



# Housing Strategy Evidence Base

June 2014

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# Population



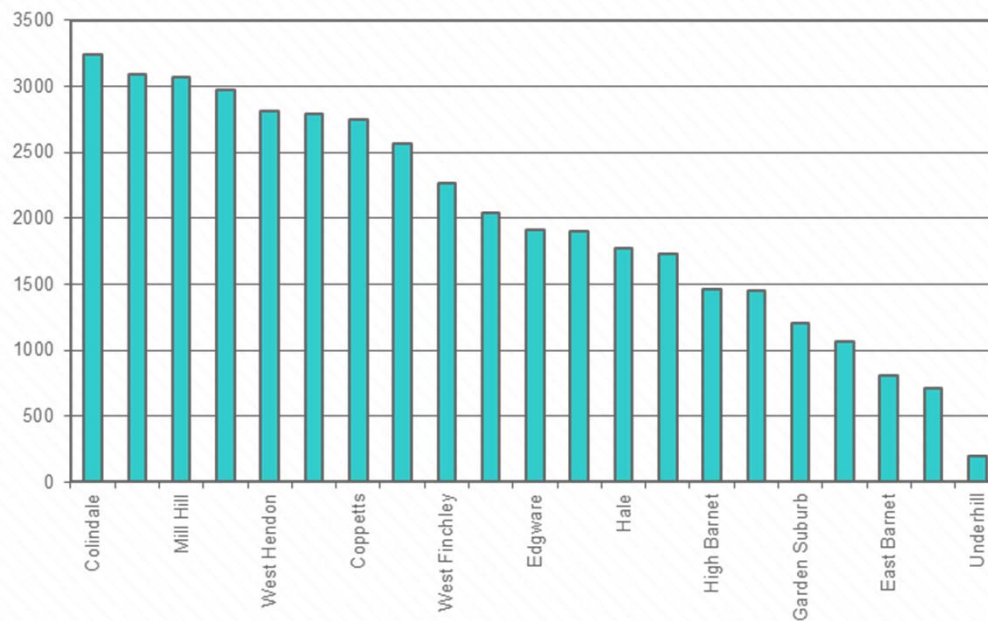


# High rate of population growth between 2001 and 2011 - Growth highest in West of Borough

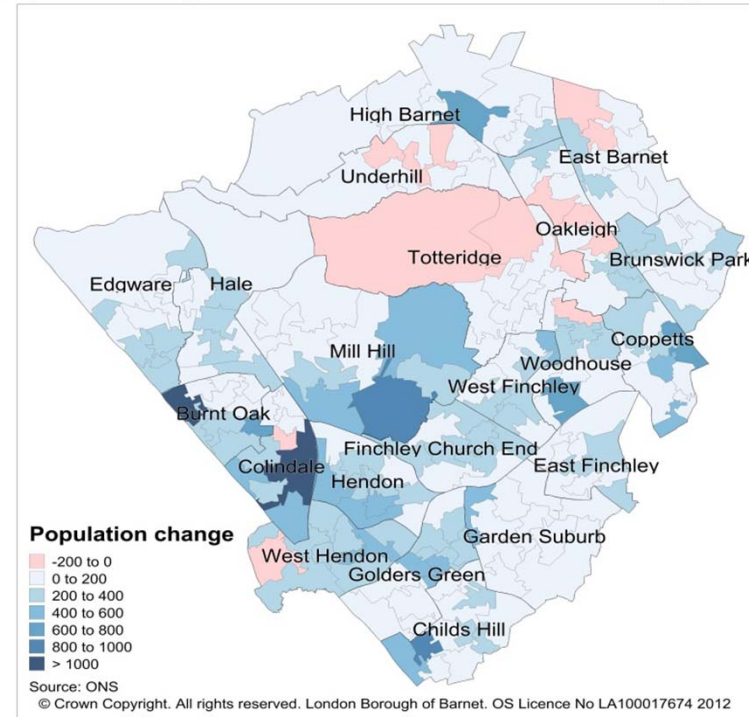
Top 5 wards by population 2001	
Childs Hill	17,261
Golders Green	16,248
Underhill	15,721
Hale	15,663
Woodhouse	15,533

