

Appendix B

Housing Strategy Evidence Base

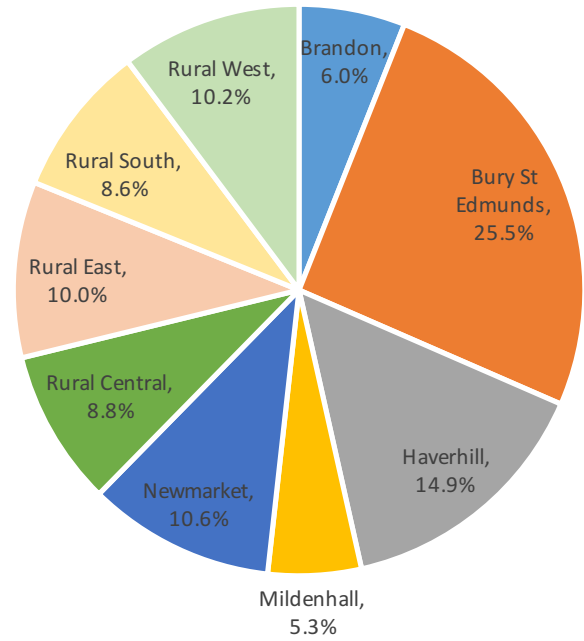


Household location

West Suffolk’s households are spread across a large rural area, plus 5 main settlements.

(source: Census 2011)

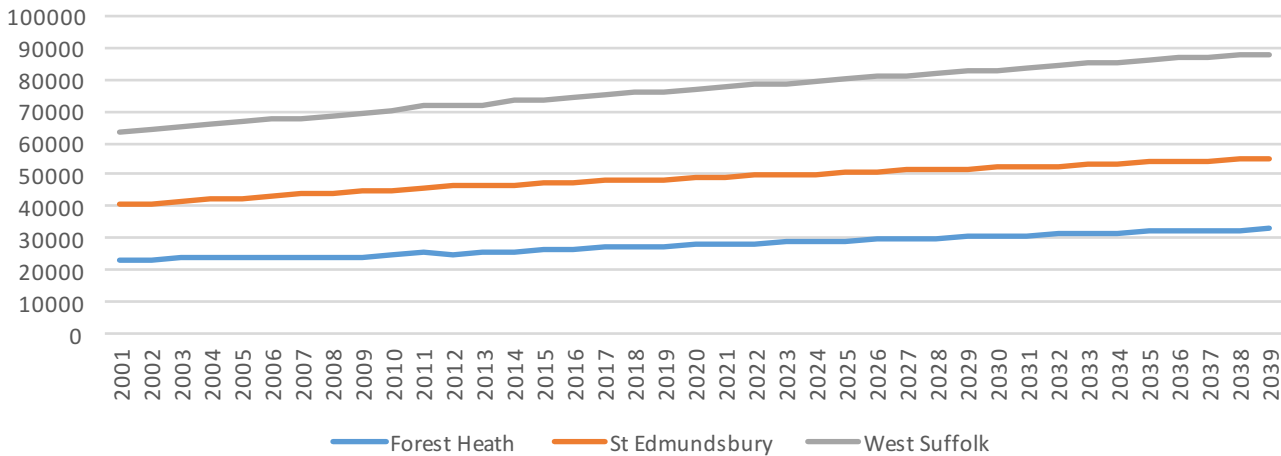
The location of households are shown across West Suffolk’s nine geographies (right).



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)



