attracted higher market rents in Hart (£150 per sqm per annum). This was higher than the rate for the FEMA (£144 per sqm per annum), Hampshire and Solent (£119 per sqm per annum) and England (£88 per sqm per annum). Again, the good performance in Hart is likely driven by the small quantum of stock and lack of vacancy.

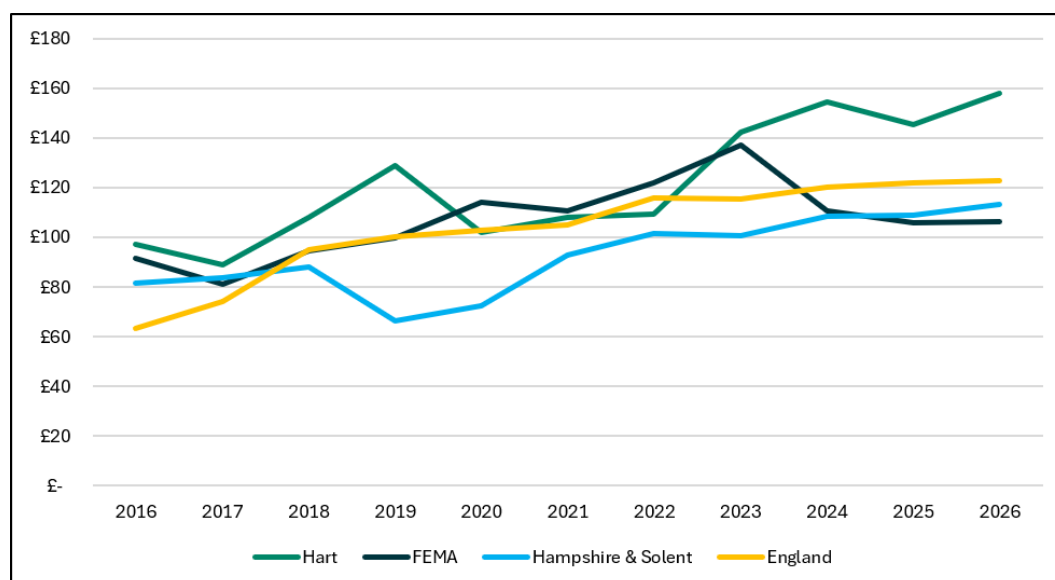
12.3.33 Storage and distribution properties also attracted higher market rental values in Hart (£147 per sqm per annum) than the recorded market rental value across the FEMA (£139 per sqm per annum), Hampshire and Solent (£117 per sqm per annum) and England (£100 per sqm per annum). Unlike the other industrial use classes, the good performance of B8 space (in terms of rental value) cannot be attributed to low vacancy. However, the small size of the market (Hart represented only 11.3% of all B8 floorspace in the FEMA) and the good quality of premises, in well-connected locations (such as along or near the M3) contribute to driving rental values up.

Table 12-8: Average rental values for Industrial properties in Q1 2026 (£ per sqm)

	Hart	FEMA	Hampshire and Solent	England
Light industrial [E(g)(iii)]				
Market rent (£/sqm)	£158	£106	£113	£123
General industrial [B2]				
Market rent (£/sqm)	£150	£144	£119	£88
Storage and Distribution [B8]				
Market rent (£/sqm)	£145	£139	£119	£100
Total				
Market rent (£/sqm)	£147	£136	£117	£98

Source: CoStar, (2026)

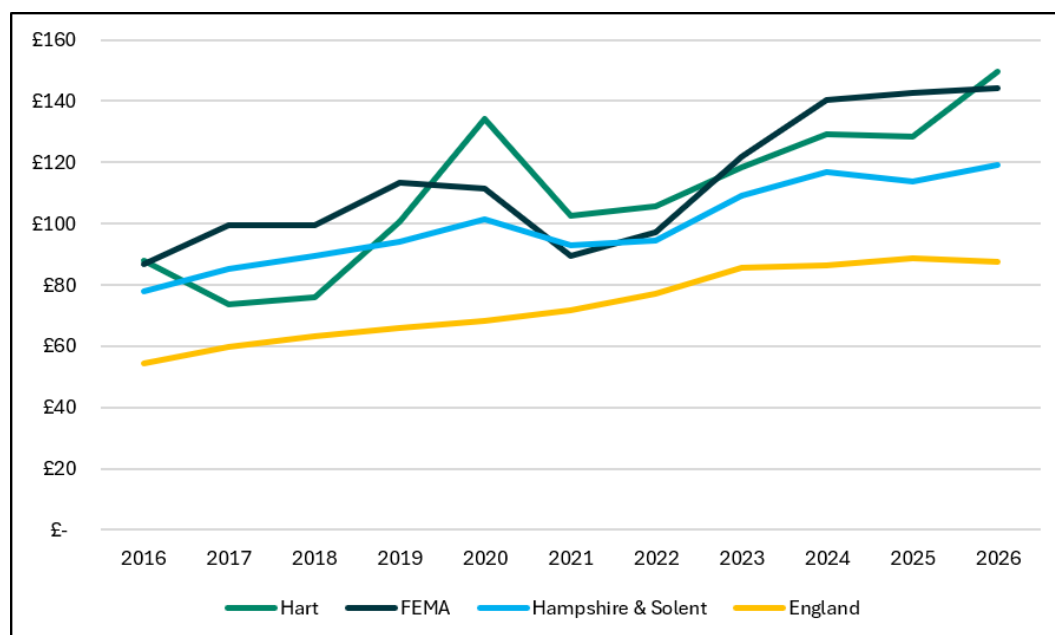
12.3.34 As shown in Figure 12-18, light industrial rental market values have increased in Hart between 2016 and 2026 at an average annual rate of 5%. This is higher than across the FEMA (1.5%) and Hampshire and Solent (3.3%), but lower than across England (6.8%). This again demonstrates the good performance of the local market compared to the region, which however lags behind England.

Figure 12-18: Average rent for Light industrial [E(g)(iii)] floorspace (£ per sqm per annum)

Source: CoStar, (2026)

12.3.35 The increase in rental values for general industrial space between 2016 and 2026 is comparable across all geographies, as shown in Figure 12-19. Over the past ten years, Hart has experienced fluctuations in rental values, but achieved an overall annual average increase of 5.5%. This is broadly comparable to the growth in the FEMA (5.2%), but higher than across Hampshire and Solent (4.4%) and England (4.9%). This, again, demonstrate the strengths of the small local market in Hart.

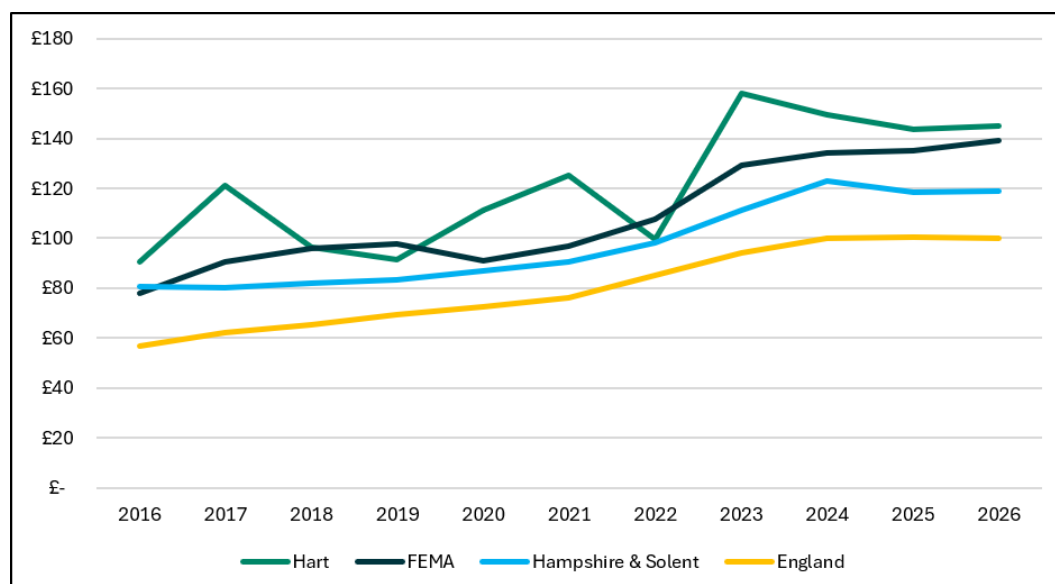
Figure 12-19: Average rent for General industrial [B2] floorspace (£ per sqm per annum)



Source: CoStar, (2026)

12.3.36 As shown in Figure 12-20, market rental values for storage and distribution properties have followed an increasing trend between 2016 and 2026 across all geographies. Market rental values in Hart have increased at a faster average annual rate (4.8%) than across Hampshire and Solent (4.0%), but a lower rate than across the FEMA (6.0%) and England (5.9%).

Figure 12-20: Average rent for Storage and Distribution [B8] floorspace (£ per sqm per annum)



Source: CoStar, (2026)

12.4 Summary

Office Market

- 12.4.1 The evidence points to a structurally changing office market in Hart, characterised by a shrinking stock of floorspace, relatively small premises, and tight vacancy in key size bands. Hart has seen a substantial reduction in office floorspace (around -28% between 2016 and 2026), markedly greater than the decline across the FEMA and Hampshire & Solent, and in contrast to growth at the national level. This signals both historic loss of stock (through redevelopment, conversion or demolition) and a local office market that has underperformed relative to England as a whole.
- 12.4.2 Hart's office supply is dominated by small and medium-sized premises, with a high proportion of units below 500 sqm and no buildings over 10,000 sqm¹²⁴. Vacancy across the District is below the commonly accepted frictional benchmark of 8%, particularly for premises below 1,000 sqm where vacancy has been well below for a sustained period, pointing to constrained choice for smaller occupiers. This tightness is reflected in rental patterns, with relatively high rents for the smallest size band despite overall average rents in Hart sitting below FEMA and national levels. Such conditions can constrain the growth of SMEs and start-ups if the combination of limited supply and elevated rents in smaller units persists.
- 12.4.3 These local dynamics sit within wider structural shifts in office occupancy and workspace requirements driven by hybrid and home working, and by a “flight to quality” towards higher specification, amenity-rich locations. High home-working rates and lower average office utilisation suggest that future growth in office-based employment may not translate directly into proportional growth in floorspace requirements, and that occupiers may continue to consolidate space or focus on higher quality stock. In Hart, where large units have experienced high vacancy and loss of stock, but smaller units are scarce and relatively expensive, any future demand is likely to be focused on flexible, good-quality space in accessible locations, rather than on significant new large-scale office parks.

Industrial Market

- 12.4.4 Hart's industrial market is relatively small in absolute terms, but it shows clear signs of underlying strength. The District contains a concentration of industrial activity around Blackbushe Business Park, Osborne Way, Bartley Wood, Murrell Green and the edge of Fleet town centre, but overall industrial floorspace in Hart accounts for only around 11% of the FEMA total.
- 12.4.5 The stock profile is notably skewed towards smaller premises. In both light industrial and general industrial uses, the majority of buildings are below 500 sqm, and Hart has very few larger units above 1,000 sqm, while there are no

¹²⁴ Following the loss of those larger premises over the past 10 years.

buildings over 10,000 sqm in the light industrial market. This suggests a market geared towards smaller occupiers, local businesses and more flexible space requirements rather than large-scale industrial or manufacturing operations. For storage and distribution, most premises fall within the 1,000–9,999 sqm range, but Hart still lacks the very largest logistics units found in comparator areas.

- 12.4.6 Light industrial and general industrial vacancy rates are extremely low in Hart, both below the 5% frictional benchmark, which indicates limited availability of occupied-ready space. By contrast, B8 storage and distribution space has a much higher vacancy rate, reflecting the delivery of new stock ahead of full market absorption. This means the District's industrial market is not uniform: there is evidenced pressure for smaller light and general industrial units, while logistics floorspace should be approached more cautiously and only supported where justified by evidence of demand.
- 12.4.7 Hart achieves relatively high rents across all industrial sub-sectors, particularly for light industrial and general industrial space, which points to the strength of demand relative to the limited stock available. Rental growth over the last decade has generally been positive, although the market remains small and therefore sensitive to individual transactions and changes in supply. In B8, rents are also strong, but vacancy is still relatively elevated, suggesting that the market may need time to absorb recent delivery before further large-scale developments are considered by investors.
- 12.4.8 These trends indicate that Hart should protect and, where appropriate, intensify existing industrial sites to maintain a supply of smaller units that are clearly in demand. The historical evidence supports a need for additional light industrial and general industrial floorspace, but this should be modest and carefully calibrated given the small size of the market and the risk that a limited amount of new space could quickly alter vacancy levels. In contrast, additional B8 provision should be more selective, with reliance on clear demand evidence before allocating further land at scale. Overall, the market points to a need for flexible, good-quality employment space that supports SMEs, local supply chains and business retention.

13. Future Employment Land Demand

13.1 Introduction

13.1.1 This section focuses on the future demand of employment space in Hart District Council from 2026-2039, as well as over an extension period to 2044. The approach used to assess future employment floorspace and land requirements is in line with Planning Practice Guidance on Economic Needs Assessments (ENA). The analysis in this section considered a range of scenarios to test potential future demand, recognising inherent uncertainty in long-term economic forecasting¹²⁵.

13.1.2 Several approaches have been considered to model future employment land needs. These approaches are:

- **Scenario 1: Labour Demand**

Based on the floorspace and land required to accommodate expected employment growth in the district, informed by forecast employment change. This scenario is presented using Experian employment forecasts.

- **Scenario 2: Labour Supply**

Based on the latest ONS population projections, this scenario assesses the future availability of workforce in Hart to fulfil employment growth in the local authority. Allocation of labour to sectors aligns with growth predicted by Experian (Scenario 1) employment forecasts.

- **Scenario 3: Past Take-Up**

Trend-based scenario based on the continuation of historical take-up rates, sourced from CoStar. This analyses take-up rates by use class over the last 10 years and extrapolates these trends over the assessment period.

13.2 Overarching Assumptions

Employment Use Classes

13.2.1 Employment sectors have been mapped to the current core B and E(g) use classes:

- Office uses (former B1a, B1b):
E(g)(i) Offices; and
E(g)(ii) Research and development.
- Industrial uses (former B1c, B2, B8):

¹²⁵ Figures presented in the analysis may not always perfectly add-up due to rounding.

E(g)(iii) Light industrial;
 B2 General industrial; and
 B8 Storage or distribution.

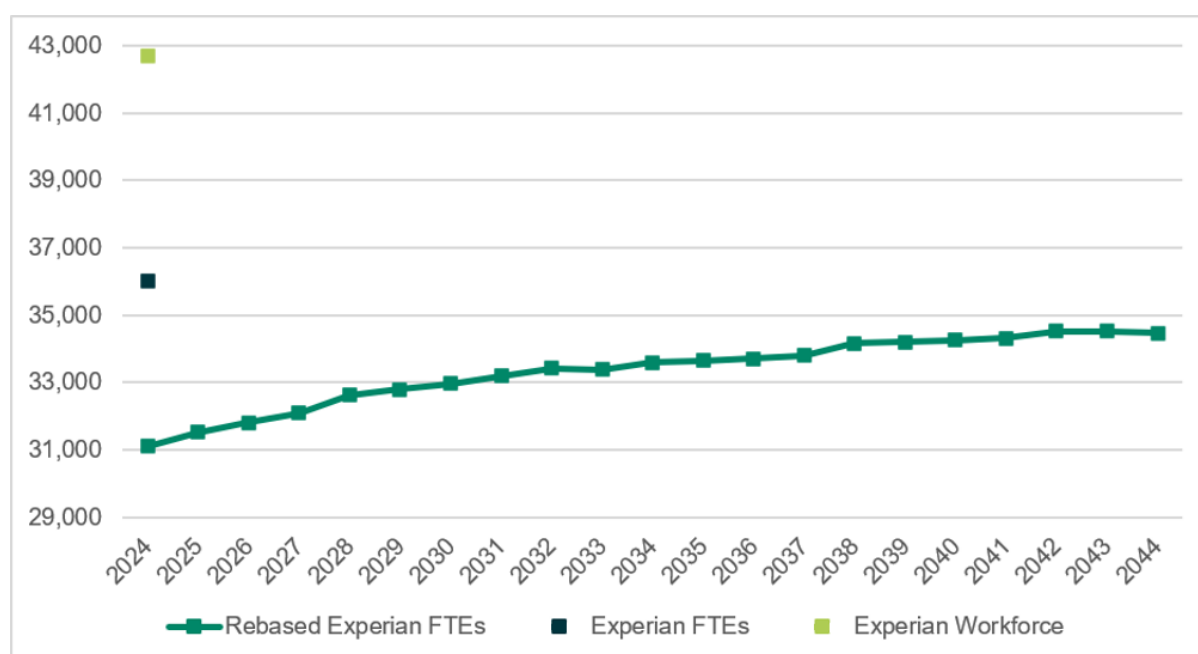
Employment to Full Time Equivalents (FTEs)

13.2.2 The conversion of Experian employment, or workforce, figures into FTE jobs has been calculated for each sector based on the ratio of full-time and part-time employment jobs in Hart using data from BRES 2024.

Rebasing of Employment Forecast

13.2.3 Employment forecasts provided by Experian do not align with official historical data published by the ONS. Therefore, to ensure alignment with the most recent official employment statistics, the baseline employment figure (year 2024) was rebased using the latest BRES data available. Predicted growth (from Experian) was then applied to this baseline figure to establish a ‘rebased’ employment forecast. Employment was also converted into FTEs, as presented in Figure 13-1.