Top 5 wards by population 2011	
Childs Hill	20,049
Golders Green	18,818
Hendon	18,472
Mill Hill	18,451
Burnt Oak	18,257

Change from 2001 to 2011



Population change between the 2001 and 2011 censuses, by LSOA

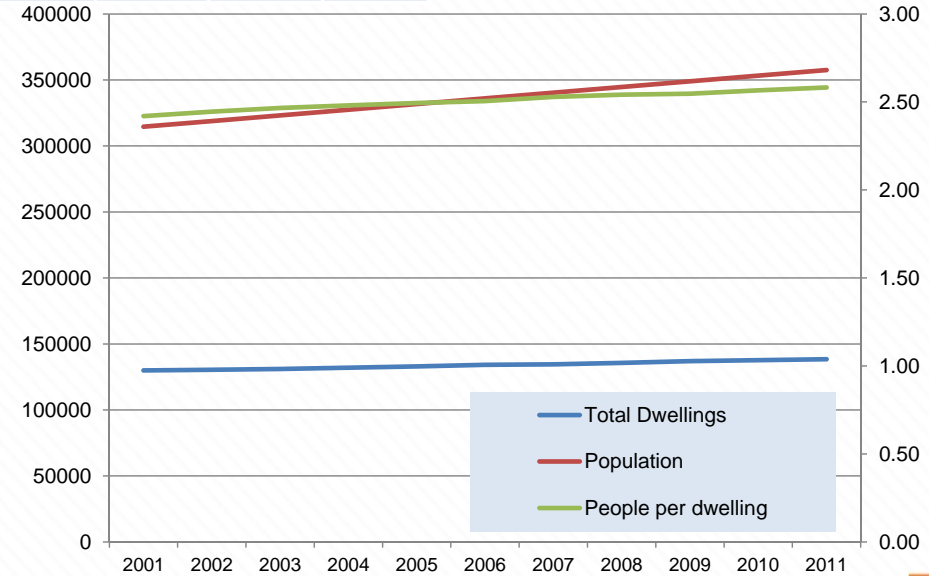
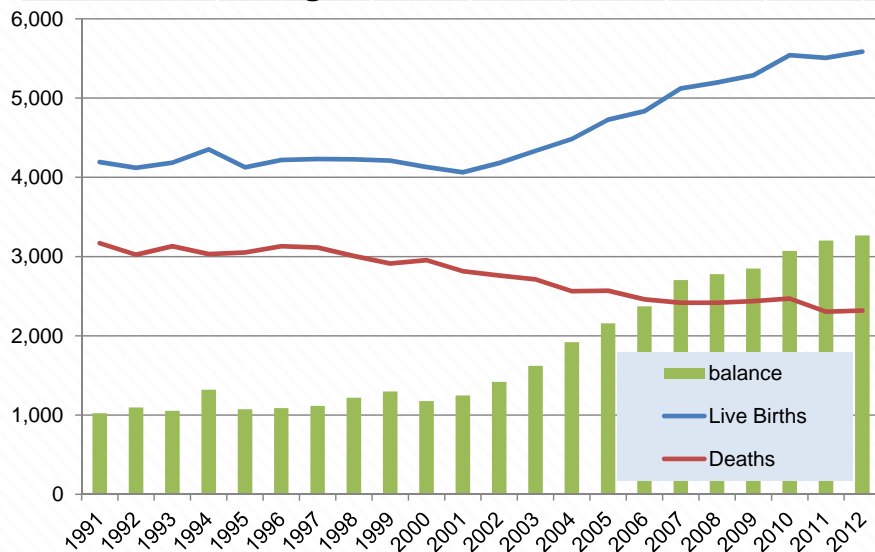
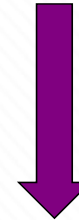


