

Our strategic housing market assessment

For the Cambridge Housing Sub-Region

May 2009

Issue 6

Introduction

This is the sixth Briefing Note to help keep you up-to-date with the progress and development of the Cambridge sub-region's Strategic Housing Market Assessment (SHMA). We have been working hard on the SHMA since its launch in June 2008 which this note updates you on. To remind you, and for newcomers to the Cambridge sub-region, the SHMA covers seven districts: Cambridge City, East Cambridgeshire, Fenland, Forest Heath Huntingdonshire, South Cambridgeshire and St Edmundsbury. From 2009 onwards our two Suffolk partners (Forest Heath and St Edmundsbury) will be "full" participants in the SHMA, where they were previously "observers". Great news!

New SHMA chapters - your input needed!

Throughout 2008 and 2009 there has been widespread change in international, national, regional and local housing markets.

During that time, we have all been involved in activities and projects to help weather the storm and prepare for a recovery in the housing market.

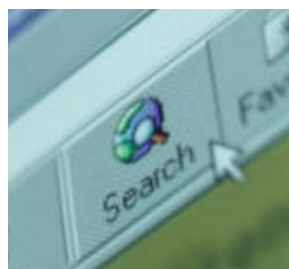
For the SHMA, one example is the new Housing Market Bulletin which aims to assess the local impact of changing housing and economic markets, by showing trends and comparisons for our sub-region compared to England and the East of England. See page 3 for a link to the Bulletin.

The County Council's research team and the SHMA project team have continually gathered information and worked to improve the SHMA.

See pages 2 and 3 for a list of work completed and underway for all chapters.

Now the time has arrived for updated chapters to be launched on the web, and to ask for your views on the new, updated and improved chapters. As before, we will be launching consultation drafts for you to read and feed back on, between 1 June and 18 July, after which we can launch amended versions to replace the "old" chapters. However the old chapters will still be available to read, in an archive area on the Horizons website, for reference.

Please do get in touch with your feedback (see page 4).



Early warning for SHMA event: 7 July 2009

Almost a year has passed since we launched the SHMA, so we'd like to invite you to an update event, on the afternoon of **7 July 2009** at Homerton College in Cambridge. Please contact the SHMA team if you would like to come along. Places are limited, so watch out for emails and updates on the Horizons website for more details as they develop.

At the event we plan to discuss the SHMA's progress, the chapters out for consultation and the 3 "spin-off" projects. The workshop provides opportunities for you to comment on the SHMA's development and to highlight areas it should cover in future. It's also a chance to meet with others to compare your views and aspirations for the housing market.

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Timetable for consultation, 2009

- **Early May:** launch Briefing Note
- **Early June:** launch new and revised chapters on Horizons website
- **Early July:** consultation event
- **Mid July:** end consultation
- **Early August:** amend and finalise chapters, launch version 2.0




The SHMA's first anniversary: work plan

Since the launch of the SHMA we have clearly stated that the first version will need to grow and develop if it is to remain up-to-date, relevant and useful to all. Parts of the SHMA have now been updated and await your feedback, before formally launching the final replacement versions. Other parts are still being updated and will be launched for consultation in the coming weeks.
























Many of the changes involve adding data for the end of the 2007/8 financial year, or adding information and targets from new strategies and plans which affect our housing sub-region.

A big priority for the team was to update Chapter 27: *Identifying housing need*, as this enables us to keep track of how changes in the housing market affect the number of new homes, and new affordable homes needed.

We welcome any views you have on any or all of these updates. If you have any queries, comments or suggested improvements to make, please contact the SHMA team (see back page for details).

Here is a brief account of the actions planned or underway for each chapter. The symbol “” denotes that the changes have been made and the draft is available for consultation (an ear for listening!). The symbol “” denotes that the changes needed are underway but not ready for consultation yet (still being written). The symbol “” denotes a key chapter to update, to feed into Chapter 27.

	Chapter and notes	Actions
1	Introduction and context Refresh to launch version 2.0	
2	Links between planning policy and SHMAs Clarify links with Joint Strategic Needs Assessments, Local Area Agreements and any other relevant plans	
3	Project structure and accountabilities Update with brief description of roles for SHMA partners	
4	The participation ladder Update list of contributors	
5	Robust and Credible Add comment on Technical Appendix once completed and published	
6	Profile of the Cambridge sub-region Update as needed	
7	Defining housing markets using commuter patterns Aim to update and add numbers of commuters going in and out of each area, not just net number. Consider using Hometrack's travel to work maps, or ward data, as an option	