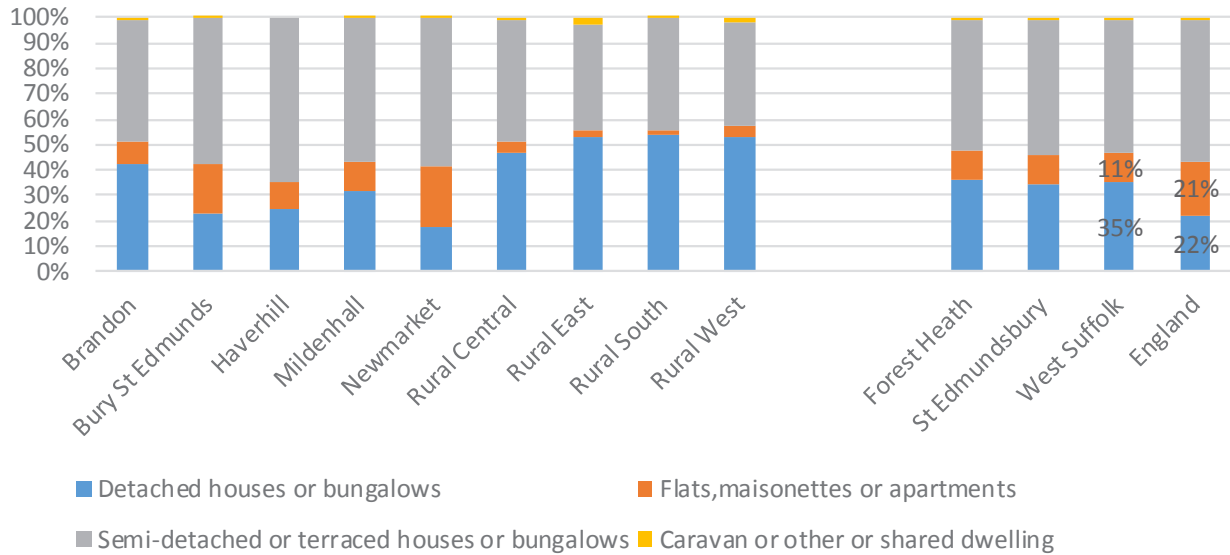
Projected no of households

	Projected no of households			% increase		
	2011	2018	2039	2011-18	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

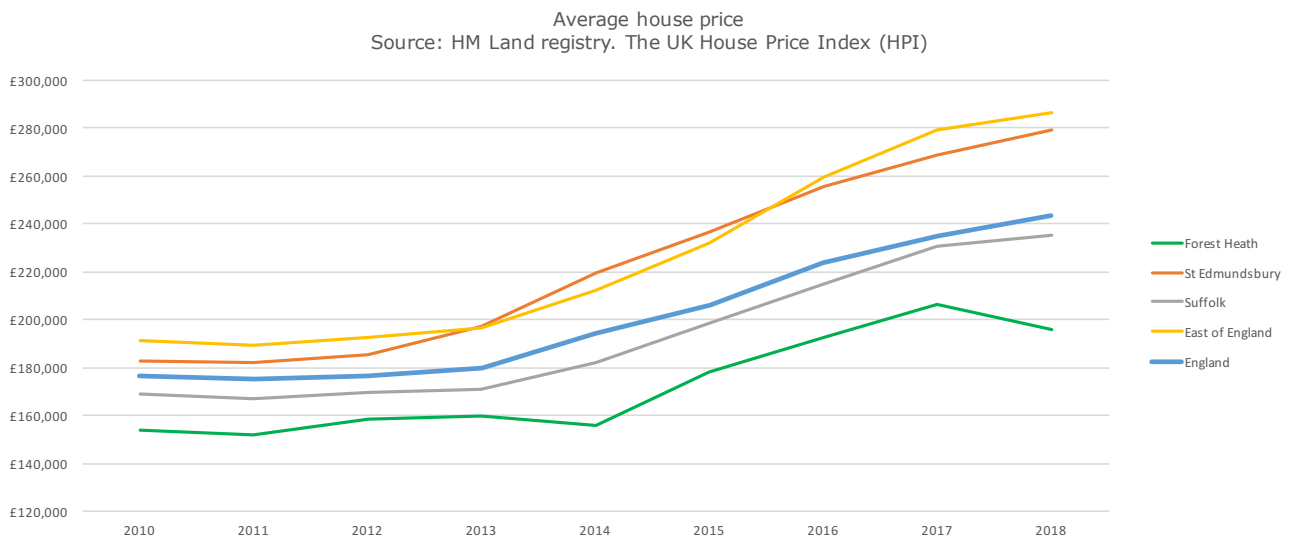
West Suffolk has a higher percentage of dwellings that are detached houses and bungalows and a lower proportion of flats, maisonettes and apartments than the England average.

