

DRAFT Housing Strategy Evidence Base

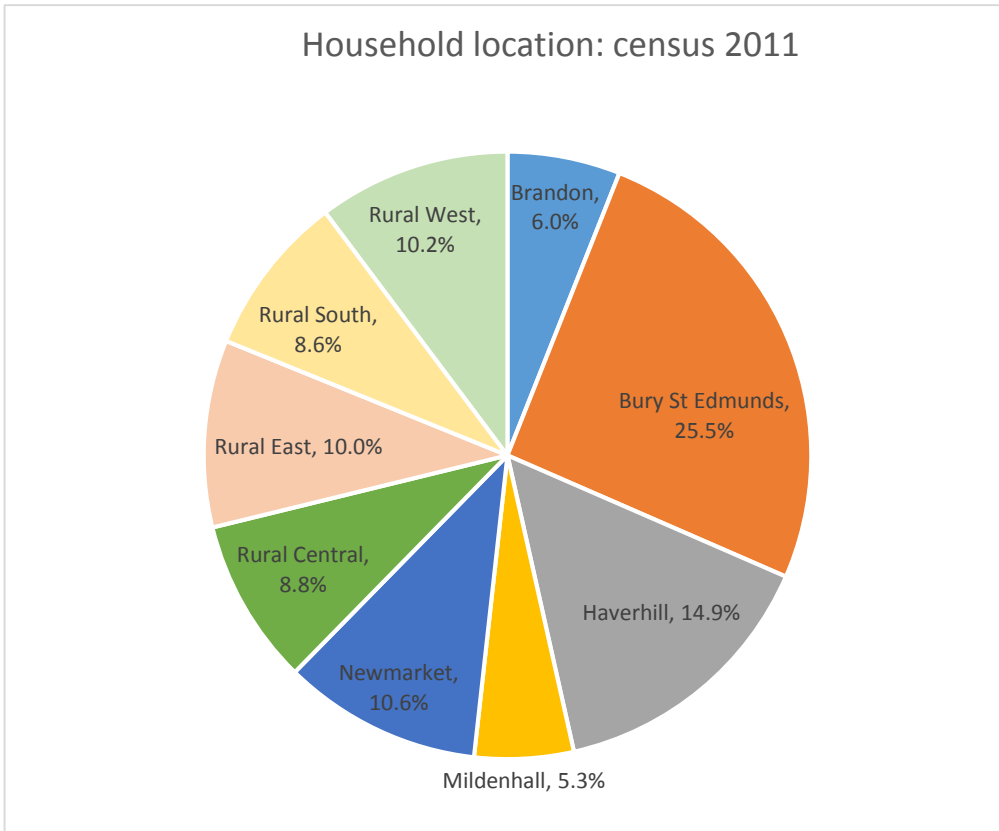
**(To be further developed during the consultation
period)**

9 October 2018
Consultation draft

Household location

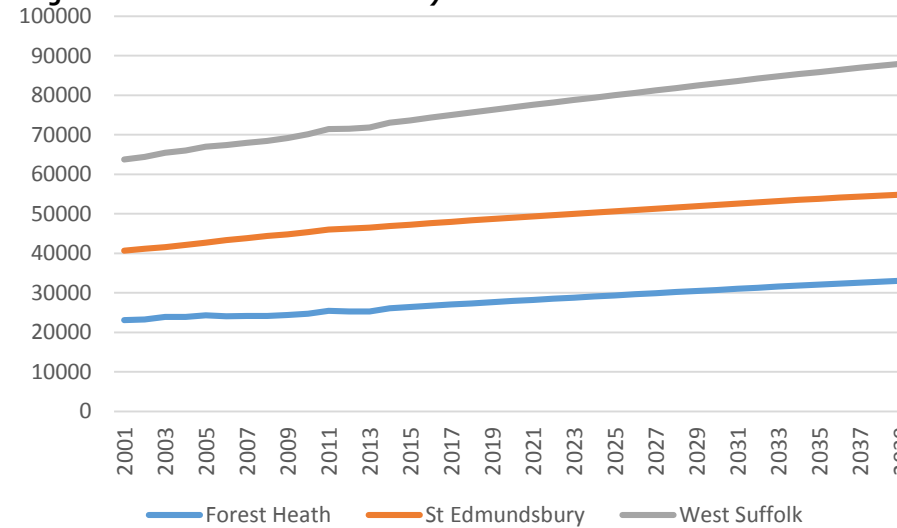
West Suffolk's households are spread across a large rural area, plus 5 main settlements (source: Census 2011)

The location of households are shown across West Suffolk's nine geographies (below).



