# EAST HERTS

# HOUSING NEEDS SURVEY 2014

# AIMS OF TODAY'S EVENT

- Present future need findings for the District
- Impact of future demographic change
- Needs of special groups
- Future housing demand and need

# METHODOLOGY - DATA SOURCES

## SECONDARY DATA

- 2011 Census
- ONS Population / Demographic projections

## HOUSING MARKET ANALYSIS

- Average and entry level property sales, prices and rents
- Intermediate Market

## PRIMARY DATA

- Household Survey response data across 17 ward sub-areas;

# THE CURRENT HOUSING STOCK

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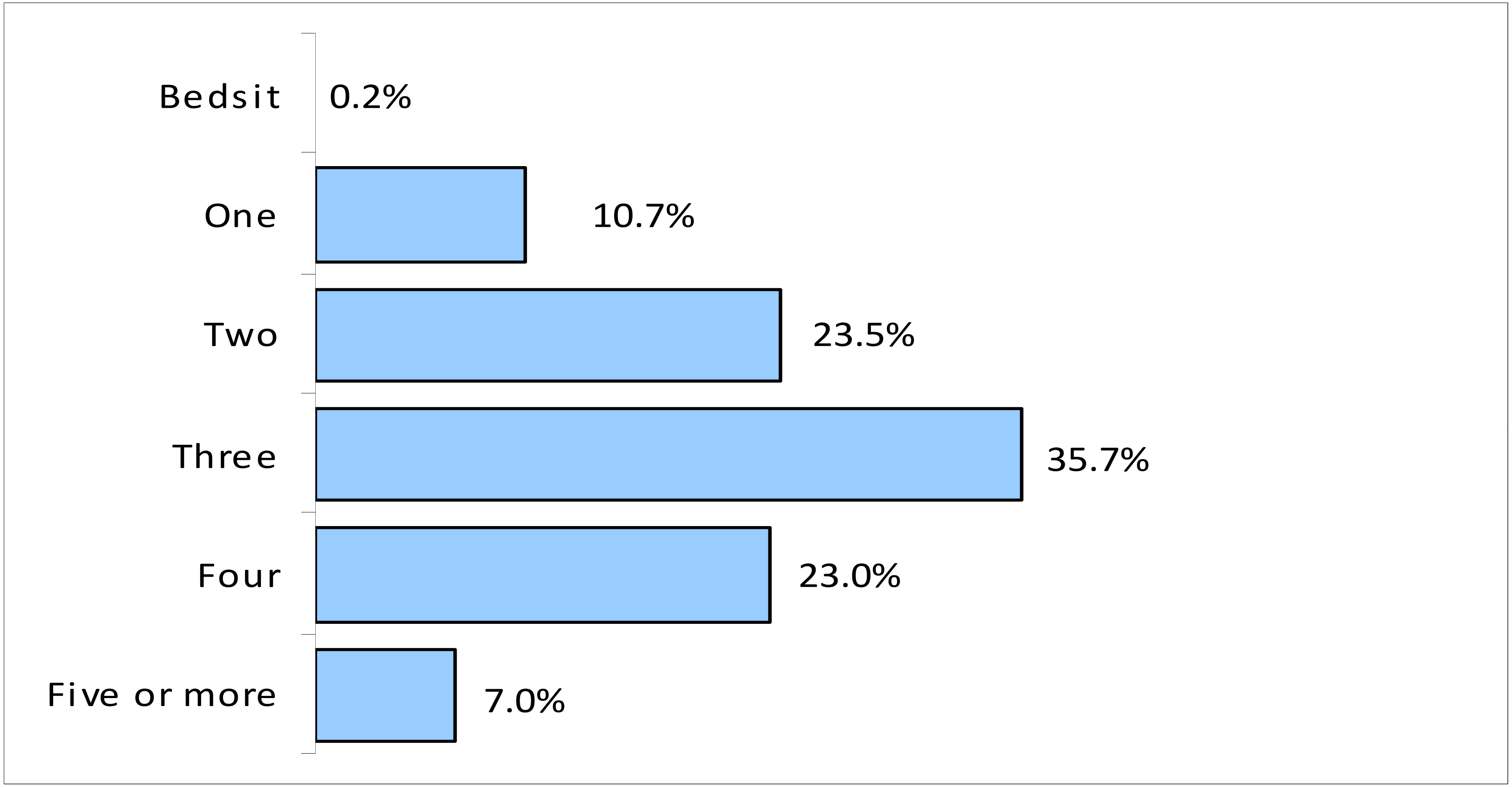
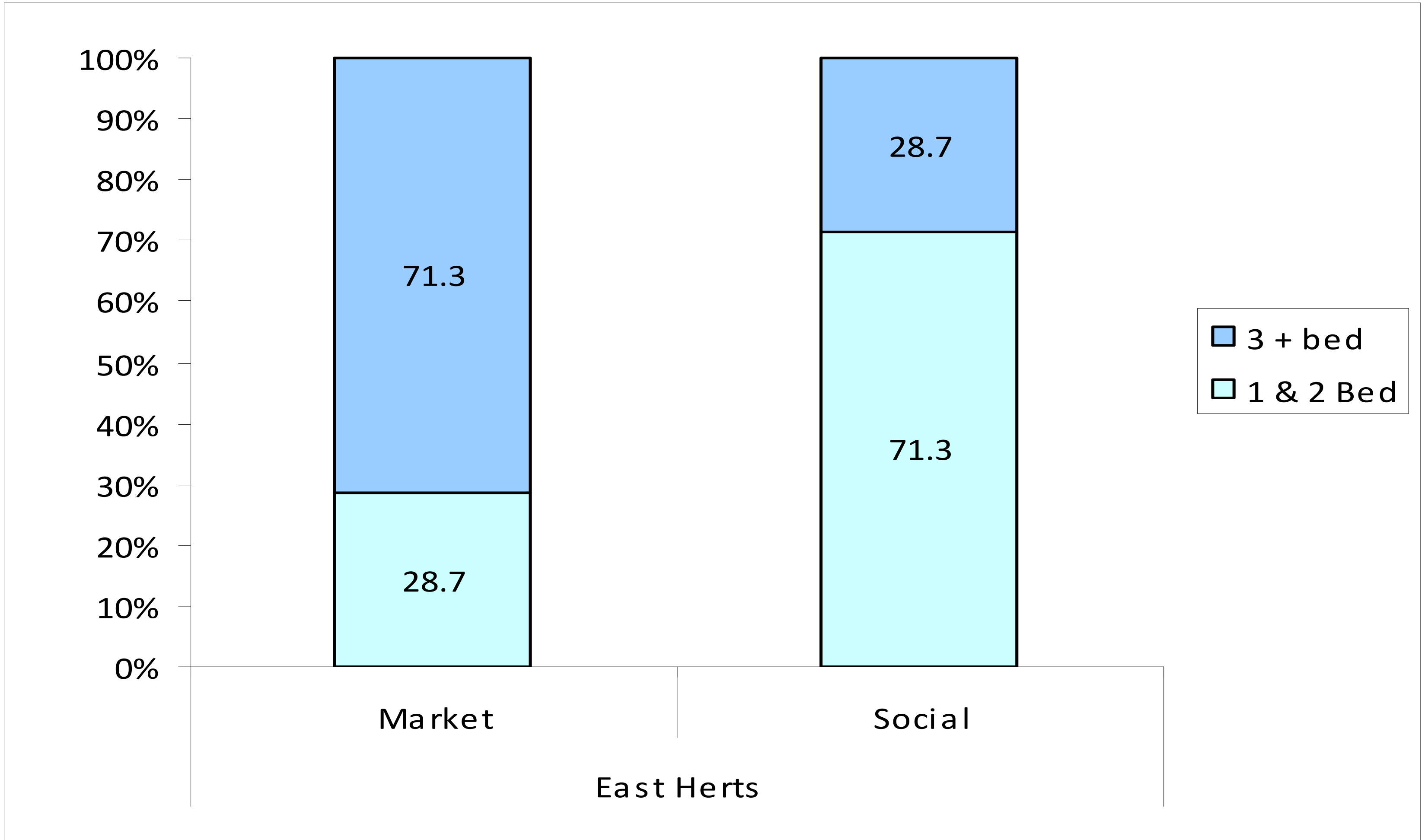
- Stock flow expected to meet 90% of all needs
- Need to understand existing stock structure
- Type / size and flow by tenure and location
- Address stock imbalances in future delivery

