Appendix B - Facts & Figures Evidence Base

The purpose of this Appendix is to establish sub regional baseline data to support GHG identify and deliver its priorities, inform decision making and direct resources. It will form the basis for identifying and comparing patterns and trends over time to inform analysis. The main intention at this stage is to provide relevant sub regional facts and figures but there is also some limited analysis.

The profile does not claim to be a fully comprehensive indeed part of the work of the strategy will be developing the information we have on housing markets on an ongoing basis and understanding major issues such as the impact of changing demographics.

The information is organised and presented under the headings of the four main strategic objectives. Categories of some data appear in more than one section because there is new information that relates to that strategic theme.

The information in this report was, as far as is known, correct at the date of publication. Greater Haven Gateway cannot accept responsibility for any error or omission.

Strategic Objective 1

Enable the development of high quality and sustainable affordable housing in places, where people want to live.

Population

National Population Projections are produced every two years for the UK and constituent countries using the level of births, deaths and migration. Based on observed levels, assumptions and estimates they give an indication of future trends and projections in the population.

The estimated increase in population and household units in the sub region will put additional pressure on the demand for housing.
In 2001 the population in the sub region was 888,752. The mid 2009 population estimates suggest that the population has increased to 961,400. By 2031 the projected population of the sub region is 1,239.700[1].

Based on these figures it is estimated that the population will increase by 28% within a 30 year period.

[1] Source: Table 4, 2008-based Subnational Population Projections Office for National Statistics (ONS). © Crown Copyright

Households[2]

In 2001 the estimated number of households in the sub region were 374,000 by 2011 projections are that there will be 439,000 households. By 2031 the projected number of households increases to 585,000[3].

Based on these figures it is estimated that the percentage of households will increase by 36% within a 30 year period.

Diversity

The Greater Haven Gateway is becoming an increasingly diverse sub region following significant in-migration. The percentage of BME households has increased and the diversity within this group has become greater.

The data in Table 1 below originates from the Mid-2007 Experimental Ethnicity Estimates and should be viewed with caution, and 2001 Census. The extract below shows the percentage of the population categorised as non-white in the LAs in the sub region[4] at these two snapshot periods.
Examining figures for 2001 and 2007 it indicates is that Ipswich is the only LA in the sub region that has a higher proportion of non-white ethnic groups than the East of England, 6.6% in 2001 and 10.6% in 2007. Colchester has the next highest percentage of 7.9%, just below the East of England average, but twice the percentage of 2001.

All the more rural LAs have also seen a noticeable increase in the proportion of non-white ethnic groups in the same period.

Table 1: Percentage non white ethnic groups in the population, 2001[5] & 2007[6]

LA	2001	2007
Babergh	1.3%	3.5%
Braintree	1.8%	4.5%
Colchester	3.8%	7.9%
Ipswich	6.6%	10.6%
Maldon	1.4%	3.9%
Mid Suffolk	1.0%	3.1%
Suffolk Coastal	1.9%	4.6%
Tendring	1.3%	5.2%
East of England	**4.9**	**8.4%**

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2 Source:All projections are 2006-based. The 2006-based household projections are linked to the Office for National Statistics 2006-based Population Projections, and are not an assessment of housing need or do not take account of future policies. They are an indication of the likely increase in households given the continuation of recent demographic trends.
3 Source: Table 406 Household estimates and projections, Communities and Local Government
4 In this context White includes Irish White and Other White
5 Source 2001, Table KS0603, Neighbourhood Statistics
6 Mid-2007 Experimental Ethnicity Estimates, Population Estimates Unit, Office for National Statistics (ONS). © Crown Copyright, 2010.

The different economic situation and housing need of these groups may require different responses or services to be provided in a different way.
Figures above are provided to indicate broad trends in the sub region. The Equality and Diversity sub group use more detailed figures to analyse the effects of CBL policies on minority communities.

Location

In developing sustainable and successful communities increasing emphasis is being placed on location and supporting infrastructure. There are two local authorities in the sub region that have significant urban centres the other six districts are more rural with smaller market towns.

Table 2 broadly categorises the population by settlement type giving the percentage of people living in rural and urban areas.

Table 2: Percentage of population by settlement type[7]

	Babergh	Braintree	Colchester	Ipswich	Suffolk Coastal	Tendring
Urban	28.3%	59.4%	68.6%	100%	48.1%	74%
Rural	71.7%	40.6%	31.4%		51.9%	26%

The need for affordable housing is a high priority in the rural districts. Younger households are often priced out of their local areas and are forced to migrate to cheaper areas resulting in a fragmentation of family and social networks.

The provision of new affordable dwellings is linked to open housing market activity, particularly the building of new dwellings. Planning policies across the region require between 25-40% of affordable housing on each new development (above a set threshold) and with the reduction of new development sites coming forward this has a significant impact on the number of new affordable homes developed. Lack of development in rural areas means there is no opportunity to provide affordable dwellings unless they are promoted through Rural Exception sites.

New housing supply

Table 3 below shows all (private sector and RSLs) new dwellings completed in a six year period from 2004-05 to 2009-10 and gives the total for each year. It indicates that during 2006-07 the most new dwellings were completed, a total of 5,120, and then each subsequent year numbers declined, showing that 2009-10 had the least dwellings completed at 2,690.

Taking average projected household numbers for six years in this decade suggests that 39,000 new dwellings would be needed to accommodate growth whereas some 22,450 dwellings were completed, some 58% of the need.

[7] Figures not available for Mid Suffolk and Maldon

Table 3: All dwellings completed[8]

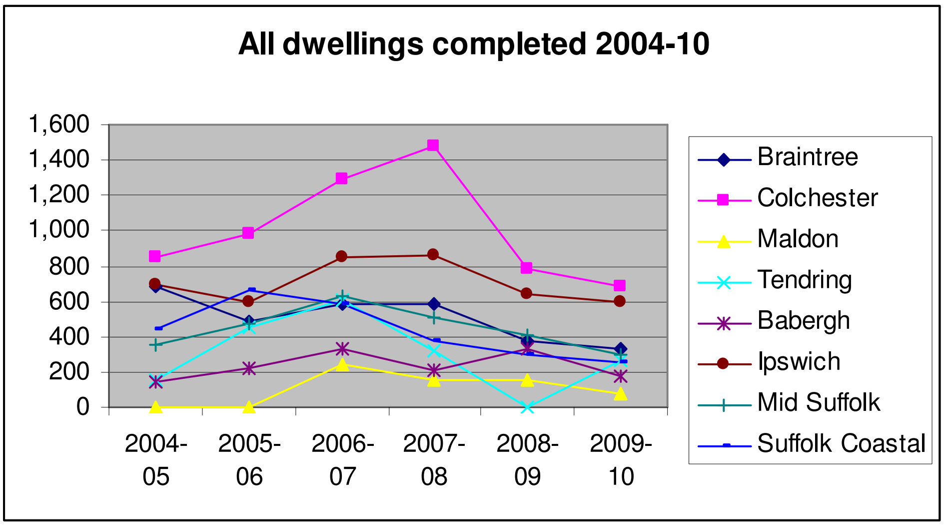


Table 4 below shows the number of affordable homes built by RSLs over the same period. Of interest is that the trends in RSL dwellings completed during this period do not mirror the pattern of completions of all dwellings. Based on the information available this sector represents 9% of all dwellings built in this six year period.

Table 4: All RSL dwellings completed 2004 to 2010[9]

	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Braintree	40	60	160	80	130	110
Colchester	50	40	110	80	80	100
Maldon	X	X	0	0	45	30
Tendring	X	30	10	20	X	80
Babergh	0	0	10	10	70	0
Ipswich	30	40	80	80	100	40
Mid Suffolk	0	0	30	30	90	30
Suffolk Coastal	0	40	0	0	30	20
Total	120	210	400	300	545	410

Turnover of housing stock

Table 5 below shows a year on year falling trend in the annual turnover of housing stock in all LAs. In 2010 (figures represent 9 months activity) the turnover of housing was between 1.3% and 1.0% of the private housing stock, with Mid Suffolk having the

[8] Source: Table 253, All dwellings completed 2004-10 CLG House building statistics - 2. The data source is local authority and National House Building Council (NHBC) building control returns submitted to CLG.

[9] Source: Table 253, All dwellings completed 2004-10 CLG House building statistics - 2. The data source is local authority and National House Building Council (NHBC) building control returns submitted to CLG.

greatest turnover. This compares to a much higher level of turnover, between 7.1% in Colchester and 5.5% in Tendring for 2006 (for the whole year).