Growth in number of households

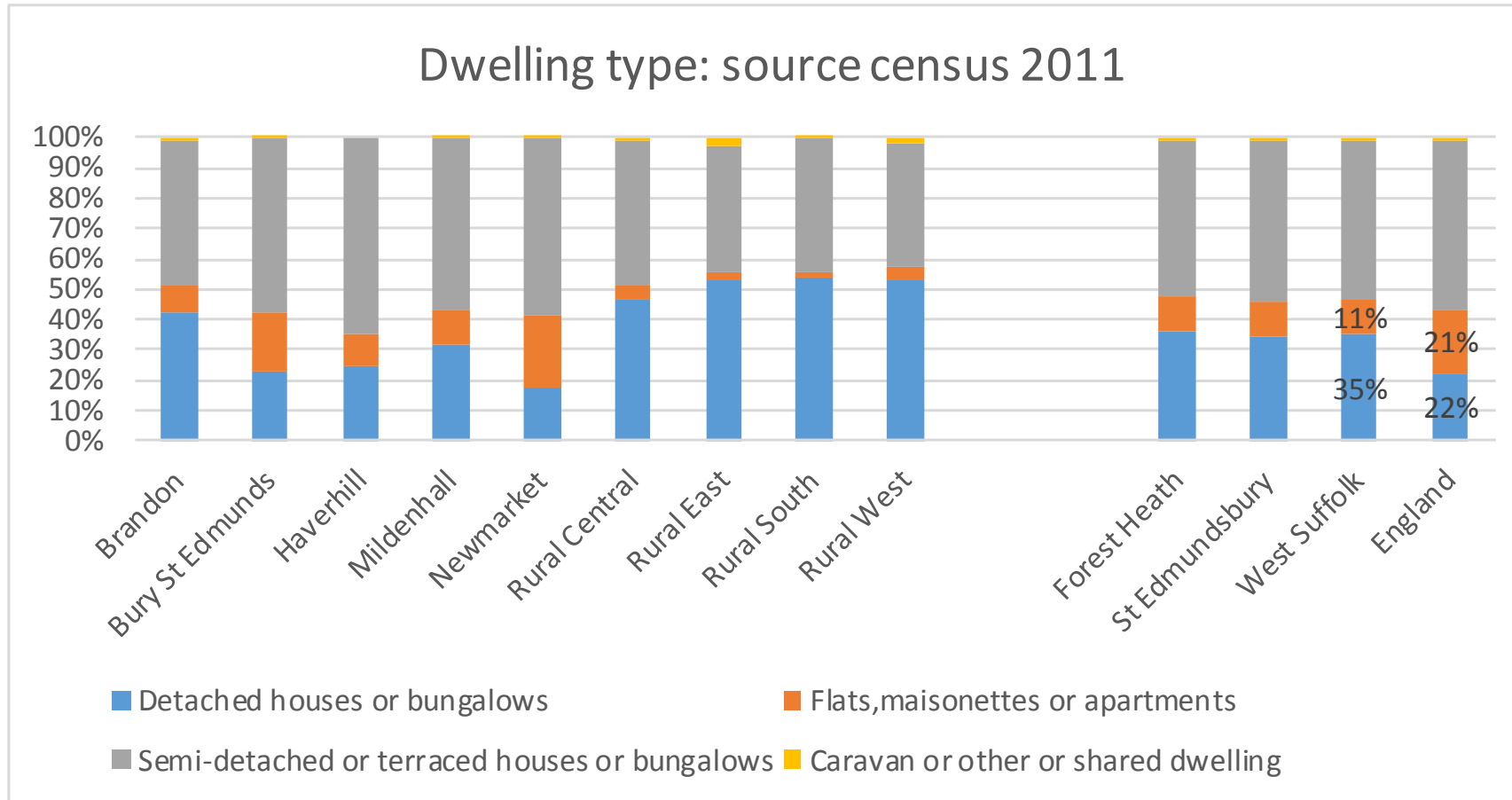
Between 2011 and 2018, the number of households in West Suffolk increased by 6% (7% in Forest Heath and 5% in St Edmundsbury) compared to 7% in England. By 2039 the number of houses in West Suffolk is expected to increase further with a 16% increase from 2018 to 2039, compared to an 18% increase in England (21% increase in Forest Heath and 14% increase in St Edmundsbury) (Source: ONS Household projections 2014 based)



	Projected no of households			% increase		
	2011	2018	2039	2011-2018	2011-2039	2018-2039
English	22103878	23696830	28003598	7%	27%	18%
Suffolk	311669	327730	375245	5%	20%	14%
Forest Heath	25456	27330	33046	7%	30%	21%
St Edmundsbury	46014	48326	54870	5%	19%	14%
West Suffolk	71470	75656	87916	6%	23%	16%