Figure 13-1: Experian Rebased Employment Forecast



Source: AECOM calculations, based on Experian and ONS BRES

Employment to Use Classes

13.2.4 The proportion of FTE jobs in each sector has been disaggregated by the type of employment use class and non-employment use classes. The use class proportions for each sector are based on a detailed assessment of the current breakdown of jobs in the sub-sectors in Hart’s economy, consideration of local characteristics and AECOM’s professional judgment. Each sector has been apportioned between relevant use classes. This is used to calculate the proportional jobs in each sector by use class.

Employment Density and Plot Ratio Assumptions

13.2.5 Employment numbers for each use class have been converted to floorspace requirements by applying appropriate employment density assumptions. To calculate land requirements, plot ratios have been applied to convert floorspace into land (hectares). The employment densities and plot ratios applied draw on the HCA Employment Densities Guide 3rd Edition (2015) and AECOM's appreciation of prevailing rates/ratios. These are summarised in Table 13-1 below.

Table 13-1: Employment Density and Plot Ratio Assumptions

Use class	HCA Employment Density Guide (2015)	Employment density assumption used (sqm per full-time equivalent (FTE) job)	Plot Ratio (% of site area) ¹²⁶
E(g)(i)	Offices – 8-13 sqm NIA per FTE job	10	65%
E(g)(ii)	R&D space – 40-60 sqm NIA per FTE job	50	40%
E(g)(iii)	Light industrial – 47 sqm NIA per FTE job	47	40%
B2	Industrial & Manufacturing – 36 sqm GIA per FTE job	36	40%
B8	Storage & Distribution – 70-95 sqm GEA per FTE job	74	40%

Source: AECOM, *HCA Employment Density Guide (2015)*

13.2.6 It should be noted that employment ratios can vary significantly depending on location and the exact type of use. The HCA Employment Densities Guide allows for this by providing density ranges against uses. This study has applied these ranges, and adjusted where it has been deemed appropriate to do so, based on the following considerations:

- For E(g)(i), consideration is given to emerging trends regarding the utilisation of office floorspace. This accounts for the more efficient use of space due to a higher frequency of flexible and hybrid working. It is acknowledged that the popularity of these working models has increased markedly in recent years since the Covid-19 pandemic. The British Council of Offices, in its latest guidance on office design, advised that 10 sqm per job be designed for in new floorspace planning. Therefore, 10 sqm per job is considered reasonable in this forecasting exercise.
- For E(g)(ii), E(g)(iii) and B2 uses, employment densities are aligned with those in the HCA Employment Densities Guide. Where a range is provided in the guidance, the midpoint has been applied for the purposes of this assessment.

¹²⁶ Based on plot ratio achieved by recent or modern developments in Hart. Plot ratios for E(g)(ii), E(g)(iii), B2 and B8 align with plot ratios applied in the previous Employment Land Review for Hart. Plot ratio for E(g)(i) has been increased from the previous study (from 50%) based on the analysis of plot ratio of modern office developments in Hart carried out by AECOM.

- For B8 uses, an average density towards the lower end of the HCA Employment Densities Guide has been applied. This is to reflect an average density between regional and local distribution. This is considered appropriate for Hart, where most storage and distribution uses are of small and medium scale and tend to serve the regional market.

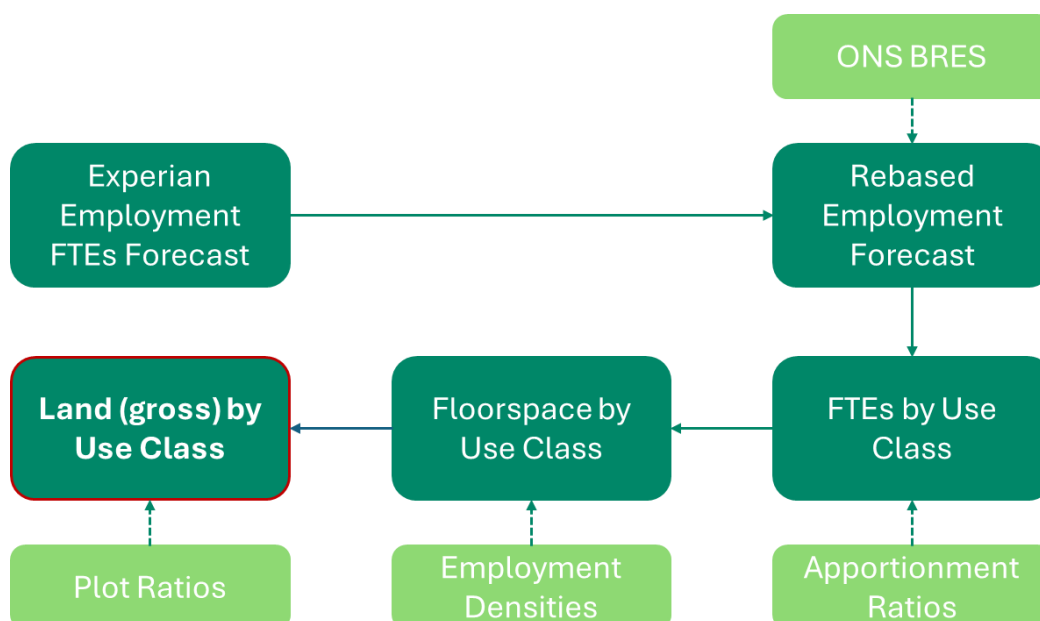
13.2.7 The scenarios discussed in this section should be treated as broadly indicative. Predicting future economic trends and corresponding employment land requirements is inherently uncertain. The assessment of future demand is based on a series of assumptions, including the future performance of individual business sectors, the proportion of employment in each sector that corresponds to each of the B and E(g) use classes, and the future employment densities and plot ratios for each use class. Furthermore, the future economic performance of Hart's economy is subject to external factors that are hard to predict in the context of this study, such as political and economic changes at the national and international levels¹²⁷.

13.2.8 With the above caveat in place, the scenarios presented in this section provide an indication of future economic trends and are a useful tool to inform employment land policy. It should also be noted that figures presented in the following sections have been rounded and therefore may not total correctly.

13.3 Scenario 1: Labour Demand

13.3.1 The Labour Demand scenario, using the latest available Experian UK Local Market Forecasts Quarterly (February 2026), follows a detailed approach to convert employment FTEs into gross future demand for office (E(g)(i) and E(g)(ii)) and industrial (E(g)(iii), B2 and B8) floorspace and land. This approach is summarised in Figure 13-2.

¹²⁷ Given that the Experian employment data drives the floorspace requirements of the district, it is important to consider how the forecasts consider the increasing role of automation and artificial intelligence. Within the data, labour force size is an independent variable, alongside lagged employment and total hours worked (and lagged total hours worked). Total hours worked is dependent on Gross Domestic Product (reflecting the strength (or not) of the economy), and labour augmenting technical progress. The latter considers the impact of automation and artificial intelligence on hours and shows a negative coefficient.

Figure 13-2: Labour Demand - General Approach

Source: AECOM

13.3.2 According to Experian's February 2026 employment forecasts, full time equivalent (FTE) employment across all sectors in Hart is forecast to increase from 43,500 in 2026 to 46,900 in 2039 (+3,400, or +7.8%) and to 47,300 in 2044 (+3,800, or + 8.7%). When rebased to ONS BRES 2024 baseline figure, FTEs across all sectors in Hart is forecast to increase from 31,810 in 2026 to 34,200 in 2039 (+2,390, or +7.5%) and to 34,460 in 2044 (+2,650, or + 8.3%).

13.3.3 As shown in Table 13-2, the biggest growth sectors in terms of absolute number of FTE employment include: Other Private Services, Accommodation & Food Services and Administrative & Supportive Services.

13.3.4 The sectors forecast to decline the most in absolute terms include Wholesale, and Recreation, as well as Retail to 2044 (but no change to 2039).

Table 13-2: Forecast growth or decline by employment category

Employment Sector	FTE change 2026-2039		FTE change 2026-2044	
	Experian	Rebased Experian	Experian	Rebased Experian
Other Private Services	400	710	500	890
Accommodation & Food Services	1,100	580	1,400	740
Administrative & Supportive Services	900	430	1,100	520
Professional Services	400	270	400	270
Education	300	190	300	190
Specialised Construction Activities	200	180	200	180
Computing & Information Services	100	80	100	80

Employment Sector	FTE change 2026-2039		FTE change 2026-2044	
	Experian	Rebased Experian	Experian	Rebased Experian
Land Transport, Storage & Post	100	70	100	70
Residential Care & Social Work	100	70	0	0
Health	100	60	200	120
Agriculture, Forestry & Fishing; Air & Water Transport; Chemicals (manufacture of); Civil Engineering; Computer & Electronic Products (manufacture of); Construction of Buildings; Extraction & Mining; Finance; Food, Drink & Tobacco (manufacture of); Fuel Refining; Insurance & Pensions; Machinery & Equipment (manufacture of); Media Activities; Metal Products (manufacture of); Non-Metallic Products (manufacture of); Other Manufacturing; Pharmaceuticals (manufacture of); Printing and Recorded Media (manufacture of); Public Administration & Defence; Real Estate; Telecoms; Textiles & Clothing (manufacture of); Transport Equipment (manufacture of); Utilities; Wood & Paper (manufacture of)	0	0	0	0
Retail	0	0	-100	-60
Recreation	-100	-60	-100	-60
Wholesale	-200	-200	-300	-300
All Sectors	3,400	2,390	3,800	2,650

Source: Experian FTE Employment Forecast (February 2026), AECOM calculations

13.3.5 FTE employment in office and industrial use class sectors makes up approximately 51.9% of all employment in Hart in 2026 (16,510 out of a total of 31,810 FTE jobs). Experian forecasts FTEs in office and industrial sectors to increase overall by 6.8% over the period 2026-2039, and 7.5% over the period 2026-2044. By 2039, FTE employment in office and industrial use class sectors is expected to represent approximately 51.6% (17,630 out of a total of 34,200 FTE jobs) of all employment in Hart, dropping further to 51.5% by 2044 (17,750 out of a total of 34,460 FTE jobs).

Table 13-3: FTE jobs forecast by use class – Labour demand

Use class	2026	2039	2044	Change 2026-2039		Change 2026-2044	
E(g)(i)	10,240	11,290	11,450	1,050	10.2%	1,210	11.8%
E(g)(ii)	110	110	110	0	0.0%	0	0.0%
Total office jobs	10,350	11,400	11,560	1,050	10.1%	1,210	11.7%
E(g)(iii)	2,640	2,740	2,740	100	4.0%	100	4.0%
B2	460	460	460	0	0.0%	0	0.0%
B8	3,060	3,030	2,980	-30	-1.0%	-80	-2.6%
Total industrial jobs	6,160	6,240	6,190	80	1.2%	30	0.4%
Total office and industrial jobs	16,510	17,630	17,750	1,120	6.8%	1,240	7.5%
Non-Employment Use Class	15,300	16,570	16,710	1,270	8.3%	1,410	9.3%

Source: AECOM calculations, based on rebased Experian Forecast

13.3.6 Based on the above employment forecasts and the employment density assumptions summarised in Table 13-4, Hart employment floorspace requirement forecasts over the period 2026-2044 is expected to increase by 11,000 sqm (+2.3%), including an increase of 12,100 sqm of office space and a decrease of 1,100 of industrial space, as presented in Table 13-4 below.

Table 13-4: FTE Floorspace Need (sqm), 2026-2044 - Labour demand

Use class	2026	2039	2044	Change 2026-2039		Change 2026-2044	
E(g)(i)	102,400	112,900	114,500	10,500	10.3%	12,100	11.8%
E(g)(ii)	5,500	5,500	5,500	0	0.0%	0	0.0%
Total office floorspace need	107,900	118,400	120,000	10,500	9.7%	12,100	11.2%
E(g)(iii)	124,100	129,000	129,000	4,900	3.9%	4,900	3.9%
B2	16,600	16,600	16,600	0	0.0%	0	0.0%
B8	226,500	224,200	220,500	-2,300	-1.0%	-6,000	-2.6%
Total industrial floorspace need	367,200	369,800	366,100	2,600	0.7%	-1,100	-0.3%
Total office and industrial floorspace need	475,100	488,200	486,100	13,100	2.8%	11,000	2.3%

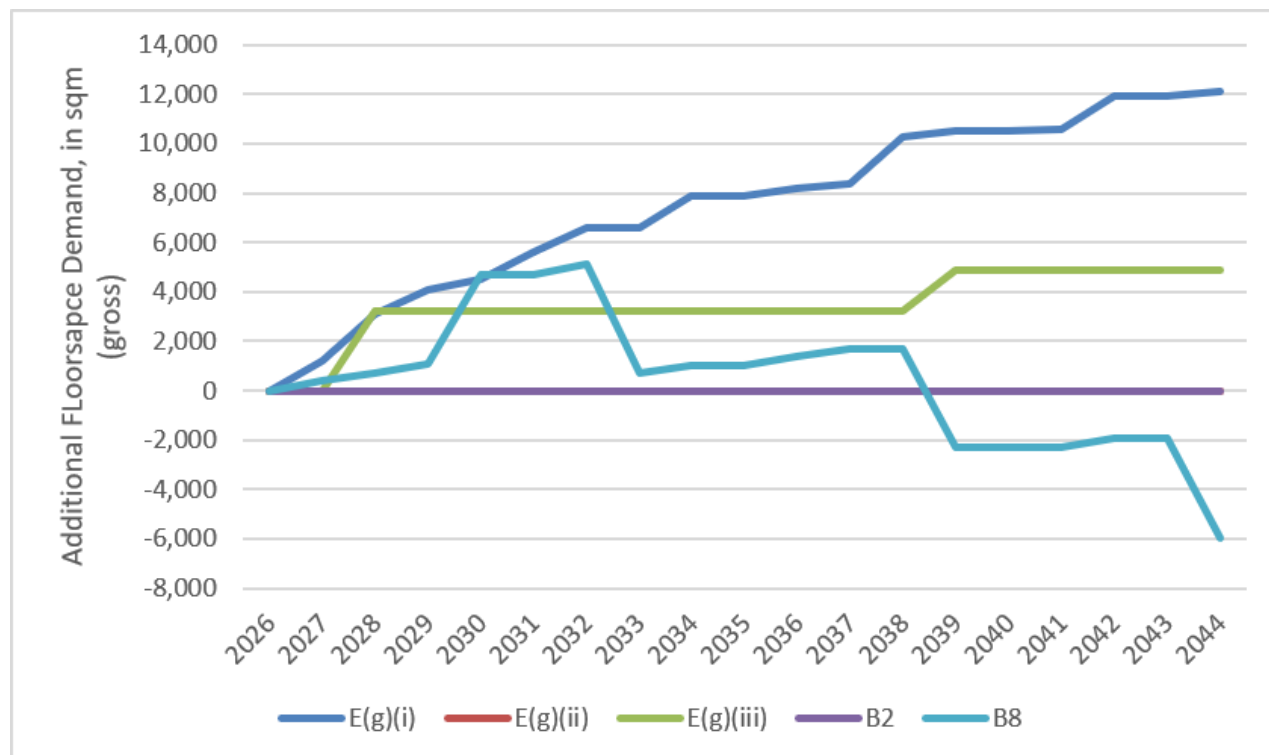
Source: AECOM calculations, based on rebased Experian Forecast

13.3.7 Figure 13-3 shows the evolution of employment floorspace requirements in Hart between 2026 and 2039, and between 2026 and 2044. This shows that based on employment forecasts there would be a gross requirement for:

- +10,500 sqm of E(g)(i) floorspace by 2039, increasing to +12,100 sqm by 2044;
- No change in sqm of E(g)(ii) floorspace, both to 2039 and 2044;

- +4,900 sqm of E(g)(iii) floorspace, both to 2039 and 2044;
- No change in sqm of B2 floorspace, both to 2039 and 2044; and
- -2,300 sqm of B8 floorspace by 2039, increasing to -6,000 sqm by 2044.