# Growth to date has been driven by high birth rate and international migration

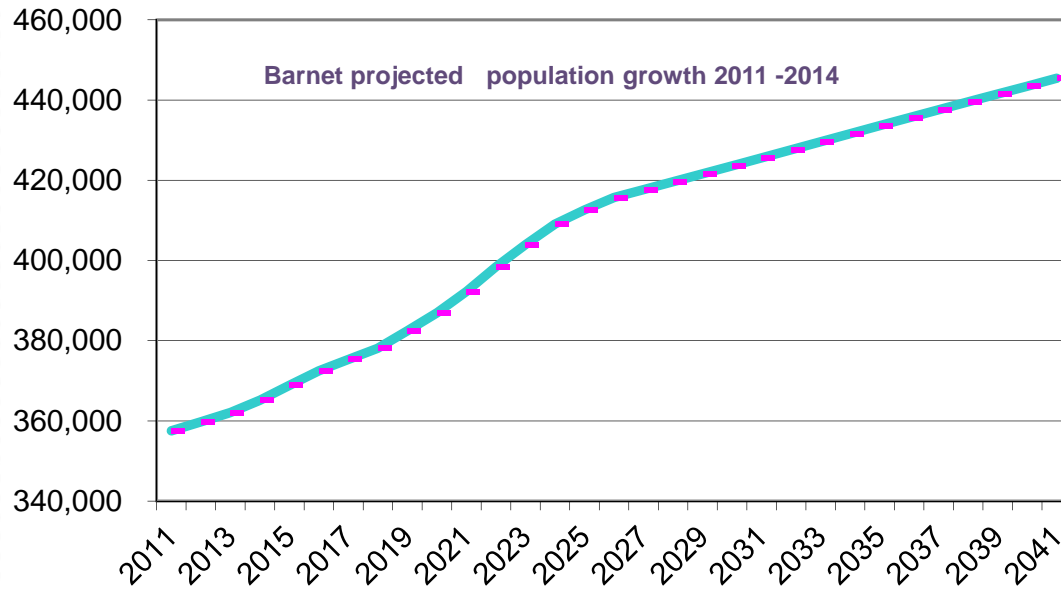
## Barnet Migration Figures

		2003/4	2004/5	2005/6	2006/7	2007/8	2008/9	2009/10	2010/11	2011/12	Overall
International	In	6400	8000	6600	8300	7700	7600	7000	8100	6800	66500
	Out	2800	3200	3500	4200	3200	3900	3700	3300	2900	30700
	<b>Net</b>	<b>3600</b>	<b>4800</b>	<b>3100</b>	<b>4100</b>	<b>4500</b>	<b>3700</b>	<b>3300</b>	<b>4800</b>	<b>3900</b>	<b>35800</b>
Internal	In	18900	18800	20100	20200	19800	20700	21100	19900	20800	180300
	Out	21900	21200	21600	22300	22400	20100	21100	21300	21600	193500
	<b>Net</b>	<b>-3000</b>	<b>-2400</b>	<b>-1500</b>	<b>-2100</b>	<b>-2600</b>	<b>600</b>	<b>0</b>	<b>-1400</b>	<b>-800</b>	<b>13200</b>
<b>Net Change</b>	<b>600</b>	<b>2400</b>	<b>1600</b>	<b>2000</b>	<b>1900</b>	<b>4300</b>	<b>3300</b>	<b>3400</b>	<b>3100</b>	<b>22600</b>	

The number of people per dwelling has increased from 2.4 to 2.6 between 2001 and 2011