Table 5: Turnover of private housing stock as a percentage 2006-2010

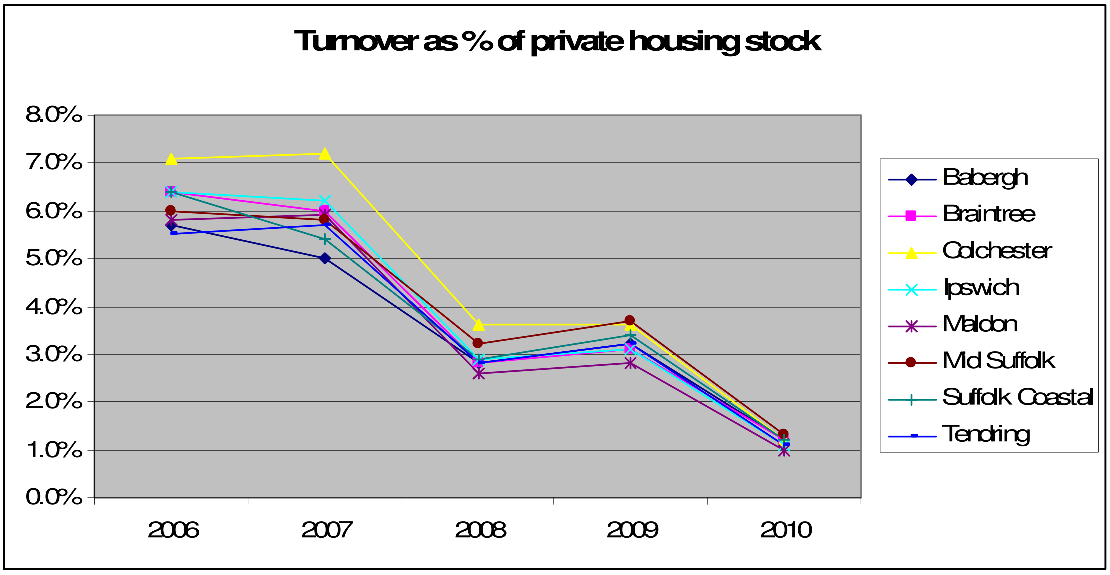


Table 6 below shows the actual turnover of properties in numbers over a five year period, 2006-2010. Even taking into consideration the figures for 2010 are three quarters of a year only it can be seen that the number of properties has fallen considerably in every LA. It shows that the turnover of properties halved from 2006 to 2008, falling from 24,249 in 2006 to 11,591 in 2008. It also indicates that the 2008 figure may indeed be halved again in 2010.

Table 6: Turnover of properties in numbers 2006-2010

	Babergh	Braintree	Colchester	Ipswich	Maldon	Mid Suffolk	Suffolk Coastal	Tendring	TOTAL IN GHG
2006	2,049	3,552	4,683	3,328	1,471	2,213	3,353	3,600	24,249
2007	1,804	3,360	4,718	3,240	1,500	2,144	2,856	3,686	23,308
2008	996	1,554	2,374	1,494	660	1,157	1,542	1,814	11,591
2009	1,148	1,730	2,358	1,612	709	1,354	1,774	2,042	12,727
2010	427	673	785	585	254	467	611	693	4,495

Affordability

Affordability is a key issue that affects people’s housing options and what type of accommodation they can access. Affordable housing includes social rented and intermediate housing which is provided to eligible households whose needs are not met by the market. Key indicators which determine affordability are local incomes and local house prices.

The median average annual wage for all employees by place of work across the sub region in 2009 was £19,782, lower than the East of England average of £21,103. However, Table 7 below shows that there are significant variations, with employees working in Suffolk Coastal having consistently higher earnings (£23,128 in 2009) than other districts in the sub region and the East of England.

Although the information is not complete for all districts over the three years we see that Maldon, Tendring and Babergh have the lowest median annual wages. Comparing the median annual wages with average property prices across the sub region[10] we can see that Maldon has high property prices and some of the lowest annual wages. In six out of eight LAs there are still a third of first time buyers that are unable to afford entry into the bottom end of the market. (see table 8 below)

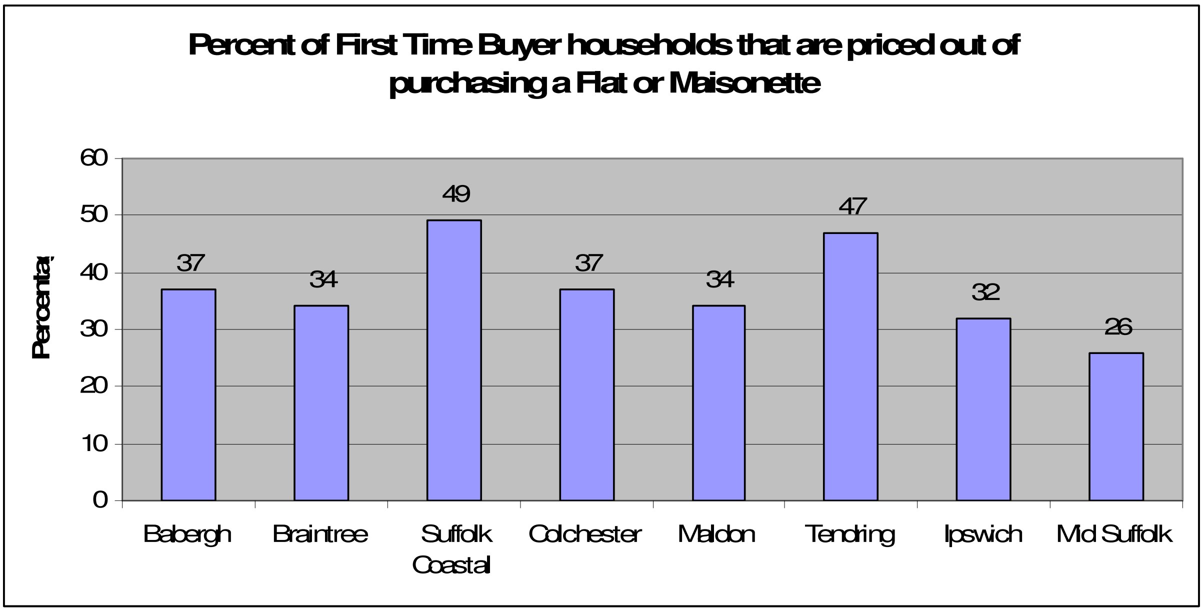
Table 7: Median Annual Wage for all employees by Place of Work 2007-09[11]

	Median	**Annual**	**Median**	**Annual**	**Median**	**Annual**
	2007	**% change**	**2008**	**% change**	**2009**	**% change**
East	19,571	2.3	21,170	4.1	21,103	3.7
Braintree	19,319	4.1	18,961	-1.9	19,354	2.1
Colchester	18,382	9.2	18,360	-0.1	20,541	11.9
Maldon	17,425	-13.1	17,893	2.7	x[12]	x
Tendring	16,073	-4.1	16,547	3.0	17,603	6.4
Babergh	16,434	15.3	x	x	17,923	x
Ipswich	17,745	-3.9	19,776	11.4	19,932	0.8
Mid Suffolk	18,915	4.2	19,734	4.3	20,184	2.3
Suffolk Coastal	22,284	4.2	24,634	10.5	23,128	-6.1

Across the sub region between a quarter and a half of all First Time Buyers cannot afford to buy a flat or maisonette. This calculation is based on a loan to value ratio of 75% which means that first time buyers have to have a 25% deposit and lending practices of obtaining mortgages based on three times the gross annual wage. Table 8 below shows the percentage of households in this position.

[10] Comparison made with 2009 figures
[11] Source: Annual Survey of Hours and Earnings, Table 7.7a Annual pay - Gross (£) - For all employee jobs: UK - ONS
[12] X indicates information not available

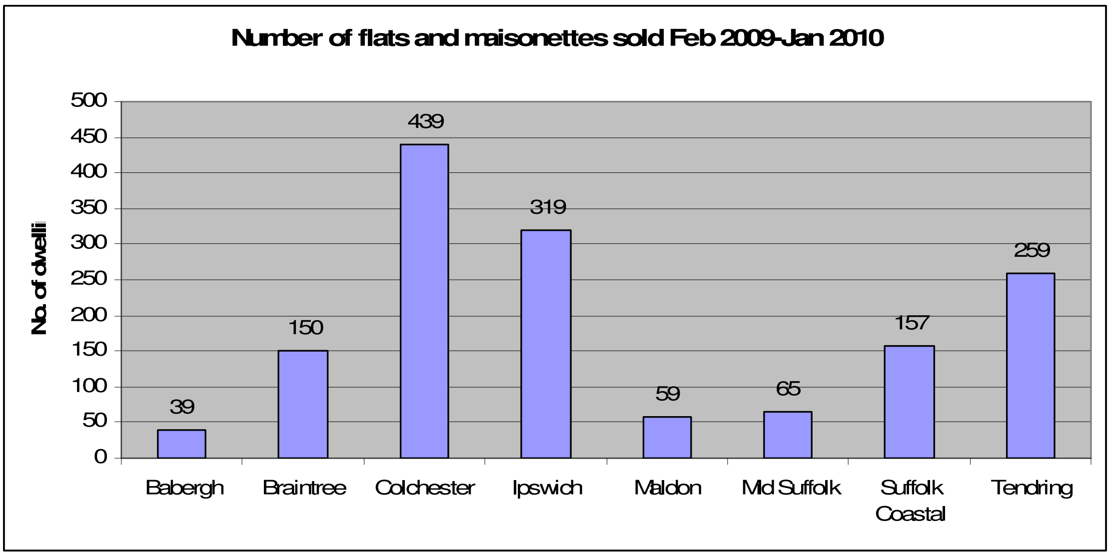
Table 8: Percentage of FTB unable to afford to buy a flat or maisonette[13]



With first time buyers unable to afford entry into the bottom end of the housing market this slows down mobility, as both households wanting to buy larger properties and older person households that want to downsize cannot find buyers. Also if households are unable to afford to purchase their own home this places additional pressure on the private rented market and supply of affordable housing.