Figure 13-3: Evolution of Gross Additional Floorspace Requirements – Labour Demand



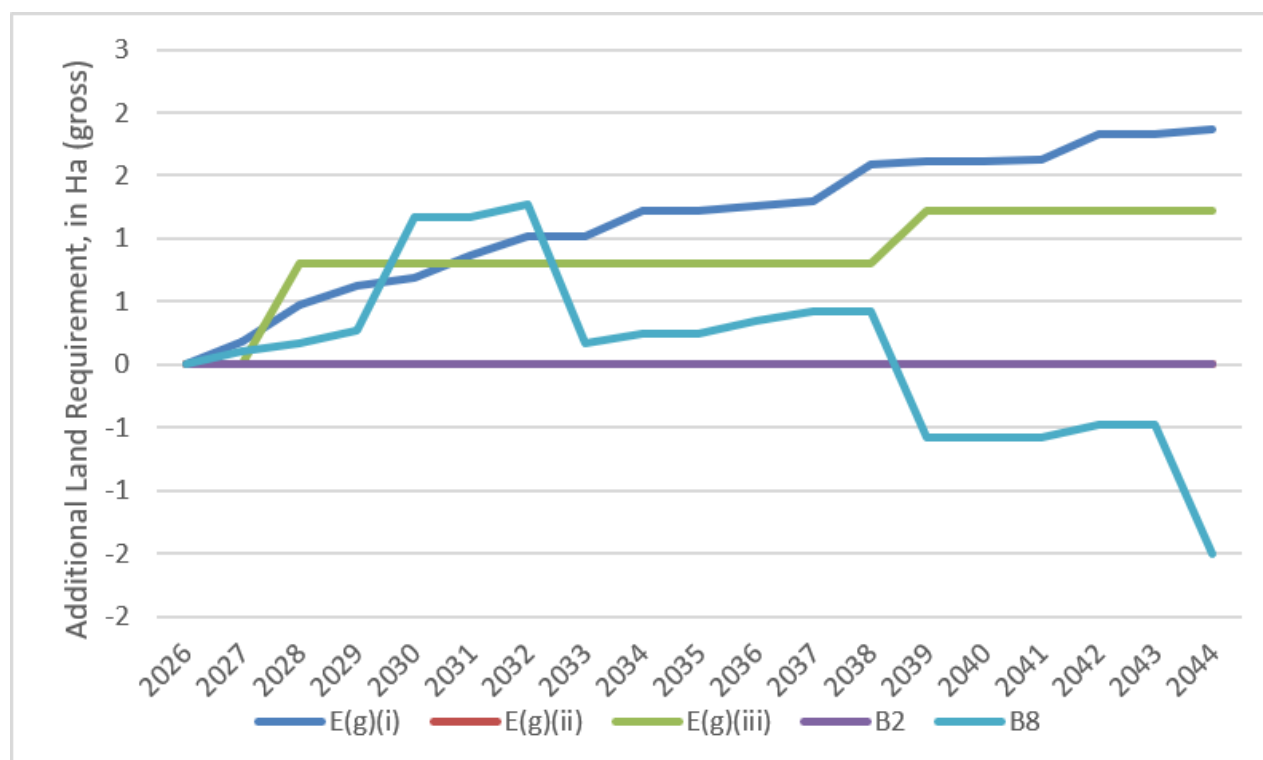
Source: AECOM calculations, based on rebased Experian Forecast

13.3.8 Finally, applying relevant plot ratios based on assumptions summarised in Table 13-1, floorspace gross requirements can be converted into land gross requirements (presented in hectares).

13.3.9 Based on this, the evolution of land requirements in Hart to 2039 and 2044 indicates a requirement for +2.3 ha by 2039 of employment land, reducing to +1.6 ha by 2044. This comprises the following:

- +1.6 ha of E(g)(i) floorspace by 2039, increasing to +1.9 ha by 2044;
- No change in ha of E(g)(ii) floorspace, both to 2039 and 2044;
- +1.2 ha of E(g)(iii) floorspace, both to 2039 and 2044;
- No change in ha of B2 floorspace, both to 2039 and 2044; and
- -0.6 ha of B8 floorspace by 2039, increasing the -1.5 ha by 2044.

Figure 13-4: Evolution of Gross Additional Land Requirements – Labour Demand



Source: AECOM calculations, based on rebased Experian Forecast

13.4 Scenario 2: Labour Supply

13.4.1 To forecast labour supply, AECOM applied the latest ONS population growth projections for the working-age population in the district.

13.4.2 The population forecast was converted into local labour supply through the following process:

- The working age population (16-64 years old) was taken from ONS Population Projections¹²⁸ as the base for the forecast of the local labour supply.
- The working age population was then converted into an economically active population estimate by applying the rate of economic activity, as reported by the ONS Annual Population Survey. This rate is 83.6%¹²⁹.
- The economically active population was converted into local labour supply by applying the rate of self-containment (% of population which remains in the same district for work). This was informed by ONS Origin Destination data¹³⁰ to calculate the rate as 72.1%.

13.4.3 The conversion from working age population to local labour supply is presented in Table 13-5 for 2026 to 2039 and 2044. The local labour supply

¹²⁸ Population Projections, Hart (2026) NOMIS

¹²⁹ Labour Market Profile, Hart (2026) NOMIS

¹³⁰ ONS Census 2021: Origin-Destination data.

for Hart, from local residents alone, is expected to increase by 2,130 workers between 2026 and 2039, as well as between 2026 and 2044¹³¹.

Table 13-5: Conversion of population forecasts into local labour supply

	2026	2039	2044	Change 2026-2039	Change 2026-2044
Working age population	62,840	65,110	66,370	2,270	3,530
Economically active population	52,530	54,430	55,490	1,900	2,960
Local labour supply	37,880	39,250	40,010	1,370	2,130

Source: AECOM calculations, based on ONS population forecast

13.4.4 This increase in labour supply was then distributed between the different planning use classes following the growth forecasted by Experian in terms of labour demand. This was done such that declining industries follow the loss predicted in the forecast and growing industries accommodate all of the additional labour supply accordingly.

13.4.5 This scenario shows the largest relative growth is expected to be in E(g)(i) jobs with an additional 510 FTE jobs (+5.0%) to 2039 and 740 FTE jobs (+7.2%) to 2044. E(g)(iii) is forecast to see an increase of 70 FTEs by 2039 with no further increase by 2044. Whilst E(g)(ii) and B2 show no change (to both 2039 and 2044), B8 is forecast to see a decrease in jobs of -80 FTEs to 2039 and -120 FTEs to 2044.

Table 13-6: FTE jobs forecast by use class - Labour supply

Use class	2026	2039	2044	Change 2026-2039	Change 2026-2044
E(g)(i)	10,240	10,750	10,980	510	740
E(g)(ii)	110	110	110	0	0
Total office jobs	10,350	10,860	11,090	510	740
E(g)(iii)	2,640	2,710	2,710	70	70
B2	460	460	460	0	0
B8	3,060	2,980	2,940	-80	-120
Total industrial jobs	6,160	6,150	6,110	-10	-50
Total office and industrial jobs	16,510	17,010	17,210	500	700

¹³¹ It should be noted that the Hart Economic Development Strategy (A Prosperous Future For Hart), March 2025, suggest a decline in working age population of about 1,000 people. The discrepancy between this figure on the figure presented in this HEDNA is caused by the data source used. The Economic Development Strategy uses 2018-based population projections, whilst the HEDNA uses the latest projections (2022-based) which implies a materially larger population growth than the 2018-based projections due to higher migration assumption.

Use class	2026	2039	2044	Change 2026-2039		Change 2026-2044	
Non-Employment Use Class	15,300	16,280	16,730	1,430	9.3%	1,430	9.3%

Source: AECOM calculations, based on ONS population forecast and rebased Experian Forecast

13.4.6 Based on the above employment forecasts and the employment density assumptions summarised in Table 13-1, Hart floorspace requirement over the period 2026-2044 is expected to increase by 1,800 sqm (+0.4%), including 7,400 sqm of office space and -5,600 sqm of industrial space, as presented in Table 13-7 below.

Table 13-7: FTE floorspace need (sqm) – Labour supply

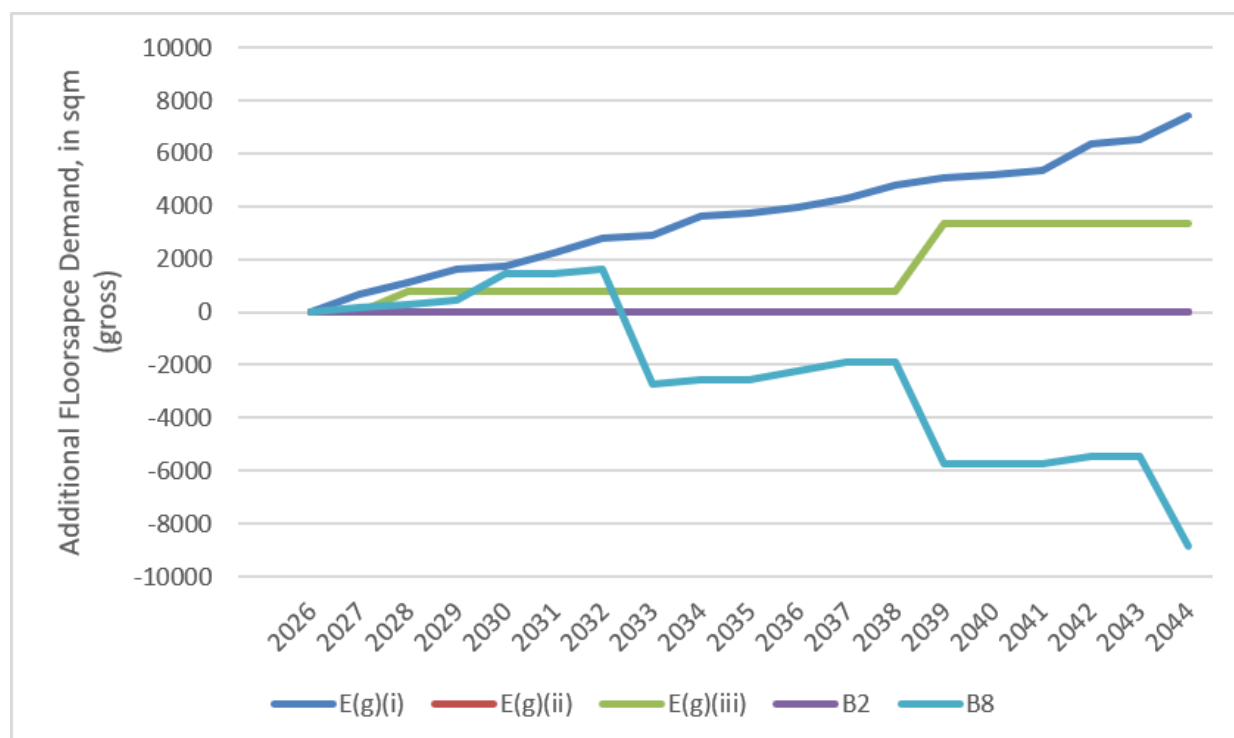
Use class	2026	2039	2044	Change 2026-2039		Change 2026-2044	
E(g)(i)	102,400	107,500	109,800	5,100	5.0%	7,400	7.2%
E(g)(ii)	5,500	5,500	5,500	0	0.0%	0	0.0%
Total office floorspace need	107,900	113,000	115,300	5,100	4.7%	7,400	6.9%
E(g)(iii)	124,100	127,400	127,400	3,300	2.7%	3,300	2.7%
B2	16,600	16,600	16,600	0	0.0%	0	0.0%
B8	226,500	220,800	217,600	-5,700	-2.5%	-8,900	-3.9%
Total industrial floorspace need	367,200	364,800	361,600	-2,400	-0.7%	-5,600	-1.5%
Total office and industrial floorspace need	475,100	477,800	476,900	2,700	0.6%	1,800	0.4%

Source: AECOM calculations, based on rebased Experian Forecast

13.4.7 Figure 13-5 shows the evolution of gross employment floorspace requirements in Hart between 2026 and 2039, as well as between 2026 and 2044. This shows that based on employment forecasts, there would be a gross requirement for:

- +5,100 sqm of E(g)(i) floorspace by 2039, increasing to +7,400 sqm by 2044;
- No change in sqm of E(g)(ii) floorspace, both by 2039 and 2044;
- +3,300 sqm of E(g)(iii) floorspace, both by 2039 and 2044;
- No change in sqm of B2 floorspace, both by 2039 and 2044; and
- -5,700 sqm of B8 floorspace by 2039, increasing to -8,900 sqm by 2044.

Figure 13-5: Evolution of Gross Additional Employment Floorspace Requirements – Labour Supply



Source: AECOM calculations, based on rebased Experian Forecast

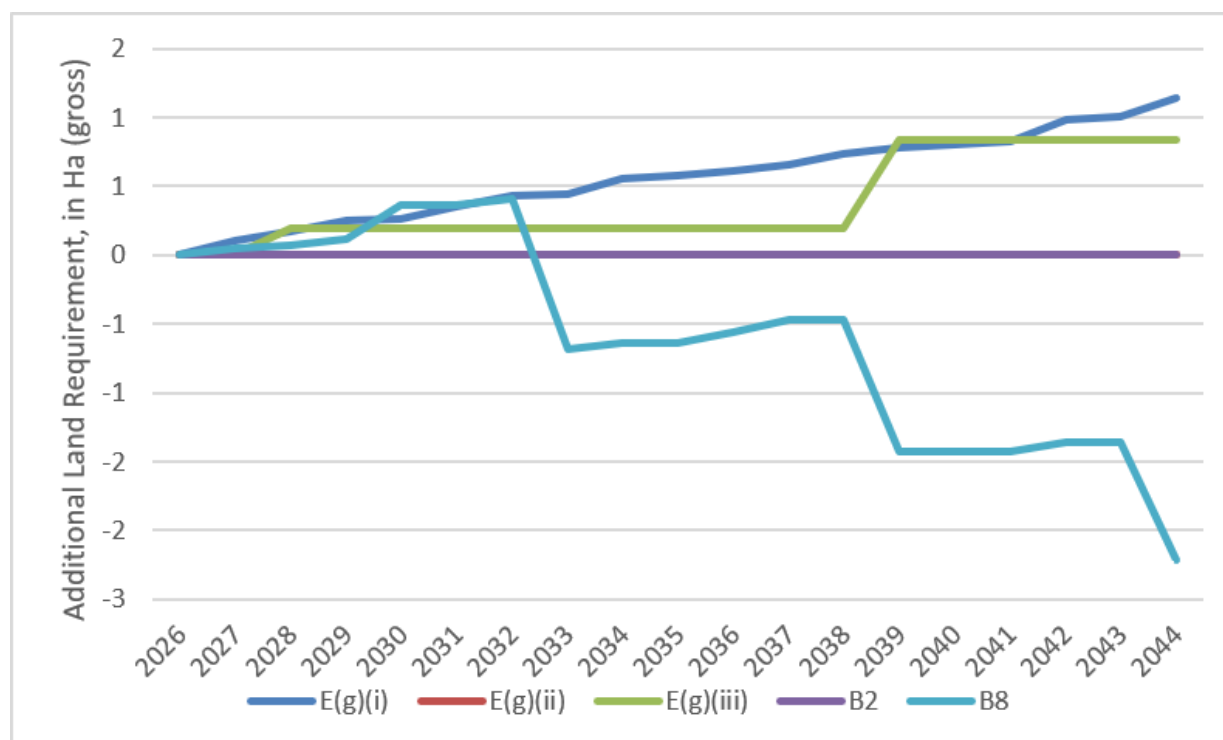
13.4.8 Finally, by applying relevant plot ratios based on assumptions summarised in Table 13-1, floorspace gross requirements can be converted into land gross requirements (presented in hectares).

13.4.9 Based on this, the evolution of gross employment land requirements in Hart indicates a need for -0.2 ha to 2039 and 2044¹³² of employment land, comprising the following:

- +1.1 ha of E(g)(i) floorspace (to 2039 and 2044);
- No change in ha of E(g)(ii) floorspace (to 2039 and 2044);
- 0.8 ha of E(g)(iii) floorspace (to 2039 and 2044);
- No change in ha of B2 floorspace (to 2039 and 2044); and
- -2.2 ha of B8 floorspace (to 2039 and 2044).

¹³² This total figure does not match the sum of figures presented below, broken down by use class, due to rounding.

Figure 13-6: Evolution of Gross Additional Employment Land Requirements – Labour Supply



Source: AECOM calculations, based on rebased Experian Forecast

Sensitivity Test: Labour Supply+

13.4.10 A sensitivity test has been undertaken for the above scenario to consider the wider functional economic market area (FEMA) labour supply market. This scenario includes the labour supply inflow into Hart as well as the existing district labour supply. It assumes both are fulfilled by demand.

13.4.11 ONS data was engaged for working age population projections for the neighbouring local authority districts of Basingstoke and Deane and Rushmoor that make up the FEMA. As per Section 12, the working age population forecasts for the FEMA were converted into economically active population estimates by applying the rate of economic activity, as reported by the ONS Annual Population Survey.

13.4.12 Using ONS Origin-Destination data, the increase in the economically active population was then multiplied by the proportion of the working age population in both neighbouring districts that travel into Hart to work. This increase in the FEMA labour supply was then distributed between the different planning use classes following the growth forecasted by Experian in terms of labour demand.

13.4.13 Under the Labour Supply+ sensitivity test, the total number office jobs are forecast to increase by 580 (+5.7%) by 2039 and 840 (+8.1%) by 2044. The total number of industrial jobs increase by 10 (+0.2%) by 2039, but decrease by 30 (-0.5%) by 2044.

13.4.14 The additional floorspace requirement is estimated to be +5,800 sqm by 2039 and +8,400 sqm by 2044 for office and -1,500 sqm by 2039 and -4,600 sqm by 2044 for industrial.

13.4.15 This equates to a 0.9 ha by 2039 and 1.3 ha by 2044 increase in employment land for office and 0.9 ha by 2039 and 1.1 ha by 2044 decrease for industrial – leading to an overall requirement of 0.5 ha by 2039 and 0.2 ha by 2044 of employment land.

13.5 Scenario 3: Past Take-Up

13.5.1 This scenario forecasts change in employment land based on ‘past take-up’. AECOM applied data from CoStar on net absorption of employment floorspace by planning use class for Hart. CoStar provides data from 2009.

13.5.2 The historical net absorption (annual average), by planning use class, is projected to inform the future demand for employment floorspace. As part of this exercise, several historical periods were considered (past 5 years, past 10 years and past 15 years). It was considered that the past 10-year average was the most robust, as it was not overly impacted by the 2008 financial crisis and was long enough to smooth the impact of Covid-19 (unlike the past 5-year average).

13.5.3 The average historical annual absorption of employment floorspace was projected to 2039 and 2044 from the 2026 baseline position. Table 13-8 provides a summary of the average net absorption of employment floorspace by planning use class over the past 5, 10 and 15 years.