# Barnet's Population will continue to grow across most age groups



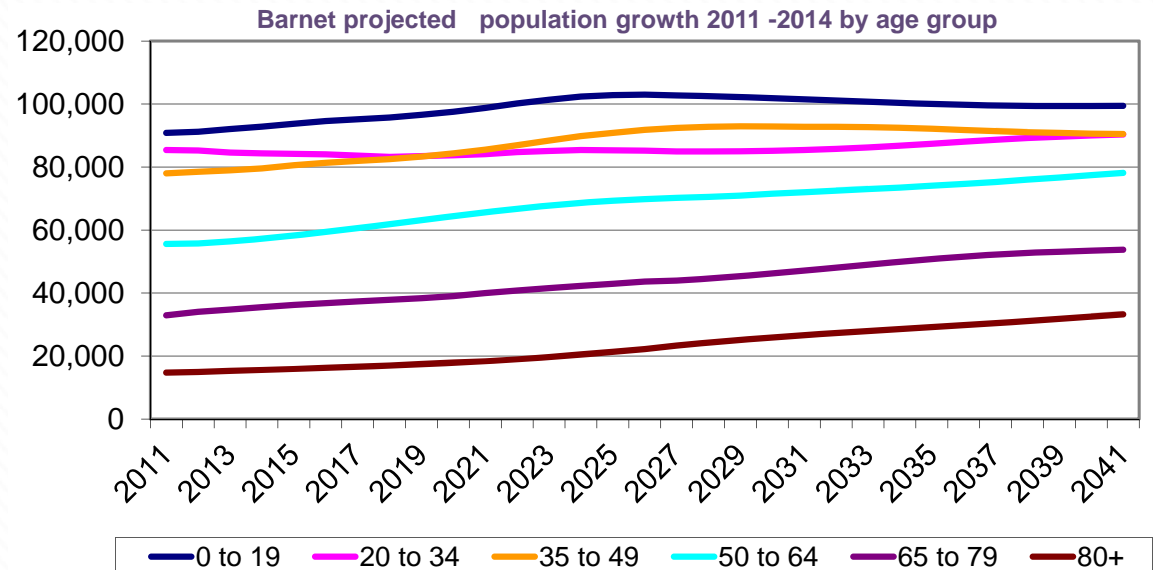
Barnet's population in 2013 **362,065**

Barnet's projected population by 2041 **445,422**

Projected increase in Barnet's population – equivalent to town the size of **Harlow or Stevenage** **83,357**

**67,400** People aged over 70 in Barnet by 2041 – **double** that of 2013

**73,000** Barnet's school-age population by 2026 – **20%** higher than in 2013



# Ward populations by 2041

**128%**

Projected population growth in Colindale,

&

**98%**

Golders Green

.....significant housing growth through regeneration expected in both areas.