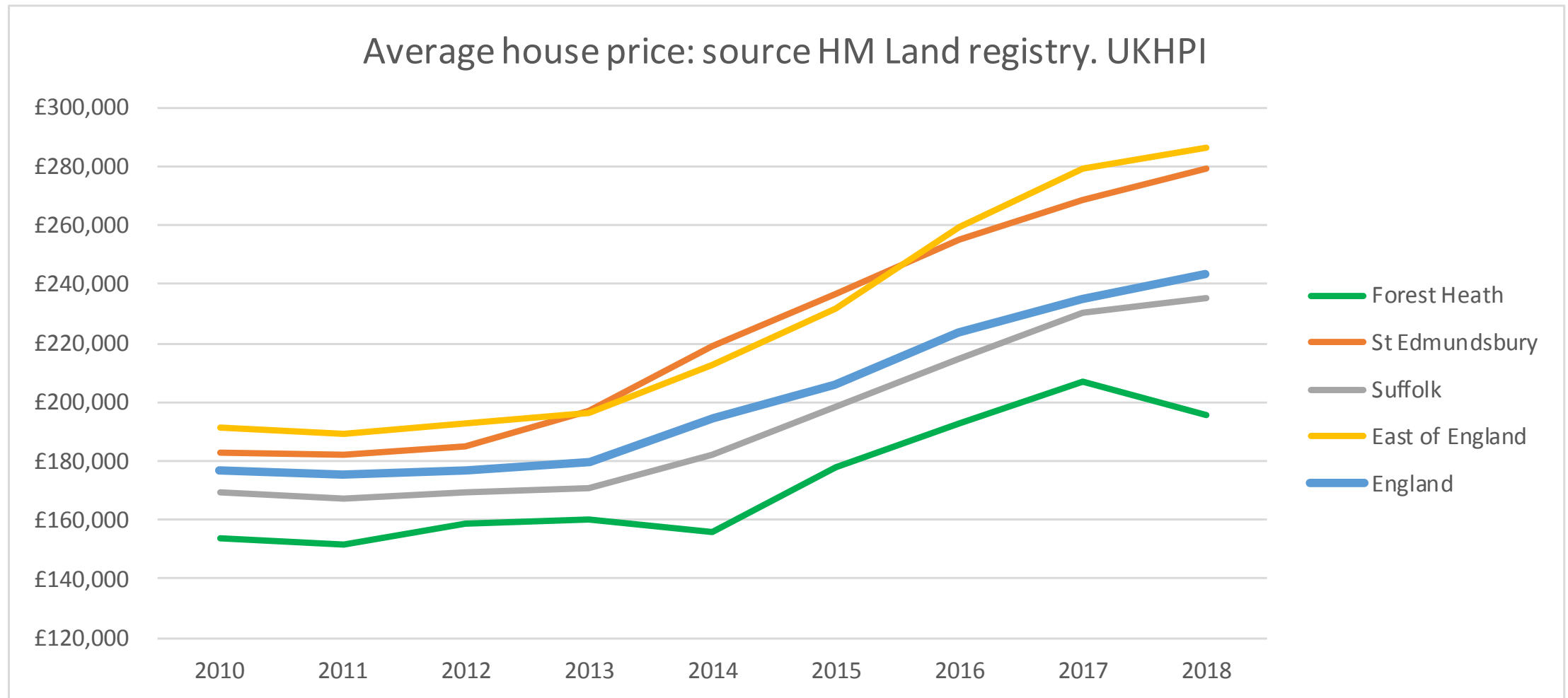
Dwelling type

West Suffolk has a higher percentage of dwellings that are detached houses and bungalows and a lower proportion of flats, maisonettes and apartments than the England average (source: Census 2011)