Table 9 below shows the number of flats and maisonettes sold during February 2009 to January 2010.

Table 9: Number of flats and maisonettes sold



[13] Source: Hometrack Housing Intelligence - this is a modelled figure which is derived from the house price and income assumptions. The figures displayed are simply derived from incomes and house prices and do not account for the existing tenures of local residents. The house price data is based on data from the Hometrack Automated Valuation Model and the incomes data is supplied by CACI. February 2009-January 2010

Cost of Buying an entry level 1 bed property[14]

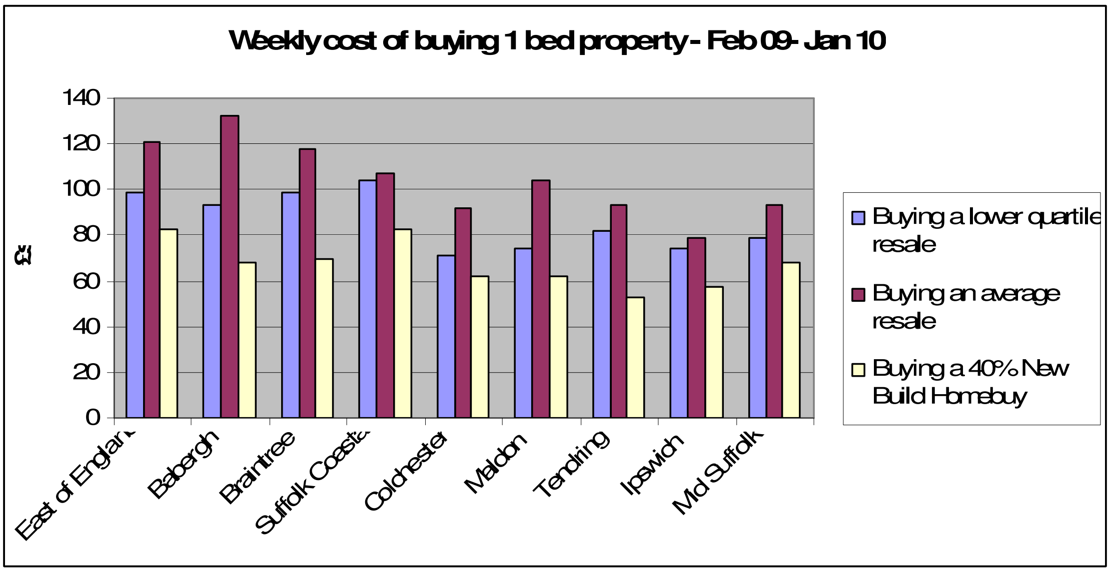
The costs of buying varies widely across the sub region and to provide an example we have taken the costs of buying a 1 bed property using the East of England average cost as a comparator. The costs below do not take into account the need for a 25% mortgage, legal fees and the ability to qualify for a mortgage which are significant barriers for many people.

Table 10 below shows that the average cost of *buying a lower quartile resale* 1 bed property in the East of England is £99 per week. It is the same cost in Braintree, £99, in Suffolk Coastal it is higher at £104 and in the remaining districts in the sub region it is lower than the East of England average.

The cost of buying an *average resale* 1 bed property in the East of England is £121 per week. In Babergh the same property is £132 whereas in Ipswich it is as low as £79.

The average cost of buying a *40% New Build Homebuy* in the East of England is £83 per week. It is the same cost, £83, in Suffolk Coastal but lower in all other districts, with the lowest cost in Tendring of £53 per week.[15]

Table 10: Weekly cost of buying a 1 bed property[16]

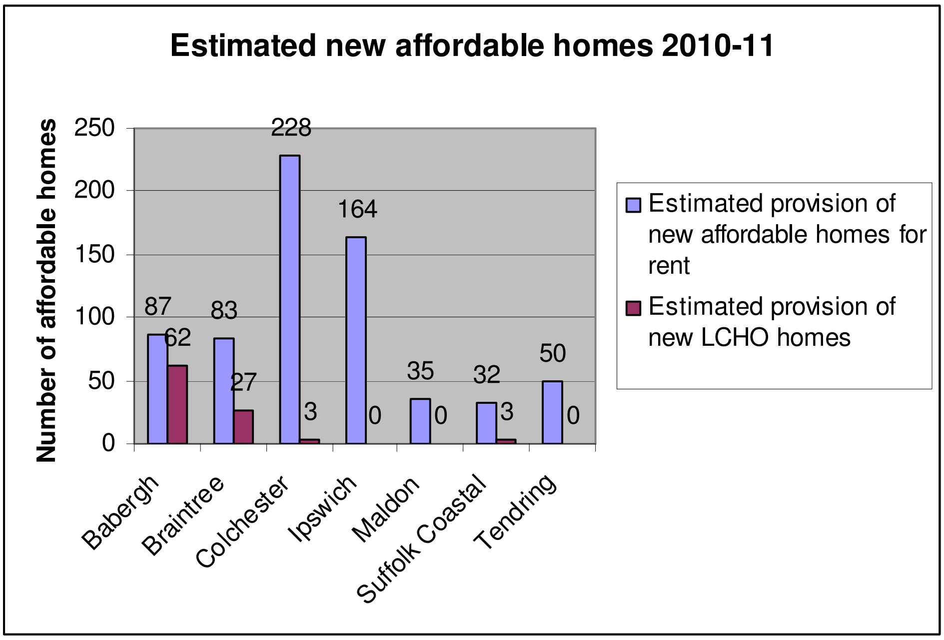


[14] Source: Hometrack Housing Intelligence February 2009-January 2010
[15] Figures for new build were not available across the sub region
[16] Source: Hometrack Housing Intelligence

Supply of affordable housing

The need for new affordable rented homes each year across the sub region far outstrips supply.
The total estimated delivery of new affordable homes across the sub region, (from seven out of the eight LAs) for 2010-11, is 771.[17] This target partially reflects the downturn but it is also part of a consistent pattern of not being able to deliver the number of homes needed across the sub region. Table 11 below gives the estimated numbers for new affordable homes for rent (including intermediate) and the number of low cost homes.

Table 11: Estimated new affordable homes 20-11[18]



Market sales activity

Average property prices across the sub region have increased dramatically in the past nine years despite the recent downward trend in market conditions. Looking at figures for average property prices, for the last six months from November 09 to May 2010, all districts have seen an increase in average property prices with the exception of Colchester, with Babergh experiencing the highest increase of 8%. There is a large differential between the average property price across the district, with Ipswich having the lowest average house price of £142,763 and Maldon having the highest of £236,879.

Table 12 below gives the trends over the past nine years.

[17] Figures not available for Mid Suffolk
[18] Data direct from LAs

Table 12: Average property prices across the sub region in the past nine years[19]

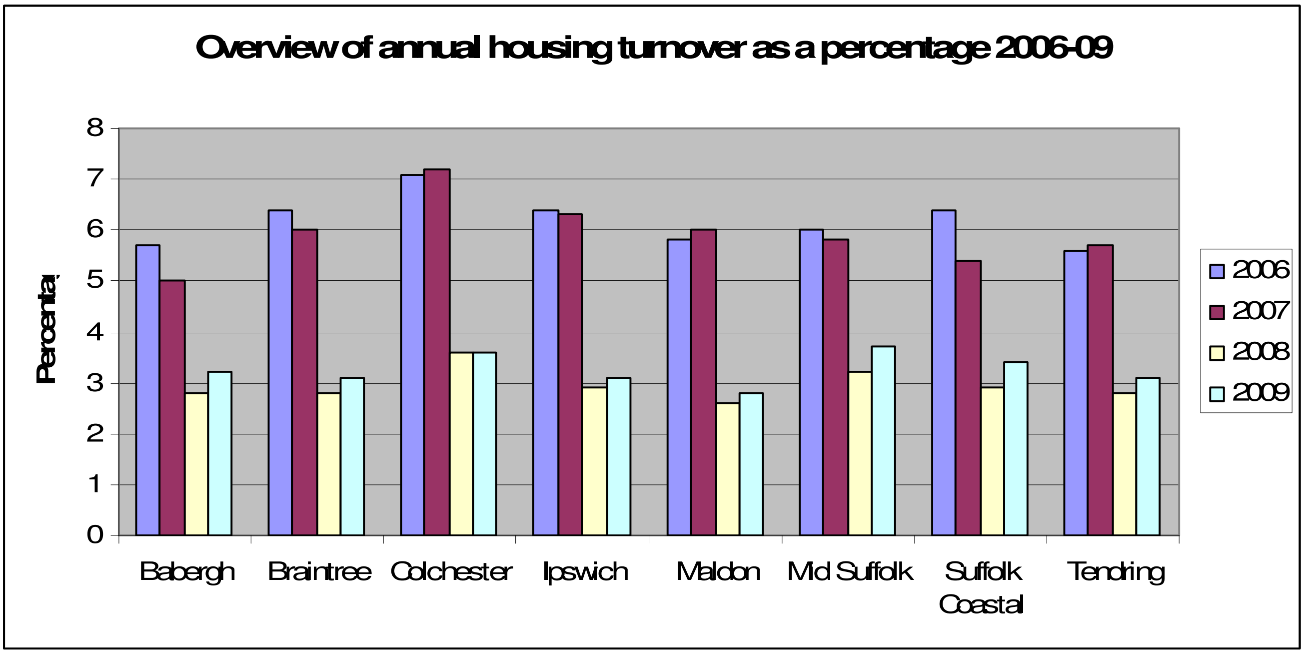
	Babergh	Braintree	Suffolk Coastal	Colchester	Maldon	Tendring	Ipswich	Mid Suffolk
Nov 01	129,493	123,212	130,853	116,070	137,718	97,979	86,893	122,980
Nov-02	168,928	157,892	154,583	142,934	173,855	125,137	107,261	154,102
Nov-03	181,228	178,075	174,115	159,939	197,327	143,916	126,144	173,569
Nov-04	199,788	198,891	210,775	183,463	218,069	161,475	142,419	198,220
Nov-05	203,579	198,453	206,675	188,346	234,612	166,922	142,660	195,879
Nov-06	227,368	208,799	217,637	196,969	233,105	180,001	154,119	210,960
Nov-07	237,800	224,752	245,254	211,472	255,155	187,495	162,959	226,313
Nov-08	222,278	228,063	244,414	187,563	255,384	180,871	150,318	217,361
Nov-09	217,845	205,894	228,532	200,067	227,499	161,163	137,529	205,908
May-10	237,898	212,384	236,849	199,459	236,879	170,474	142,763	206,837