Also projected to see relatively large population increases in

**41%**

Mill Hill

&

**37%**

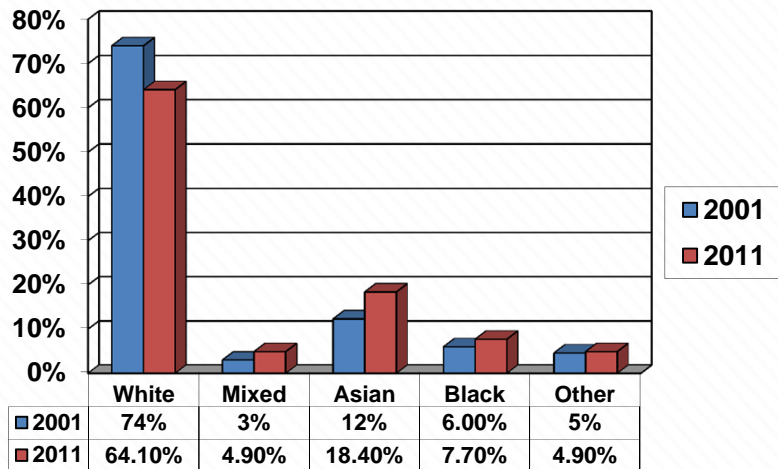
West Hendon

Ward	2011	2021	2031	2041	% increase
Colindale	17,147	29,197	37,550	39,176	128%
Golders Green	18,872	25,369	35,652	37,285	98%
Mill Hill	18,517	24,051	25,056	26,186	41%
West Hendon	17,448	20,502	22,889	23,940	37%
Edgware	16,781	18,274	19,503	20,480	22%
Childs Hill	20,105	21,422	22,986	24,127	20%
Finchley Church End	15,774	16,745	17,253	18,080	15%
Totteridge	15,212	15,952	16,695	17,495	15%
West Finchley	16,588	17,157	18,071	18,971	14%
Brunswick Park	16,449	16,857	17,775	18,634	13%
East Barnet	16,191	16,550	17,124	17,895	11%
Hendon	18,518	19,157	19,592	20,544	11%
Woodhouse	17,633	18,246	18,727	19,578	11%
High Barnet	15,360	15,761	16,176	16,960	10%
Oakleigh	15,866	15,953	16,710	17,511	10%
Garden Suburb	15,985	16,054	16,562	17,422	9%
Burnt Oak	18,273	18,274	18,981	19,748	8%
East Finchley	16,044	16,238	16,645	17,404	8%
Underhill	15,974	16,123	16,490	17,207	8%
Hale	17,495	17,315	17,772	18,629	6%
Coppetts	17,305	17,080	17,363	18,148	5%
<b>All</b>	<b>357,537</b>	<b>392,277</b>	<b>425,572</b>	<b>445,420</b>	<b>25%</b>



# Barnet has become more diverse

Change in ethnicity 2001 vs 2011 census

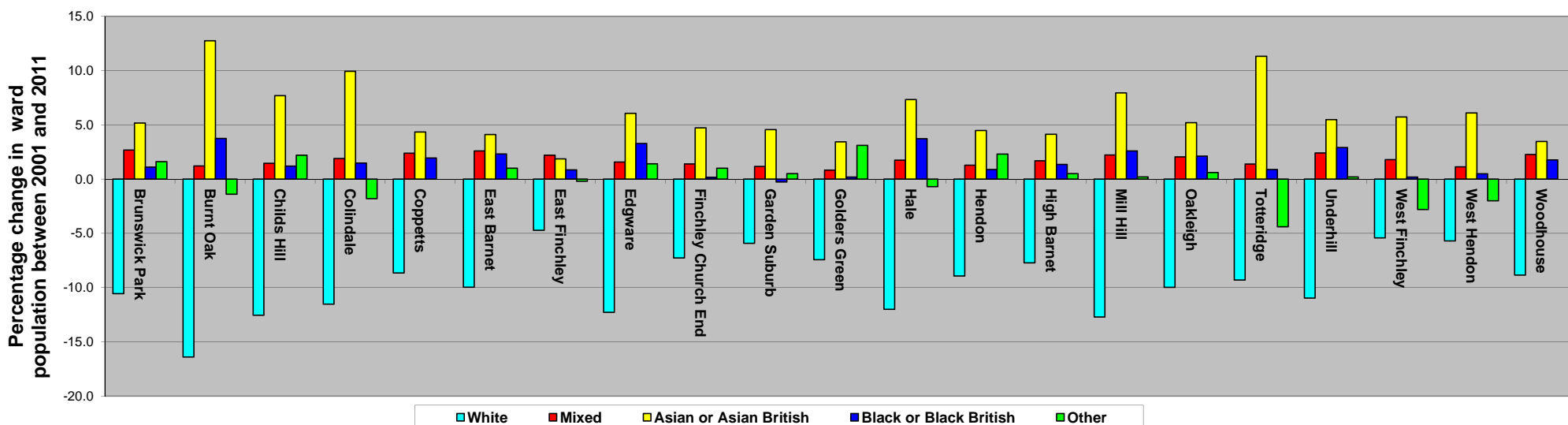


**143** languages other than English spoken by pupils in Barnet schools (January school census 2011)

Barnet is getting more diverse, driven by both more births among BAME communities and an increase of migrants.