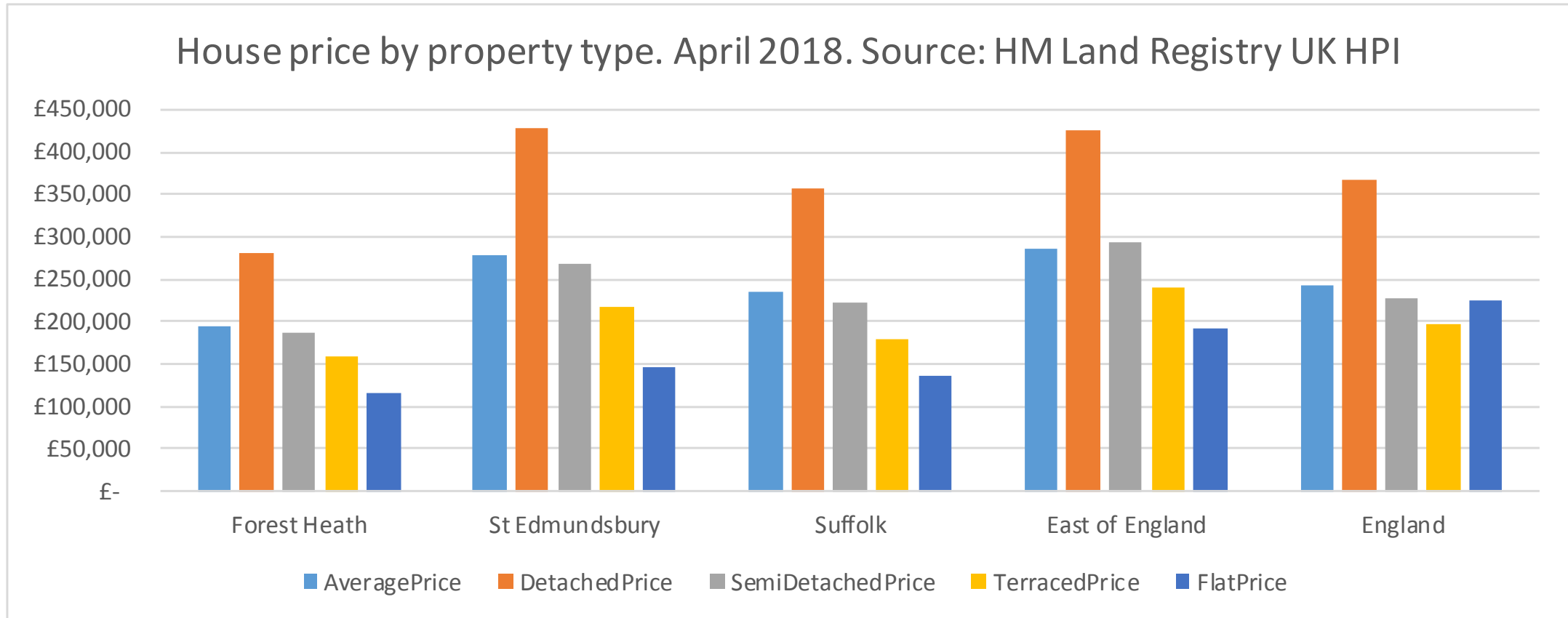


House price – average house price

Data from the Land Registry's House Price Index shows how average house prices in Suffolk fell dramatically in 2008, before a recovery in late 2009 and a further increase of 7.4 during 2013/14



House price by property type



Affordability ratios: median quartile

This table shows the median house price to median income ratio between March 2016 and April 2018. The ratios show how many "times" income the local house prices represent. It is usually accepted that house prices of 3 to 3.5 times income are considered affordable.

	Mar-16	Jun-16	Sep-16	Dec-16	Mar-17	Jun-17	Sep-17	Dec-17	Apr-18
Forest Heath	6.6	6.7	6.9	7.2	7.1	6.9	7	7.1	7.4
St Edmundsbury	8	8.1	8.1	8.2	7.7	7.3	7.5	7.7	7.9
East of England	8	8	8.2	8.5	8.2	8	8.2	8.2	8.4

Affordability of buying and renting housing: lower quartile

Buying a property

Ratio of lower quartile house price to lower quartile gross annual workplace-based earnings

HM Land Registry's measure of affordability of housing is the ratio between an area's earnings and house prices. A person in Suffolk, on the lower quartile salary, would need to pay over 10 times their salary to afford a house with the lower quartile price.

This may be due to Forest Heath's proximity to Cambridge and the use of the private rented sector by USAFE personnel.

