Sevenoaks 2016 Housing Study: Final report key findings

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Scope of key findings presentation

1. Brief background
2. Households, dwellings and population
3. Affordable housing need
4. Market demand
5. Private rented sector
6. Older people and support in the home
7. Armed forces
8. Summary of key issues and points for discussion

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1.1 Strategic Context for the work

- National Planning Policy Framework
  - Increasing the supply of housing
- Housing Study to underpin your evidence base to inform planning policy and housing strategy

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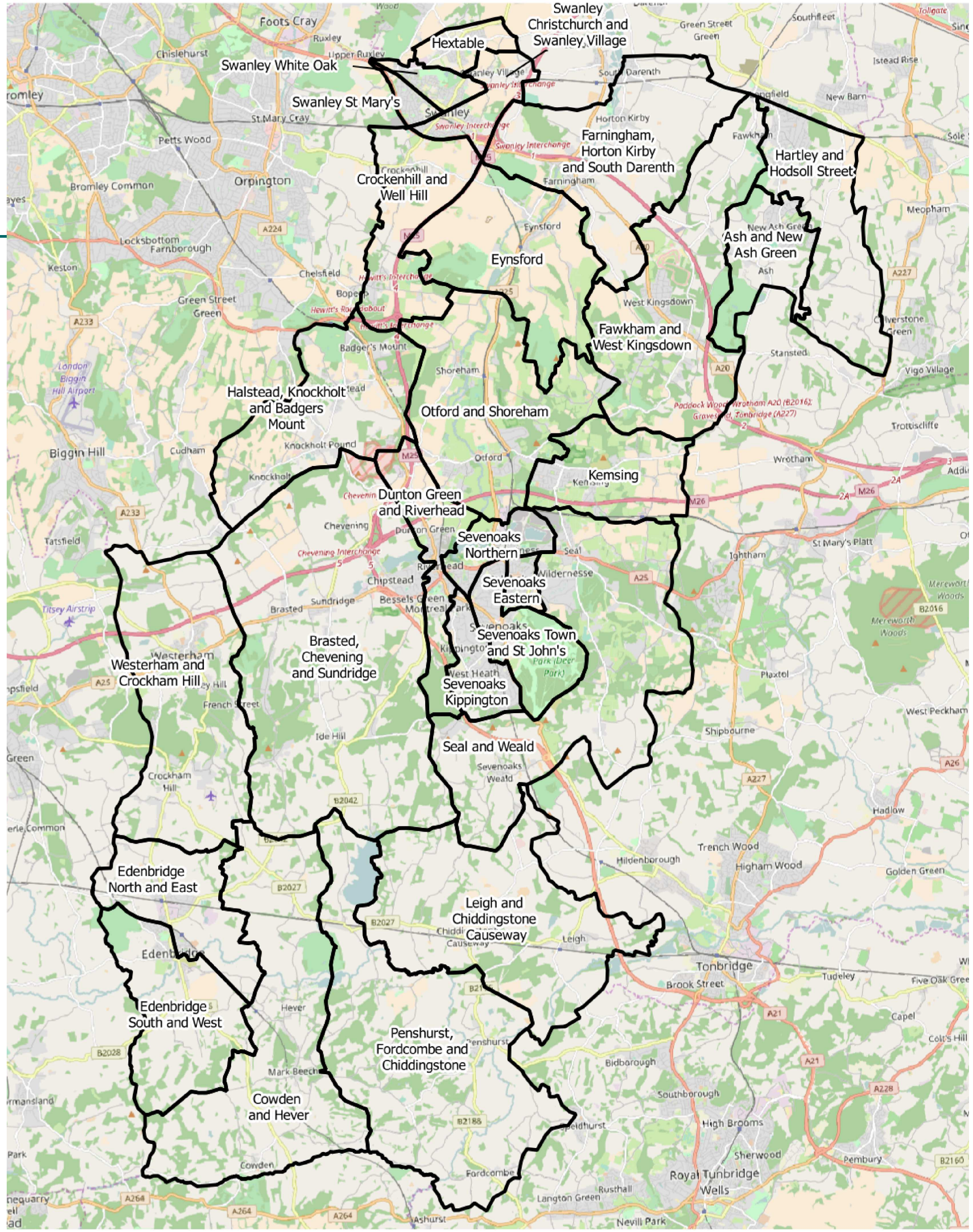
1.2 Methodology