(source: Census 2011)



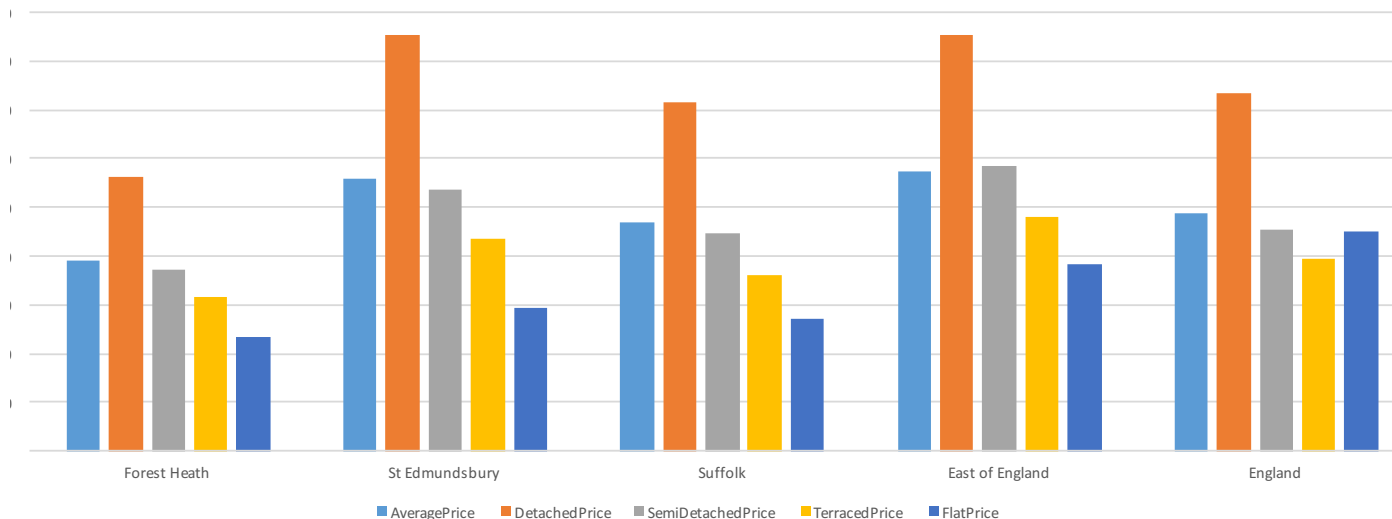
House price – average house price

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

House price by property type.
Source: HM Land Registry. The UK House Price Index (HPI) April 2018



Affordability ratios: median quartile

This table shows the median house price to median income ratio between March 2016 and April 2018 when buying a property. 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.

Source: Housing Market Bulletin June 2018

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

Affordability of buying and renting housing: lower quartile

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.

Cost of renting a property (£)

	FHDC	SEBC	East of England	England
1 bed	144	144	158	173
2 bed	173	173	196	178
3 bed	242	219	233	207
4 bed	319	321	323	353