Ethnic groups as percentage of population increasing across all wards

White groups as percentage of population falling across all wards.





# Higher concentration of BAME ethnic groups in social housing

Tenure	Total	White	Mixed ethnic group	Asian	Black	Other
Owned outright	82,008	74.5%	2.5%	18.1%	2.2%	2.7%
Owned with a mortgage or loan or shared ownership	124,058	66.5%	4.6%	20.1%	5.0%	3.7%
<b>All owned</b>	<b>206,066</b>	<b>69.7%</b>	<b>3.8%</b>	<b>19.3%</b>	<b>3.9%</b>	<b>3.3%</b>
Rented from Barnet Homes	28,752	53.4%	7.7%	12.6%	19.8%	6.5%
Other Social Rented	18,508	49.9%	8.5%	13.5%	22.2%	5.9%
<b>All Social Rented</b>	<b>47,260</b>	<b>52.0%</b>	<b>8.0%</b>	<b>12.9%</b>	<b>20.7%</b>	<b>6.3%</b>
<b>Private Rented</b>	<b>99,271</b>	<b>57.8%</b>	<b>5.6%</b>	<b>19.8%</b>	<b>9.4%</b>	<b>7.5%</b>
<b>All categories</b>	<b>352,597</b>	<b>64.0%</b>	<b>4.8%</b>	<b>18.6%</b>	<b>7.7%</b>	<b>4.9%</b>

Disproportionately high number of people living in socially rented housing are from BAME ethnicities and in particular Black ethnicities; more than 20% of people identifying themselves as black live in socially rented housing, while only 4% of black people are owner-occupiers.

# The way people live is changing too

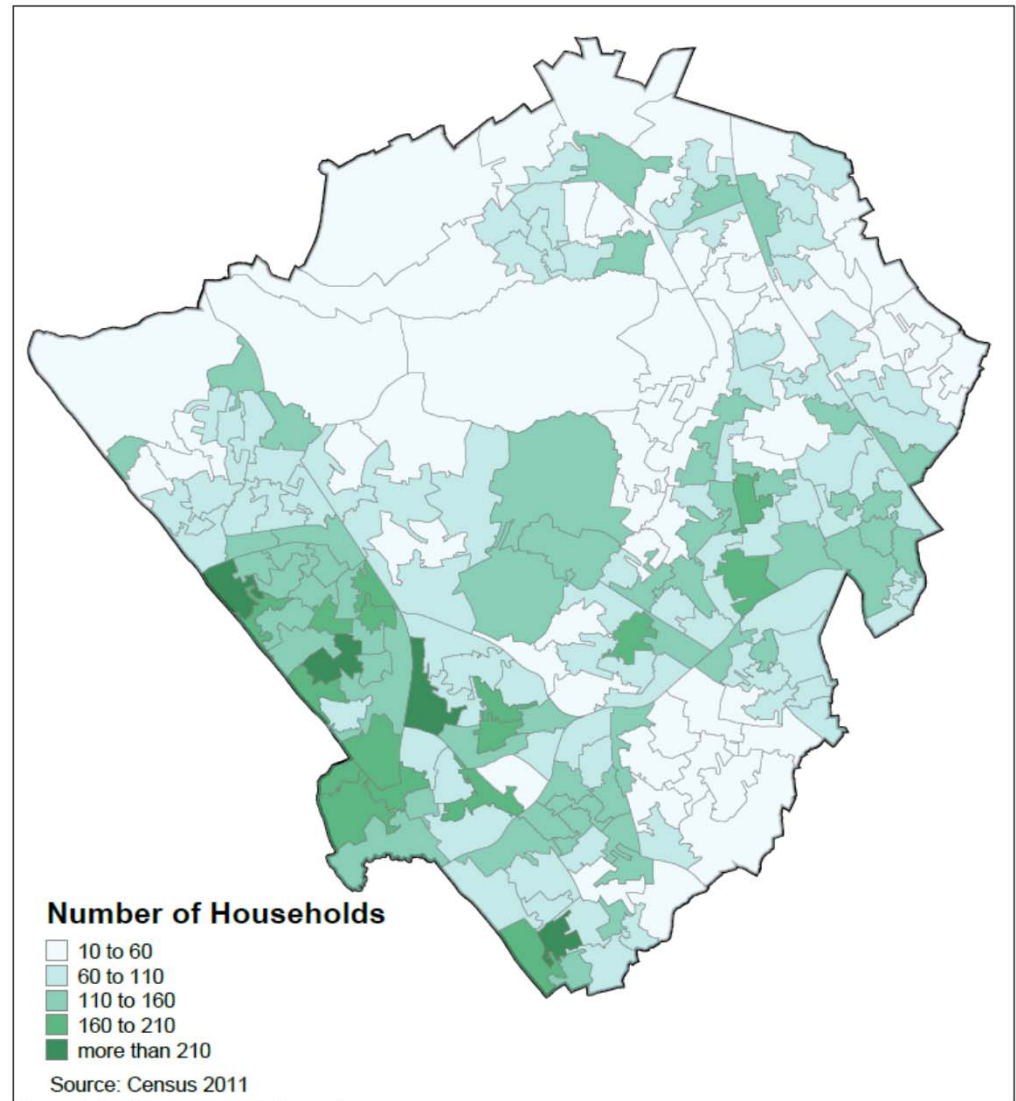
There are **135,900** households in Barnet with an average of 2.6 people per household (*and falling*)