	April 2018
Forest Heath	10.2
St Edmundsbury	11
East of England	11
England	TBC

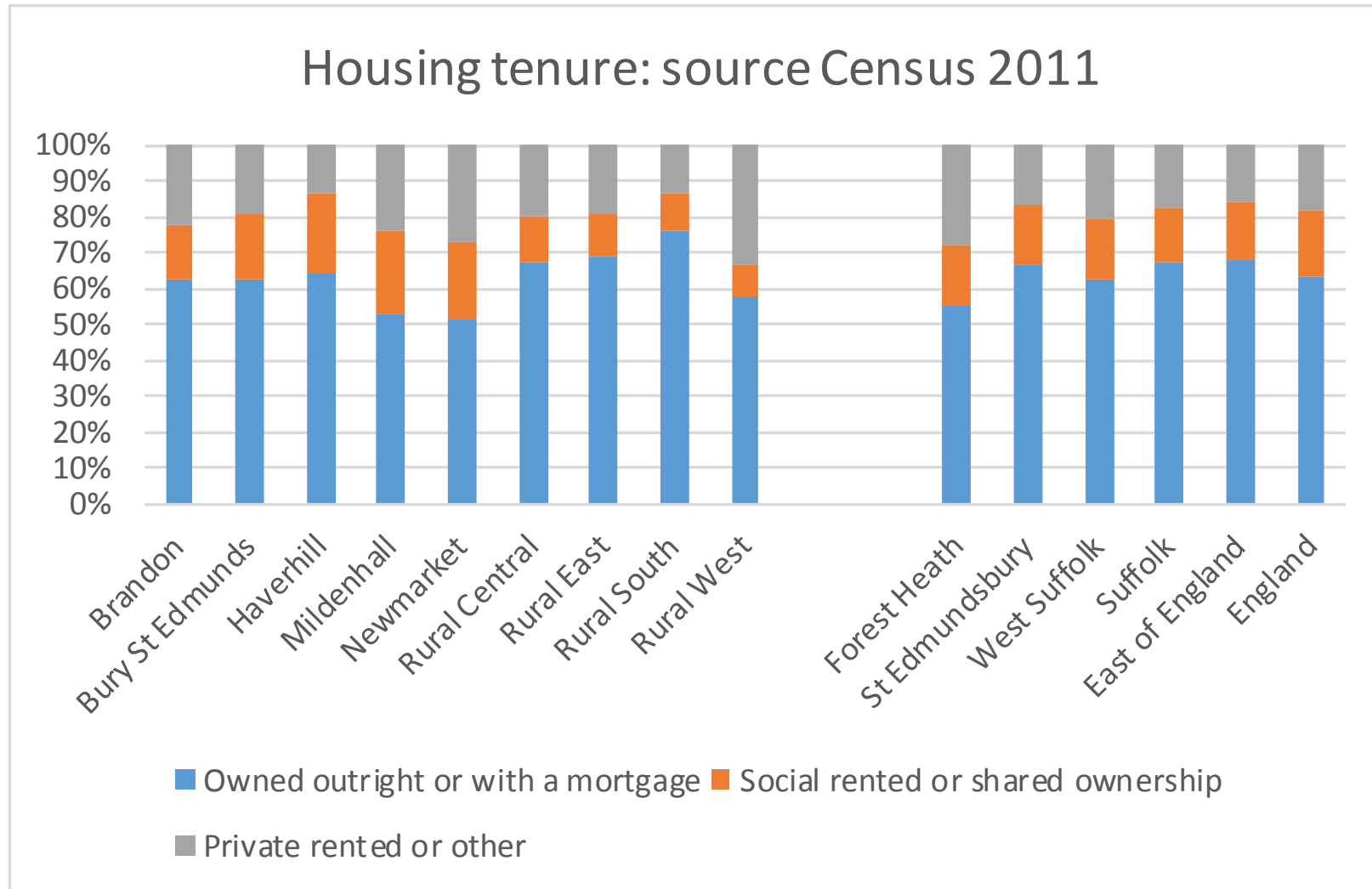
Cost of renting a property (£)

	FHDC	SEBC	East of England	England
1 bed	144	144	155	173
2 bed	173	173	196	178
3 bed	242	219	230	207
4 bed	317	323	323	346

Source: Housing Market Bulletin June 2018

Housing tenure

West Suffolk's tenure mix has a lower than average proportion of social housing than the national average. St Edmundsbury has a higher proportion of owner occupied, and Forest Heath has a higher proportion of private rented properties than average.



Land supply for housing

Through the Strategic Housing Land Availability Assessment (SHLAA) we assess potential sites for future housing development and have identified land for 21,272 new homes on Greenfield and Brownfield sites over the next 15 years - 8,990 are in Bury St Edmunds, 5,947 in Haverhill, 606 in Newmarket, 1,470 in Mildenhall and 3,369 in rural West Suffolk. https://www.westsuffolk.gov.uk/planning/Planning_Policies/upload/Main-body-of-report.pdf

		2011 /12	2012/2 013	2013/ 2014	2014 / 2015	2015 / 2016	2016/ 2017	2017/ 2018	Total
Forest Heath	Completions	332	363	246	182	188	344		1655
	Target	340	340	340	340	340	340		2040
	Difference	-8	23	-94	-158	-152	4		-385
	Difference (%)	97.65 %	106.76 %	72.35 %	53.53 %	55.29 %	101.18 %		81.12%
St Edmundsbury	Completions	134	133	238	414	441	388		1698
	Target	481	481	481	481	481	481		2886
	Difference	-347	-348	-243	-67	-41	-93		-1188
	Difference (%)	27.86 %	27.65%	49.48 %	86.07 %	91.48 %	80.67%		60.53%

Affordable homes delivered

Across West Suffolk, 842 affordable homes have been delivered over the past five years.