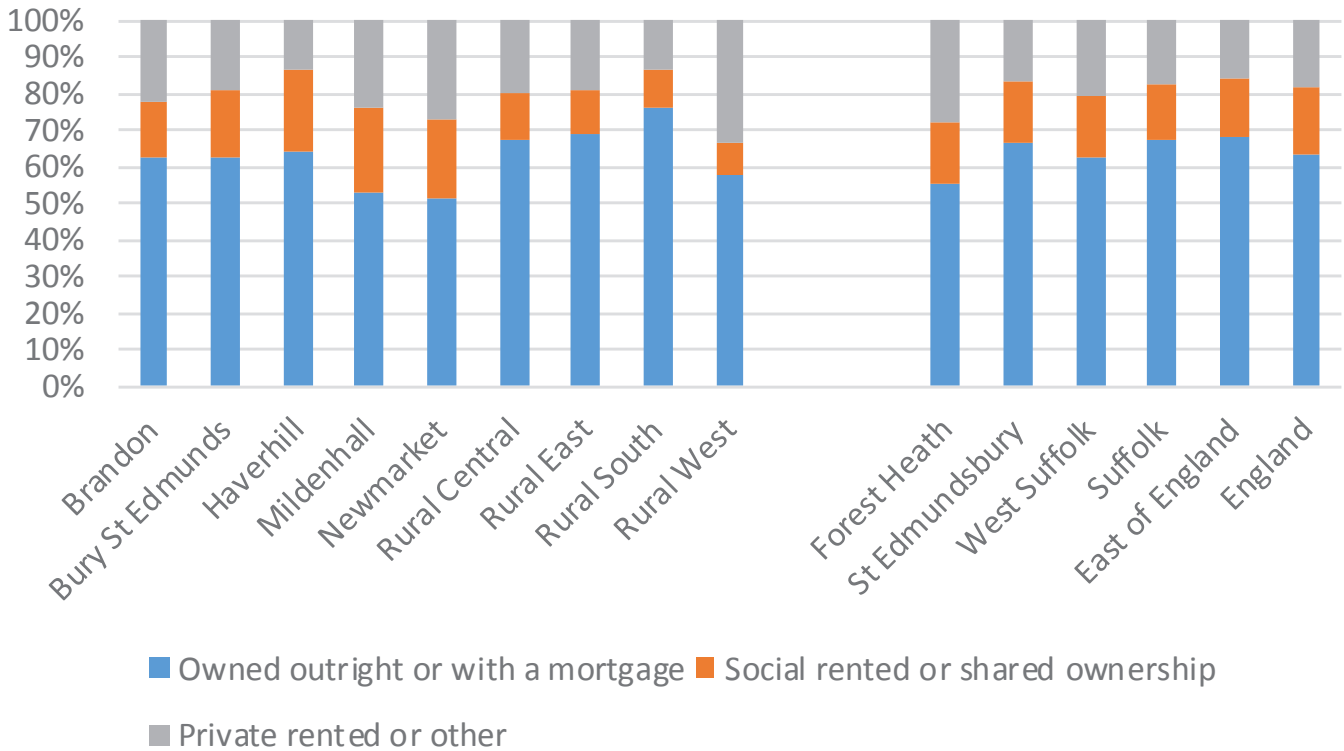
Buying a property

	June 2018
Forest Heath	10.3
St Edmundsbury	11
East of England	11



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.

www.westsuffolk.gov.uk/planning/Planning_Policies/upload/Main-body-of-report.pdf

		2011/2012	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/18	Total
Forest Heath	Completions	332	363	246	182	188	344	380	2035
	Target	340	340	340	340	340	340	340	2380
	Difference	-8	23	-94	-158	-152	4	40	-345
	Difference (%)	97.65%	106.76%	72.35%	53.53%	55.29%	101.18%	111.7%	85.5%
St Edmundsbury	Completions	134	133	238	414	441	388	235	1983
	Target	481	481	481	481	481	481	577	3463
	Difference	-347	-348	-243	-67	-41	-93	-342	-1480
	Difference (%)	27.86%	27.65%	49.48%	86.07%	91.48%	80.67%	40.7%	57.26%



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
2018/19	209	633

The following table shows the number of affordable houses delivered in towns and rural areas over the last three years:

	Forest Heath		St Edmundsbury	
	Town	Rural	Town	Rural
2015/16	0	15	69	116
2016/17	16	17	85	24
2017/18	54	121	22	39

Empty homes 2017

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.

Source: gov.uk/livatables on dwelling stock

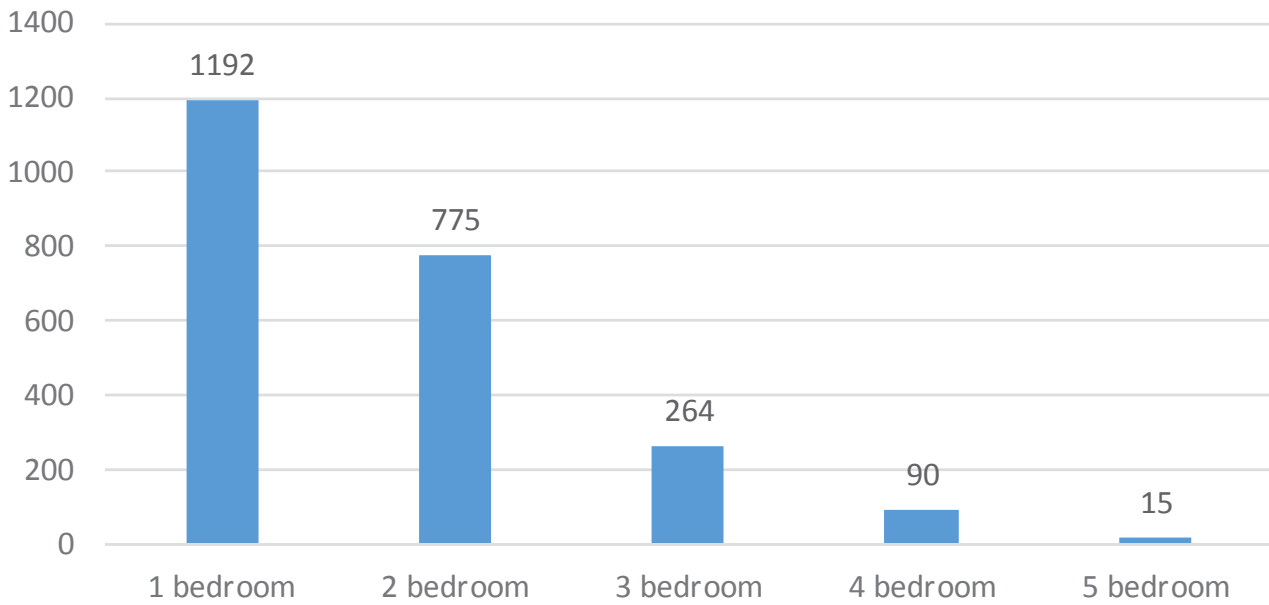
	% of all homes that are empty	% of all homes that are long term empty
Forest Heath	2.90%	0.85%
St Edmundsbury	1.99%	0.57%
West Suffolk	2.33%	0.68%
Suffolk	2.26%	0.71%
East of England	2.23%	0.70%
England	2.53%	0.86%