One in three households resides in a *flat* making these the most common type of dwelling

Movement towards smaller, single person households;  
**81,000** individuals living alone.

Lone parent households expected to increase by **82%**

Number of households with more than 1.5 people per bedroom



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Source: Census 2011

# Economy

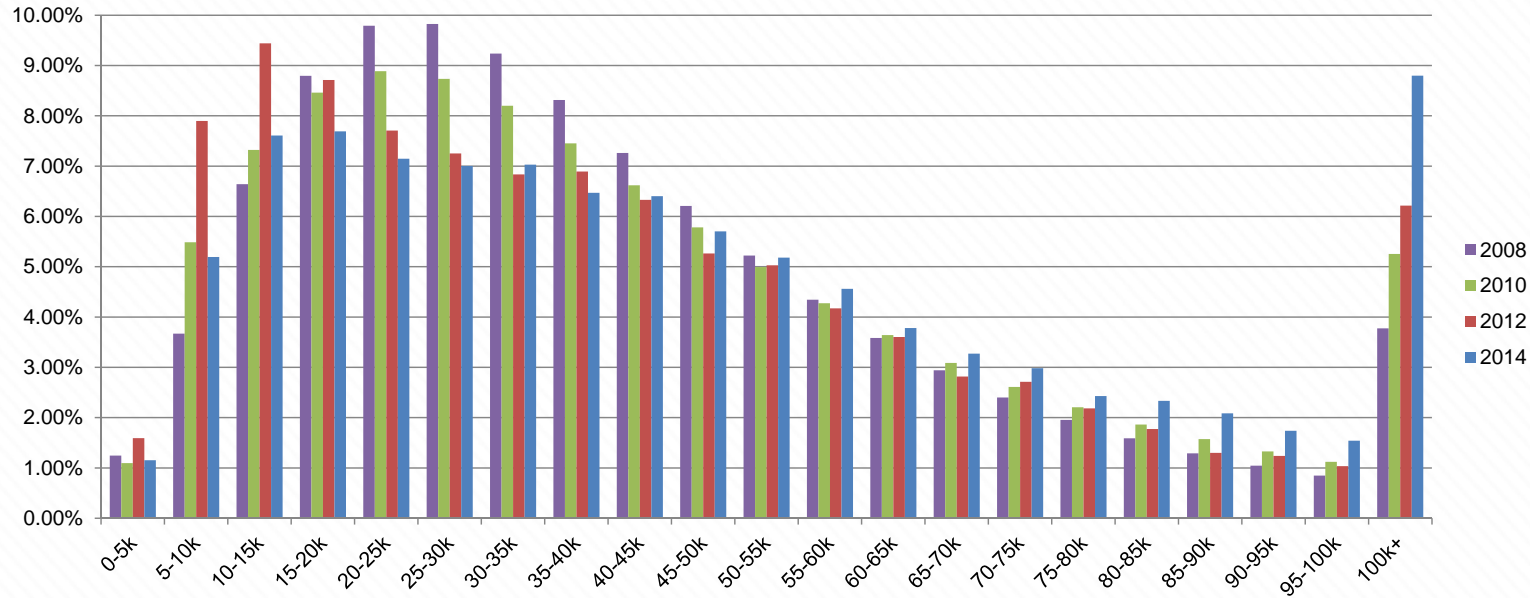


[dreamstime.com](http://dreamstime.com)



# A prosperous borough...

Distribution of unequivalised income in £5k bands



The average household income in **Barnet** was lowest in **2012**. The greatest increase since 2012 has been seen in households earning £100k+.