- Review of the latest secondary data
  - house prices, private rented sector information, 2011 census)

- Major household survey
  - 100% census of households
  - Return by post or online
  - 8,858 responses (17.6% response rate overall)

- Stakeholder consultation
  - Estate agents, RPs, Adult Social Care, Neighbouring authorities

1.3 Geography



2.1 Households and dwellings

Households: 48,795 (2016 Council Tax)

Dwellings: 49,667 (2016 Council Tax)

872 vacant (1.9% of dwelling stock and below 'transactional vacancy' level of around 3% - that is the proportion of stock which would normally be expected to be vacant to allow movement within the market)

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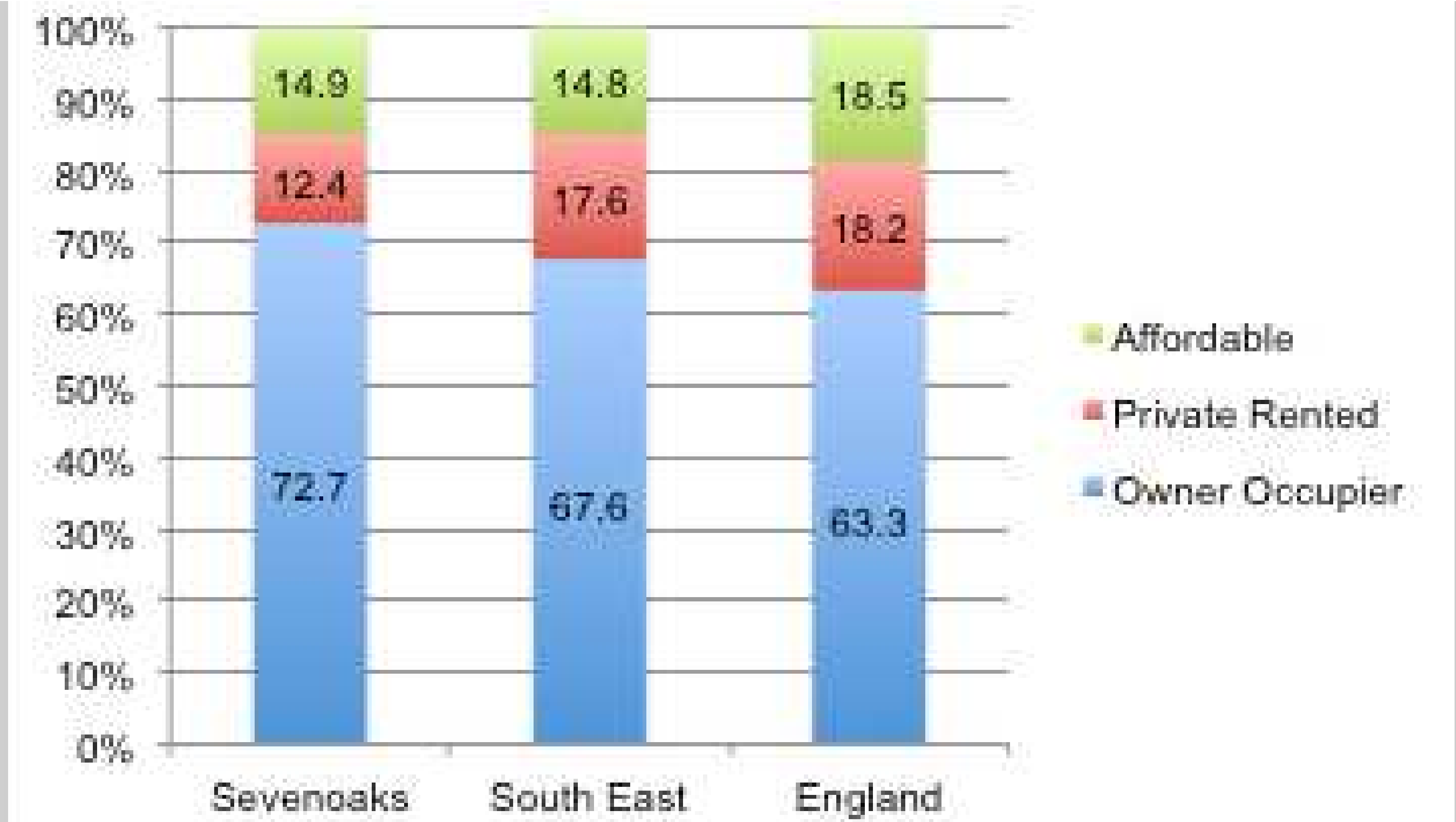
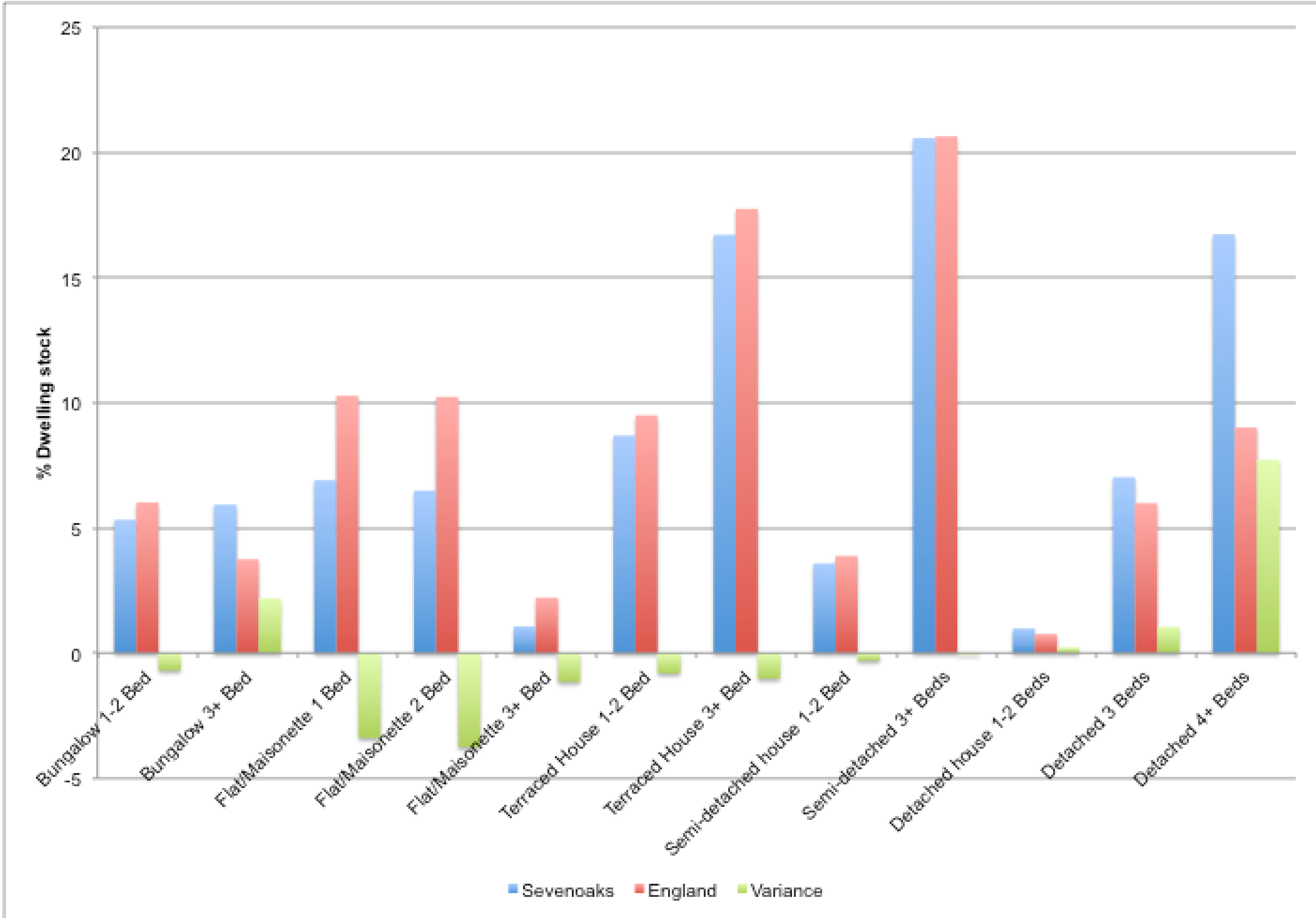
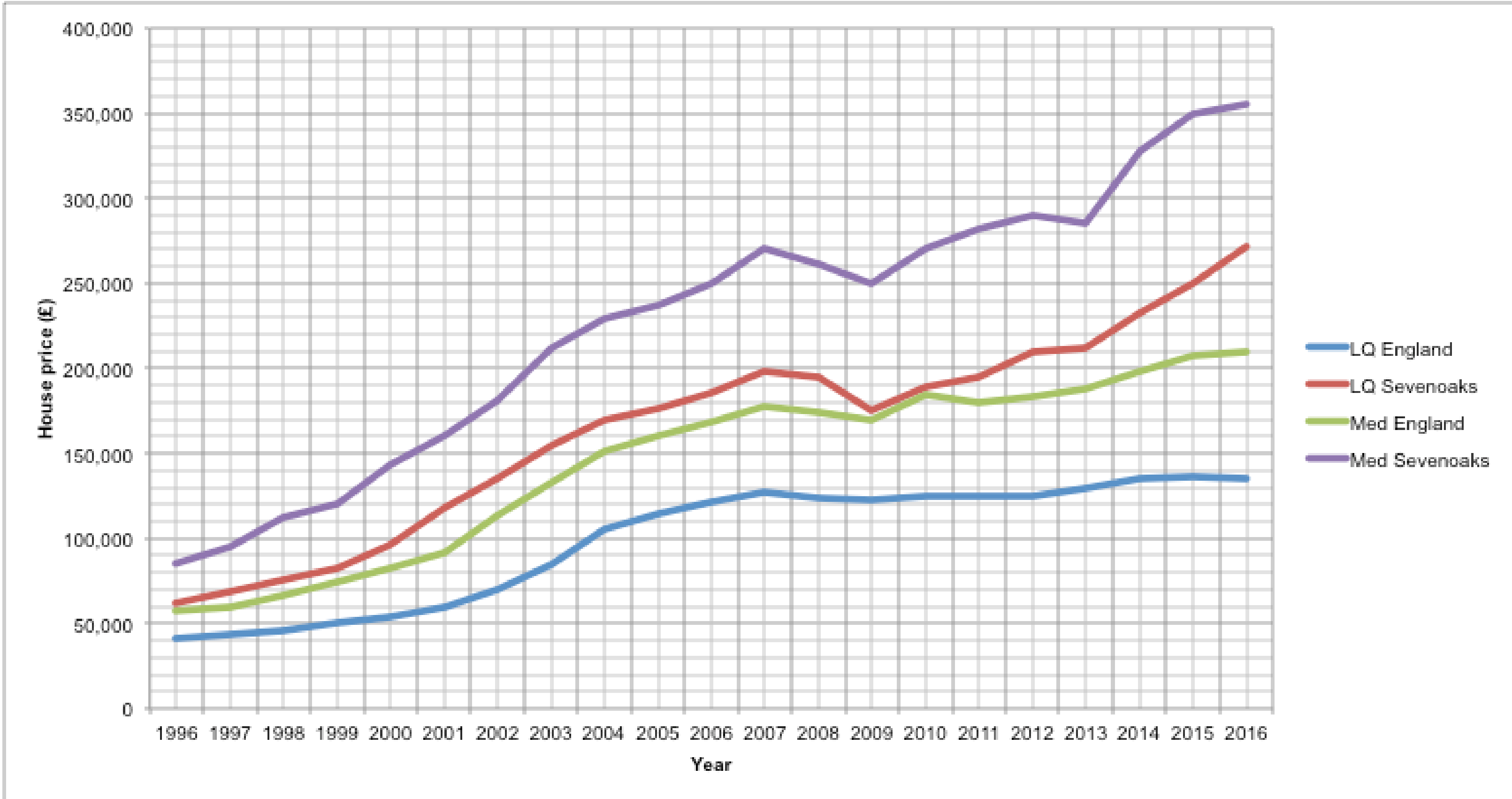
2.2 Tenure profile