Table 13-8: Average Annual Net Absorption of Floorspace (sqm)

	5-Year	10-Year	15-Year
Office (E(g)(i))	-1,052	-6,693	-6,295
R&D (E(g)(ii))	0	0	0
Light Industrial (E(g)(iii))	-47	-497	-345
Industrial (B2)	-279	-174	-49
Warehouse (B8)	3,826	1,464	1,450

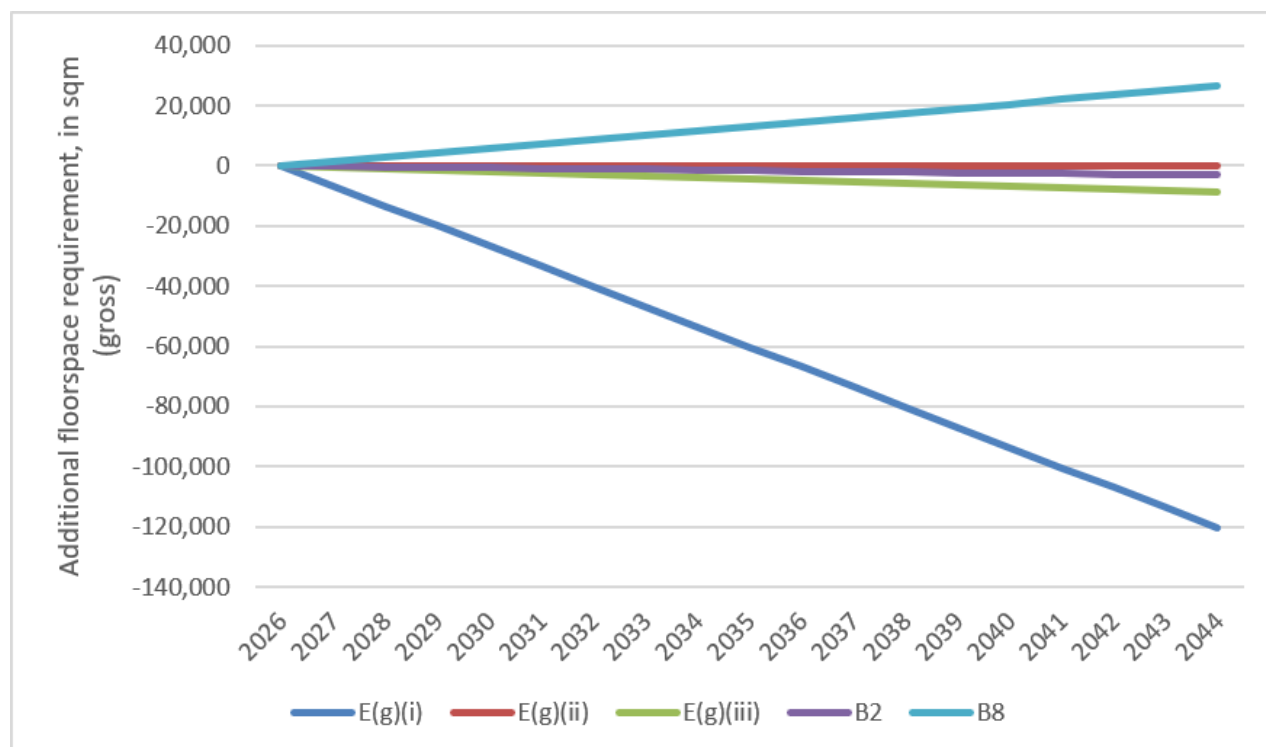
Source: AECOM 2026, based on CoStar

13.5.4 Figure 13-7 shows the projected evolution of gross employment floorspace requirements in Hart between 2026 and 2044. This estimates an overall decline by 76,700 sqm to 2039 and 106,200 sqm to 2044 based on the continuation of past 10-year trends. The breakdown by use class is as below:

- -87,000 sqm of E(g)(i) floorspace by 2039, increasing to -120,500 sqm by 2044;
- No change in sqm of E(g)(ii) floorspace, to both 2039 and 2044;
- -6,500 sqm of E(g)(iii) floorspace by 2039, increasing to -8,900 sqm by 2044;

- -2,300 sqm of B2 floorspace by 2039, increasing to -3,100 sqm by 2044; and
- +19,000 sqm of B8 floorspace by 2039, increasing to -26,300 sqm by 2044.

Figure 13-7: Evolution of Gross Additional Employment Floorspace Requirements – Past Take-Up (10-year average)

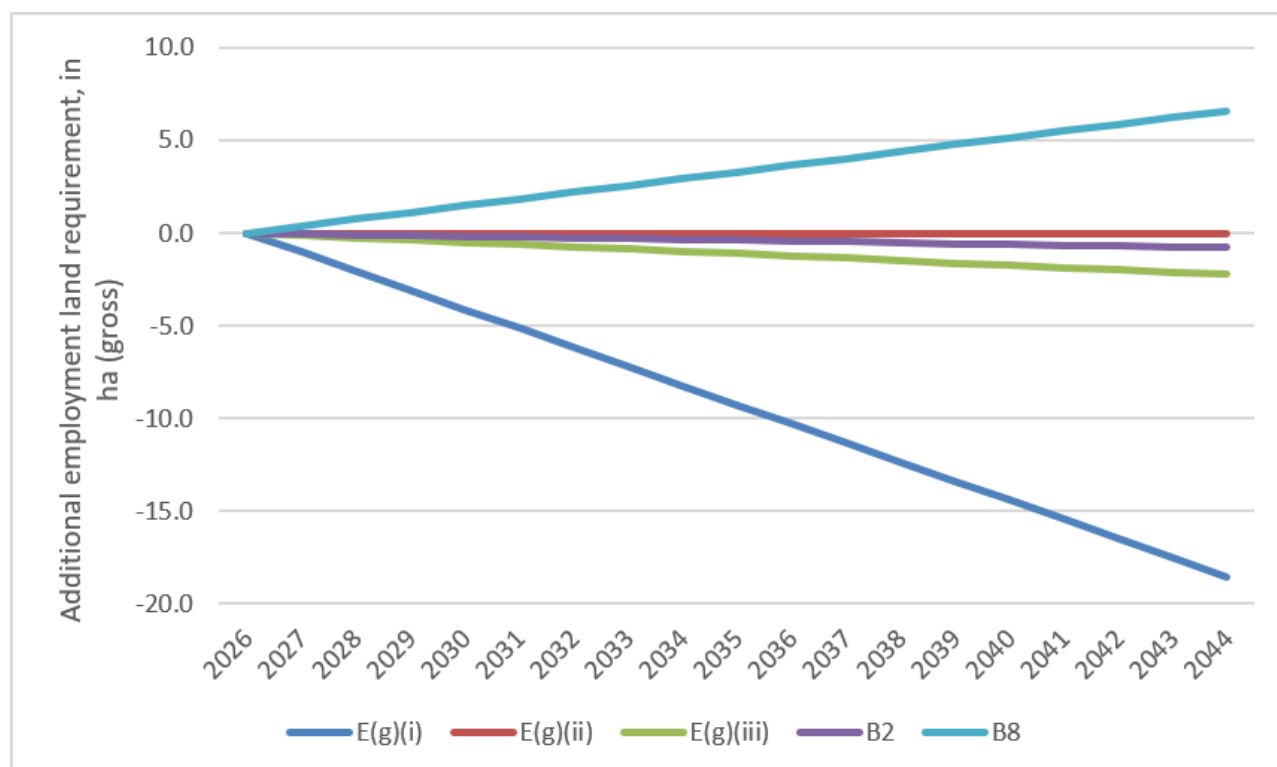


Source: AECOM calculations, based on CoStar data (June 2026)

13.5.5 Finally, applying relevant plot ratios, gross employment floorspace requirements have been converted into gross employment land requirements (presented in hectares).

13.5.6 Based on this, the evolution of land requirements in Hart to 2039 indicates an overall loss of 10.8 ha of employment land by 2039, increasing to 15.0 ha by 2044. This comprises the following:

- -13.4 ha of land for E(g)(i) use by 2039, increasing to -18.5 ha by 2044;
- No change in ha of land for E(g)(ii) use, to both 2039 and 2044;
- -1.6 ha of land for E(g)(iii) use by 2039, increasing to -2.2 ha by 2044;
- -0.6 ha of land for B2 use by 2039, increasing to -0.8 ha by 2044; and
- +4.8 ha of land for B8 use by 2039, increasing to +6.6 ha by 2044.

Figure 13-8: Evolution of Gross Additional Employment Land Requirements – Past Take-Up (10-year average)

Source: AECOM calculations, based on CoStar data (June 2026)

13.6 Replacement of Losses

13.6.1 The forecasting exercise has also taken into account replacement of losses. Although some redevelopment will take place on existing employment sites, there is likely to be losses of employment floorspace and land to other uses.

13.6.2 To estimate the annual replacement rate of floorspace losses, assumptions have been applied based on average annual losses derived from CoStar demolition data for the period 2016–2025, as follows:

- 25% of office floorspace [E(g)(i), E(g)(ii) uses] losses will be replaced each year; and
- 50% of industrial floorspace [E(g)(iii), B2, B8 uses] losses will be replaced each year.

13.6.3 This is set out in Table 13-9 below:

Table 13-9: Allowance for Replacement of Losses 2026-2039 and 2026-2044 (sqm)

Type of Space/Use Class	Average Annual Loss (sqm)	Allowance for Losses 2026-2039 (sqm)	Allowance for Losses 2026-2044 (sqm)
E(g)(i) / E(g)(ii)	9,319	30,287	41,937
E(g)(iii) / B2 / B8	595	3,868	5,352
Total	9,914	34,151	47,289

Source: AECOM calculations, based on CoStar data (June 2026)

13.6.4 The data and assumptions set out above have been applied to the labour demand, labour supply and past take-up scenarios.

13.7 Net Requirement for Floorspace and Land

Office

13.7.1 The forecast net requirement for office space (E(g)(i) and E(g)(ii) uses) and land equivalent under all scenarios is set out in Table 13-10 (to 2039) and Table 13-11 (to 2044). The table identifies all the parameters which have been used to inform the supply / demand balance. The existing supply position is informed by CoStar data on supply of office floorspace (in sqm) and vacancy of floorspace (% of total stock available).

Table 13-10: Net Requirement for Office Floorspace and Land by Scenario 2026 to 2039

Parameters	Scenario 1 Labour Demand	Scenario 2 Labour Supply	Scenario 3 Past Take-Up
	Floorspace (sqm)		
A. Supply of occupied floorspace/land (2026)	184,072	184,072	184,072
B. Current vacant floorspace/land	11,013	11,013	11,013
C. Total stock of floorspace/land [A+B]	195,085	195,085	195,085
Forecast			
D. Gross floorspace demand to 2039	10,440	5,076	-87,012
E. Optimum frictional vacancy at 2039 [8% of A+D for office] ¹³³	15,561	15,132	7,765
F. Surplus/deficit of vacant floorspace/land in 2039 [E-B]	4,548	4,119	-3,248
G. Replacement of Losses (25% for office)	30,288	30,288	30,288
H. Gross requirement for floorspace/land 2026-2039 [C+D+F+G]	240,361	234,567	135,113
I. Net additional requirement for floorspace/land 2026-2039 [H-C]	45,276	39,482	-59,972
Net Additional Land Requirement (ha) 2026-2039	7.0	6.1	-9.2

Source: AECOM

13.7.2 To recognise the need for surplus floorspace to be available (to allow for the churn of businesses), an optimum frictional vacancy rate (assumed to be 8% of occupied supply and gross floorspace demand to 2039 and 2044 for office

¹³³ An allowance for frictional floorspace has been included in our assessment. To operate efficiently a property market requires a small proportion of total floorspace to be readily available for take-up to allow businesses expanding or contracting to move to suitable premises. This available space is called frictional floorspace, the optimal rate of which we assume to be currently around 8% for office uses and 5% for industrial uses.

floorspace) is considered, alongside an allowance for the replacement of future losses.

Table 13-11: Net Requirement for Office Floorspace and Land by Scenario 2026 to 2044

Parameters	Scenario 1 Labour Demand	Scenario 2 Labour Supply	Scenario 3 Past Take-Up
	Floorspace (sqm)		
A. Supply of occupied floorspace/land (2026)	184,072	184,072	184,072
B. Current vacant floorspace/land	11,013	11,013	11,013
C. Total stock of floorspace/land [A+B]	195,085	195,085	195,085
Forecast			
D. Gross floorspace demand to 2044	12,095	7,406	-120,478
E. Optimum frictional vacancy at 2044 [8% of A+D for office] ¹³⁴	15,693	15,318	5,088
F. Surplus/deficit of vacant floorspace/land in 2044 [E-B]	4,680	4,305	-5,925
G. Replacement of Losses (25% for office)	41,937	41,937	41,937
H. Gross requirement for floorspace/land 2026-2044 [C+D+F+G]	253,797	248,733	110,619
I. Net additional requirement for floorspace/land 2026-2044 [H-C]	58,712	53,648	-84,466
Net Additional Land Requirement (ha) 2026-2044	9.0	8.3	-13.0

Source: AECOM

13.7.3 This shows that, up to 2039, there is a projected net requirement between approximately -60,000 sqm and +45,300 of office floorspace in Hart, translating into a land requirement for office uses of between -9.2 ha and +7.0 ha.

13.7.4 Looking to 2044, the projected net requirement widens further, between approximately -84,500 sqm and +58,700 of office floorspace in Hart. This would translate to a land requirement for office uses of between -13.0 ha and +9.0 ha.

Industrial

13.7.5 The forecast net requirement for industrial floorspace and land under all scenarios is set out below in Table 13-12 (to 2039) and Table 13-13 (to 2044). The table identifies all the parameters which are used to inform the supply/demand balance. The existing supply position is once again informed

¹³⁴ An allowance for frictional floorspace has been included in our assessment. To operate efficiently a property market requires a small proportion of total floorspace to be readily available for take-up to allow businesses expanding or contracting to move to suitable premises. This available space is called frictional floorspace, the optimal rate of which we assume to be currently around 8% for office uses and 5% for industrial uses.

by CoStar data. The current supply of available floorspace is factored into the assessment after it is netted off against the optimum frictional vacancy rate, following the same approach taken for office space requirements.

Table 13-12: Net Requirement for Industrial Floorspace and Land by Scenario 2026 to 2039

Parameters	Scenario 1 Labour Demand	Scenario 2 Labour Supply	Scenario 3 Past Take-Up
	Floorspace (sqm)		
A. Supply of occupied floorspace/land (2026)	125,343	125,343	125,343
B. Current vacant floorspace/land	17,982	17,982	17,982
C. Total stock of floorspace/land [A+B]	143,325	143,325	143,325
Forecast			
D. Gross floorspace demand to 2039	2,646	-2,381	10,304
E. Optimum frictional vacancy at 2039 [5% of A+D for industrial] ¹³⁵	6,399	6,148	6,782
F. Surplus/deficit of vacant floorspace/land in 2039 [E-B]	-11,583	-11,834	-11,200
G. Replacement of Losses (50% for industrial)	3,866	3,866	3,866
H. Gross requirement for floorspace/land 2026-2039 [C+D+F+G]	138,254	132,975	146,295
I. Net additional requirement for floorspace/land 2026-2039 [H-C]	-5,071	-10,350	2,970
Net Additional Land Requirement (ha) 2026-2039	-1.3	-2.6	0.7

Source: AECOM

13.7.6 This shows that up to 2039, there is a projected (net) requirement between approximately -10,400 sqm and +3,000 of industrial floorspace in Hart. This would translate to a land requirement for industrial uses of between -2.6 ha and +0.7 ha.

13.7.7 Up to 2044, the projected (net) requirement further widens to between approximately -12,200 sqm and +8,600 of industrial floorspace in Hart. This would translate to a land requirement for industrial uses of between -3.0 ha and +2.2 ha.

¹³⁵ An allowance for frictional floorspace has been included in our assessment. To operate efficiently a property market requires a small proportion of total floorspace to be readily available for take-up to allow businesses expanding or contracting to move to suitable premises. This available space is called frictional floorspace, the optimal rate of which we assume to be currently around 8% for office uses and 5% for industrial uses.

Table 13-13: Net Requirement for Industrial Floorspace and Land by Scenario 2026 to 2044

Parameters	Scenario 1 Labour Demand	Scenario 2 Labour Supply	Scenario 3 Past Take-Up
	Floorspace (sqm)		
A. Supply of occupied floorspace/land (2026)	125,343	125,343	125,343
B. Current vacant floorspace/land	17,982	17,982	17,982
C. Total stock of floorspace/land [A+B]	143,325	143,325	143,325
Forecast			
D. Gross floorspace demand to 2044	-1,030	-5,530	14,267
E. Optimum frictional vacancy at 2044 [5% of A+D for industrial] ¹³⁶	6,216	5,991	6,981
F. Surplus/deficit of vacant floorspace/land in 2044 [E-B]	-11,766	-11,991	-11,001
G. Replacement of Losses (50% for industrial)	5,352	5,352	5,352
H. Gross requirement for floorspace/land 2026-2044 [C+D+F+G]	135,881	131,156	151,943
I. Net additional requirement for floorspace/land 2026-2044 [H-C]	-7,444	-12,169	8,618
Net Additional Land Requirement (ha)	-1.9	-3.0	2.2

Source: AECOM

13.8 Preferred Scenario

13.8.1 The scenarios set out within this section forecast varying changes in floorspace in Hart across the Local Plan period; with varying growth outlooks forecast under Scenario 1 (Labour Demand); Scenario 2 (Labour Supply); and Scenario 3 (Past Take-Up).