The average property price in the sub region in 2010 is £205,442 compared to the East of England average property price of £248,230.

Although the movement in average property prices gives an indication of the housing market looking at the number of properties sold, average number of viewings per property, number of weeks to sell a property and the percentage of the asking price achieved provides further insight into activity in the market.

[19] Source: Hometrack Housing Intelligence June 2008-May 2010

Table 13: Annual housing turnover as a percentage of the private sector [20]



All the LAs in the sub region saw a significant fall in the turnover of property in the period 2006-09, with Braintree, Ipswich, Maldon and Tendring seeing a drop of more than 50%. However the trend shows that there has been a small increase in the turnover from 2008 to 2009

March 09 saw an increase in viewings of properties per sale across most of the districts, with an average of 14.5 viewings per property. The average conceals wide variations in activity with Maldon and Tendring seeing 20.9 and 10.6 viewings per property respectively. Spring is traditionally one of the busiest times in the house sales market but comparing March 09 with March 2010 we can see that in March 2010 average viewings fell to an average of ten per property - again with activity highest in Maldon with 13.3 viewings and Tendring with 8.4.

Table 14 below gives the trends over the past two years at district level.

[20] Source: Hometrack Housing Intelligence proportion of privately owned housing turning over each year expressed as a percentage of private sector housing in the area (owner occupied and private rented housing). This is based on data from the Land Registry and the Census.

Table 14: Average number of viewings per sale over time[21]

	Babergh	Braintree	Suffolk Coastal	Colchester	Maldon	Tendring	Ipswich	Mid Suffolk
Jun-08	13.2	12.5	11.7	15.5	14.8	14.3	15.9	10.3
Sep-08	13.7	15.1	10.8	16.3	9.1	15.8	12.9	7.8
Dec-08	9.4	9.7	11.3	8.2	9.2	12.1	12	8.8
Mar-09	15.1	13.7	12.3	13.4	20.9	10.6	17.9	12.8
Jun-09	11.2	10.8	9.4	12.3	13.3	10.1	16.3	11.2
Sep-09	7.4	6.8	9.5	8.7	11.6	8.8	11.7	10.4
Dec-09	11.7	10.2	8.4	12.3	9	9	13.7	10.2
Mar-10	10.5	10.8	7.7	10.4	13.3	8.4	9.1	9.6
Apr-10	12.3	10.9	10.5	10	12.4	11.7	11.5	11
May-10	12.8	10.5	9.9	10.2	11.6	10.3	11.5	10.4

The number of weeks it takes to sell a property also gives an indication of market activity. Examining quarterly figures from June 2008 to May 2010 the overall trend suggests that properties are taking fewer weeks to sell. On average properties in June 2008 were taking 11 weeks to sell but in May 2010 this had reduced to just over 7 weeks. In Ipswich in May 2010 properties were taking just under 5 weeks to sell compared to Maldon where the average was just over 10 weeks. This trend may be indicative of the limited supply of housing on the market.

Table 15 below shows the number of weeks to sell a property in each district over a two year period.

Table 15: Number of weeks to sell a property[22]

	Babergh	Braintree	Suffolk Coastal	Colchester	Maldon	Tendring	Ipswich	Mid Suffolk
Jun-08	11.2	14.1	11.2	9.6	11.7	9.7	10	10.2
Sep-08	10.7	14.4	10.2	11.3	15.9	11.1	10	13.4
Dec-08	10.2	11.6	13.2	11.9	15.9	9.9	11.6	13.4
Mar-09	11.2	10.4	10.9	10.2	12.4	9.5	8.6	12.9
Jun-09	10.5	8.7	11.4	8.1	10.6	8.8	8.1	11.7
Sep-09	7.7	7.6	6.7	7.7	9.3	7.6	4.5	7.3
Dec-09	6.8	6.5	6.8	8.1	9.6	7	5.8	9.5
Mar-10	7	7.3	6.5	9.2	12.1	7.3	5.3	10
May-10	7	7.1	5.7	7.3	10.2	7.5	4.8	9

[21] Source: Hometrack Housing Intelligence June 2008-May 2010
[22] Source: Home track Housing Intelligence; Comparing the percentage change in the number of new properties being registered for sale each month against the percentage change in the number of new buyers registering.

Table 16 below shows the typical proportion of the asking price that is achieved for all sales agreed over the month (shown for one month each quarter period)[23].
In March 2009 the percentage of the asking price achieved for sales ranged from 88% to 90%. In March 2010 this percentage had increased in all districts, with a range of 93% to 95%. In May 2010 this increased had been maintained or improved in all districts apart from Ipswich which saw a 2% decrease.
Traditionally high viewings with short selling times tends to indicate a buoyant market or high viewings with long selling times suggests an over-estimation of values or over-supply of particular types of properties.

Table 16: Proportion of the asking price achieved for all sales over time[24]

	Babergh	Braintree	Suffolk Coastal	Colchester	Maldon	Tendring	Ipswich	Mid Suffolk
Jun-08	91.6%	92.0%	89.4%	90.0%	91.1%	90.6%	92.0%	93.3%
Sep-08	90.5%	89.9%	90.1%	87.4%	89.1%	88.6%	92.0%	90.7%
Dec-08	88.2%	89.9%	87.6%	88.5%	88.8%	88.1%	88.0%	87.1%
Mar-09	88.7%	90.7%	88.9%	88.8%	90.6%	89.1%	88.1%	90.6%
Jun-09	91.2%	93.2%	90.2%	92.3%	93.5%	90.8%	92.0%	90.4%
Sep-09	91.8%	95.2%	90.6%	94.2%	94.3%	94.2%	93.4%	93.2%
Dec-09	94.7%	95.8%	90.8%	95.5%	95.0%	95.3%	94.2%	92.9%
Mar-10	94.9%	94.8%	94.5%	93.6%	94.9%	93.2%	95.0%	93.0%
May-10	95.1%	94.2%	94.5%	95.4%	95.5%	93.5%	92.9%	93.6%

To summarise from the above information we can tentatively say that there are signs that the housing sales market is showing signs of recovery across the sub region, with indications that prices are increasing or stabilising, there are fewer viewings to achieve a sale, properties are selling quicker and a higher proportion of the asking price being achieved. However these signs of improvement are set against substantial decreases in the percentage of overall housing turnover.

[23] Source: The data comes from Hometrack's monthly survey of estate agents and is based at postcode district level
[24] Source: Hometrack Housing Intelligence June 2008-May 2010

Strategic Objective 2

Improve the condition and use of existing housing taking into account social and environmental factors that impact on quality of life.

Housing stock by tenure

Table 17 below breaks down the existing housing stock into four categories; owner occupation, social affordable housing, private rented and other[25] and gives a percentage for each group.

In all districts the largest group are owner occupiers, with Maldon having over 80% and Ipswich having the lowest at 61%.

The next largest group are households living in affordable housing provided by LAs or RSLs. Ipswich has the highest percentage, 23%, compared to Tendring which has only 10%. Some districts have transferred their housing stock to RSLs or management companies so do not have responsibility for day to day management but maintain a strategic function.

Households renting privately are the smallest group and Ipswich has over 16% of households within this tenure compared to Braintree with only 6%.

