

Our strategic housing market assessment

For the Cambridge Housing Sub-Region

August 2009

Issue 7

Consulting you...

We have now launched several chapters of the Strategic Housing Market Assessment (SHMA), updating and building on chapters launched back in 2008. The new chapters can be found on the Cambridgeshire Horizons website, at: www.cambridgeshirehorizons.co.uk/shma

Go to "SHMA consultations" at the bottom of the page and you can click on whichever chapter interests you.

Tables on pages 2 and 3 of this note show all the chapters in the SHMA, whether we have launched them for consultation yet or plan to soon, the dates the consultation is open, and some brief notes on the changes we have made.

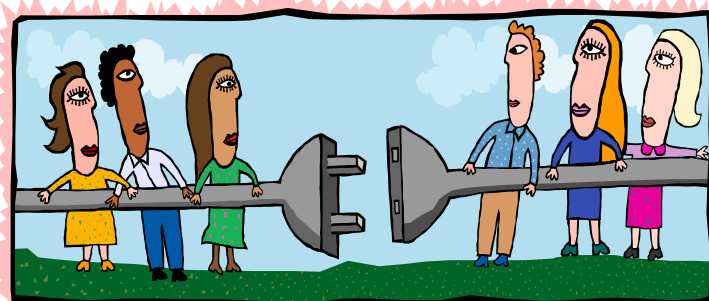
As with the 2008 version, your views are much appreciated when developing the SHMA.

On page 4 we have provided some simple questions to prompt your thoughts when giving feedback, though any format for comments is acceptable and (if you prefer) you can just write an email to the project team.

The SHMA is a huge and evolving data set. The 2009 version uses 2007/8 data, and builds on the firm foundation laid in 2008 which used 2005/6 data. Early in 2010, we plan to revise the SHMA again using data from the end of 2008/9.

One major improvement is the full participation of our two Suffolk partners at St Edmundsbury and Forest Heath, where they were originally "observers". This meant they were included in parts, but not all of the SHMA.

The five Cambridgeshire districts who remain fully involved are Cambridge City, East Cambridgeshire, Fenland, Huntingdonshire and South Cambridgeshire.



SHMA Workshop

Continuing our theme of learning from each other and listening to your views, on 7 July 2009 around 30 people met to talk about the housing market, the SHMA and how we can work together to develop and use the SHMA further in future. A full feedback pack is available at:

http://www.cambridgeshirehorizons.co.uk/useful_stuff/training.aspx

The pack includes slides from three presentations, the thoughts and suggestions made in workshop groups which considered "How can the SHMA help us respond to the challenge in future?" and notes from the plenary discussions.

Each workshop group discussed:

1. How have you used the SHMA over the past year?
2. Where has this been positive/helpful?
3. What is missing? What can we do to improve the SHMA; to develop it, to add missing data, to meet your needs and respond to the new and changing housing market we are faced with?

Many thanks to all who came along and got involved - please see page 4 for highlights of the suggestions made...

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Special points of interest:

- Consultation chapters now available on Horizons website.
- First set of chapters open for feedback till mid October.
- Second batch will be ready mid September, consultation on these will close end October.
- Short set of questions available to help guide your thoughts if needed.

Progress on chapters




We have been working hard to progress many chapters of the SHMA, and now we are looking for your feedback.

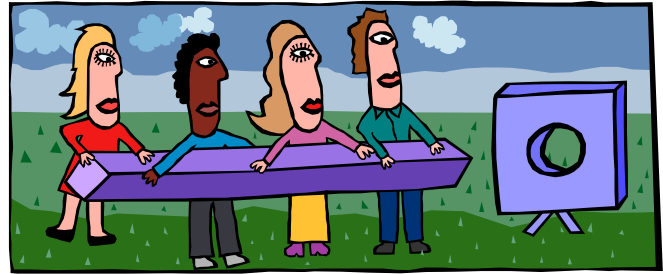
For most chapters we have set a deadline of 14 October 2009 for comments. This gives you six weeks to respond to the consultation, even though some of the chapters have been available for a while longer.









There are some chapters still being worked on, which we aim to upload on the Horizons website by 16 September, with a consultation deadline of 30 October 2009, again allowing six weeks to respond.