13.8.2 For office use classes, the floorspace requirements forecasted through Scenario 1 (Labour Demand) and 2 (Labour Supply) indicate that there will be a net additional growth requirement of between 39,500 and 45,300 sqm to 2039, an average of 42,400 sqm. This increases to between 53,600 and 58,700 sqm to 2044, an average of 56,200 sqm to 2044. This represents an expansion of Hart office stock of 20%-23% to 2039 and 27%-30% to 2044. Scenario 3 (Past Take-Up) contradicts the other two scenarios in forecasting a reduction in office floorspace requirement by 60,000 sqm to 2039 and 84,500 sqm to 2044, equivalent to a reduction of 31% and 43% respectively in net additional floorspace. However, adopting historical take-up rates from the past

¹³⁶ An allowance for frictional floorspace has been included in our assessment. To operate efficiently a property market requires a small proportion of total floorspace to be readily available for take-up to allow businesses expanding or contracting to move to suitable premises. This available space is called frictional floorspace, the optimal rate of which we assume to be currently around 8% for office uses and 5% for industrial uses.

5 years instead of 10 years results in a positive net additional requirement of 19,200 sqm of office space to 2039 and 25,200 sqm to 2044.

- 13.8.3 Based on the above observations, and the disparity between Scenarios 1 and 2 with Scenario 3, the average gross floorspace demand across all three scenarios is recommended to be carried forward as the preferred scenario. This results in a growth requirement of 8,300 sqm of net office floorspace to 2039, increasing to 9,300 sqm to 2044¹³⁷. This is equivalent to 1.3 ha and 1.4 ha respectively. This blended scenario is considered a reasonable projection informed by all three scenarios.
- 13.8.4 For industrial use classes, the floorspace requirements forecasted through Scenario 1 (Labour Demand) and 2 (Labour Supply) indicate that there will be a negative net additional growth requirement of between 5,100 and 10,400 sqm to 2039, increasing to 7,400 and 12,200 sqm to 2044. This represents a reduction of Hart industrial stock of 4%-7% and 5%-8% respectively. Scenario 3 (Past Take-Up) contradicts the other two scenarios in forecasting an expansion in industrial floorspace requirement by 3,000 sqm to 2039 (+2%) and 8,600 sqm to 2044 (+6%). It should be noted that the negative floorspace requirement forecasts from Scenarios 1 and 2 are largely driven by a forecasted reduction in Wholesale employment by Experian. This reduction of -197 FTEs (-5.7%) to 2039 and -296 FTEs (-8.6%) to 2044, is relatively small and not consistent with the forecast for other industrial jobs, which largely remain stable or increase slightly up to 2039 and 2044.
- 13.8.5 Based on the above observations, a growth requirement for 3,000 sqm to 2039 and 8,600 sqm to 2044 of net industrial floorspace, equivalent to 0.7 ha to 2039 and 2.2 ha to 2044 is considered to be a reasonable projection. This is based on Scenario 3 (past take-up from the previous 10 years). This scenario accounts for observed previous demand and avoids relying on uncertain forecasts in Wholesale employment. An alternative past take-up scenario, based on the previous 5 years instead of 10, forecasts a greater net additional requirement of 39,900 sqm to 2039 and 59,800 sqm to 2044. This is likely influenced by the Covid-19 pandemic and recent geopolitical uncertainty requiring higher levels of industrial stock. Therefore, overall Scenario 3 is considered a realistic long-term preferred scenario which supports economic growth and the creation of employment locally for a growing population.

13.9 Qualitative Considerations

- 13.9.1 The following qualitative future demand considerations are informed by the baseline assessments presented in Section 12, and stakeholder engagement carried out with landowners, businesses and organisations, public sector organisations, as well as local commercial property agents.

¹³⁷ This increases marginally to 9,600 sqm when considering the sensitivity test (Labour Supply+).

Office

- 13.9.2 Demand for traditional office space across the region and surrounding authorities is undergoing a structural realignment. This trend is confirmed by responses to surveys undertaken by AECOM with local businesses, business organisations, public sector organisations, landowners and commercial property agents. Demand for older, secondary, or un-refurbished office stock is contracting, while demand for modern, highly flexible, and high-specification office space remains focused but selective.
- 13.9.3 Occupiers are increasingly prioritising quality, energy efficiency, and operational flexibility over gross area. Un-refurbished assets are experiencing higher vacancy risks, whereas Grade A, well-located office clusters are the focus of active regeneration and investment to retain market appeal.
- 13.9.4 Demand for future office locations will strongly favour sites situated on main sustainable transport and active travel corridors, helping occupiers in attracting new staff but also meeting their net-zero objectives.

Industrial

- 13.9.5 Demand for industrial, warehousing, and logistics space in Hart and the broader region is high and predicted to remain high over the next 5–10 years by local and regional commercial property agents.
- 13.9.6 Local commercial market feedback indicates consistent occupier demand focused on small-to-mid-sized units ranging from 1,000 sqm to 3,500 sqm, alongside a specific local shortage of small starter units under 1,000 sqm for SMEs.
- 13.9.7 Demands for larger-scale strategic distribution hubs (over 10,000 sqm) tend to be drawn toward major strategic corridors such as the M4 or primary M3 interchanges. This is a disadvantage for Hart, which is located on the M3 (providing east-west connectivity), but not near a major interchange (which would allow immediate south-north connectivity). However, feedback from neighbouring local authorities confirm that this demand has declined from recent years. Demand for larger-scale logistics is also dependent on the availability of other strategic infrastructure, such as multi-modal transport infrastructure, utilities, digital, as well as proximity to labour and to major demand centres.
- 13.9.8 Local growth is expected to be driven by expansion in advanced manufacturing, defence, digital technologies, research and development, and data centres, alongside structural shifts in consumer reliance on e-commerce and fast-delivery logistics.
- 13.9.9 Increasing operational reliance on automation, high-tech manufacturing, and electric transport fleets has made utility capacity (specifically grid power availability) one of the most critical determinant of site viability and occupier

demand. Delivery of large-scale industrial and logistics space is also heavily constrained by capacity on the Strategic Road Network. Future growth around major junctions requires robust transport mitigation, access management, and landscape impact mitigation. Availability of local labour (including skilled labour) and proximity to demand centres are also considered by occupiers when selecting a location for implantation of their industrial and logistics activities.

13.9.10 While occupier demand remains strong, commercial delivery faces challenges from tighter funding environments and elevated construction costs, particularly driven up by ESG and energy efficiency standards which are sought after by investors and corporate occupiers.

13.9.11 Future industrial allocation and intensification should focus on strategic locations near primary highway junctions to accommodate freight and distribution efficiency. It should also safeguard space for small starter units and mid-sized "grow-on" industrial space (up to 3,500 sqm) to foster local business retention, supply chain resilience, and economic growth.

Appendix A : Glossary

Affordability

The terms ‘affordability’ and ‘affordable housing’ have different meanings. ‘Affordability’ is a measure of whether housing may be afforded by certain groups of households. ‘Affordable housing’ refers to particular tenures and products (defined below).

Affordability Ratio

Assessing affordability involves comparing housing costs against incomes or earnings. The ratio between median house prices and median earnings can be used to assess the relative affordability of housing and is the measure which is used in the Government’s Standard Method calculation to determine local housing need. Example: median house price to median earnings by local authority e.g. income = £25,000, house price = £200,000. House price: income ratio = $\text{£}200,000/\text{£}25,000 = 8$, (the house price is 8 times income).

Affordable Housing (NPPF 2026 Definition)

Affordable housing: Housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers or national military housing needs); and which complies with one or more of the following definitions:

- a. Social Rent: meets all of the following conditions: (a) the rent is set in accordance with the government’s rent policy for Social Rent; (b) the landlord is a registered provider; and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision.
- b. Other affordable housing for rent: meets all of the following conditions: (a) the rent is set in accordance with the government’s rent policy for Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).
- c. Discounted market sales housing: is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.
- d. Other affordable routes to home ownership: is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low cost homes for sale (at a price equivalent to at least 20% below local market value) and

rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to government or the relevant authority specified in the funding agreement.

e. Military affordable housing: meets all of the following conditions: (a) the rent is sub market military rent as determined by the Ministry of Defence; and (b) it includes provisions to remain as affordable housing for future eligible households, service personnel and veteran households (including widowed partners and spouses of service personnel), or for the subsidy to be recycled for alternative affordable housing provision.

Affordable rented housing

Rented housing let by registered providers of social housing to households who are eligible for social rented housing. Affordable Rent is not subject to the national rent regime but is subject to other rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable). The national rent regime is the regime under which the social rents of tenants of social housing are set, with particular reference to the Guide to Social Rent Reforms (March 2001) and the Rent Influencing Regime Guidance (October 2001). Local market rents are calculated using the Royal Institution for Chartered Surveyors (RICS) approved valuation methods¹³⁸.

Age-Restricted Market Housing

A type of housing which 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.

Bedroom Standard¹³⁹

The bedroom standard is a measure of occupancy (whether a property is overcrowded or under-occupied, based on the number of bedrooms in a property and the type of household in residence). The Census overcrowding data is based on occupancy rating (overcrowding by number of rooms not including bathrooms and hallways). This tends to produce higher levels of overcrowding/ under occupation. A detailed definition of the standard is given in the Glossary of the EHS Household Report.

Build to Rent

Purpose built housing that is typically 100% rented out. It can form part of a wider multi-tenure development comprising either flats or houses, but should be on the same

¹³⁸ The Tenant Services Authority has issued an explanatory note on these methods at <http://www.communities.gov.uk/documents/planningandbuilding/pdf/1918430.pdf>

¹³⁹ See <https://www.gov.uk/government/statistics/english-housing-survey-2011-to-2012-household-report>

site and/or contiguous with the main development. Schemes will typically be professionally managed stock in single ownership and management control.

Business Register and Employment Survey (BRES)

An official annual survey conducted by the Office for National Statistics (ONS) that provides detailed statistics on employment and employee jobs by sector and local area.

Commercial Property Market Area

A geographic boundary defining core commercial property areas that compete directly with one another.

Community-Led Development (NPPF 2026 definition)

A development taken forward by, or with, a not-for-profit organisation, that is primarily for the purpose of meeting the needs of its members or the wider local community, rather than being a primarily commercial enterprise. The organisation should be created, managed and democratically controlled by its members, and membership of the organisation should be open to all beneficiaries and prospective beneficiaries of that organisation. It may take any one of various legal forms including a co-operative society, community benefit society, and company limited by guarantee. The organisation should own, manage, or steward the development in a manner consistent with its purpose, potentially through a mutually supported arrangement with a Registered Provider of Social Housing. The benefits of the development to the community should be clearly defined and consideration given to how those benefits can be protected over time, including in the event of the organisation being wound up.

Community Led Housing/Community Land Trusts

Housing development, provision and management that is led by the community is very often driven by a need to secure affordable housing for local people in the belief that housing that comes through the planning system may be neither the right tenure or price-point to be attractive or affordable to local people. The principle forms of community-led models include cooperatives, co-housing communities, self-help housing, community self-build housing, collective custom-build housing, and community land trusts. By bringing forward development which is owned by the community, the community is able to set rents and/or mortgage payments at a rate that it feels is appropriate. The Government has a range of support programmes for people interested in bringing forward community led housing.

Community Right to Build Order¹⁴⁰

A community right to build order is a special kind of neighbourhood development order, granting planning permission for small community development schemes, such as housing or new community facilities. Local community organisations that meet certain

¹⁴⁰ See <https://www.gov.uk/guidance/national-planning-policy-framework/annex-2-glossary>

requirements or parish/town councils are able to prepare community right to build orders.

Compound Average Annual Growth Rate

The average rate at which a variable (such as rental rates or population) grows per year over a given multi-year period.

Concealed Families (Census definition)¹⁴¹

The 2011 Census defined a concealed family as one with young adults living with a partner and/or child/children in the same household as their parents, older couples living with an adult child and their family or unrelated families sharing a household. A single person cannot be a concealed family; therefore one elderly parent living with their adult child and family or an adult child returning to the parental home is not a concealed family; the latter are reported in an ONS analysis on increasing numbers of young adults living with parents.

Downsizing or Rightsizing

Households who wish to move into a property that is a more appropriate size for their needs can be said to be downsizing or rightsizing. This is often used to refer to older households who may be living in large family homes but whose children have left, and who intend to move to a smaller dwelling. The popularity of this trend is debatable as ties to existing communities and the home itself may outweigh issues of space. Other factors, including wealth, health, status and family circumstance also need to be taken into consideration, and it should not be assumed that all older households in large dwellings wish to downsize.

Disabled people

People have a disability if they have a physical or mental impairment, and that impairment has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities. These persons include, but are not limited to, people with ambulatory difficulties, blindness, learning difficulties, autism and mental health needs.

Discounted Market Sale

A form of Affordable Housing where the property is sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.

Dwelling Size (Census Definition)

Dwelling size can be referred to either in terms of the number of bedrooms in a home (a bedroom is defined as any room that was intended to be used as a bedroom when the property was built, any rooms permanently converted for use as bedrooms); or in

¹⁴¹ See

http://webarchive.nationalarchives.gov.uk/20160107160832/http://www.ons.gov.uk/ons/dcp171776_350282.pdf

terms of the number of rooms, excluding bathrooms, toilets halls or landings, or rooms that can only be used for storage. All other rooms, for example, kitchens, living rooms, bedrooms, utility rooms, studies and conservatories are counted. If two rooms have been converted into one they are counted as one room. Rooms shared between more than one household, for example a shared kitchen, are not counted.

Dwelling Type (Census Definition)

This refers to the type of accommodation used or available for use by an individual household (i.e. detached, semi-detached, terraced including end of terraced, and flats). Flats are broken down into those in a purpose-built block of flats, in parts of a converted or shared house, or in a commercial building.

Economic Activity Rate

The percentage of working-age residents (aged 16–64) who are either employed or actively seeking employment within the labour market.

Employment Density

The average amount of floorspace (measured in square metres) allocated per full-time equivalent (FTE) worker, used to calculate physical space requirements based on job growth.

Employment Land

Property and sites designated for business use, typically categorised into office space and various industrial use classes.

Equity Loans/Shared Equity

An equity loan which acts as a second charge on a property. For example, a household buys a £200,000 property with a 10% equity loan (£20,000). They pay a small amount for the loan and when the property is sold e.g. for £250,000 the lender receives 10% of the sale cost (£25,000).

Extra Care Housing or Housing-With-Care

Housing which 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 included in retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.

First Homes

In 2021 the Government introduced First Homes as a new form of discounted market housing which will provide a discount of at least 30% on the price of new homes. A more detailed explanation of First Homes and its implications is provided in the main body of the HEDNA.

Frictional Vacancy Rate

An optimal target vacancy rate (typically 8% for office and 5% for industrial space) required to allow normal market fluidness, enabling businesses to move, expand, or relocate without causing supply constraints.

Full-Time Equivalent (FTE)

A standardised measurement unit equal to one full-time employee, used to consolidate part-time and full-time job figures into comparable labour metrics.

Functional Economic Market Area (FEMA)

A geographic area defined by real-world economic interactions – such as commuting patterns, housing markets, transport networks, and commercial property markets.

Gross Value Added (GVA)

A measure of the economic output generated by an area, industry, or sector, calculated as the value of produced goods and services minus the cost of intermediate inputs.

GVA per Head

Total Gross Value Added divided by the total resident population, serving as a general indicator of local economic output per resident.

GVA per Hour Worked

A measure of labour productivity calculated by dividing economic output (GVA) by the total number of hours worked, capturing the intrinsic efficiency and quality of local jobs regardless of resident population size.

Habitable Rooms

The number of habitable rooms in a home is the total number of rooms, excluding bathrooms, toilets and halls.

Household Reference Person (HRP)

The concept of a Household Reference Person (HRP) was introduced in the 2001 Census (in common with other government surveys in 2001/2) to replace the traditional concept of the head of the household. HRPs provide an individual person within a household to act as a reference point for producing further derived statistics and for characterising a whole household according to characteristics of the chosen reference person.

Housing Market Area

A housing market area is a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work. Local housing markets are typically defined as areas of 50% closure – the area within which 50% of people both live and work. Strategic housing market areas are generally defined as areas which achieve 66% closure. The extent of the housing market areas identified will vary, and many will in

practice cut across various local planning authority administrative boundaries. It is often the case that housing market areas overlap.

Housing Tenure (Census Definition)

Tenure provides information about whether a household rents or owns the accommodation that it occupies and, if rented, combines this with information about the type of landlord who owns or manages the accommodation.

Job Density

The total number of jobs situated within a specific local area divided by the working-age resident population (aged 16–64).

Local housing need

The number of homes identified as being needed through the application of the Standard Method set out in national planning guidance.

Local Planning Authority

The public authority whose duty it is to carry out specific planning functions for a particular area. All references to local planning authority apply to the District Council, London Borough Council, County Council, Broads Authority, National Park Authority or the Greater London Authority, to the extent appropriate to their responsibilities.

Location Quotient (LQ)

A statistical metric used to quantify how concentrated an industry or sector is in a local area compared to a broader reference region or national average (an LQ greater than 1.0 indicates a local industrial cluster).

Lower Quartile

The bottom 25% value, i.e. of all the properties sold, 25% were cheaper than this value and 75% were more expensive. The lower quartile price is used as an entry level price and is the recommended level used to evaluate affordability; for example for first time buyers.

Lower Quartile Affordability Ratio

The Lower Quartile Affordability Ratio reflects the relationship between Lower Quartile Household Incomes and Lower Quartile House Prices, and is a key indicator of affordability of market housing for people on relatively low incomes.

Market Housing

Market housing is housing which is built by developers (which may be private companies or housing associations, or Private Registered Providers), for the purposes of sale (or rent) on the open market.

Mean (Average)

The mean or the average is, mathematically, the sum of all values divided by the total number of values. This is the more commonly used “average” measure as it includes all values, unlike the median.