2.3 Dwelling stock profile



2.4 House price trends 1996-2016



Source: DCLG; Land Registry

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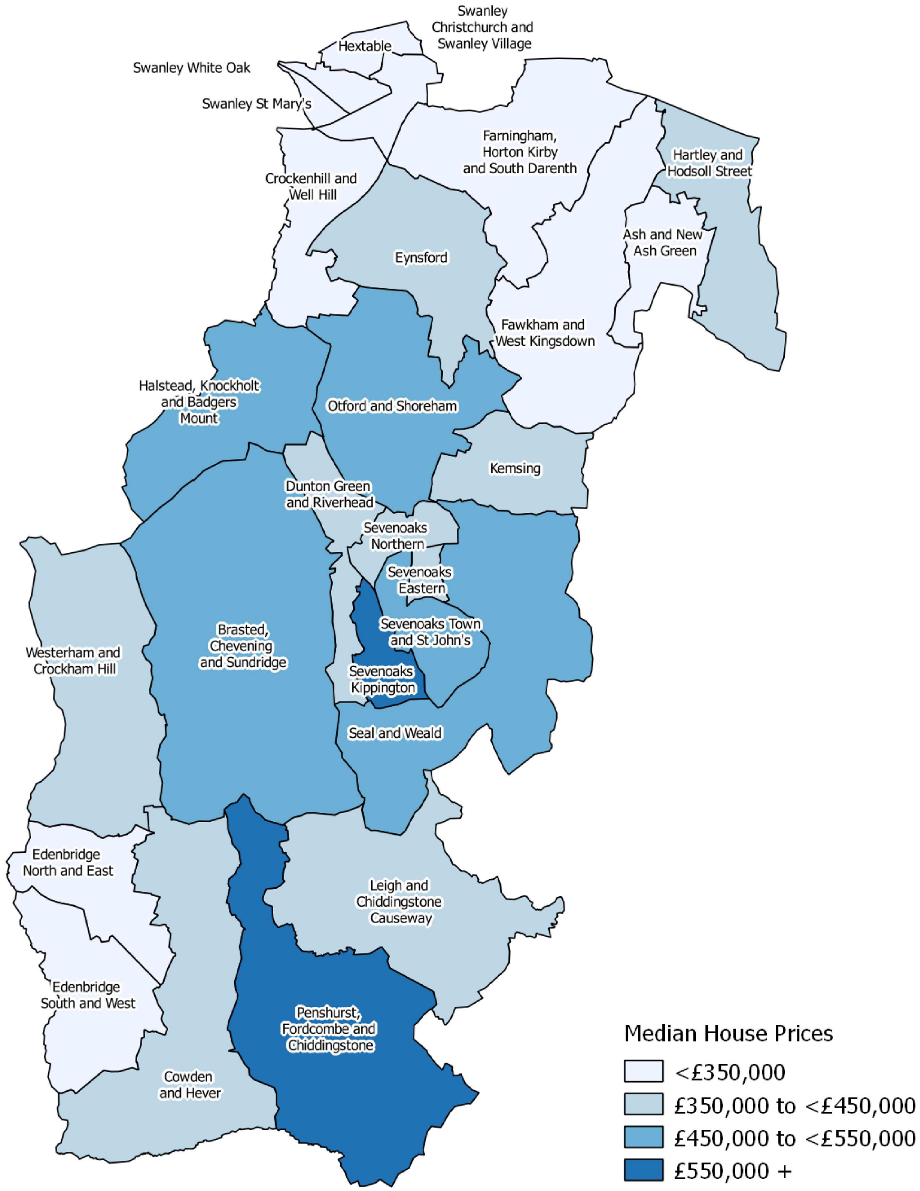
2.5 House Price Distribution

(Median Price 2015)



2.6 House price relative affordability

	House Price (£)		Income to be affordable*	
	2000	2016	2000	2016
Lower Quartile	£96,500	£272,000	£24,125	£68,000
Median	£143,250	£355,000	£35,813	£88,750