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.

Current demand for property sizes in West Suffolk, 1 July 2018



Who is on the housing register – 1st July 2018

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.

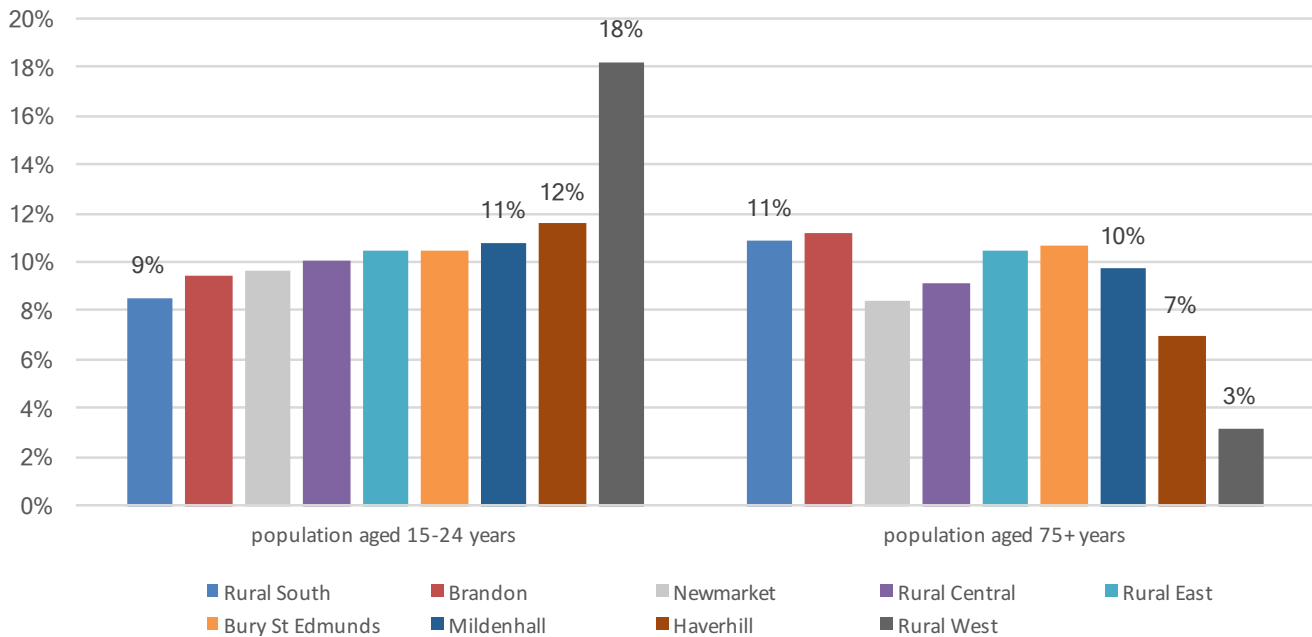
	2016	2039	2016	2039
Age band	England		West Suffolk	
0-14	18%	16%	18%	17%
15-19	6%	6%	5%	5%
20-24	6%	6%	6%	5%
25-34	14%	13%	14%	13%
35-44	13%	11%	12%	10%
45-59	20%	18%	20%	17%
60-74	15%	17%	17%	18%
75+	8%	13%	9%	16%

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.