	Forest Heath	St Edmundsbury
2013/14	51	68
2014/15	49	96
2015/16	15	185
2016/17	33	109
2017/18	61	175
	209	633

Empty homes

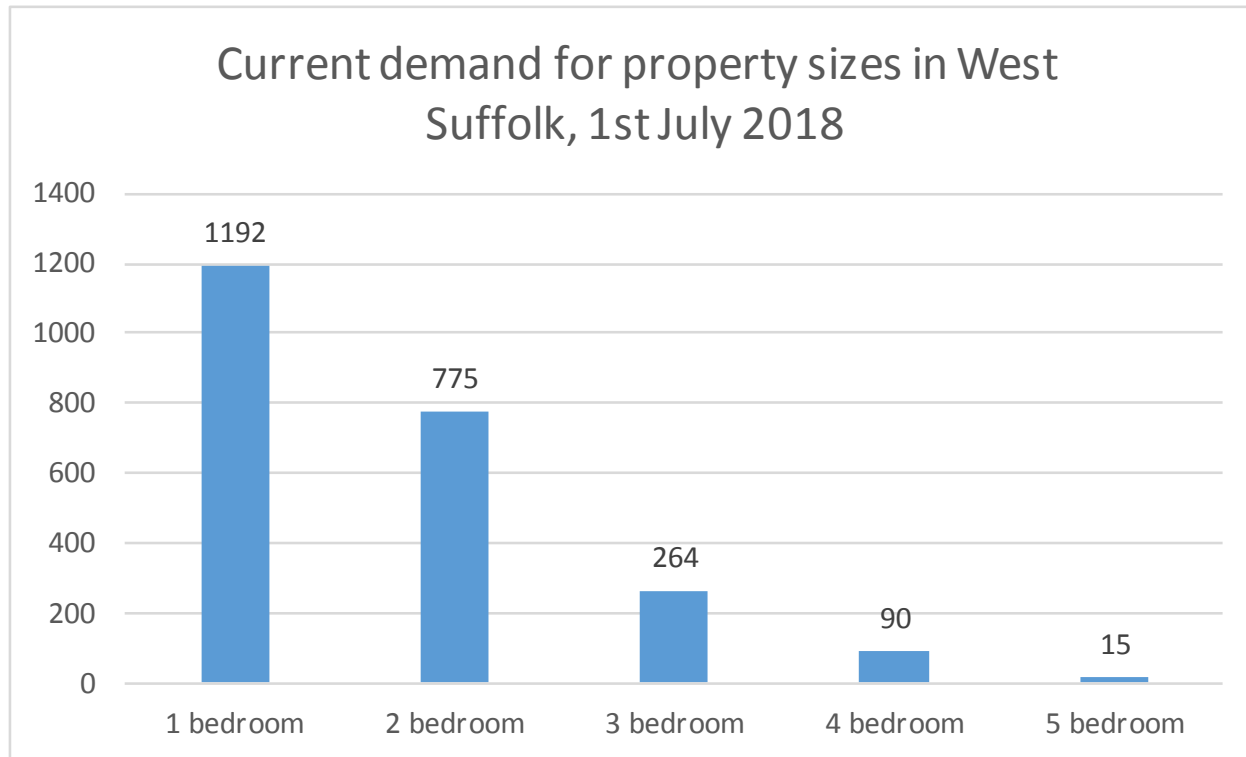
Data from the Empty Homes Agency show that the percentage of homes in Forest Heath that were empty and long term empty in 2011 was higher than the county, regional and national averages.

Empty homes 2017		
Source: gov.uk/live tables on dwelling stock		
	% of all homes that are empty	% of all homes that are long term empty
Forest Heath	2.90%	0.85%
St Edmundsbury	1.99%	0.57%
West Suffolk	2.33%	0.68%
Suffolk	2.26%	0.71%
East of England	2.23%	0.70%
England	2.53%	0.86%

Housing size – need and demand on housing

Source: Housing Register database

The majority of households currently on the Housing Register in West Suffolk are waiting for a 1 or 2 bed home.



Single	41%
Couples	12%
Family with children	45%
Other HH types	2%
	100%

Household size

Data on average household size is calculated by looking at the number of projected households and Subnational Population Projections.

	Average household size 2011	Average household size 2018	Average household size 2039
Forest Heath	2.3	2.42	2.39
St Edmundsbury	2.4	2.35	2.25
West Suffolk		2.38	2.3
Suffolk	2.3	2.29	2.19
East of England	2.4	2.36	2.27
England	2.4	2.37	2.26

Age profile: population growth

The table below shows the expected population growth between 2016 and 2039. From 2016 to 2039 the population is expected to grow by 11% in England and 10% in West Suffolk. The growth in population for those residents aged 75+ is much larger. For residents in West Suffolk aged 75+ we can expect to see 84% growth with resident numbers rising from 16,600 to 30,600

The table below shows the percentage growth from 2016 to 2039

	England	West Suffolk
All ages	11%	10%
0-14	2%	3%
15-19	11%	13%
20-24	5%	4%
25-34	2%	-2%
35-44	-1%	-3%
45-59	2%	-6%
60-74	22%	16%
75+	76%	84%

Source: Subnational population projections 2016 (published May 2018)

Age profile: percentage population by age

The table below shows the percentage of population by age band for 2016 and 2039.