Table 17: Housing stock by tenure[26]

	Babergh	Braintree	Colchester	Ipswich	Maldon	Mid Suffolk	Tendring
Owner occupied	79.3%	72.5%	76.5%	60.9%	80.2%	76.9%	77.8%
Social/ Affordable	13.7%	19.1%	13.4%	22.7%	11.6%	15.0%	10.0%
Private rent	7.0%	5.8%	8.6%	16.4%	8.2%	6.0%	12.2%
Other	0.0%	2.7%	1.6%	0.0%	0.0%	2.1%	0.0%

Whilst across the sub region, at a district level, there are variations in the proportion of different tenures and rural/ urban locations there are common issues related to tackling the condition and use of stock that we will continue to focus on as a partnership.

Category 1

Category 1 hazards are a risk to the health and safety of an occupier which mandate local authority action under their enforcement powers. The estimated cost of tackling the homes with a Category 1 hazard in the sub region is far in excess of the amount of money available to deal with such properties. Not all districts were able to provide data on Category 1 hazards and unfitness in private sector dwellings as a percentage of total

[25] Other relates to other public sector stock (non council and RSL)
[26] Source: District SHMAs - Figures were not available for Suffolk Coastal

private sector dwellings. Those that did reported from the date of the last private sector stock condition survey and the percentage ranged from just over 1% to 30%.

Table 18 below shows the number of Category 1 hazards across *all tenures* in the districts.

Table 18: All tenure Category 1 hazards 2009[27]

Babergh	Braintree	Colchester	Ipswich	Maldon	Mid Suffolk	Suffolk Coastal	Tendring
Not available	3468	3141	6195	7224	1280	4803	2224

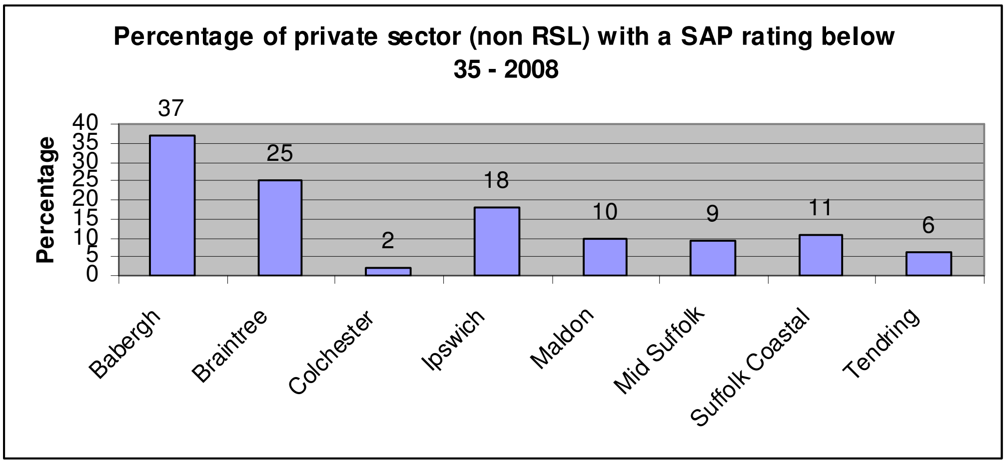
Particular attention will be given to partnership working to develop proportionate responses and solutions to tackling Category 1 'hard to heat homes'.

SAP ratings

Similarly as part of the fuel poverty strategy we will be exploring how we can share experience and maximise the effects of a range of interventions, advice and assistance to improve SAP ratings and meet decent homes standards.

Table 19 below shows the percentage of private sector homes with an energy efficiency SAP rating below 35. This shows that Babergh has 37% of private homes with a SAP rating below 35, compared to 2% in Colchester. There are wide variations in the age and construction material of existing private stock which has an impact on the SAP levels.

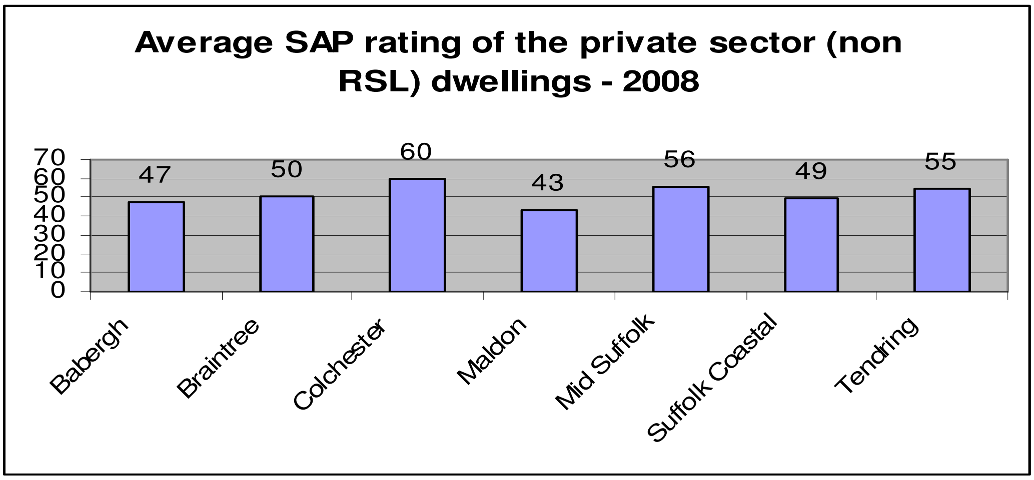
Table 19: Percentage of private sector homes with an energy efficiency SAP rating below 35 - 2008[28]



[27] Source: HSSA 2009
[28] Source: HSSA 2008

There are several elements that contribute to SAP ratings such as, the built structure of the home, its heating and hot water system, internal lighting and any renewable technologies used in the home. Table 20 below gives the average SAP rating of private sector dwellings. Colchester has the highest rating of 60 and Maldon has the lowest rating of 43.

Table 20: Average SAP rating of the private sector (non RSL) dwellings - 2008[29]



Empty Homes

Across all tenures the percentage of *all* dwellings that are vacant ranges from 1.1% to 4.2%, with an average of 3.1% across the sub region. The sub regional average is slightly higher than the East of England average of 2.2%. Table 21 below shows the percentage of *all* dwellings that are vacant.

Table 21: Percentage of all empty dwellings (including all sectors)[30]

Babergh	Braintree	Colchester	Ipswich	Mid Suffolk	Suffolk Coastal	Tendring	Maldon
4.0%	3%	3.4%	2.7%	2.6%	3.2%	4.2%	1.1%

Within the strategy we will be aiming to improve our understanding and analysis of data relating to private sector stock that has been vacant for 6+ months. By refining and agreeing definitions of categories of Empty Homes this will help us prioritise which Empty Homes we will tackle and how.

Table 22 below gives the percentage of private sector stock that has been vacant for 6+ months.

[29] Source: HSSA 2008
[30] Source: 2009 Housing Strategy Statistical Appendix

Table 22: Number of private sector stock vacant for 6+ months[31]

	Babergh	Braintree	Colchester	Ipswich	Maldon	Mid Suffolk	Suffolk Coastal	Tendring
2007	389	No return	522	522	367	551	796	1196
2008	733	889	883	394	421	529	802	1269
2009	1060	708	924	567	306	672	896	1153

As we can see the number of Empty Homes is increasing in the sub region, with only Maldon and Tendring showing a slight decrease over the past three years.

In 2007 some 4,343 private sector dwellings have been vacant for 6+ months. (data from seven out of eight LAs)

In 2008 some 5,920 private sector dwellings have been vacant for 6+ months.

In 2009 some 6,286 private sector dwellings have been vacant for 6+ months which equates to a 6% increase.

Disabled Facilities Grant

The information included in Table 23 below has been collected in a variety of ways by the different districts so is not directly comparable. It has been included as purely indicative of demand. However, it is noticeable that there is the highest amount of enquiries and growing number of applications in Suffolk Coastal.

Table 23: Disabled facilities grants[32]

	Enquiries		Applications		Completions	
	2008-09	**2009-10**	**2008-09**	**2009-10**	**2008-09**	**2009-10**
Babergh	53	98	27	41	x	x
Braintree	x	x	125	100	85	60
Ipswich	60	49	25	26	x	x
Maldon	73	72	46	37	x	x
Mid Suffolk	x	44	x	44	51	X
Suffolk Coastal	248	213	72	107	x	x
Tendring	x	x	x	x	59	x

[31] Source: 2009 Housing Strategy Statistical Appendix (excludes private homes vacant for 6+ months for regeneration and housing schemes)
[32] Figures unavailable for Colchester and information collected and provided different ways by LAs therefore not information comparable

Seven out of the eight districts were able to provide information on LA funds available for DFGs to private sector housing in 2010 which amounted to just over two million pounds. Further collation of data needs to be done to evidence the relationship between supply of and demand for DFGs and projected figures for an ageing population.

Information we have on household composition dates back to 2001 Census so we will be closely analysing the 2011 census figures, when they become available, to identify trends. Examining the 2001 data we can see that ‘one person pensioner’ households in several districts are higher than the Eastern region, a significant 7.2% higher in Tendring. Similarly ‘all pensioner’ households in Suffolk Coastal and Tendring are 3.1% and 5% respectively higher than the Eastern region.