Source: Mid-year estimates 2016
(published Oct 2017)

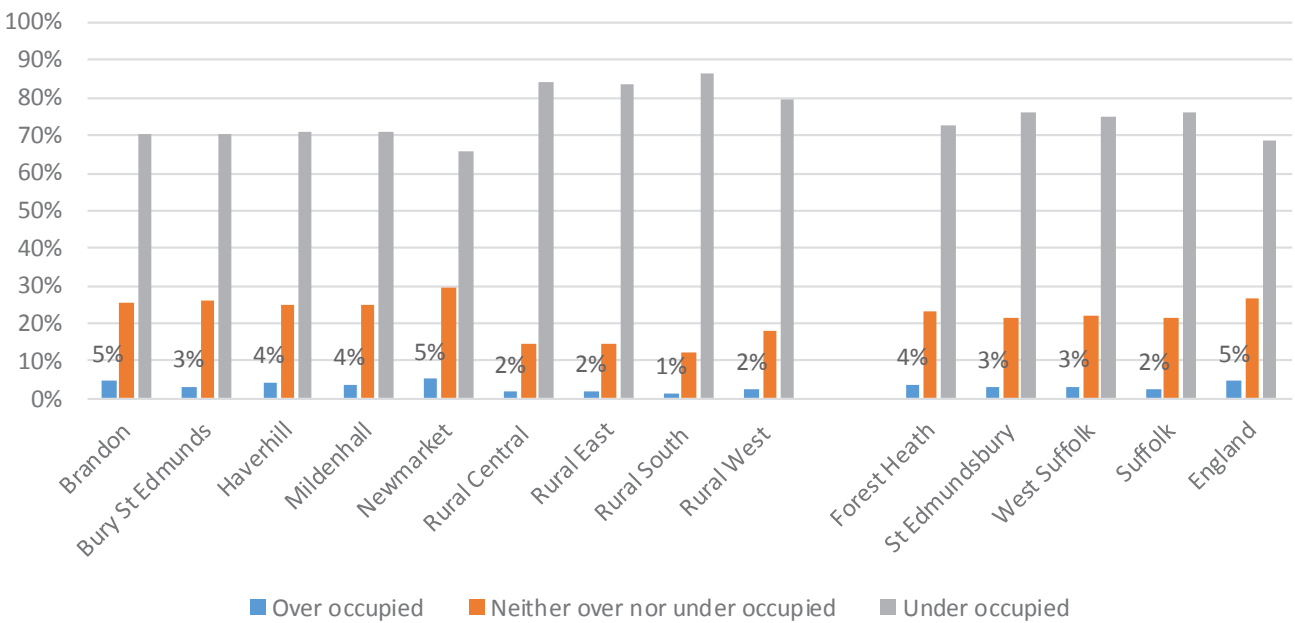
Rural South	Rural West
Cavendish	Eriswell and the Rows
Chedburgh	Exning
Clare	Lakenheath
Hundon	Manor
Kedington	South
Wickhambrook	
Withersfield	

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.

Source: Census 2011



Housing register applicants

West Suffolk		
	01-Jul-18	%
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



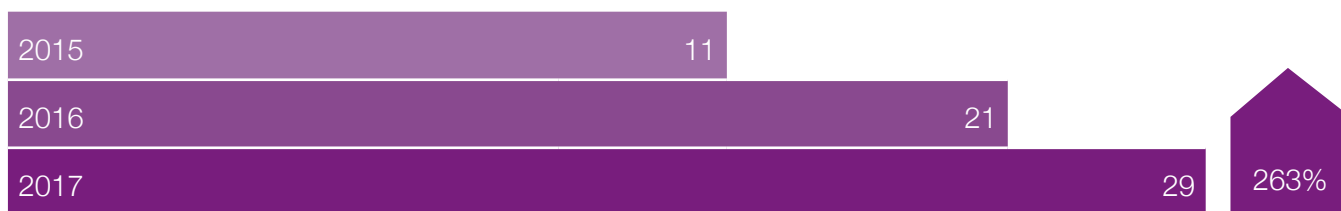
Homelessness (revised data)

	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/livatables on homelessness

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

Number of rough sleepers in West Suffolk



Useful links

Further information about housing can be found at the following links:

- Strategic Housing Market Assessment: <https://cambridgeshireinsight.org.uk/housing/local-housing-knowledge/our-housing-market/shma/>
- Cambridge sub-region housing market bulletin: <https://cambridgeshireinsight.org.uk/wp-content/uploads/2018/09/hmb-38.pdf>