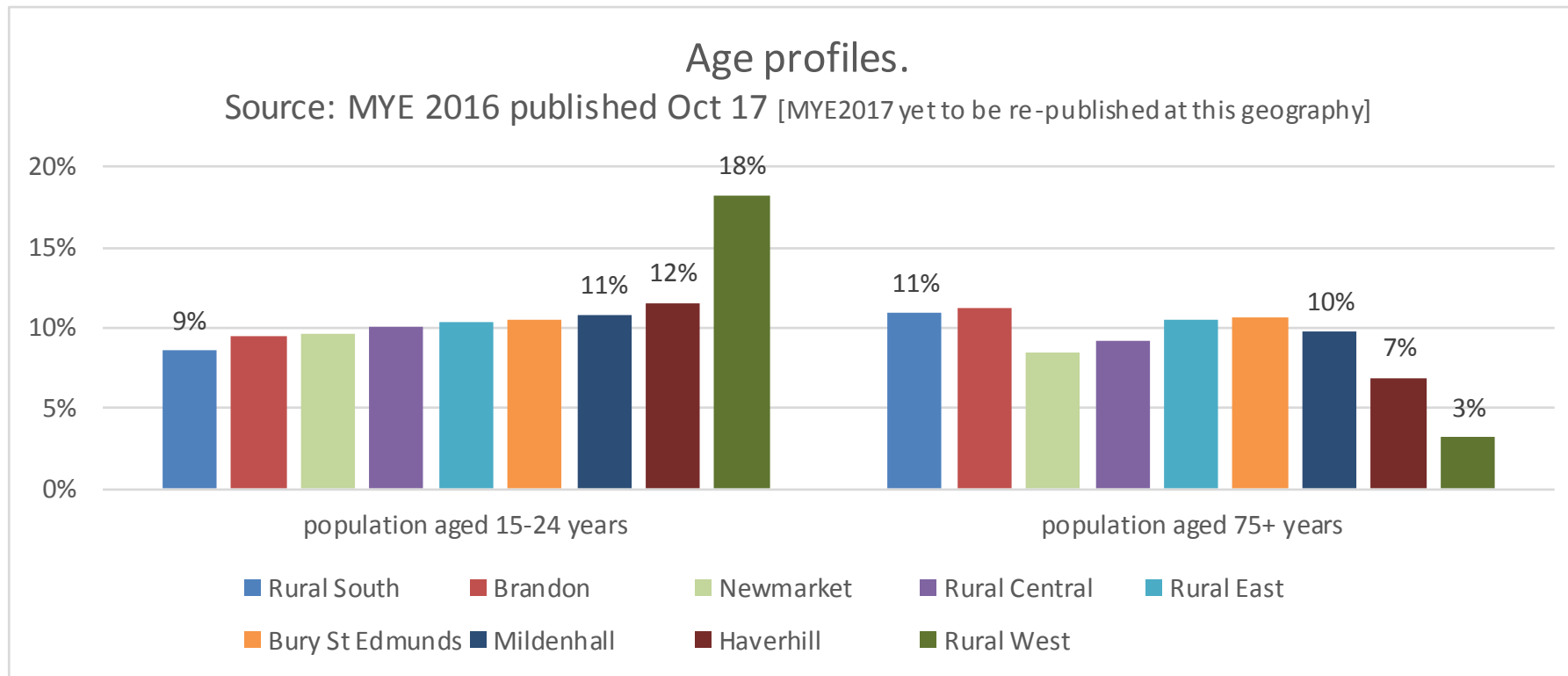
Currently in West Suffolk 1 in 11 residents are aged 75 and over. By 2039 it is predicted that 1 in 6 residents will be aged 75 and over.

	2016	2039	2016	2039
Age band	England		West Suffolk	
0-14	18%	16%	18%	17%
15-19	6%	6%	5%	5%
20-24	6%	6%	6%	5%
25-34	14%	13%	14%	13%
35-44	13%	11%	12%	10%
45-59	20%	18%	20%	17%
60-74	15%	17%	17%	18%
75+	8%	13%	9%	16%

Source: Subnational population projections 2016
(published May 2018)

Age profile – differences across the region

Some areas of West Suffolk, for example Mildenhall, Haverhill and Rural West have a more youthful population. 18% of the population in Rural West is aged between 15-24 years with only 3% of their population aged 75 and over. In comparison, Rural South has an older population with only 9% aged between 15-24 years and 11% aged 75 plus.