Strategic Objective 3

Maximise customers housing choices and mobility using the full range of options available taking into account changing housing needs and demographics.

Housing Register

In 2009 GHG introduced a sub regional Choice Based Lettings (CBL) scheme which provides mobility for applicants across the sub region[33]. This scheme has a Common Allocations Policy across all districts in the scheme and participating RSLs, giving applicants more mobility across a wider geographical area.
Table 24 below shows the distribution of homes according to bed size across the sub region. In total there just under 20,000 homes

Table 24: Maximum bed sizes: by authority[34]

	Babergh	Braintree	Colchester	Ipswich	Maldon	Mid Suffolk	Suffolk Coastal
0	1	0	3	2	0	0	0
1	1025	1785	2076	2288	629	1049	701
2	587	1304	1438	1573	368	671	515
3	263	561	681	646	168	279	249
4	63	121	174	140	36	66	51
5	7	27	29	20	6	6	10
6	1	1	5	3	0	1	2
	1947	3799	4406	4672	1207	2072	1528

Demand for properties is high and Table 2 below provides a snapshot of the bidding patterns for various properties.

In February 2010 some 16,638 bids were made on 881 properties advertised through the CBL scheme. On average 19 bids were received for each property (including sheltered, properties without bids etc).

Table 25 - Bids made in February 2010 (not including sheltered)[35]

Property size	Number of properties	Total bids	Average per property
1 bed	142	4909	35
2 bed	286	6956	24
3 bed	126	3344	27
4 bed	14	768	55
Studio	13	409	31

The highest number of bids during the same period was 243 bids on a 1 bedroom house in Colchester (Colne Housing) and 239 bids on 3 bed house (with two reception rooms) with own driveway in Ipswich (Ipswich Borough Homes).

[33] Seven out of the eight districts in the GHG participate in the Choice Based Lettings Scheme
[34] Source: CBL generated data 2010 - does not include Tendring
[35] Source: CBL generated data 2010 - does not include Tendring

Housing Register - Tendring

Tendring is not part of the CBLs scheme but figures below show that demand for affordable housing is high within Tendring with a total of 3,436 applications (3,074 excluding transfers) registered at the end of March 2009. The greatest demand is for 1 bed homes which total over 55% of all applications. Examining need by household type shows that some 22% of all applications are from older people, either single people or couples.

Some 96.7% of applications are from residents of Tendring and 2.2% from the adjacent district of Colchester.

Housing need

Table 26 below shows the proportion of households in each district that have registered on CBL, indicating a housing need.

The figures should be treated with caution as the numbers of households are estimates and sub regional household projections are less robust than those at the regional level, particularly for those areas with relatively small numbers of households. Also the figures have been rounded to the nearest thousand. However, what it does give is an indication of need.

Table 26: Number and proportion of households on CBL Housing Needs Register

LA	Number of households[36]	Number on Housing Register[37]	Proportion of households on Housing Register
Babergh	39,000	1800	4.6%
Braintree	64,000	4487	7%
Colchester	81,000	5209	6.4%
Ipswich	57,000	5141	9%
Maldon	28,000	1410	5%
Mid Suffolk	42,000	2216	5.3%
Suffolk Coastal	58,000	1785	3%

Population

The estimated increase in population and household units will put additional pressure on the demand for housing. The population in the sub region in 2001 was 888,752. The mid 2009 population estimates that the population has increased to 961,400, which represents 7.5% increase in eight years.

[36] Source: Table 406 household estimates and projections, All projections are 2006-based. The 2006-based household projections are linked to the Office for National Statistics 2006-based Population Projections, and are not an assessment of housing need or do not take account of future policies. They are an indication of the likely increase in households given the continuation of recent demographic trends.
[37] Source: Number on housing register for CBL July 2010

Table 27: Mid 2009 population estimates[38]

	Mid 2009
Braintree	142.700
Colchester	177.100
Maldon	62.900
Tendring	148.000
Babergh	85.800
Ipswich	126.600
Mid Suffolk	94.200
Suffolk Coastal	124.100

National Population Projections are produced by ONS every two years for the UK using the level of births, deaths and migration. Based on observed levels, assumptions and estimates they give an indication of future trends and projections in the population.

By 2030 the projected population of the sub region is 1,228.7[39] this is a growth of 272,500 or 22% in the period from 2008 to 2030[40]. Migration data tells us that in the year ending June 2009 alone there was a net increase of 4,200 people in the sub region.[41]

Ageing population

The population of the UK is ageing. Over the last 25 years the percentage of the population aged 65 and over increased from 15 per cent in 1984 to 16 per cent in 2009, an increase of 1.7 million people. Over the same period, the percentage of the population aged under 16 decreased from 21 per cent to 19 per cent. This trend is projected to continue. By 2034, 23 per cent of the population is projected to be aged 65 and over compared to 18 per cent aged under 16[42].
Table 28 below shows that the population aged 65 years and over will double in the period 2010 to 2030 in all GHG districts.

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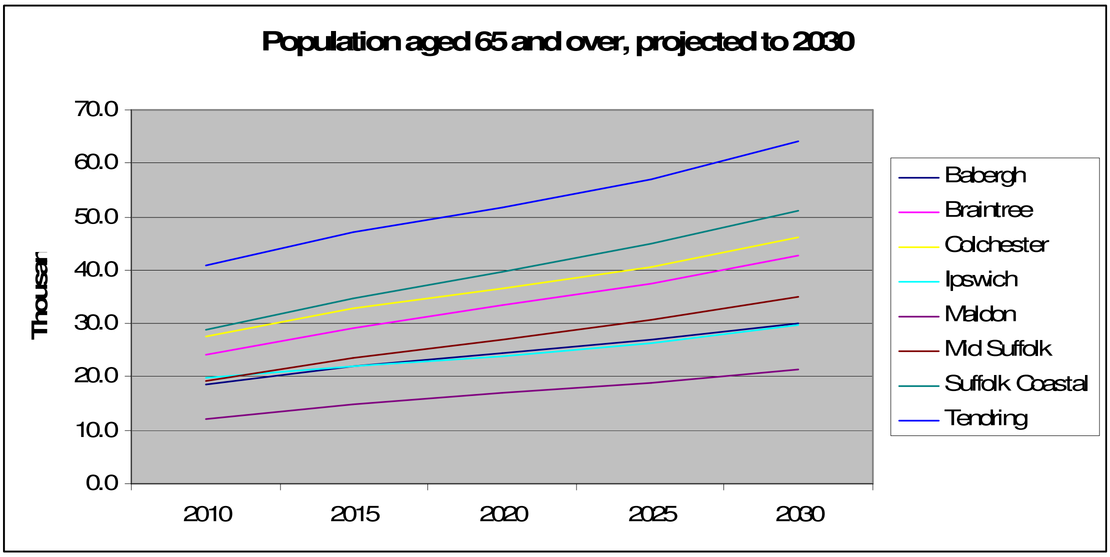
[38] Source: Table 10 Mid-2008 to Mid-2009 Population Estimates: Office for National Statistics (ONS). © Crown Copyright, 2010.
39 Source: 2008-based Subnational Population Projections, ONS © Crown Copyright, 2010.
40 Source: 2008-based Subnational Population Projections, ONS © Crown Copyright, 2010.
[41] Source: 2006-based Household Estimates and Projections. Communities and Local Government, 2009.
[42] Source: ONS- Snapshot – Ageing, http://www.statistics.gov.uk/cci/nugget.asp?id=2157

Table 28: Population aged 65 and over, projected 2010-2030[43]



We can also see from Table 29 below that people over 65 years, as a percentage of the total population, will increase significantly, particularly in the more rural LAs.

Table 29: Population aged 65 and over as a percentage of the total population, projected to 2030[44]

	2010	2015	2020	2025	2030
Babergh	22%	25%	27%	28%	30%
Braintree	17%	19%	21%	22%	24%
Colchester	15%	17%	17%	18%	19%
Ipswich	15%	16%	16%	17%	18%
Maldon	19%	22%	24%	26%	28%
Mid Suffolk	20%	23%	25%	27%	29%
Suffolk Coastal	23%	26%	27%	29%	32%
Tendring	27%	30%	31%	32%	34%

Further analysis shows the projected growth, in all GHG districts, in the number of people aged 65 - 74 who are *living alone*, in the period 2010-2030.

[43] Source: ONS population projections based on 2008 mid year population estimates taken from POPPI - www.poppi.org.uk
[44] Source: ONS population projections based on 2008 mid year population estimates taken from POPPI - www.poppi.org.uk

Table 30: Total number of people aged 65 to 74 years predicted to live alone from 2010 to 2030 and % increase from 2010-30[45]

	2010	2015	2020	2025	2030	%>2010-30
Babergh	2,460	3,070	3,150	3,020	3,340	**26**
Braintree	3,240	4,080	4,390	4,310	4,910	**34**
Colchester	3,680	4,550	4,810	4,730	5,360	**31**
Ipswich	2,410	2,810	3,090	3,160	3,590	**33**
Maldon	1,760	2,190	2,250	2,190	2,460	**28**
Mid Suffolk	2,600	3,260	3,600	3,620	4,130	**37**
Suffolk Coastal	3,720	4,680	5,060	5,110	5,840	**36**
Tendring	5,190	6,140	6,410	6,330	7,180	**28**
TOTAL	**25,060**	**30,780**	**32,760**	**32,470**	**36,810**	

More significant, perhaps for the provision of housing and housing related services, is the projected number of people aged 74 and over who are *living alone*, in the same period. It is projected that all districts, apart from Ipswich, can expect to see between 43%-54% increase in the next two decades in the number of people aged 75 years and over living alone.