We welcome your views on any, or all, of these updates. If you have comments or suggestions, please contact the SHMA team (see p.4)

Key to the list:

-  Drafts now available for consultation till 14 October 2009.
-  Changes are underway but not ready for consultation. Aim to launch by 16 September and consult till 30 October 2009.
-  A key chapter to update.
- X** No immediate plans to update.



	Chapter and notes	Actions
1	Introduction and context Refresh to launch version 2.0 Added maps showing different sub-regions.	
2	Links between planning policy and SHMAs Refresh to launch version 2.0.	
3	Project structure and accountabilities Update with brief description of roles for SHMA partners, including move from observer to participant for Suffolk districts.	
4	The participation ladder Update list of SHMA partners from version 2.0.	
5	Robust and Credible Add comment on Technical Appendix once completed and published. Update cross-refs.	
6	Profile of the Cambridge sub-region Added maps and information on the two Suffolk districts.	
7	Defining housing markets using commuter patterns 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 by postcode / house prices by ward Update on basis of Ch. 13. Moved from postcode areas to ward areas as a more useful level of Assessment.	

Chapter and notes	Actions
9 Economic context and forecasting Data from the regional spatial and economic strategies added, along with the effect of new projections for the RSS review on future projections.	 
10 Demographic context and forecasting Updated 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, re-issue as per 2008 version.	X
13 Current property prices Updated for 2007/8 prices.	 
14 Changes in property price over time Update using Hometrack and Land Registry data. Add note on data sources and long-term trends as annex.	
15 The private rented market 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 Note to be added updating on this area given recent market reduction for BTL.	
17 Social rented housing turnover, register and lettings Updated for 2007/08. Added profile of social renters.	 
18 Homelessness Update for 2007/08.	 
19 Applications for intermediate housing Update for 2007/08.	 
20 Sales of intermediate housing Update using new CORE data for 2007/08.	 
21 Current affordability by size and tenure Added new information about affordability by size of home.	 
22 Planning for housing delivery Updated with new regional targets from RSS, and overall trajectory.	

Chapter and notes	Actions
23 Past and future housing delivery Update using districts' 2008 annual monitoring reports. Change some graphs and add district data across the sub-region.	
24 Links to land availability Review and update in light of districts' progress on land availability assessments.	
25 Key drivers of the housing market and building industry Review recent economic and housing market downturn, adding sections about changes, consequences and resulting actions.	
26 Delivering balanced and mixed communities Adds link and summary of new JRF guidance.	
27 Identifying housing need Update using all data to end of 2007/8.	
28 Observers data Updated in light of Suffolk partners joining fully - further detail to be added later in 2009.	
29 Future sizes of homes New tool being developed as a spin-off which will either replace or supplement existing chapter, depending on feedback. Add more complete account of "new development surveys" completed and planned more in future, which feed in.	
30 Indication of affordable tenures Update in light of Chapters 17, 19, 20 and 27.	
31 BME housing issues Light-touch review. Added Hometrack maps across sub-region and data for two Suffolk districts (previously Cambridgeshire only).	
32 Migrant workers housing Plan to review in light of new County report on international migration, in longer term.	X
33 Gypsy and traveller housing issues Plan to update with new criteria, and EERA's review across the region, in longer term.	X
34 Housing for different household types 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	X
35 Disability and housing issues Plan to update in line with Supporting Peoples' new needs analysis and referring to Cambridgeshire's disability housing strategy and JSNA, in longer term	X
36 Rural housing Add a map showing the location and number of park homes sites. Clarify rural definitions. Move table to appendix.	

Chapter and notes	Actions
37 New! First time buyers New chapter arising from the first SHMA on this tricky aspect of the housing market.	
38 New! Link to Housing Viability Studies Suggested new chapter to provide links to viability studies as available for each district.	
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	

What happens next?

Once we have consulted you on all the new and updated chapters based on 2007/8 data, we will make the necessary changes and launch these chapters late in 2009.

This version will incorporate as much data as possible for the two Suffolk districts, but will not include the full assessment of affordable housing need in Chapter 27. For Cambridgeshire districts, Ch 27 will be re-run using exactly the same methodology as for the first SHMA, using 2007/8 data sources.