# PROPERTY SIZE PROFILE - 2014 SURVEY



# MARKET AND SOCIAL STOCK BY BED SIZE



# UNDER / OVER-OCCUPATION

| Tenure | % under-occupied | % over- occupied |
|---|---|---|
| Owner occupied with mortgage | 46.6 | 1.7 |
| Owner occupied no mortgage | 70.6 | 0.1 |
| Private rented | 9.6 | 5.0 |
| Registered Provider Rent | 13.2 | 4.9 |
| Shared Ownership | 2.6 | 0.0 |
| All stock | 44.0 | 2.0 |

- **Social rent – 950 under-occupied;**
- **38.5% of Social 3 & 4 bedroom stock is under-occupied;**
- **Over-crowding in social stock – 350 properties.**

# THE ACTIVE HOUSING MARKET

# PROPERTY PRICES Q3 2014

| Type / Size | Average | Lowest Quartile |
|---|---|---|
| 1 bedroom flat (151) | 153,686 | 139,995 |
| 2 bedroom flat (170) | 242,969 | 199,950 |
| 2 bedroom terraced (137) | 269,820 | 230,000 |
| 3 bedroom semi-detached (187) | 358,648 | 309,995 |

- Average price £357,865 at September 2014;
- Average prices increased by 6% over last year (2013–2014);
- Sales at 769 properties were 10% higher than in 2013;
- 32% of sales were terraced houses; Flats 24%
- LQ Flats require a single income of £35,000 / £42,100

DCA

# PRIVATE RENTED SECTOR

- Private rented sector (13.2%) now higher than social rent (12.7%);
- 65% consider their housing to be adequate, the lowest level by tenure;
- Sector has the lowest levels of energy and insulation facilities;
- 1 bedroom flat rents average £695 and the lowest quartile is £575;
- The household income to privately rent is £27,600 / £32,400;
- 90% of new forming households cannot afford to rent in this sector;