Median

The middle value, i.e. of all the properties sold, half were cheaper and half were more expensive. This is sometimes used instead of the mean average as it is not subject to skew by very large or very small statistical outliers.

Median Affordability Ratio

The Median Affordability Ratio reflects the relationship between Median Earnings and Median House Prices.

Mortgage Ratio

The mortgage ratio is the ratio of mortgage value to income which is typically deemed acceptable by banks. Approximately 75% of all mortgage lending ratios fell below 4 in recent years¹⁴², i.e. the total value of the mortgage was less than 4 times the annual income of the person who was granted the mortgage.

Neighbourhood plan

A plan prepared by a Parish or Town Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

Net Absorption

The net structural change in occupied commercial floorspace over a given timeframe (gross space occupied or demolished minus gross space vacated or built).

Origin-Destination (Flow) Data

Census data tracking individual movement patterns between a person's usual place of residence and their workplace to analyse commuting flows.

Output Area/Lower Super Output Area/Middle Super Output Area

An output area is the lowest level of geography for many national statistics, and is the core geography from which statistics for other geographies are built. Output areas were created for England and Wales from the 2001 Census data, by grouping a number of households and populations together so that each output area's population is roughly the same. 175,434 output areas were created from the 2001 Census data, each containing a minimum of 100 persons with an average of 300 persons. Lower Super Output Areas consist of higher geographies of between 1,000-1,500 persons (made up of a number of individual Output Areas) and Middle Super Output Areas are higher than this, containing between 5,000 and 7,200 people, and made up of individual Lower Layer Super Output Areas. Some statistics are only available down

¹⁴² See <https://www.which.co.uk/news/2017/08/how-your-income-affects-your-mortgage-chances/>

to Middle Layer Super Output Area level, meaning that they are not available for individual Output Areas or parishes.

Planning Use Classes

Standardised statutory definitions categorising how land and buildings are used in planning policy:

E(g)(i): Office space.

E(g)(ii): Research and development (R&D) space.

E(g)(iii): Industrial processes compatible with residential areas (light industrial).

B2: General industrial uses (manufacturing and heavier processing).

B8: Storage or distribution premises (warehousing and logistics).

Plot Ratio

The ratio of total floor area of a building relative to the total area of the land plot on which it stands, used to translate floorspace requirements into gross land area (hectares).

Private Rented

Private rented accommodation is accommodation owned by a private landlord who is not a local authority or registered provider of social housing. Most private rented accommodation is let through an agent or the landlord directly. A private tenant usually has an assured tenancy.

Retirement Living or Sheltered Housing

Housing for older people which 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.

Residential Care Homes and Nursing Homes

Housing for older people comprising of 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.

Self-build and custom-build housing (2024 NPPF definition)

Housing built by an individual, a group of individuals, or persons working with or for them, to be occupied by that individual. Such housing can be either market or affordable housing. A legal definition, for the purpose of applying the Self-build and Custom Housebuilding Act 2015 (as amended), is contained in section 1 (A1) and (A2) of that Act.

Self-Containment Rate

The percentage of working residents who live and work within the same defined geographical boundary (measured separately for worker inflows and outflows).

Shared Ownership

Housing where a purchaser part buys and part rents from a housing association or local authority. Typical purchase share is between 25% and 75% (though this was lowered in 2021 to a minimum of 10%), and buyers are encouraged to buy the largest share they can afford. This generally applies to new build properties, but re-sales occasionally become available. There may be an opportunity to rent at intermediate rent level before purchasing a share in order to save/increase the deposit level.

Sheltered Housing¹⁴³

Sheltered housing (also known as retirement housing) means having your own flat or bungalow in a block, or on a small estate, where all the other residents are older people (usually over 55). With a few exceptions, all developments (or 'schemes') provide independent, self-contained homes with their own front doors. There are many different types of scheme, both to rent and to buy. They usually range in size from studio flats (or 'bedsits') through to 2 and 3 bed roomed. Properties in most schemes are designed to make life a little easier for older people - with features like raised electric sockets, lowered worktops, walk-in showers, and so on. Some will usually be designed to accommodate wheelchair users. And they are usually linked to an emergency alarm service (sometimes called 'community alarm service') to call help if needed. Many schemes also have their own 'manager' or 'warden', either living on-site or nearby, whose job is to manage the scheme and help arrange any services residents need. Managed schemes will also usually have some shared or communal facilities such as a lounge for residents to meet, a laundry, a guest flat and a garden.

Specialist Housing for the Elderly

Specialist housing for the elderly, sometimes known as specialist accommodation for the elderly, encompasses a wide range of housing types specifically aimed at older people, which may often be restricted to those in certain older age groups (usually 55+ or 65+). This could include residential institutions, sometimes known as care homes, sheltered housing, Extra Care housing, retirement housing and a range of other potential types of housing which has been designed and built to serve the needs of older people, including often providing care or other additional services. This housing can be provided in a range of tenures (often on a rented or leasehold basis).

Social Rented Housing

Social Rent: meets all of the following conditions: (a) the rent is set in accordance with the government's rent policy for Social Rent; (b) the landlord is a registered provider; and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing

¹⁴³ See <http://www.housingcare.org/jargon-sheltered-housing.aspx>

provision. Guideline target rents for this tenure are determined through the national rent regime.

Standard Occupational Classification (SOC)

A national system for classifying job roles into structured skill and activity tiers (e.g., SOC 1–3 representing managerial, professional, and technical occupations).

Travel to Work Area (TTWA)

A self-contained labour market area defined by the Office for National Statistics (ONS) where generally at least 75% (or 66.7% for larger working populations) of the resident workforce works locally, and vice versa.

Appendix B Adopted Local Plan Policies

Table B-1: Hart Local Plan 2032 Adopted Policies (Housing)¹⁴⁴

Hart Local Plan (Strategy and Sites) 2032	
Policy	Provisions relating to housing
SD1 – Sustainable Development	When considering development proposals, the Council will take a positive approach that reflects the presumption in favour of sustainable development contained in the National Planning Policy Framework (or its successor), whilst having regard to the need to assess, and where appropriate, mitigate against, the likelihood of a significant effect on the Thames Basin Heaths Special Protection Area. Planning applications that accord with the policies in the Development Plan (including, where relevant, policies in Neighbourhood Plans) will be approved unless material considerations indicate otherwise. Where there are no policies relevant to the application or the most relevant policies are out of date at the time of making the decision, the Council will grant permission unless: a) The application of policies in the National Planning Policy Framework that protect areas or assets of particular importance provide a clear reason for refusing the development proposed; or b) Any adverse impacts of granting planning permission would significantly and demonstrably outweigh the benefits, when assessed against the policies in the National Planning Policy Framework taken as a whole.
SS1 – Spatial Strategy and Distribution of Growth	Development will be focused within defined settlements, on previously developed land in sustainable locations, and on allocated sites as shown on the Policies Map. New Homes Subject to the availability of deliverable avoidance and mitigation measures in respect of the Thames Basin Heaths Special Protection Area, the housing requirement in Hart is 423 homes per annum between 2014 and 2032 which equates to 7,614 homes. The supply of new homes will come from the following sources: a) Completions since 1st April 2014 and delivery of housing commitments as of 1st April 2018; b) Permitting further development and redevelopment within the defined Settlement Policy Boundaries (subject to other plan policies); c) Delivery of Hartland Village for 1,500 homes, approximately 1,400 of which are expected to be within the plan period (Policy SS2); d) Supporting the delivery of new homes through Neighbourhood Plans; e) Permitting rural exception sites located outside of defined Settlement Policy boundaries in accordance with Policy H3, and other housing where it is

¹⁴⁴ <https://www.hart.gov.uk/sites/default/files/2024-08/Hart-Local-Plan-strategy-and-Sites-2032.pdf>

	essential for the proposal to be located in the countryside in accordance with Policy NBE1.
SS2 – Hartland Village	Harland Village, a site of approximately 54 hectares to the east of Fleet, is allocated for a new settlement that delivers approximately 1,500 dwellings with an appropriate mix of sizes and types of accommodation, including affordable housing. The affordable housing shall be distributed throughout the site with each phase making an appropriate contribution towards the overall provision. There will not be any new housing within 400m of the Thames Basin Heaths Special Protection Area (TBHSPA).
H1 – Housing Mix: Market Housing	Proposals for new homes will be supported where: - They provide an appropriate mix of dwelling types and sizes having regard to the most up to date evidence on housing need, and the size, location, and characteristics of the site and its surroundings; - On sites of 5 or more dwellings, 15% of new market homes are accessible and adaptable homes as defined by requirement M4(2) of the building regulations; - Provision is made for specialist/supported accommodation where appropriate having regard to the needs set out in the SHMA or other relevant evidence at the time an application is submitted; - On sites of 20 or more dwellings, 5% of plots are for self and custom build homes, subject to site suitability and the need shown on the self and custom build register. Development proposals for new homes must be supported by an explanation of the proposed mix of new homes, in the context of the criteria above. Proposals that do not meet one or more of the criteria may be supported provided they are justified in relation to evidence of housing need, viability, or to site-specific physical or environmental constraints.
H2 – Affordable Housing	On major developments (i.e. developments where 10 or more homes will be provided, or the site has an area of 0.5 hectares or more) the Council will require 40% of the new homes to be affordable housing, to be provided in accordance with the following criteria: - The affordable housing will be provided on site, and interspersed and distributed throughout the development mixed with market housing; - The affordable housing will be of a size and type which meets the requirements of those in housing need; - The tenure mix of the affordable housing will be 65% affordable housing for rent and 35% affordable home ownership unless superseded by the most up to date evidence concerning local housing need; 15% of the affordable units will be accessible and adaptable as defined by requirement M4(2) of the Building Regulations; - Where evidenced by local need, one or more of the affordable dwellings will be built as wheelchair user dwelling to meet, or exceed where justified, the requirements of Building Regulations M4(3); - In cases where the 40% calculation provides a part dwelling a financial contribution will be sought equivalent to that part dwelling; - The affordable housing for rent should be used solely for that purpose and remain at an affordable price for future eligible households, or the subsidy should be recycled for alternative affordable housing provision.

	Where it is robustly justified and it is clearly demonstrated that the provision of affordable housing on site is impractical, the Council may accept off-site provision, or a financial contribution of equivalent value in lieu of on-site provision. Only when fully justified, will the Council grant planning permission for schemes that fail to provide 40% affordable housing, or fail criteria a) to g) above. Any such proposals must be supported by evidence in the form of an open book viability assessment, demonstrating why the target cannot be met. In such cases the Council will commission an independent expert review of the viability assessment, for which the applicant will bear the cost. The Council will then negotiate with the applicant to secure the optimum quantity and mix of affordable housing that is viable and meets the identified housing need. Developments which appear to artificially restrict the site area, or level of development proposed in order to avoid the provision of affordable housing will be refused.
H3 – Rural Exception Sites	Small-scale developments of affordable housing on land adjoining or closely related to villages will be supported provided: a) They would address a proven local need for affordable housing; b) The affordable housing is available in perpetuity for those with a local connection; c) They include a mix of dwelling types, sizes, and tenures that are informed by a discussion and agreement with the Council, including considerations of the current evidence of housing needs for the settlement; and d) The development is in keeping with the character and size of the settlement. Some market housing will be supported as part of a rural exceptions scheme where it would facilitate the provision of subsidised rented accommodation to meet local needs.
H4 – Specialist and Supported Accommodation	Proposals for specialist and supported accommodation that meets the needs of older persons or other requiring specialist care will be permitted: a) On sites within the settlement boundaries; and b) On sites in the countryside provided: i. There is a demonstrated need for the development; and ii. There are no available and viable alternatives within settlement boundaries; and iii. The site is well related to an existing settlement with appropriate access to services and facilities either on or off site.

Source: Hart District Council

Appendix C Documents Reviewed

C.1 Introduction

13.9.12 This section examines relevant documents.

Invest 2035: the UK's Modern Industrial Strategy (2024)

13.9.13 Invest 2035: the UK's Modern Industrial Strategy¹⁴⁵ sets out a long-term, place-based approach to economic growth, focusing on high-potential sectors and regions, and prioritising investment in strategic industrial sites and clusters. The strategy identifies eight growth-driving sectors: advanced manufacturing, clean energy industries, creative industries, defence, digital and technology business, financial services, life sciences, and professional and business services.

13.9.14 A core objective of the industrial strategy is unleashing the full potential of cities and regions. To do so, the strategy aims to concentrate efforts on places with the greatest potential for the growth sectors, places with high-potential clusters and strategic industrial sites. This is particularly relevant for Hart, which demonstrates significant strengths in sectors such as data processing, specialist electronics, telecommunications, and scientific and professional services.

Economic Strategy for Hampshire: Committing to Prosperity (2025–2027) (2024)

13.9.15 The Economic Strategy for Hampshire¹⁴⁶ sets out the growth opportunity that Hampshire represents, revisits the Economic Strategy 2023, and re-enforces the six capitals framework, describes what has changed since, and outlines how the Hampshire Prosperity Partnership Board and its partners are responding.

13.9.16 The Strategy sets out the vision:

“To create an environment that enables sustainable and long-term economic success which, in turn, increases the prosperity and opportunity for the people of Hampshire now and in the future.”

¹⁴⁵ Department for Business & Trade, Invest 2035: the UK's modern industrial strategy (updated 24 November 2024). Available at: <https://www.gov.uk/government/consultations/invest-2035-the-uks-modern-industrial-strategy/invest-2035-the-uks-modern-industrial-strategy>

¹⁴⁶ Hampshire County Council, (2024); Economic Strategy for Hampshire: Committing to Prosperity (2025–2027). Available at: <https://hampshire.moderngov.co.uk/documents/s127048/Economic%20Strategy%20Update%20and%20Regional%20Update%20-%20Appendix.pdf?utm>

Economy and Growth Plan for Hampshire 2025 to 2027

13.9.17 The Economy and Growth plan¹⁴⁷ outlines Hampshire County Council's priorities for driving sustainable and inclusive economic growth. It builds on the Economic Strategy for Hampshire and sets out the key actions that Hampshire County Council will take during 2025-27 to implement this strategy with the ultimate aim is to strengthen the local economy, support communities and prepare for future opportunities such as regional devolution.

13.9.18 The plan sets out 22 key actions across five priority areas:

- High potential sectors and clusters;
- Business support;
- Energy;
- Infrastructure; and
- Skills, employment and careers.

Hampshire Strategic Infrastructure Statement (2019)

13.9.19 The Hampshire Strategic Infrastructure Statement¹⁴⁸ examines the infrastructure demands being placed on the County and the mitigation required to offset it. It represents an overview of the infrastructure needed to support future development for the administrative area of Hampshire. This statement also includes a summary of the proposed development strategies for each local authority in Hampshire including for the district of Hart.

13.9.20 Several key findings have been identified within this statement. Chapter 4 sets out the assessment of economic and demographic pressures, trends and forecasts that the county will experience over the coming two decades. Notably, this evidence shows that the addition of new employment sites recently completed across Hampshire, and a number of sites with planning permissions allocated for future development, will create additional infrastructure requirements on the local and strategic infrastructure networks, in particular transport, utilities and superfast broadband.

13.9.21 It focuses on a wide range infrastructure types including transport; schools; countryside schemes; waste infrastructure; flood risk management infrastructure; social & community infrastructure such as libraries; extra care housing; health care provision; and blue light services. The statement identifies each infrastructure type; provides some background information to explain the infrastructure and its importance in supporting development; examines current pressures on the network and identifies key pinch points;

¹⁴⁷ Hampshire County Council, (2025); Economy and growth plan for Hampshire 2025 to 2027. Available at: <https://documents.hants.gov.uk/hampshire-prosperity-partnership/Economy-and-GrowthPlan-Hampshire-2025-2027.pdf>

¹⁴⁸ Hampshire County Council, (2019); Hampshire Strategic Infrastructure Statement. Available at: <https://documents.hants.gov.uk/planning-strategic/HampshireStrategicInfrastructureStatement.pdf>

explains what triggers the need for additional capacity; and finally, how the infrastructure might be funded where information is available.

A Prosperous Future for Hart: A Strategy to Support a Successful Local Economy, 2025-35

13.9.22 This strategy¹⁴⁹ aims to support a successful local economy in the district, underpinned by a thorough analysis of the local economy and its potential over the next ten years. It identifies the steps that Hart District Council and its partners can take to support sustainable, long-term prosperity.

13.9.23 The Strategy highlights Hart as a productive economy, underpinned by a skilled workforce and important links to the wider sub-region. Sustaining this is considered important in the context of technological and demographic change.

“Hart will be a prosperous and vibrant area, with an excellent environment and quality of life. At the heart of one of the UK’s leading innovation corridors, new investment will complement a dynamic local business community. People will choose to live and work in an area that positively builds on its success and is sustainable for the future”

13.9.24 The five priorities required to deliver this vision include:

- Promoting Hart’s investment opportunity;
- Supporting Hart’s innovative edge;
- Creating flourishing town and village centres;
- Enabling access to lifelong learning; and
- Unlocking everyone’s potential.