There is a "lag" between the end of each financial year (31 March) and data becoming available to use in the SHMA. The first SHMA was based on 2005/6 data. As it was launched in June 2008 we had just passed the end of the 2006/7 financial year. So we are working, in this update, to catch up with this 2007/8 data. Once this update is complete, we will move on to a further update early in 2010 which will use 2008/9 data. Subject to consultation, along with this new 2008/9 data we also aim to:

- Move from housing needs register to HomeLink choice based lettings data, enabling comparison of "bands" of housing need across the sub-region, which was not previously possible
- Look to replace all primary survey data with secondary sources, to remove the need for a household survey and to make best use of existing data which we can easily use and update.

We hope these major changes will improve the SHMA, following the CLG guidance more closely, making it quicker to update and more robust in future, without compromising data quality.



Edited highlights of workshop...

Some of the suggestions made at our workshop on 7 July 2009 included:

Access and format

- ♦ No need for 800 pages of anything! Could a 50-page version be created?
- ♦ Like the memory sticks!
- ♦ Need to keep marketing it.
- ♦ Difficult to find figures at right level of analysis.
- ♦ Add links on district websites to the SHMA.
- ♦ Improve titles for sections - not very intuitive.
- ♦ Set up a forum to identify "hot topics" and to lead the research.
- ♦ Have used it, but it is daunting!
- ♦ Like the fact it's web-based.
- ♦ Would like the option to comment on-line and ask where to find stuff amongst all the pdfs.
- ♦ Could set up forums to pose questions on topics or areas.

Existing content

- ♦ Incorporate feedback from planning enquiries.
- ♦ Need to improve information on private sector house sizes – not very clear.
- ♦ Affordability needs to be more location-specific to be useful.
- ♦ Need more on sizes of all properties – explore use of Size Guide.

- ♦ Need to add more on "hot" and "cold" spots of affordability .
- ♦ Could use housing needs survey undertaken by rural housing enablers to feed in to rural chapter.
- ♦ Could use home improvement agency information for chapter on disability.
- ♦ Improve links with joint strategic needs assessments.
- ♦ Needs to link better to land availability assessments.
- ♦ Baseline is useful.
- ♦ More specialism is needed.

Future investigation needed...

- ♦ Interesting to look further into commuting patterns.
- ♦ Financial world is a parameter which needs to be built in better .
- ♦ Need to consider existing sheltered housing, levels of dependency, new provision, effect on domiciliary care, ageing population trends.
- ♦ Park homes aimed at specific ages too. Have a Park Manager, sense of community, easy to adapt.
- ♦ Can the SHMA do demography compared to equity to help find a revenue stream / stair-casing especially for older people?
- ♦ Needs to be mindful of Variable Tariff and other initiatives evolving from s106.

Timeliness

- ♦ Useful to have more up-to-date info, especially on sales
- ♦ Local evidence is totally crucial – not fixed in time, must be "living" evidence.
- ♦ Need to use the SHMA to make judgements on the future, but always using back-wards looking data to do this.

Plenary discussion points

Other suggestions included:

- ♦ Need to get events in diary earlier.
- ♦ Need more people contributing to increase diversity of input.
- ♦ Finance in the housing market is a big issue – could invite a speaker on this specific topic.
- ♦ Perhaps a whole day event with lunch?
- ♦ Move location out of Cambridge as long as good transport links - possibly Ely?
- ♦ Would be good to use mapping to bring data from various sources together – increase accessibility.
- ♦ Health service data and priorities need to tie in – but a challenge.

Plenty of useful thoughts and suggestions - again thank you for these, we will be working on them in this update, and in future.

Some questions to prompt feedback...

Here are some questions to prompt your feedback on the new and updated SHMA chapters:

1. How readable was it?
2. How understandable was it?
3. Can you suggest ways to make it easier to read or to understand?
4. Is anything included which you thought unnecessary or could be reduced?
5. Was anything missed which you would like to see added?
6. Do you have any other comments or suggestions?

If you have feedback on any aspect of the SHMA, please send your feedback to the SHMA project team, care of...

sue.beecroft@cambridgeshirehorizons.co.uk

...or you can call on 01223 714044