# KEY MARKET DRIVER

## DEMOGRAPHIC CHANGE

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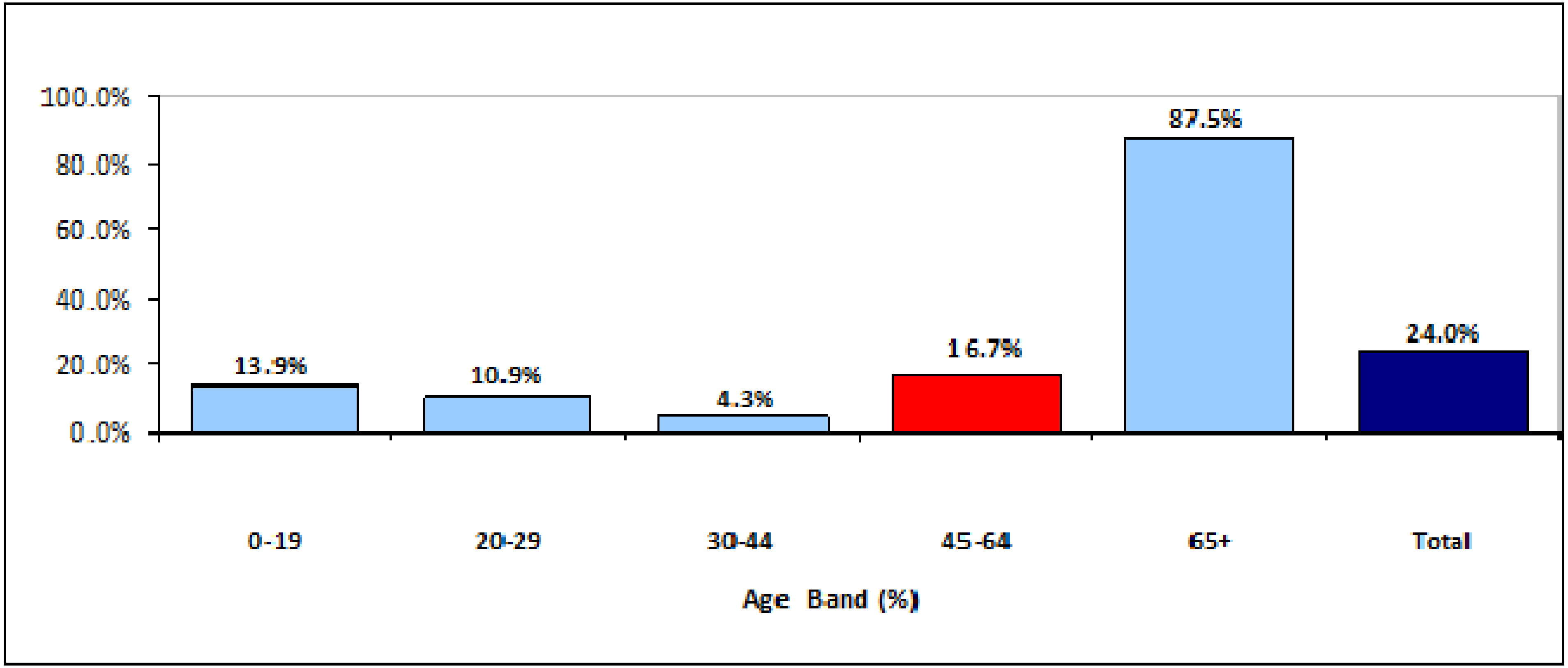
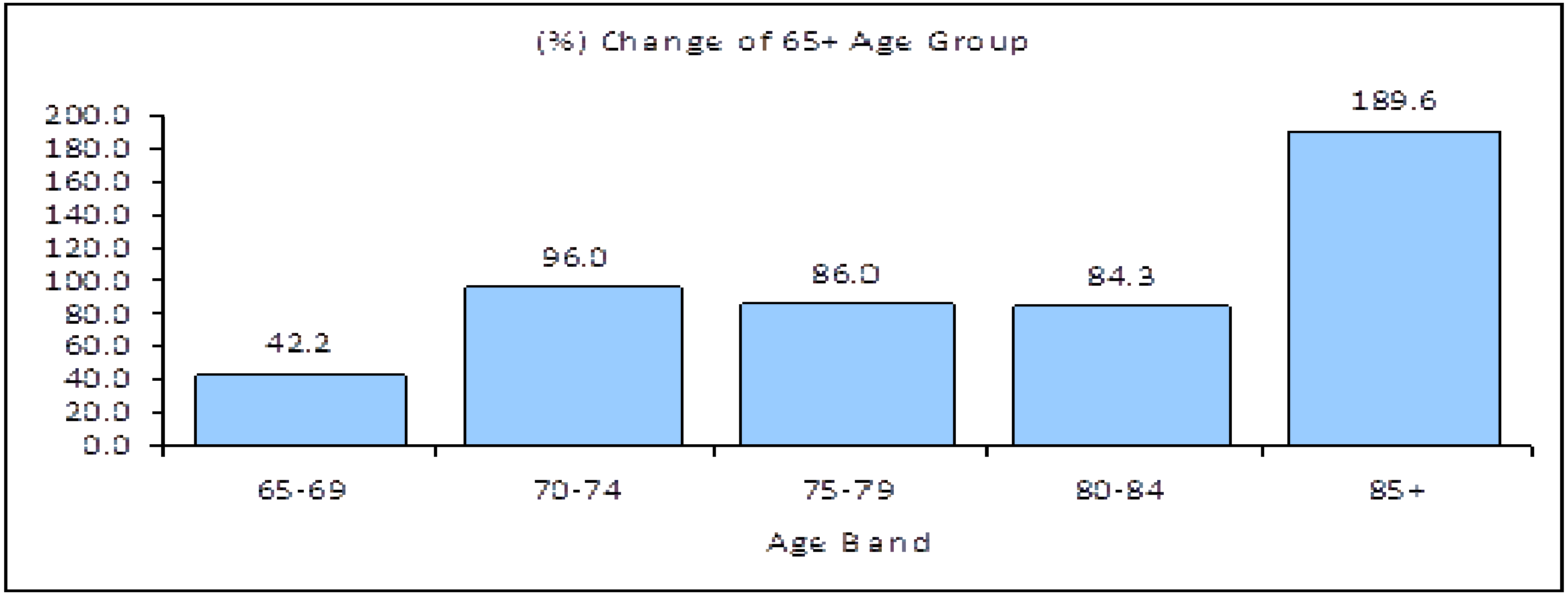
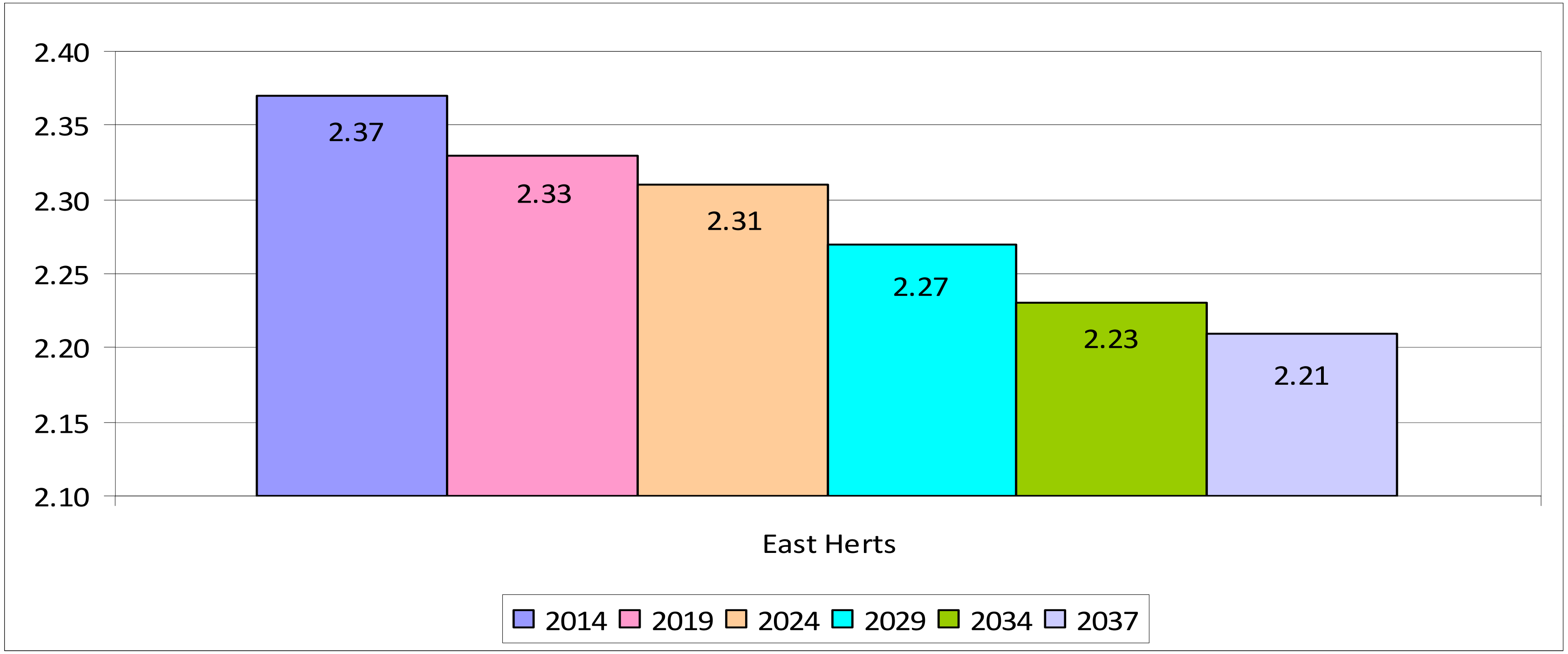