C.2 Other relevant documents

13.9.25 Further reports and evidence base documents which relate to the housing element of the HEDNA include:

- Hart, Rushmoor, and Surrey Heath Strategic Housing Market Assessment (SHMA) 2014-2032, November 2016¹⁵⁰;
- Hart Social and Affordable Rent Affordability Assessment, October 2024¹⁵¹;

¹⁴⁹ Hart District Council and SQW, (2025); A prosperous future for Hart: A strategy to support a successful local economy, 2025-35. Available at:

<https://www.hart.gov.uk/sites/default/files/2025-06/A-prosperous-future-for-Hart-March-2025.pdf>

¹⁵⁰ https://www.hart.gov.uk/sites/default/files/2022-11/hrsh_shma_main_report_final_161125.pdf

¹⁵¹ <https://www.hart.gov.uk/sites/default/files/2025-12/Affordable-Homes-SPD-Affordability-Assessment-report.pdf>

- Impact of Social Rented Homes on Development Viability, September 2024¹⁵²;
- Position Statement on the need for specialist and supported accommodation for older persons in Hart, 27 January 2026¹⁵³;
- Hampshire County Council Children's Strategic Commissioning Market Position Statement, May 2025¹⁵⁴;
- Hampshire County Council Children's Residential Care Market Position Statement, May 2025¹⁵⁵; and
- Hampshire County Council Residential and Nursing Market Position Statement, June 2025¹⁵⁶.

¹⁵² <https://www.hart.gov.uk/sites/default/files/2025-12/Impact-of-social-rented-housing-on-development-viability.pdf>

¹⁵³ <https://www.hart.gov.uk/sites/default/files/2026-01/Older-Persons-Specialist-Accommodation-Position-Statement.pdf>

¹⁵⁴ <https://documents.hants.gov.uk/childrens-services/market-position-statement-overarching.docx>

¹⁵⁵ <https://documents.hants.gov.uk/childrens-services/market-position-statement-residential.docx>

¹⁵⁶ <https://documents.hants.gov.uk/adultservices/market-position-statements/Residential-and-Nursing-Market-Position-Statement-2025.pdf>

Appendix D : Definition of Geographies

Hart refers to the entirety of Hart District.

North Hampshire Unitary Authority area is the District/Boroughs of Hart, Rushmoor, and Basingstoke & Deane.

Hampshire & the Solent Combined Authority is the entirety of Hampshire County, the Isle of Wight, Southampton Unitary Authority area, and Portsmouth Unitary Authority area.

The Census Output Areas which make up the sub-areas of Fleet & Church Crookham, Blackwater & Yateley, Hook, Rural North & Villages, and Rural South and Villages are outlined in Table D-1 below.

Table D-1: Census Output Areas for Hart District Sub-Areas

Sub Area	Output Areas
Fleet & Church Crookham	E00116106
	E00116107
	E00116108
	E00116109
	E00116110
	E00116111
	E00116112
	E00116113
	E00116114
	E00116115
	E00116116
	E00116117
	E00116118
	E00116119
	E00116120
	E00116121
	E00116122
	E00116123
	E00116124
	E00116125
	E00116126
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	E00116128
	E00116129
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	E00116131
	E00116132
	E00116133

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	E00116135
	E00116136
	E00116137
	E00116139
	E00116148
	E00116149
	E00116159
	E00116160
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	E00116164
	E00116165
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	E00116221
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	E00116224
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	E00116228
	E00116229
	E00167906
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	E00167910
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	E00167914
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	E00167918
	E00167919
	E00167920
	E00184831
	E00184834
	E00184835
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	E00184936
	E00184937
	E00184959
	E00184961
	E00184963
	E00184969
	E00184980
	E00184988
	E00184989
	E00185001
Blackwater & Yateley	E00116092
	E00116094
	E00116096
	E00116097
	E00116098
	E00116099
	E00116100
	E00116101
	E00116102
	E00116103
	E00116104
	E00116105
	E00116230
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	E00116333
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	E00116338
	E00116339
	E00116340
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	E00116273
	E00116274
	E00116276
	E00116277
	E00116278
	E00116279
	E00116280
	E00116281
	E00116282
	E00116283

	E00167921
	E00167923
	E00167924
	E00167928
	E00184946
	E00184970
	E00184973
	E00184985
	E00185022
Rural North & Villages	E00116150
	E00116151
	E00116152
	E00116153
	E00116154
	E00116155
	E00116156
	E00116157
	E00116158
	E00116246
	E00116247
	E00116248
	E00116249
	E00116250
	E00116251
	E00116253
	E00116254
	E00116255
	E00116256
	E00116257
	E00116258
	E00116259
	E00116260
	E00116261
	E00116262
	E00116285
	E00116286
	E00116307
	E00184858
	E00184864
	E00184892
	E00184986

Rural South & Villages	E00116138
	E00116140
	E00116141
	E00116142
	E00116143
	E00116144
	E00116145
	E00116287
	E00116291
	E00116292
	E00116293
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	E00116306
	E00116308
	E00167922
	E00167925
	E00167926
	E00167927
	E00184866
	E00184889
	E00184921
	E00184972

Source: Census 2021

Appendix E : Benefit Entitlement Scenarios

Table E-1: Benefits Scenario 2 – Couple with 3 Children

Source: ONS, VOA, Rightmove.co.uk, AECOM Calculations

	Blackwater Valley BRMA						Basingstoke BRMA					
	Scenario 2a: Couple, 3 children, no earnings			Scenario 2b: Couple, 3 children, LQ earnings			Scenario 2a: Couple, 3 children, no earnings			Scenario 2b: Couple, 3 children, LQ earnings		
	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS
Bedroom entitlement	3	3	3	3	3	3	3	3	3	3	3	3
Earnings (gross, weekly)	£0.00	£0.00	£0.00	£493.38	£493.38	£493.38	£0.00	£0.00	£0.00	£493.38	£493.38	£493.38
Earnings (net, weekly)	£0.00	£0.00	£0.00	£422.92	£422.92	£422.92	£0.00	£0.00	£0.00	£422.92	£422.92	£422.92
LHA rate	£298.03	£298.03	£298.03	£298.03	£298.03	£298.03	£264.66	£264.66	£264.66	£264.66	£264.66	£264.66
Actual rent (weekly)	£259.12	£159.91	£369.19	£259.12	£159.91	£369.19	£259.12	£159.91	£417.44	£259.12	£159.91	£417.44
Total benefit income, of which:	£464.77	£464.77	£464.78	£518.94	£419.73	£558.66	£464.66	£464.66	£464.67	£518.94	£419.73	£525.20
- Universal Credit ¹⁵⁷	£360.61	£360.61	£360.62	£456.09	£356.88	£495.81	£360.61	£360.61	£360.62	£456.09	£356.88	£462.35
- Child benefit	£62.85	£62.85	£62.85	£62.85	£62.85	£62.85	£62.85	£62.85	£62.85	£62.85	£62.85	£62.85
- Council Tax Support	£41.31	£41.31	£41.31	£0.00	£0.00	£0.00	£41.20	£41.20	£41.20	£0.00	£0.00	£0.00
Total net income (earnings and benefits excluding CTS ¹⁵⁸)	£423.46	£423.46	£423.47	£941.86	£842.65	£981.58	£423.46	£423.46	£423.47	£941.86	£842.65	£948.12
% net income spent on rent	61%	38%	87%	28%	19%	38%	61%	38%	99%	28%	19%	44%
Disposable income after rent (weekly)	£164.34	£263.55	£54.28	£682.74	£682.74	£612.39	£164.34	£263.55	£6.03	£682.74	£682.74	£530.68

¹⁵⁷ Universal Credit is used in these scenarios as they are assumed to be new claims. Some households in Hart will be claiming legacy benefits and will not yet be moved on to Universal Credit. The amount claimed should be the same overall.

¹⁵⁸ Council Tax Support amount is excluded from the net income + benefit amount as it is assumed this would be spent directly on Council Tax and would not be available for other living expenses.

Table E-2: Benefits Scenario 3 – Single Person (aged 30)

	Blackwater Valley BRMA						Basingstoke BRMA					
	Scenario 3a: Single person, aged 30, no earnings			Scenario 3b: Single person, aged 30, LQ earnings			Scenario 3a: Single person, aged 30, no earnings			Scenario 3b: Single person, aged 30, LQ earnings		
	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS
Bedroom entitlement	Room	Room	Room	Room	Room	Room	Room	Room	Room	Room	Room	Room
Earnings (gross, weekly)	£0.00	£0.00	£0.00	£493.38	£493.38	£493.38	£0.00	£0.00	£0.00	£493.38	£493.38	£493.38
Earnings (net, weekly)	£0.00	£0.00	£0.00	£422.92	£422.92	£422.92	£0.00	£0.00	£0.00	£422.92	£422.92	£422.92
LHA rate	£110.00	£110.00	£110.00	£110.00	£110.00	£110.00	£93.51	£93.51	£93.51	£93.51	£93.51	£93.51
Actual rent (weekly)¹⁵⁹	£170.11	£122.46	£244.19	£170.11	£122.46	£244.19	£170.11	£122.46	£250.00	£170.11	£122.46	£250.00
Total benefit income, of which:	£299.14	£251.49	£239.33	£35.54	£0.00	£0.00	£299.06	£251.41	£222.72	£35.54	£0.00	£0.00
- Universal Credit¹⁶⁰	£268.16	£220.51	£208.35	£35.54	£0.00	£0.00	£268.16	£220.51	£191.82	£35.54	£0.00	£0.00
- Child benefit	-	-	-	-	-	-	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
- Council Tax Support	£30.98	£30.98	£30.98	£0.00	£0.00	£0.00	£30.90	£30.90	£30.90	£0.00	£0.00	£0.00
Total net income (earnings and benefits excluding CTS¹⁶¹)	£268.16	£220.51	£208.35	£458.46	£422.92	£422.92	£268.16	£220.51	£191.82	£458.46	£422.92	£422.92
% net income spent on rent	63%	56%	117%	37%	29%	58%	63%	56%	130%	37%	29%	59%
Disposable income after rent (weekly)	£98.05	£98.05	-£35.84	£288.35	£300.46	£178.73	£98.05	£98.05	-£58.18	£288.35	£300.46	£172.92

Source: ONS, VOA, Rightmove.co.uk, AECOM Calculations

¹⁵⁹ Assumed to live in a 1-bedroom dwelling even though only eligible for Room rate due to lack of data on room rates and likelihood that a number of these households are living in 1-bedroom dwellings due to a small HMO stock in the District.

¹⁶⁰ Universal Credit is used in these scenarios as they are assumed to be new claims. Some households in Hart will be claiming legacy benefits and will not yet be moved on to Universal Credit. The amount claimed should be the same overall.

¹⁶¹ Council Tax Support amount is excluded from the net income + benefit amount as it is assumed this would be spent directly on Council Tax and would not be available for other living expenses.

Table E-3: Benefits Scenario 4 – Older Couple (state pension)

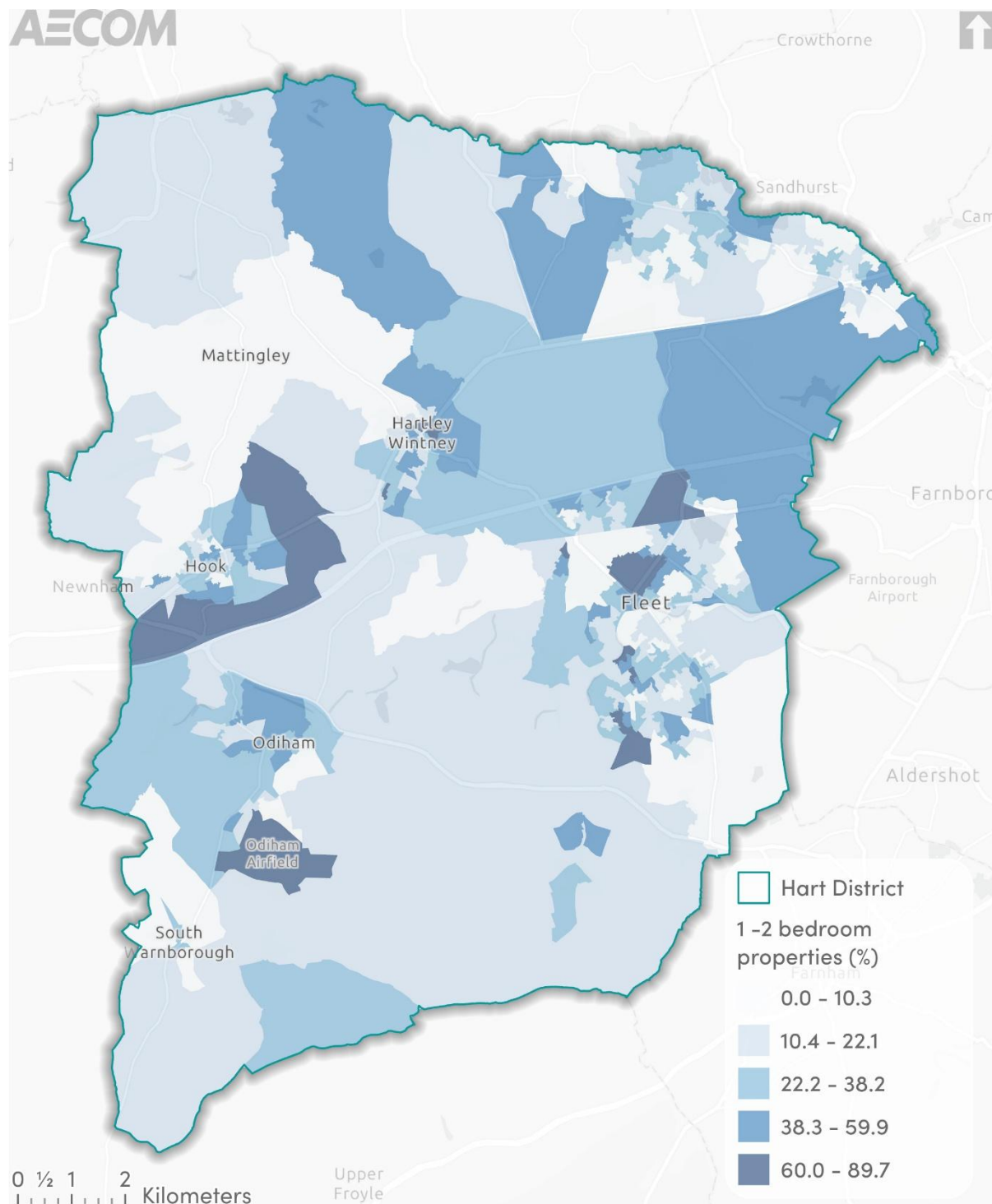
	Blackwater Valley BRMA			Basingstoke BRMA		
	Scenario 4a: Couple (aged 65+), 2 x state pension			Scenario 4a: Couple (aged 65+), 2 x state pension		
	Affordable Rent	Social Rent	PRS	Affordable Rent	Social Rent	PRS
Bedroom entitlement	1	1	1	1	1	1
Earnings (gross, weekly)	N/A	N/A	N/A	N/A	N/A	N/A
Earnings (net, weekly)	£482.60	£482.60	£482.60	£482.60	£482.60	£482.60
LHA rate	£184.11	£184.11	£184.11	£179.51	£179.51	£179.51
Actual rent (weekly)	£170.11	£122.46	£244.19	£170.11	£122.46	£250.00
Total benefit income, of which:	£127.06	£79.41	£141.06	£126.95	£79.30	£136.35
- Housing Benefit	£105.60	£57.95	£119.60	£105.60	£57.95	£115.00
- Child benefit	-	-	-	-	-	-
- Council Tax Support	£21.46	£21.46	£21.46	£21.35	£21.35	£21.35
Total net income (earnings and benefits excluding CTS ¹⁶²)	£588.20	£540.55	£602.20	£588.20	£540.55	£597.60
% net income spent on rent	29%	23%	41%	29%	23%	42%
Disposable income after rent (weekly)	£418.09	£418.09	£358.01	£418.09	£418.09	£347.60

Source: ONS, VOA, Rightmove.co.uk, AECOM Calculations

¹⁶² Council Tax Support amount is excluded from the net income + benefit amount as it is assumed this would be spent directly on Council Tax and would not be available for other living expenses.