	Chapter and notes	Actions
8	Defining housing markets by postcode / house prices by ward Update on basis of Ch. 13	
9	Economic context and forecasting Data from the regional spatial and economic strategies needs to be added, along with the effect of new projections for the RSS review on future projections	 
10	Demographic context and forecasting Update figures based on latest projections and summarise effect throughout SHMA	 
11	Dwelling profile and occupation Update, removing repeats with Ch. 17	 
12	Housing stock condition None	X
13	Current property prices Update for 2007/8 prices. Add note on data sources and trends as annex	 
14	Changes in property price over time Update using Land Registry and other data. Highlight very long-term trends	
15	The private rented market Updated following our annual survey of private rents, estate and lettings agents (all being described in Annex 3, 4 and 5)	
16	The buy-to-let sector Note to be added updating on this area	
17	Social rented housing turnover, register and lettings Updated for 2007/08	 
18	Homelessness Update for 2007/08 using the homelessness JSNA	 
19	Applications for intermediate housing Update using new data from HomeBuy agent	 
20	Sales of intermediate housing Update using new CORE data	 
21	Current affordability by size and tenure Has been improved adding new information about affordability by size of home. We would welcome your comments on this new, more detailed approach	 
22	Planning for housing delivery To be reviewed and updated.	

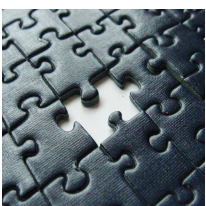
Chapter and notes	Actions
23 Past and future housing delivery Update using district 2008 monitoring reports	
24 Links to land availability Review and update in light of districts' progress on strategic land availability assessments	
25 Key drivers of the housing market and building industry Review in recent economic and housing market downturn, adding sections about the recent changes, consequences and resulting actions	
26 Delivering balanced and mixed communities Add links to any new guidance published	
27 Identifying housing need Update using all data to end of 2007/8	
28 Observers data Review/remove in light of Suffolk partners joining fully	X
29 Future sizes of homes New tool being developed as a spin-off which could replace or supplement existing chapter, depending on feedback. Add more complete account of "new development surveys" completed and planned more in future, which feed into guidance on sizes	
30 Indication of affordable tenures Update in light of Chapters 17, 19, 20 and 27	
31 BME housing issues Light-touch review possibly adding system to monitor housing actions by district	

Chapter and notes	Actions
32 Migrant workers housing Review in light of new County report on international migration	
33 Gypsy and traveller housing issues Update with new criteria, and outcomes of EERA's review	
34 Housing for different household types Update references to new Supporting Peoples' needs analysis and updating references to other County-wide strategies, including older people and JSNA	
35 Disability and housing issues Update in line with Supporting Peoples' new needs analysis (due to report around June 09) and referring to Cambridgeshire's disability housing strategy and JSNA	
36 Rural housing Add a map showing the location and number of park homes sites	
37 New! First time buyers This is a new addition arising from the first SHMA. Your thoughts on it are particularly welcome, along with suggestions how to use and improve it in future	
Appendices:	
Annex 3: Survey of private rents (Jan 08)	
Annex 4: Estate agents survey	
Annex 5: Letting agents survey	
Annex 13: Technical appendix	
Annex 14: Key facts and figures	

Spin-off projects

Alongside the developing SHMA, some new projects have started which aim to use and develop the SHMA data, building on its findings.

These are published as "spin off" projects, so the SHMA remains an evidence base which provides the data needed for others to develop policy. Once ready, they will be launched on the Horizons website alongside the SHMA.



Spin-off 1: Defining tenures

A note to help planners, strategists and others to understand the various affordable housing tenures available, how they "fit" with planning policy and our housing markets. Work in progress.

Spin-off 2: Size guide

A tool to guide thinking about the sizes of homes needed on sites across our sub-region, given current and projected demography, current sizes of homes in the area, and our intention to create

balanced, mixed communities. Work in progress.

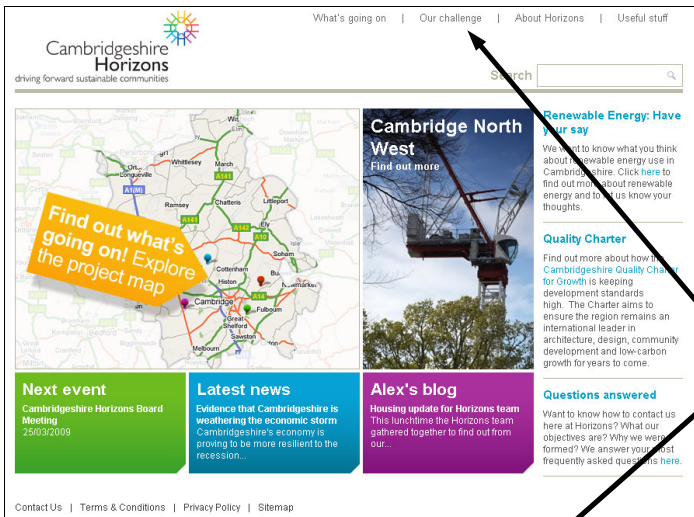
Spin-off 3: Housing Market Bulletin

A note comparing our sub-region to regional and national trends, and looking at housing market trends over time - first edition published November 2008, planned quarterly thereafter.