# OLDER POPULATION GROWTH - 2012 - 2037




- **Over 65 Group - 16% of total in 2012 – increases to 24.4% in 2037;**
- **Growth of 42.2% on 65-69 group; 96% in 70-74 and 189% in 85+ ;**

# HOUSEHOLD SIZE CHANGE TO 2037




- Reduce from 2.37 in 2014 to 2.21 in 2037

# HOUSING NEEDS OF SPECIAL GROUPS

# SHELTERED HOUSING DEMAND & NEED to 2017

| | Private | Affordable | All Sectors | Total |
|---|---|---|---|---|
| Local | 117 | 388 | 505 | 2,227 |
| In-Migrant | 1,224 | 498 | 1,722 | |

- Over 742 units a year needed to 2017;  almost 170 local need
- 77% of total need due to in-migrating parents / relatives
- Need for 828 Extra Care units, all from in-migrating parents

# SPECIFIC HOUSEHOLD GROUPS

## Households with Support Needs

- Households with a disability 9,850 (16.5%)
- Aged over 50 – 77.6%; 65+ 58.6% including 27.3% over 80;
- Walking difficulty / mobility 57.1%
- Outstanding Support need 1,050 (18.8%)
- Adapted Properties 6,970 (11.7%)

## BME Households

- Proportion of household population 3,116 (5.2%)
- Over-occupation 195 (6.3%)

# NEW HOUSEHOLDS

# &

# AFFORDABILITY

# CONCEALED HOUSEHOLDS

- 3,782 households plan to form locally in 3 years to 2017
- 70.5% want market housing; 29.5% affordable housing

**MARKET**

- 37.8% want flat ; 23.6% a terrace;
- 50.1% want 1 bedroom ; 34.2% 2 bedrooms;
- Main location choice was Hertford; 67.2% to be near family / friends

**AFFORDABLE**

- 96% want 1 bedroom flat;
- Sawbridgeworth & Bishops Stortford highest location choices;
- 81.4% ‘always lived here’
- 74.5% earn below national average;
- 88.5% cannot afford to rent / 98% to purchase;
- Demand for shared ownership of 140 a year.

# FUTURE HOUSING DELIVERY

# FUTURE AFFORDABLE STOCK SIZE

- Affordable rented targets based on waiting list / re-let data
- 86.7% of waiting list is for 1 and 2 bedroom units
- 950 properties are under-occupied by 2 or more bedrooms
- 9 years to house a family in a 4/5 bedroom house
- Intermediate demand is principally for 3 bedrooms

| Tenure Targets | Bedroom Size (%) | | | |
|---|---|---|---|---|
| | 1 Bedroom | 2 Bedrooms | 3 Bedrooms | 4 Bedrooms + |
| Affordable Rented | 80 | | 20 (mostly 3 bed) | |
| Intermediate | 25 | 10 | 65 | 0 |

# KEY RECOMMENDATIONS

- Focus new delivery in market housing to address:-
  - future demographic and household formation change and meet the need for smaller units across the stock;
- Address the under-occupation of almost 950 social rented properties to improve the turnover of family units and address the needs of 350 over-occupied households and those on the waiting list;
- Link new affordable delivery to the growth in older people and enabling a better flow of the existing stock;
- Assess Extra Care delivery strategy to meet 85+ growth.