

Our strategic housing market assessment

For the Cambridge Housing Sub-Region

April 2010

Issue 9

SHMA update

After a lot of work updating and improving SHMA chapters, a full set has now been launched, based on 2007/08 data. To reach the updated chapters, please hold down the "Ctrl" button on your keyboard and click on this link to reach the SHMA: www.cambridgeshirehorizons.co.uk/shma.

If you have trouble finding the page, go to www.cambridgeshirehorizons.co.uk, click on "Our challenge" at the top of the page, then "Housing" which you will find in the blue menu down the left side of the page, and finally on "Strategic Housing Market Assessment". This is what you should see:

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Special points of interest:

- Updated chapters launched in March 2010
- Summary of the changes made
- Future plans for the SHMA
- SHMA research currently under way

It takes some time to gather all the data together and feed it into the SHMA. The first SHMA (launched in 2008) used 2006/7 data. With each refresh we aim to make the Assessment more and more up-to-date.

We are now planning our next update, based on 2008/9 data, for release as soon as possible in 2010. Our plan for future updates is set out in a new appendix to the SHMA which is available at:

http://www.cambridgeshirehorizons.co.uk/documents/shma/2009_editions/a20_future_timeline_for_shma.pdf.

Summary of changes...

We have made some great improvements to many chapters in the SHMA, have consulted you and launched the updated chapters on Cambridgeshire Horizons website.

Old versions of the chapters, launched in 2008, are still available under the “archive” section on the SHMA page. The table on this page gives a summary of the main changes made to version 2.0 of the SHMA.

We always welcome your views on any chapter of the SHMA, at any time. But we will continue to re-write, update and improve chapters and release them for 6 weeks’ consultation in future, to ensure partners are fully aware and informed.

Whenever this happens we will get in touch to make sure you have the chance to read and respond.

All the chapters are important to the SHMA but some take longer than others to update. So some of the 2008 chapters have yet to be fully updated.

Chapters	
1	Introduction and context - 2009 Refreshed to launch version 2.0. Added further maps.
2	Links between planning policy and SHMAs - 2009 Refreshed to launch version 2.0.
3	Project structure and accountabilities - 2009 Updated with brief description of roles for SHMA partners.
4	The participation ladder - 2009 Updated list of SHMA partners for version 2.0.
5	Robust and Credible - 2009 Added comment on Technical Appendix (Annex 13) and updated cross-references.
6	Profile of the Cambridge sub-region - 2009 Added maps and information on the two Suffolk districts. Added key facts from Hometrack for each district.
7	Defining housing markets using commuter patterns - 2009 Added numbers of commuters going in and out of each area, not just net number, using County Council’s Census reports. Added maps showing travel to work areas from Hometrack.
8	Defining housing markets using postcode sectors - 2009 Updated on basis of Chapter 13. Moved from postcode areas to ward areas as a more useful level of assessment.
9	Economic context and forecasting - 2009 Added data from the regional spatial and economic strategies, along with the effect of new projections for the RSS review on future projections.

Chapters	
10	Demographic context and forecasting - 2009 Updated figures based on latest projections and summarise effect throughout SHMA.
11	Dwelling profile and occupation - 2009 Updated, removing repeats with Chapter 17.
12	Housing stock condition Stuck with 2008 version as little new data. Update in 2010.
13	Current property prices - 2009 Updated for 2007/8 prices.
14	Changes in property price over time Updated using Hometrack data.
15	The private rented market - 2009 Updated following our annual survey of private rents, estate and lettings agents (described in Annex 3, 4 and 5).
16	The buy-to-let sector - 2009 Note added updating chapter given market change for buy-to-let
17	Social rented housing turnover, register and lettings - 2009 Updated for 2007/08. Added profile of social renters
18	Homelessness - 2009 Updated using 2007/08 data, including link to new Cambridgeshire’s new joint strategic needs assessment for homelessness.
19	Applications for intermediate housing - 2009 Updated for 2007/08.
20	Sales of intermediate housing - 2009 Updated using new CORE data for 2007/08.
21	Current affordability by size and tenure - 2009 Added new information about affordability by size of home.
22	Planning for housing delivery - 2009 Updated with new regional targets and overall trajectory.
23	Past and future housing delivery - 2009 Updated using districts’ 2008 annual monitoring reports. Changed graphs and added district data across the whole sub-region.
24	Links to land availability - 2009 Reviewed and updated in light of districts’ progress on strategic housing land availability assessments (SHLAAs).