Table 31: Total number of people aged 74 years and over predicted to live alone from 2010 to 2030 and % increase from 2010-30[46]

	2010	2015	2020	2025	2030	%> 2010-30
Babergh	4,457	4,871	5,950	7,334	8,277	**46**
Braintree	5,617	6,411	7,836	9,885	11,398	**51**
Colchester	6,519	7,354	8,711	10,950	12,266	**47**
Ipswich	5,054	5,190	5,706	6,717	7,538	**33**
Maldon	2,605	3,175	3,969	5,068	5,692	**54**
Mid Suffolk	4,308	5,102	6,181	7,884	9,085	**53**
Suffolk Coastal	7,042	8,087	9,485	11,948	13,556	**48**
Tendring	9,925	11,235	12,789	15,571	17,342	**43**
TOTAL	**45,527**	**51,425**	**60,627**	**75,357**	**85,154**	

Part of the work of the new strategy will be improving the information we have on the ageing population, for example, those with limiting long term illness, reliance on state pension only, people unable to manage domestic tasks, access to transport to inform future policy and provision.

45 Source: Figures are taken from the General Household Survey 2007 table 3.4 Percentage of men and women living alone by age, ONS.Taken from POPPI - www.poppi.org.uk
[46] Ibid

Ethnicity

The GHG is becoming an increasingly diverse sub region following significant in-migration. The percentage of BME households has increased and diversity within this group has become greater. Table 1 (page 2) compares the percentage of all ethnic minority groups recorded in the 2001 Census with figures from the mid-2007 experimental estimates. The percentages give a headline indication of trends but we will have to wait until the results from the 2011 Census for more detailed information.

Gypsies and Travellers

Gypsy and Traveller Accommodation Assessments (G&TAA) have been carried out on a County wide basis and the information in Table 32 and 33 below gives the additional residential requirements for Essex and Suffolk. There are two tables because the G&TAAs have been carried out over different time periods.

Table: 32 Additional residential pitch requirements for Essex LAs in GHG, 2008-2021[47]

Area	Total 2008	Req'mt 2008-13	Total at 2013	Req'mt 2013-21	Total at 2021	Total Req'mt at 2008-21
Braintree	27	8*	59*	7	66	15
Colchester	7	-6✷	14*	2	16	-4✷
Maldon	52	9	69*	6	76	15
Tendring	3	8	11	2	14	10

* When vacant plots and planned new pitches included.
✷ Negative figure indicates estimated need will be met if pitches are built.

Table 33: Additional pitch requirements for Suffolk LAs in GHG, 2007-2016

Area	**Total pitches 2007**	**Additional pitches required by 2011**	**Additional pitches required 2011-16**
Babergh	0	1 residential + 10 transit	0
Ipswich	43	=1-3 residential plus 10 transit	11
Mid Suffolk	69 (but some of these were already out of action - 19 I think - check Julie)	41-43 residential plus 10 transit	14-15
Suffolk Coastal	0	30-32 residential +10 transit	5

47 Source: Additional residential pitch requirements for Essex study area, 2008-2021, Essex GTAA 2008 - Fordham Research

Equalities Framework

We will be seeking to improve the baseline information of all seven strands within the Equalities Framework, building on estimates from Stonewall for sexuality, aggregating new census data on religion, ethnicity and age and establishing and agreeing a working definition of disability.

Strategic Objective 4

Provide enhanced housing options based on an understanding of the links between health, well being, training, employment and housing to help prevent homelessness and support vulnerable people.

Homelessness

The rate of homelessness acceptances show the number of people that the local authorities have accepted a duty to help, that means they are homeless, in priority need, and not intentionally homeless.

Table 34 below shows a trend across all the districts in the sub region. It illustrates that the number of homelessness acceptances have largely been reducing over the past two years. Colchester remains the district with the highest level of homelessness acceptances at 209 in 2009-10.

Table 34: Number of homelessness acceptances in 2008-09 and 2009-10[48]

	2008-09	2009-10
Babergh	38	37
Braintree	195	103
Colchester	285	209
Ipswich	147	99
Maldon	40	37
Mid Suffolk	39	Not available
Suffolk Coastal	16	11
Tendring	117	69

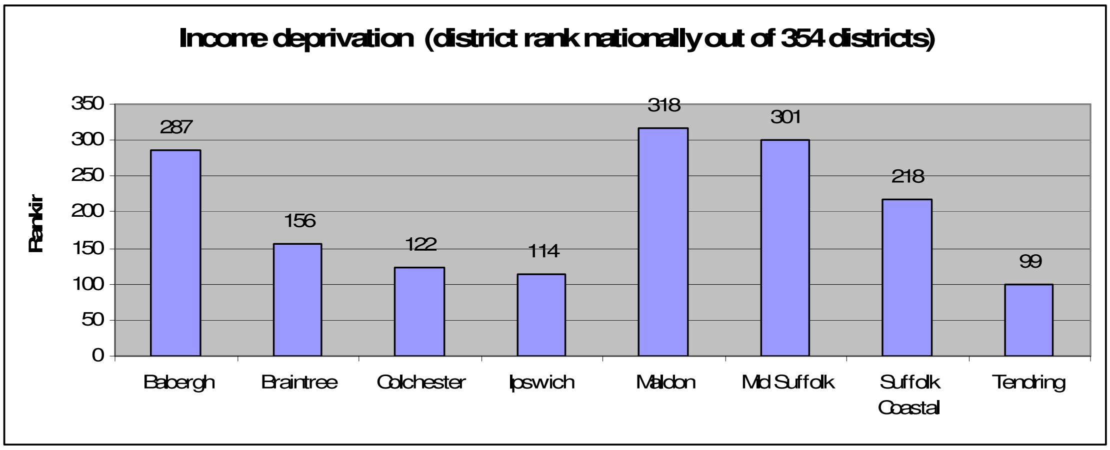
There is a clear downward trend in the number of homeless households living in temporary accommodation which corresponds to the reduction in the number of homelessness acceptances.

Income

Income deprivation is ranked by district nationally from 1 to 354 with 1 being the highest ranking i.e. 1 has the highest level of deprivation. As can be seen in Table 35 below the districts in the GHG have widely differential rankings. Tendring is ranked 99, amongst the top 100 districts with the highest income deprivation, whereas both Maldon and Mid Suffolk are amongst the least deprived ranked 318 and 301 respectively.
High income deprivation scores are indicative of housing need as poverty and high housing need are often linked.

[48] Source: Provided by GHG LAs

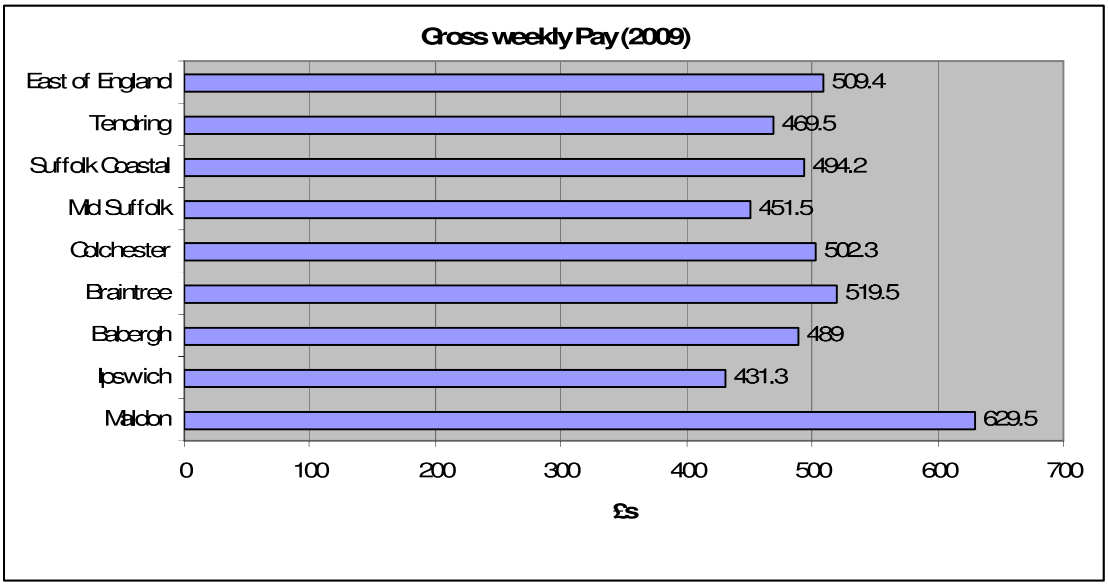
Table 35: Income deprivation[49]



Gross weekly pay of all workers
It should be noted that this data shows income levels of residents and not local wage levels which is different. Access to London and outer London wages and opportunities in districts such as Maldon and Braintree increase gross weekly pay affecting house prices - putting them well beyond local 'wages' as opposed to 'income' levels.