* based on 3.5x household income and 10% deposit

	Household survey household income 2016	Earnings 2015
Lower Quartile	£19,500	£20,979
Median	£32,500	£30,731

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2.7 Population

- Population expected to grow by 19% to 2039; increase across all age groups but most notable increase in 65+ age group

Age group	Year and population			
	2016	2028	2039	% change 2016-39
0-14	22,200	24,900	25,600	15.3
15-39	31,300	32,800	34,300	9.6
40-64	41,000	43,600	45,500	11.0
65+	25,100	31,000	37,100	47.8
Total	119,600	132,300	142,500	19.1

% aged 65+	21.0	23.4	26.0
% aged 75+	9.5	12.5	14.4

Source: ONS 2014-based population projections

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3.1 Affordable housing requirements:
Annual imbalance 2016/17 to 2020/21

- Gross requirement **782**
  - shows the total number of households in need of affordable housing BEFORE likely availability of affordable stock is considered
- Annual affordable supply **179**
  - Supply of affordable rented and intermediate tenure to new households moving into affordable housing
- Net annual imbalance **604**

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3.2 Affordable need by Placemaking area

Area	General Needs		Older Person		Total	% by area
	1/2 Bed	3+ Bed	1 Bed	2+ Bed		
Darent Valley	40	0	3	0	43	**7.1**
North East	121	10	22	5	158	**26.2**
North West	80	10	9	0	98	**16.2**
Sevenoaks and surrounds	129	13	23	1	166	**27.5**
South	65	2	12	0	78	**12.9**
Upper Darent Corridor	28	26	3	3	60	**9.9**
Total	**463**	**62**	**71**	**8**	**604**	**100.0**
% by size/designation	**76.7**	**10.3**	**11.8**	**1.3**	**100.0**	

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3.3 Tenure split

Tenure	Area (%)						
	Darent Valley	North East	North West	Sevenoaks and Surrounds	South	Upper Darent Corridor	Total
Affordable (Social) Rent	38.6	37.0	48.1	37.0	42.2	36.0	40.0
Intermediate Tenure	61.4	63.0	51.9	63.0	57.8	64.0	60.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

3.4 Starter Homes

- 3,324 eligible households
- No. bedrooms
  - 35.5% 1Bed, 47.9% 2Bed, 4.6% 3Bed and 11.7% 4+ Bed
- 19.6% could afford £200k and 13.3% could afford £250k

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4.1 Housing Market Demand

- Analysis considers:
  - Current profile of market dwellings (owner occupied and private rented)
  - The housing aspirations and expectations of households planning to move in the open market
  - Identify mismatches between what is available and household aspirations/expectations

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4.2 Market demand: Household aspirations and expectations relative to supply

Type/size	Current	Like	Expect
Detached house 1-2 Beds	1.2	5.5	2.2
Detached house 3 Beds	7.0	**21.5**	12.0
Detached house 4 or more beds	27.2	**31.7**	18.5
Semi-detached house 1-2 beds	3.8	3.0	8.5
Semi-detached house 3 beds	16.4	7.9	17.4
Semi-detached house 4 or more beds	7.0	3.1	5.0
Terraced house 1-2 Beds	6.9	3.5	7.0
Terraced house 3 Beds	9.6	2.0	4.2
Terraced house 4+ beds	1.8	0.2	0.7
Bungalow 1-2 Beds	3.2	5.0	5.0
Bungalow 3 beds	3.6	6.3	4.2
Bungalow 4+ beds	1.3	0.5	0.5
Flat/Apartment 1 Bed	3.3	1.1	3.7
Flat/Apartment 2 Beds	5.1	3.3	6.1
Flat/Apartment 3+ Beds	0.8	1.3	1.5
Other 1 Bed	1.6	0.5	0.9
Other 2 Beds	0.2	1.8	2.0
Other 3+ Beds	0.1	2.0	0.7
Total	100.0	100.0	100.0
Base	40960	8692	7966

Source: 2016 Household Survey

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4.3 Market demand analysis

- Strongest aspirations for detached houses – with particular imbalance of 3 bed detached houses
- Households expect to move to 3 bed semi-detached houses
- Higher likes/expectations for bunglows relative to supply
- Flats: lower aspiration relative to supply