Chapters	
25	<p>Key drivers - 2009</p> <p>Added review of recent economic and housing market downturn, including sections about changes, consequences and resulting actions.</p>
26	<p>Delivering balanced and mixed communities - 2009</p> <p>Added new guidance from Joseph Rowntree Foundation.</p>
27	<p>Identifying housing need - 2009</p> <p>Updated using data to end of 2007/8.</p>
28	<p>Observers data - 2009</p> <p>Updated in light of Suffolk partners joining fully - further detail to be added in future versions.</p>
29	<p>Sizes of homes - 2009</p> <p>Chapter updated by adding more information on “new development surveys” completed and planned, and an update on the sizes of homes delivered in the past.</p> <p>Changed format of chapter to remove repetition with other chapters.</p>
30	<p>Indication of affordable tenures - 2009</p> <p>Updated in light of Chapters 17, 19, 20 and 27.</p>
31	<p>BME housing issues - 2009</p> <p>Light-touch review. Added Hometrack maps across sub-region and data for two Suffolk districts (previously Cambridgeshire only).</p> <p>In future we hope to add more service information showing links between the population and uptake of housing services.</p>
32	<p>Migrant workers housing</p> <p>Stuck with 2008 version. Plan to review in light of new County report on international migration.</p>
33	<p>Gypsy and traveller housing issues</p> <p>2008 version retained, with plans to update with outcomes of EERA’s single issue review across the region early in 2010, and update plans to review our Accommodation Assessment.</p>
34	<p>Housing for different household types</p> <p>Plan to update references to new Supporting Peoples’ needs analysis and updating references to other County-wide strategies, including the older people JSNA, in longer term. Plan to improve SHMA, JSNA and Supporting People links.</p>
35	<p>Disability and housing issues</p> <p>Plan to update in line with Supporting Peoples’ new needs analysis and Cambridgeshire’s disability housing strategy, action plan and JSNA, in longer term.</p>

Chapters	
36	<p>Rural housing</p> <p>Added a map showing the location and number of park homes sites.</p> <p>Clarified rural definitions. Moved long table of settlement classifications to an annex within the chapter.</p>
37	<p>New! First time buyers - 2009</p> <p>New chapter arising from the first SHMA on this market.</p>

Appendices	
A3	Survey of private rents (Jan 08)
A4	Estate agents survey (2008)
A5	Letting agents survey (2008)
A10	Outcomes of consultation
A12	Consultation form - six questions for 2009 consultation added to annex.
A13	Technical appendix
A14	Key facts and figures (once all updated and consulted on)
A15	Change log (once all changes made)
A20	Updating plan - added new for 2009.

..and improvements

We have made some technological and formatting improvements to the SHMA text, to improve it’s accessibility, including:

- Creating index lists on the first page of each chapter which you can “click” on to find the section you are looking for. When you go the website and open a pdf document, the first page should show the chapter title and table of contents. Simply hold down the “Ctrl” button and click on whichever section you want to read. The computer should take you straight to the right page.
- Adding summary points at the start of each chapter, to help the reader get an idea of the coverage and content of the chapter.
- Using hyperlinks in chapters, when referring to other documents. You should be able to click on a link (usually in blue text and underlined) and it will take you to the source in question. We aim to develop this further in future.

Plans for 2010

In the latest SHMA update, for all five Cambridgeshire districts we have re-run the affordable housing calculation in Chapter 27 using exactly the same methodology as for the first SHMA, using 2007/8 data sources. The 2009 update includes as much data as possible for the two Suffolk districts, but does not include the full assessment of affordable housing need in Chapter 27 for them.