Link:

http://www.cambridgeshirehorizons.co.uk/documents/publications/horizons/november_2008_bulletin_1.pdf

Website wonders!



Cambridgeshire Horizons website, where the SHMA resides, has been improved. The web address to get straight to the SHMA is still: www.cambridgeshirehorizons.co.uk/shma

There is a lot of information on the new Horizons website, so here are instructions on how to find the SHMA...

How to get there:

1. Go to: www.cambridgeshirehorizons.co.uk
2. Click on "Our challenges"
3. In the left-hand menu, click on "Housing"
4. A menu will appear under "Housing"
5. Click on "Strategic Housing Market Assessment"
6. Scroll down to the bottom of the page to find the SHMA sections

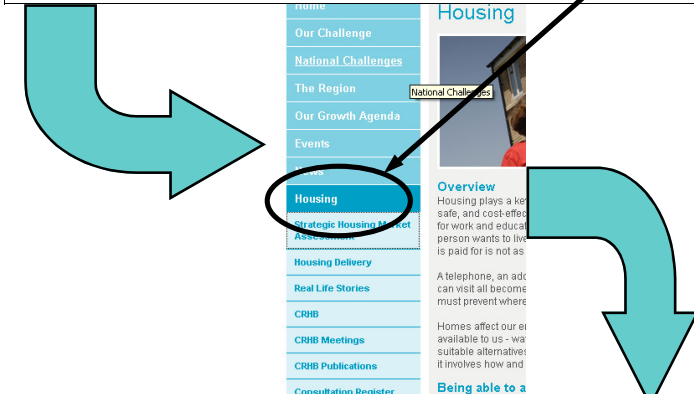
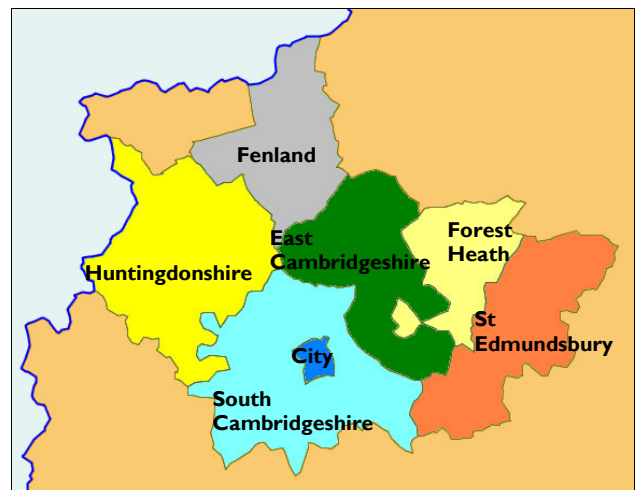
Near the bottom of the list of sections you will see "SHMA archive". This is where we will store chapters and appendices which have been replaced.

At the very bottom of the list you will see "SHMA consultations". This is where we are putting the chapters which we'd like your feedback on. The new chapters will all be available to comment on over a six week period.

The SHMA is now presented in its sections, rather than as a long list of chapters. If you click on a section title, the list of individual chapters appears, which you can then read or download. Once consultation is complete, chapters will be published while the "old" version of that chapter will be put into a SHMA archive which will still be available to read. Brief notes of the changes made, and the version number you should be looking at, will all be listed in Appendix 15, *The change log*.

SHMA coverage

The SHMA covers the seven districts shown and is supported by the Homes and Communities Agency, Cambridgeshire County Council and Cambridgeshire Horizons.



CONTACT US:

SUE BEECROFT
SUB-REGIONAL HOUSING STRATEGY CO-ORDINATOR
CAMBRIDGESHIRE HORIZONS

TEL: 01223 714044
FAX: 01223 714041

E-MAIL: SUE.BEECROFT@CAMBRIDGESHIREHORIZONS.CO.UK
WEBSITE: WWW.CAMBRIDGESHIREHORIZONS.CO.UK