Table 36 shows the gross weekly pay of the districts across the sub region compared to the East of England. There are noticeable differences between the districts in the level of income. Gross weekly pay in Ipswich is 15% lower than the East of England average and 31% lower than Maldon.

Table 36: Gross weekly Pay[50] -



[49] Source: 2007 Index of Multiple Deprivation
50 Source: ONS annual survey of hours and earnings - resident analysis Median earnings in pounds for employees living in the area

Employment

Employment deprivation again is ranked by district nationally from 1 to 354 with 1 being the highest ranking i.e. 1 has the highest level of deprivation. As can be seen in Table 37 below the districts in the GHG have widely differential rankings. Tendring is ranked 104, amongst the top third of districts with the highest employment deprivation, whereas Maldon, Mid Suffolk and Babergh are amongst the least deprived ranked 322, 308 and 305 respectively.
High employment deprivation scores are indicative of housing need as employment deprivation, poverty and high housing need are often linked.

Table 37: Employment deprivation[51]

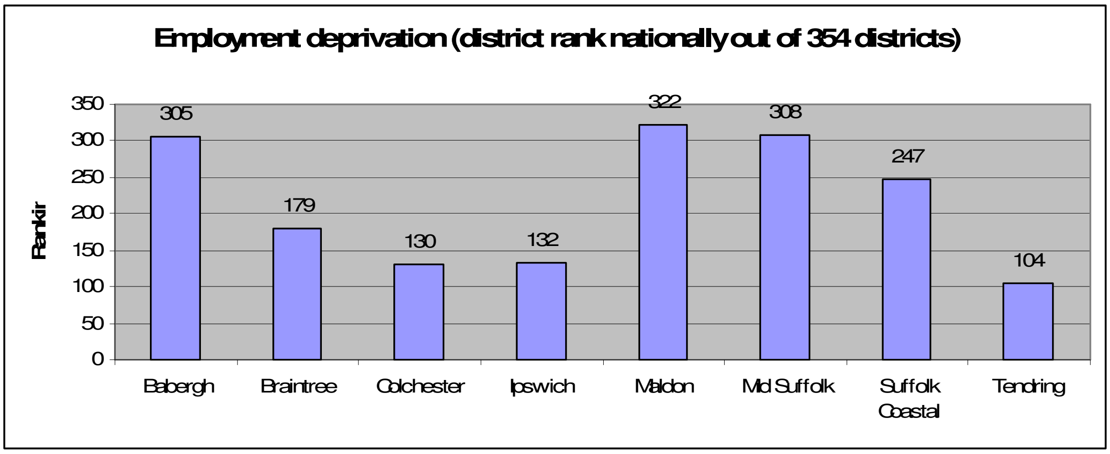


Table 38 below shows that from Quarter 1 in 2008 until Quarter 2 in 2009 unemployment rates in all of the districts increased and in many districts they doubled during this period. Since Q3 in 2009 there has been a general trend of lowering unemployment rates, with Suffolk Coastal and Mid Suffolk both having a rate of 2%. The highest rates of unemployment are Tendring and Ipswich with rates of 4.5% and 4.8% respectively, compared to the East of England rate of 3.4% at Q2, 2010.

[51] Source: 2007 Index of Multiple Deprivation

Table 38: Unemployment rates Q1, 2008 to Q2 2010[52]

	Babergh	Braintree	Suffolk Coastal	Colchester	Maldon	Tendring	Ipswich	Mid Suffolk
Q1 2008	1.1%	1.5%	1.0%	1.5%	1.2%	2.9%	2.8%	1.0%
Q2 2008	1.2%	1.4%	1.0%	1.6%	1.2%	2.6%	3.0%	1.0%
Q3 2008	1.2%	1.5%	1.1%	1.6%	1.2%	2.5%	3.1%	1.1%
Q4 2008	1.5%	1.8%	1.3%	1.9%	1.5%	2.9%	3.4%	1.2%
Q1 2009	2.3%	2.8%	1.8%	2.6%	2.3%	4.1%	4.4%	1.9%
Q2 2009	3.0%	3.6%	2.2%	3.2%	3.2%	4.8%	5.2%	2.3%
Q3 2009	2.8%	3.5%	2.1%	3.0%	2.9%	4.5%	4.9%	2.1%
Q4 2009	2.7%	3.5%	2.1%	2.9%	3.0%	4.4%	5.0%	2.2%
Q1 2010	2.7%	3.6%	2.2%	3.0%	3.0%	5.0%	5.2%	2.2%
Q2 2010	2.4%	3.3%	2.0%	2.7%	2.7%	4.5%	4.8%	2.0%

NEET information relates to young people aged 16-18 years that are not in education, employment or training. Although the NEET information in Table 39 below does not give data on a sub regional basis it gives an indication of trends in Suffolk and Essex compared to the East of England. As we can see both Essex and Suffolk have a greater proportion of 16-18 year old NEETs than the average for the East of England. Figures for 2008-09 show a slight reduction in the percentage of NEETs in Suffolk but both Essex and Suffolk still have a greater proportion than the average for the East of England.

Table 39: Proportion of 16-18 year olds NEET: 2007-2009[53]

Proportion of 16 -18 year olds NEET: 2007 -2009					
	2007	2008	2009		
EAST OF ENGLAND	**5.8%**	**6.2%**	**5.9%**		
Essex	5.6%	6.7%	6.9%		
Suffolk	7.2%	7.9%	7.4%		

[52] Source: Hometrack Housing Intelligence August 2010
[53] Source: Department for Schools, Children and Families, www.dcsf.gov.uk/14-19/index.cfm?go=site.home&sid=42&pid=343&lid=337&ctype=text&ptype=single

Table 40 below shows that both Tendring and Ipswich have the highest percentage of the working age population that are claiming key benefits, 18.7% and 17.4% respectively, significantly higher than the East of England average of 12.6%. All other districts in the sub region have a lower percentage than the East of England.

Table 40: Percentage of the working age population that are claiming key benefits[54]

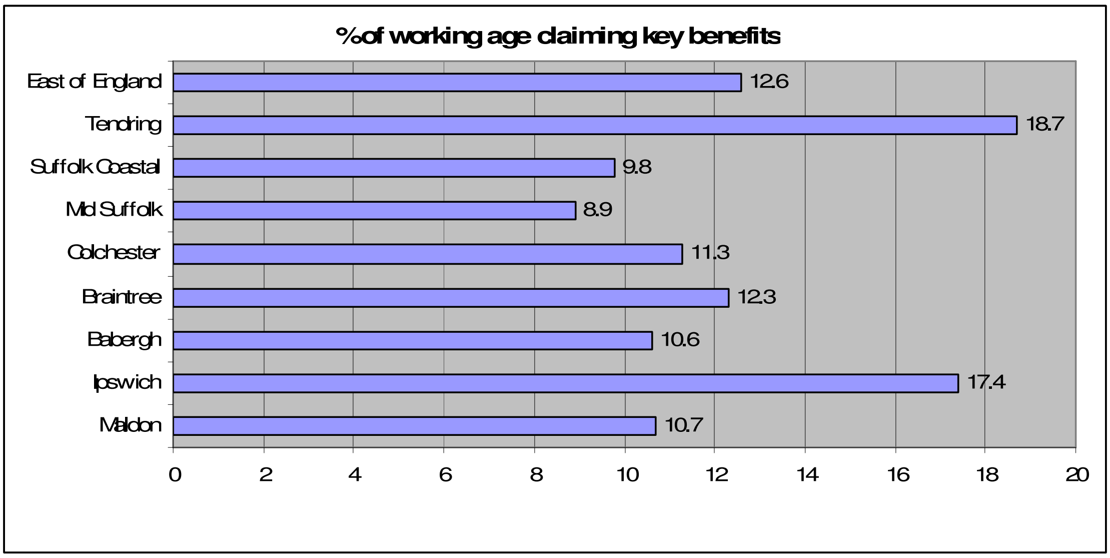


Table 41 below shows the percentage of JSA claimants in each district in January 2010. Mid Suffolk has the highest percentage of JSA claimants at 15.5% followed closely by Ipswich with 15.2%. Apart from Suffolk Coastal and Maldon all other districts in the sub region have a higher percentage of JSA claimants than the East of England with 13.5%.

Table 41: Percentage of JSA claimants who have been out of work for more than 12 months (Jan 2010)[55]

Maldon	11.7
Ipswich	15.2
Babergh	14.4
Braintree	14.2
Colchester	13.5
Mid Suffolk	15.3
Suffolk Coastal	10.5
Tendring	14
East of England	13.5

[54] Source: DWP benefit claimants - working age client group Key out-of-work benefits consists of the groups: job seekers, incapacity benefits, lone parents and others on income related benefits % is a proportion of resident working age population of area
[55] Source: ONS claimant count - age and duration Note: % is a proportion of all JSA claimants