Early in 2010, we plan to re-run all the calculations for all seven districts, using data collected at the end of 2008/09. For this version we also plan to:

- Incorporate new Choice Based Lettings data, which enables us to compare the “bands” applicants are given. Previously each district had its own priority system for housing applicants, this is the first time we can compare priority across the sub-region.
- Incorporate data from our new homebuy agent, Orbit.
- Remove references to the primary research we undertook for the first SHMA, replacing this data with robust secondary alternatives. This may remove the need for interview surveys in future.
- “Prune” the SHMA to improve its readability and accessibility.

From 2010 onwards, we plan to re-draft, consult on and publish the SHMA each year, releasing chapters as they become available during the year. This is set out in Appendix 20, *Updating plan*.

As mentioned on page 3, we have started to include hyperlinks to other documents and websites, within the SHMA chapters. In 2010 we would like to develop the use of links, to help navigate within the SHMA and to find other useful sources of data. For example, instead of reading “see chapter 20”, we would include a “clickable” link which would (via mouse click) take you straight to chapter 20. This saves you having to find the reference yourself.

Keeping in touch

To find the SHMA on the internet, hold down the “Ctrl” button and click on www.cambridgeshirehorizons.co.uk/shma or copy this address into your Navigation Bar.

To make comments on any part of the SHMA at any time, you can email Sue with your thoughts and feedback, at: sue.beecroft@cambridgeshirehorizons.co.uk

...or you can call on 01223 714044 if you prefer.

If you make comments on a chapter, we may have to “save” your input until the chapter is next updated, but we welcome your thoughts and would like to share ideas on how to improve the SHMA and the data it relies on.

If you have questions which need a discussion between partners, we may be able to set up an electronic discussion. At our June 2009 workshop some delegates asked about a SHMA discussion forum, which we’ll be happy to arrange if there is enough demand.

So do e-mail or call and we will do our best to respond, and to enable a wider discussion of your ideas should this prove useful.

New research for 2010

As part of the SHMA’s ongoing development, the following research is being progressed in 2010...

New developments surveys

Surveys are underway on significant new housing developments in both East Cambridgeshire and Fenland. Similar surveys were carried out in Cambourne in 2006 and Huntingdonshire in 2007, which have been useful in the SHMA (especially [Chapter 29](#) which looks at sizes of homes needed). Among other things, the surveys help us understand the profile of the population moving into new developments.

The Cambourne residents survey 2006: This report, produced by the Cambridgeshire County Council Research Group, details the findings of the July 2006 survey of Cambourne residents. The survey aimed to collect data about many aspects of the lives of Cambourne residents in order to inform planning decisions, service provision and to understand the way that residents feel about living in Cambourne. [Click here](#) to read the full report.

The Huntingdonshire new development survey 2007: During the summer of 2007 some 1,710 households across eight new developments in Huntingdonshire were surveyed by Huntingdonshire District Council. The aim of the survey was to learn about living in new housing developments in Huntingdonshire, in order to learn lessons and plan services more effectively in future. This report, prepared by Cambridgeshire County Council Research Group, presents the findings from the survey. [Click here](#) for the full report. Once our current surveys have been completed, more surveys are planned to continue extending our coverage and improve our understanding of who moves to this area, and the housing choices they make.

Estate and letting agents surveys

In 2007 and 2008 we conducted surveys of estate and letting agents. In 2008 our conversations with local market experts helped us build a picture of what was happening at the worst point of the credit crunch, and helped check if the national headlines were reflected at the sub-regional level.

It is almost two years since the 2008 surveys and we plan to update them to see how the market has changed in 2010. [Click here](#) for an account of the estate agents survey completed in 2008, and [click here](#) for the lettings agent survey completed in 2008.

Private rent levels

Data is now available on private rent levels across the housing sub-region, using our annual press review. These results will be published soon. At the time of the 2001 Census around 13% of people in the sub-region were renting privately, with a significantly larger proportion in Cambridge City and Forest Heath. It is likely that this proportion has increased. The annual press review also gives us an understanding of the types of homes available for rent in terms of size, type and age and energy efficiency. [Click here](#) to read our January 2008 survey results.