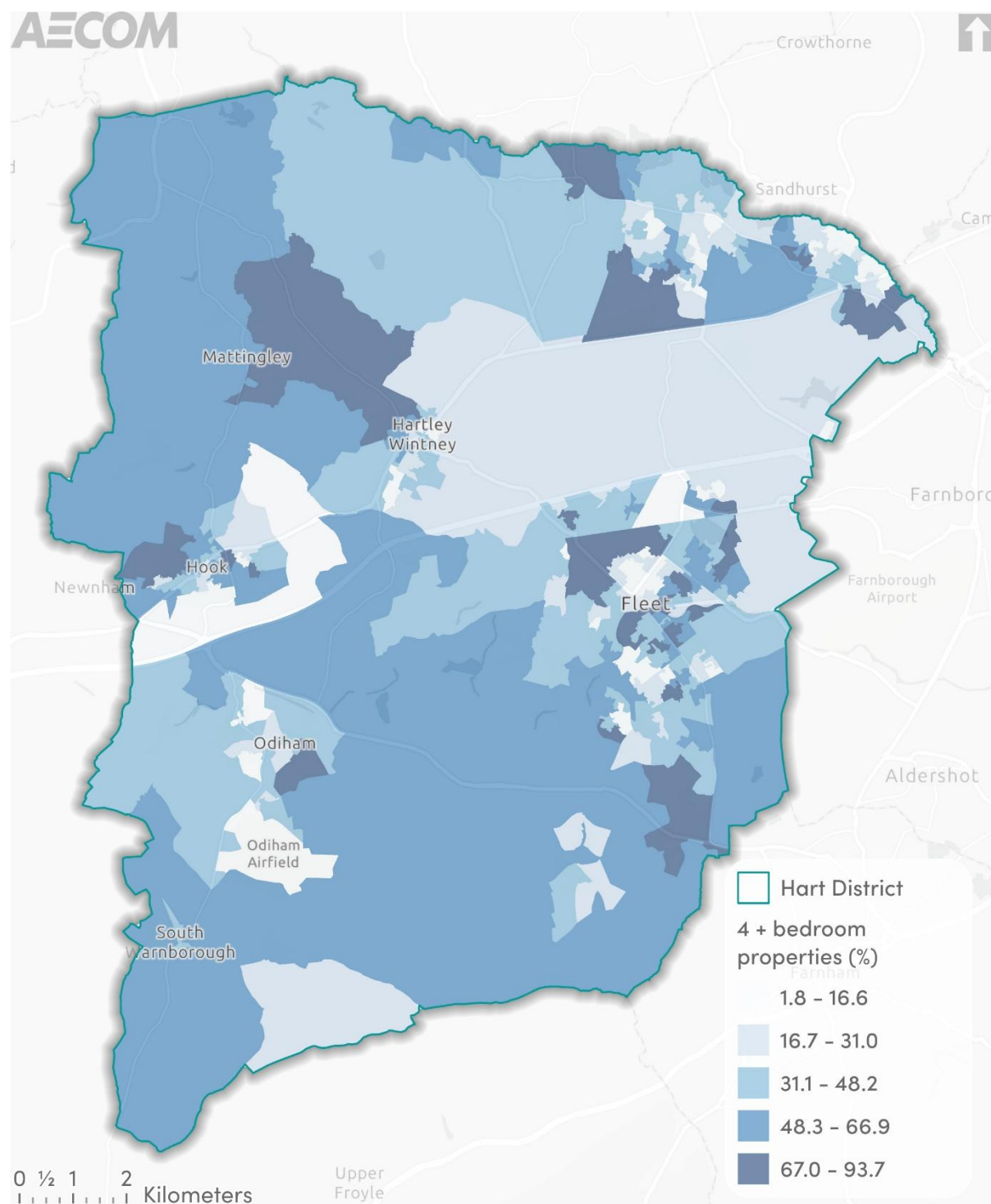
Appendix F : Detailed Heat Maps

Figure F-1: Map showing distribution of smaller (1-2 bedroom) properties, Hart, 2021



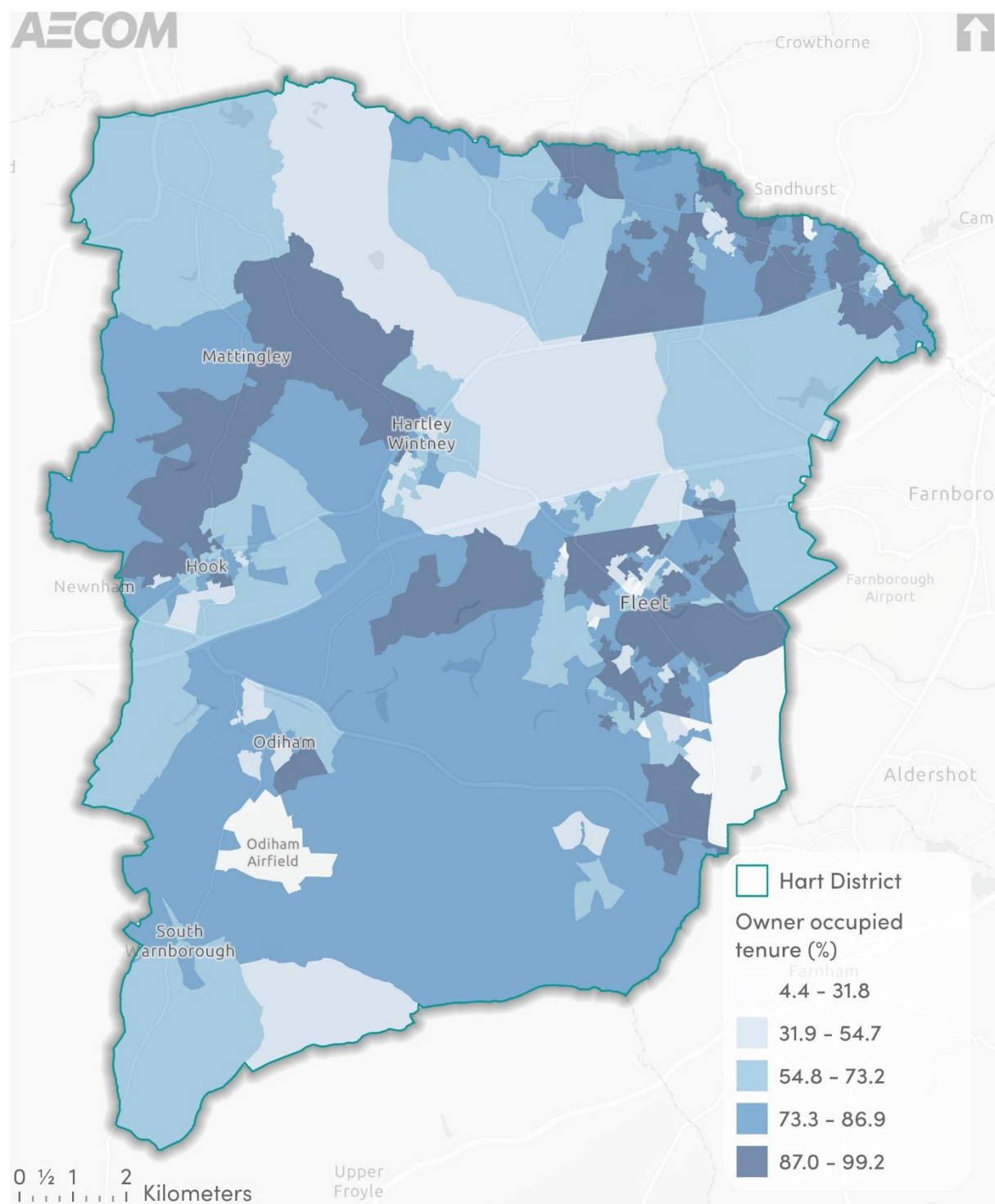
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Figure F-2: Map showing distribution of 4+ bedrooms properties, Hart, 2021



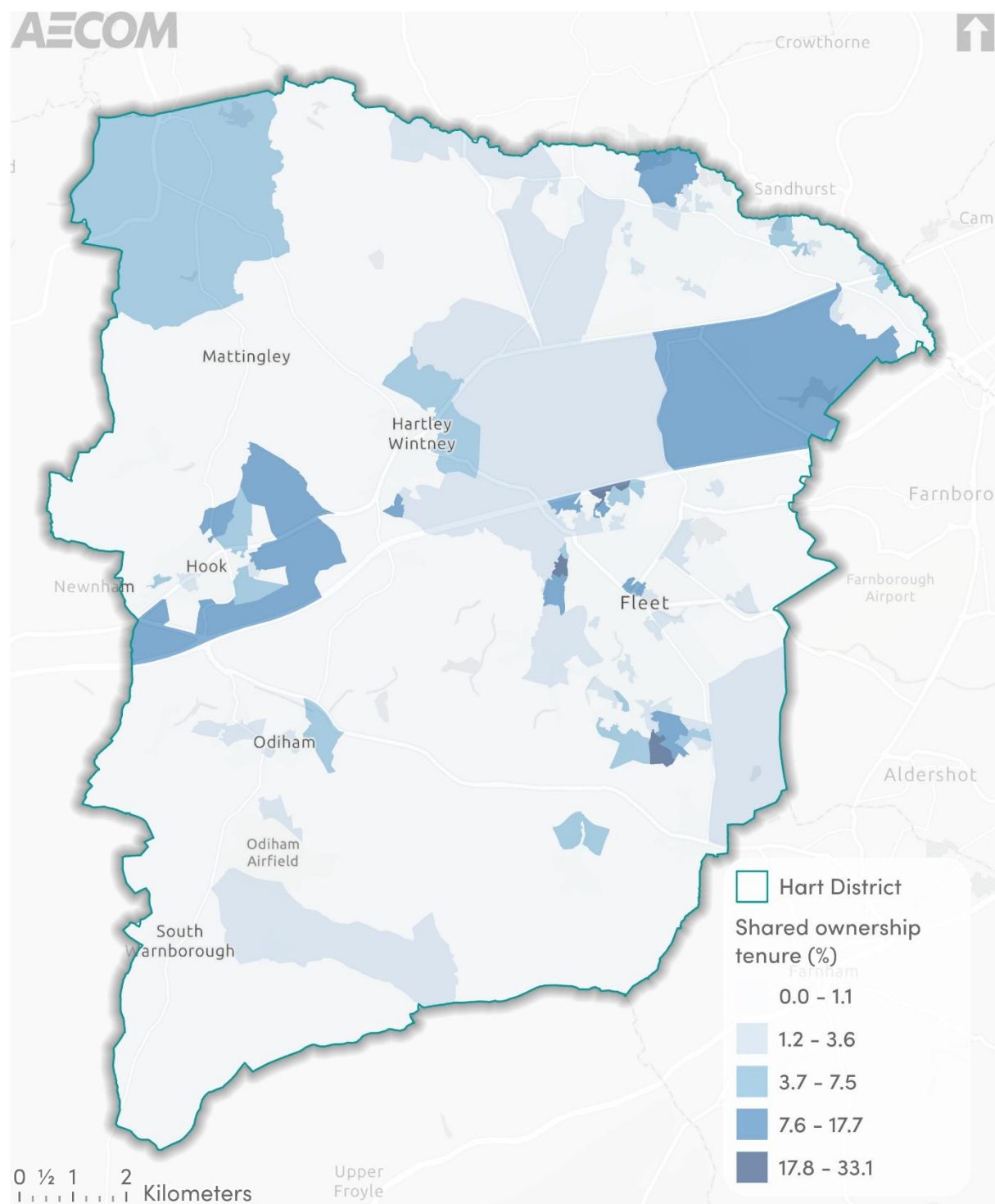
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Figure F-3: Map showing distribution of owner occupation, Hart, 2021



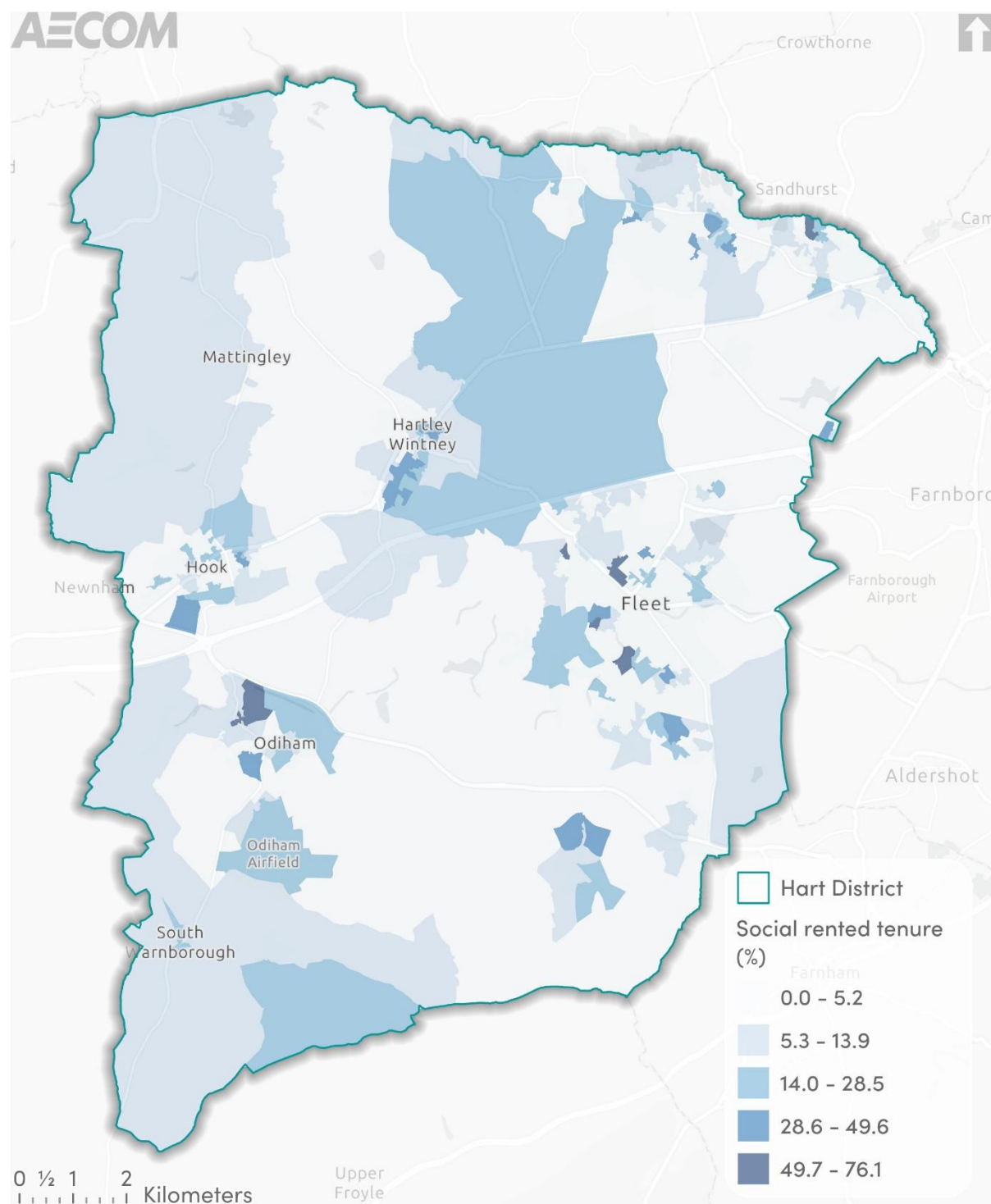
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Figure F-4: Map showing distribution of shared ownership, Hart, 2021



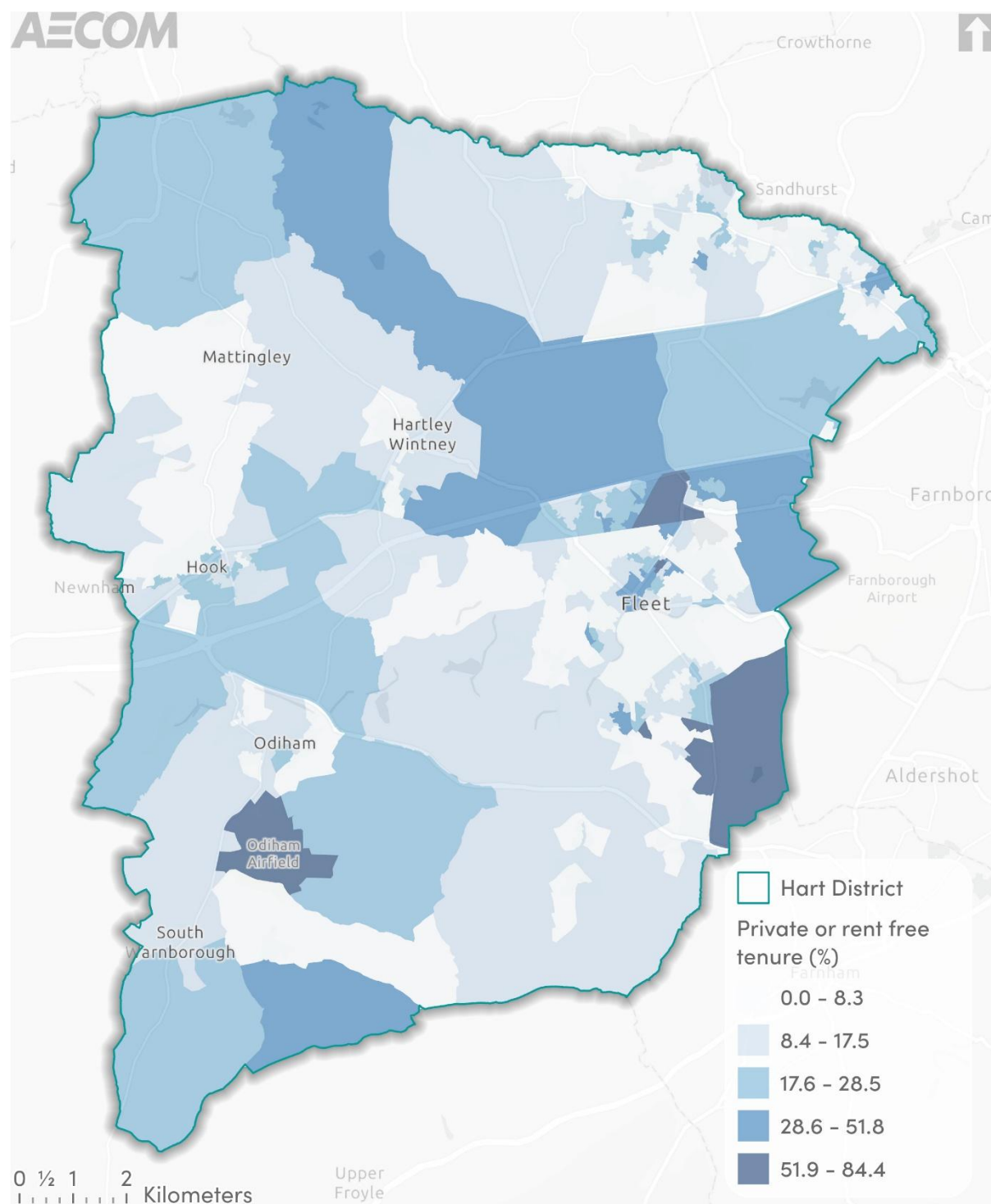
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Figure F-5: Map showing distribution of social/affordable renting, Hart, 2021



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Figure F-6: Map showing distribution of private renting, Hart, 2021



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