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4.4 Market demand (current stock compared with expectations)

Dwelling type	Darent Valley	North East	North West	Sevenoaks and Surrounds	South	Upper Darent Corridor	Total
Detached house 1-2 Beds	-1.5	-2.1	-0.3	-1.5	2.1	-2.5	-1.0
Detached house 3 Beds	-7.7	-4.7	-4.4	-6.0	-1.6	-6.3	-5.0
Detached house 4 or more beds	2.1	13.0	2.1	13.4	9.9	13.0	8.7
Semi-detached house 1-2 beds	-3.5	-1.5	-2.6	-5.6	-7.2	-6.8	-4.7
Semi-detached house 3 beds	10.0	-10.2	9.0	-5.0	-8.6	2.3	-1.1
Semi-detached house 4 or more beds	5.7	0.6	0.8	2.3	0.9	3.6	1.9
Terraced house 1-2 Beds	-0.5	-0.4	1.1	-0.1	-0.4	0.8	-0.1
Terraced house 3 Beds	4.3	4.9	8.3	3.8	4.5	4.6	5.4
Terraced house 4+ beds	0.2	3.0	1.0	0.7	2.2	-0.6	1.1
Bungalow 1-2 Beds	-2.0	-5.3	-4.3	-0.4	-0.1	-2.1	-1.7
Bungalow 3 beds	-1.9	0.0	-2.3	-1.0	-0.3	-0.8	-0.6
Bungalow 4+ beds	0.5	1.8	0.8	0.1	0.5	0.6	0.7
Flat/Apartment 1 Bed	-0.7	0.9	-3.7	1.1	2.1	-1.4	-0.4
Flat/Apartment 2 Beds	-1.8	-1.8	-1.2	0.5	-0.2	0.6	-0.9
Flat/Apartment 3+ Beds	0.4	0.0	0.7	-1.1	-0.6	-3.1	-0.7
Other 1 Bed	1.3	4.6	0.1	0.6	0.5	0.2	1.4
Other 2 Beds	0.3	0.2	-1.9	-0.1	0.3	0.3	-0.3
Other 3+ Beds	0.0	0.0	0.1	0.0	0.1	0.3	0.1

(green)	Sufficient stock relative to expectation
(red)	Not enough stock relative to expectation

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5.1 Private rented sector residents

- Around 6,046 households rent privately (12.6%)
- Generally higher income residents
  - 19.2% household incomes less than £300 each week
  - 21.6% between £300 and £500 each week
  - 33.5% £500 and £950 or more each week
  - 25.6% £950 or more
- 76.4% Heads of household employed, 11.3% retired, 2.4% unemployed, 10.1%; 9.9% other

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5.2 Private rented sector residents

- Moves in the PRS
  - 17.9% to be closer to work
  - 14.7% forced to move
  - 13.1% to move to larger/better
- Household type
  - 30% couples with children; 22.5% couples; 17.6% singles under 65; 14.1% older singles/couples;11.2% lone parents; 4.6% other

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6.1 Older persons' preferences

Housing option	Age group of HRP and % would consider		
	60-74	75+	Total
Continue to live in current home with support when needed	70.5	83.7	**75.6**
Buying a property on the open market	27.1	10.5	**20.7**
Rent a property from a private landlord	2.7	1.3	2.2
Rent from HA	8.8	6.4	7.9
Sheltered accommodation - To Rent	14.1	13.1	**13.7**
Sheltered accommodation - To Buy	17.5	17.3	**17.4**
Sheltered accommodation - Part Rent/Buy	4.2	3.4	3.9
Extra care housing - To Rent	7.4	11.3	8.9
Extra care housing - To Buy	10.9	13.9	**12.1**
Extra care housing - Part Rent/Buy	2.5	3.5	2.9
Residential care home	3.7	10.8	6.4
Co-housing	8.2	8.3	**8.3**
Go to live with children or other relatives / friends	3.4	4.1	3.7
Other	2.4	2.0	2.2
Base (households)	7616	4737	12353

Source: 2016 Household Survey

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6.2 Older persons' preferences

- Vast majority want to remain in their own home with help/support when required
- Interest in buying on open market
- Interest in sheltered/extra care housing Higher levels of interest in residential care amongst oldest age groups
- Help with moving and information on what is available would help/tempt older people to move

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6.3 What would help/temp older people to move home?