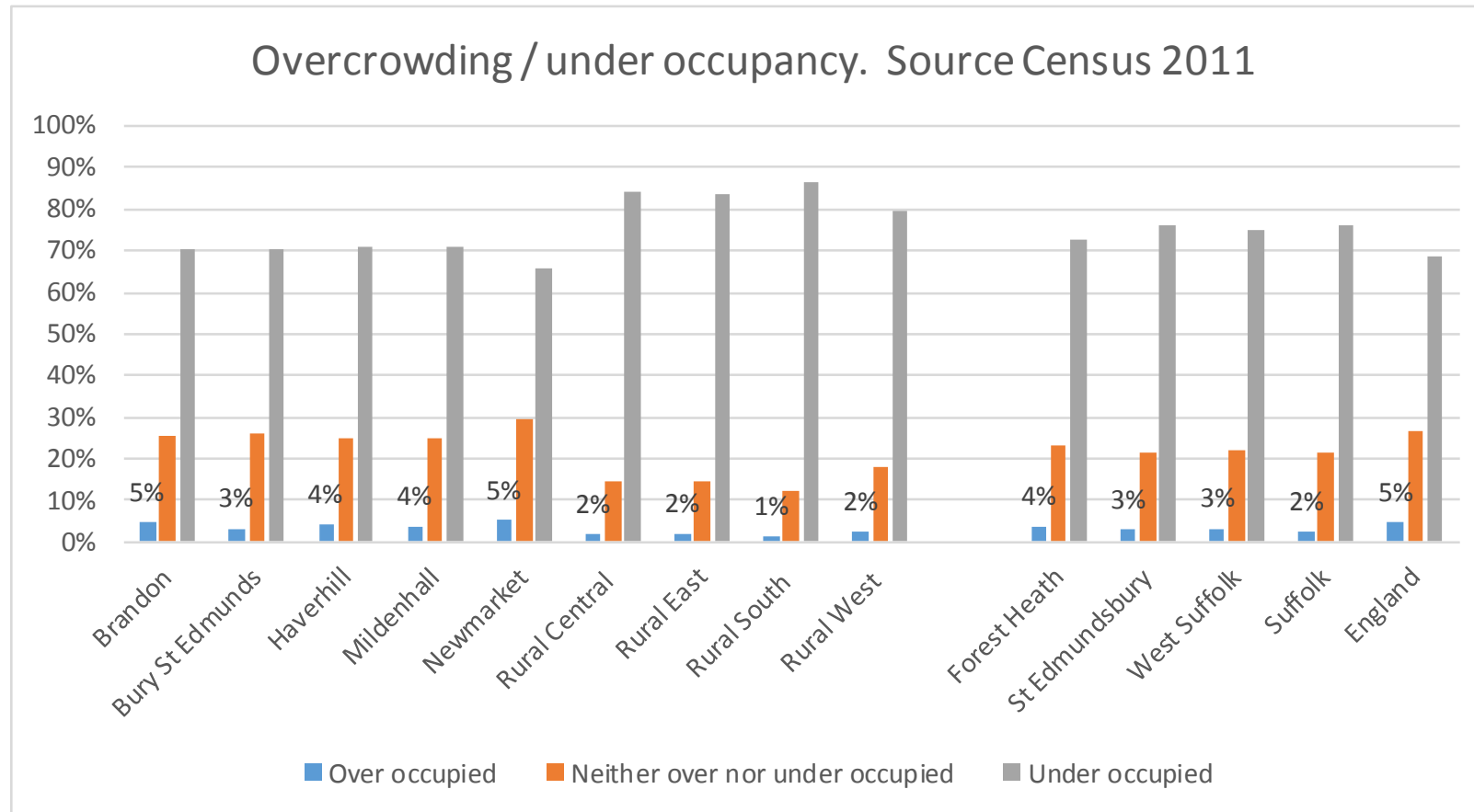
Rural West
Eriswell and the rows
Exning
Lakenheath
Manor
South

Rural South
Cavendish
Chedburgh
Clare
Hundon
Kedington
Wickhambrook
Withersfield

Overcrowding/under occupancy

A slightly higher proportion of homes in West Suffolk are under occupied when compared to the national average (i.e. they have 1 or 2 more bedrooms per household than needed). The percentage of under occupied homes increases in the rural areas. In West Suffolk 3% of homes are over occupied but this increases to 4% and 5% in Haverhill, Mildenhall, Brandon and Newmarket.

NB. These figures are from before the Spare Room Subsidy was introduced.



Housing register applicants

	West Suffolk				
	1st July 2018		%		
Band A	264		11%		
Band B	658		28%		
Band C	605		26%		
Band D	809		35%		
Total	2336				
Homeseeker	1640		70%		
Transfer	696		30%		
333 of the 2336 applicants on the housing register (14%) are aged over 65					
39% of applicants were placed in Bands A or B (high need)					

Source: Housing Register database

Homelessness (revised data)

	Homelessness per 1000 households (2017/18)		
Forest Heath	3.8		
St Edmundsbury	2.9		
West Suffolk	3.2		
Suffolk	2		
East of England	2.4		
England	2.4		

Source: MHCLG.gov.uk/live tables on homelessness

The chart below shows that the number of rough sleepers across West Suffolk has increased dramatically.



Useful links

[Strategic Housing Market Assessment](#)

[Housing Market Bulletin](#)