Assistance with moving	Age group of HRP and % would		
	60-74	75+	Total
Storage of furniture / possessions	18.3	14.0	16.7
Sorting out possessions / decluttering	25.4	29.1	26.7
Help with estate agents / lettings agents / solicitors	25.1	24.4	24.9
Help with moving to a new property	53.7	54.8	54.1
Information about what types of housing are available	66.1	63.7	65.2
Emotional support	11.4	12.2	11.7
Base (households responding)	2761	1504	4265

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6.4 Older people moving

- 1,485 older person households planning to move in the next 5 years (10.1%)

No. bedrooms	%
One	12.5
Two	36.3
Three	38.1
Four	10.9
Five or more	2.2
Total	100.0
Base	1368

Dwelling type	Like (%)	Expect (%)
House	37.5	42.0
Flat	17.8	16.9
Bungalow	33.7	26.6
Older person/supported	8.4	12.8
Other	2.6	1.7
Total	100.0	100.0
Base	1399	1192

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6.5 Amount of 'downsizing'

	Total	%
Upsizing	121	8.8
Downsizing	874	63.9
Stay Same	373	27.3
Base	1368	

6.6 Tenure preferences

- Owner occupied 81.8%
  (Outright ownership 78.2%)
- Affordable 12.5%
- Private rent 5.7%

6.7 What could be afforded

Price	% could afford
£200,000	52.9
£300,000	46.8
£400,000	38.8
£500,000	33.3

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6.8 Assistance and support in the home

Type of assistance	Age group and % households requiring assistance			
	<59	60-74	75+	Total
Help with repair and maintenance	17.0	28.0	44.6	24.2
Help with gardening	5.0	8.7	25.8	9.0
Help with cleaning	9.2	17.1	47.2	16.9
Helo with other practical tasks	5.7	10.4	35.7	11.3
Help with personal care	5.5	6.7	20.4	8.0
Want company/friendship	5.5	6.7	12.6	6.9
Base (all households)	25651	13697	6403	45751

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6.9 Aids and adaptations required now or in next 5 years

Type of assistance	Age group and % households requiring assistance			
	<59	60-74	75+	Total
Better Heating	14.8	8.6	7.9	12.0
More Insulation	16.3	8.5	5.8	12.5
Double Glazing	13.4	5.7	5.7	10.0
Adapt to Kitchens	6.3	2.8	4.5	5.0
Adapt to Bathroom	5.6	8.8	16.4	8.0
External Handrails	3.7	6.8	15.5	6.3
Downstairs WC	4.0	3.7	5.6	4.2
Stair Lift	2.7	4.7	12.2	4.6
To Access	3.4	2.9	5.3	3.5
Wheelchair	2.7	2.5	5.9	3.1
Lever Door	1.7	1.4	1.8	1.6
Carer	2.2	1.5	3.3	2.1
Community Alarm	2.0	3.9	10.2	3.7
Security Alarm	6.1	4.1	7.1	5.6
Property Size	10.4	2.5	1.7	6.8
Sound Proofing	4.7	3.1	1.9	3.8
Ventilation	5.9	1.9	1.6	4.1
Base (all households)	25651	13697	6403	45751

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7.1 Armed forces housing issues

- Survey identified 252 households with armed forces connections
  - 46.4% were owner occupiers, 34.3% private renter and 19.4% lived in affordable housing
  - None specified the need for adapted accommodation nor temporary supported accommodation

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8.1 Summary of key issues and points for discussion (1)

- Demographic change
  - Addressing housing requirement and support needs of older people
  - Enabling older people to move – market information and support
- Meeting market aspirations
  - Detached houses, bungalows, market options for older people
- Affordable need
  - imbalance of c604 each year

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8.2 Summary of key issues and points for discussion (2)

- Self-build, micro-homes
  - Limited interest at present – marketing?
- Role of private rented sector
  - Use skewed towards higher income groups
  - Diversify the tenure to support lower income groups in need of affordable housing

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