Nominal Values		2008	2010	2012	2014
Unequivalised*	Barnet	£35,475	£36,213	£35,412	£40,550
	Great Britain	£28,698	£28,445	£28,413	£28,467
Equivalised*	Barnet	£31,454	£32,129	£33,579	£38,147
	Great Britain	£25,486	£26,518	£27,580	£27,805

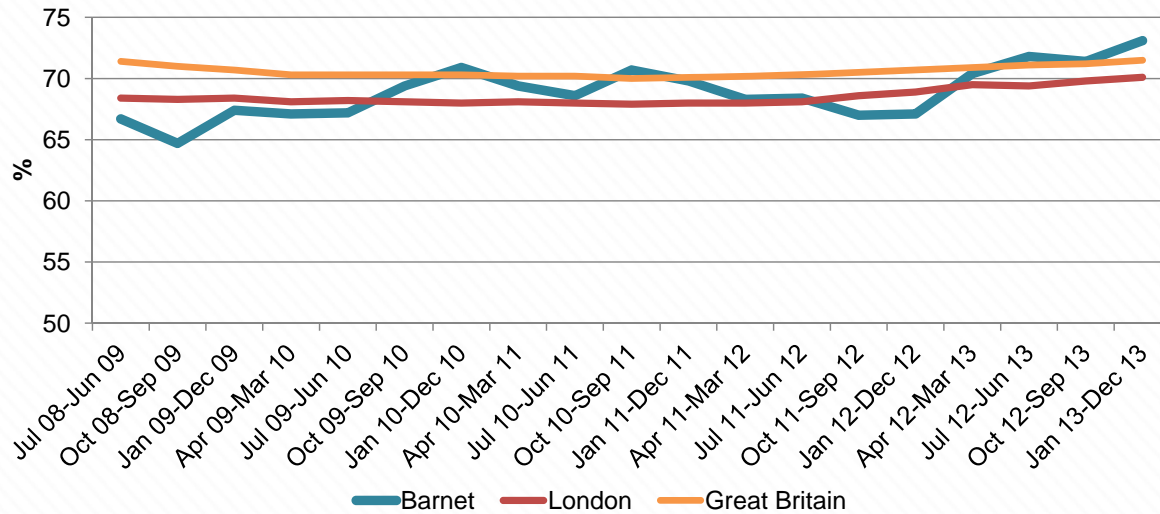
Between 2012 and 2014, Barnet's average household income **increased by 14.5%**, compared to the Great Britain average which increased by 0.2%.

\*Equivalised income estimates take into account the size and composition of a household and reflect the idea that a larger household would require a higher income than a small household in order to achieve an equivalent standard of living



# Employment

Employment rate- 16 to 64 years

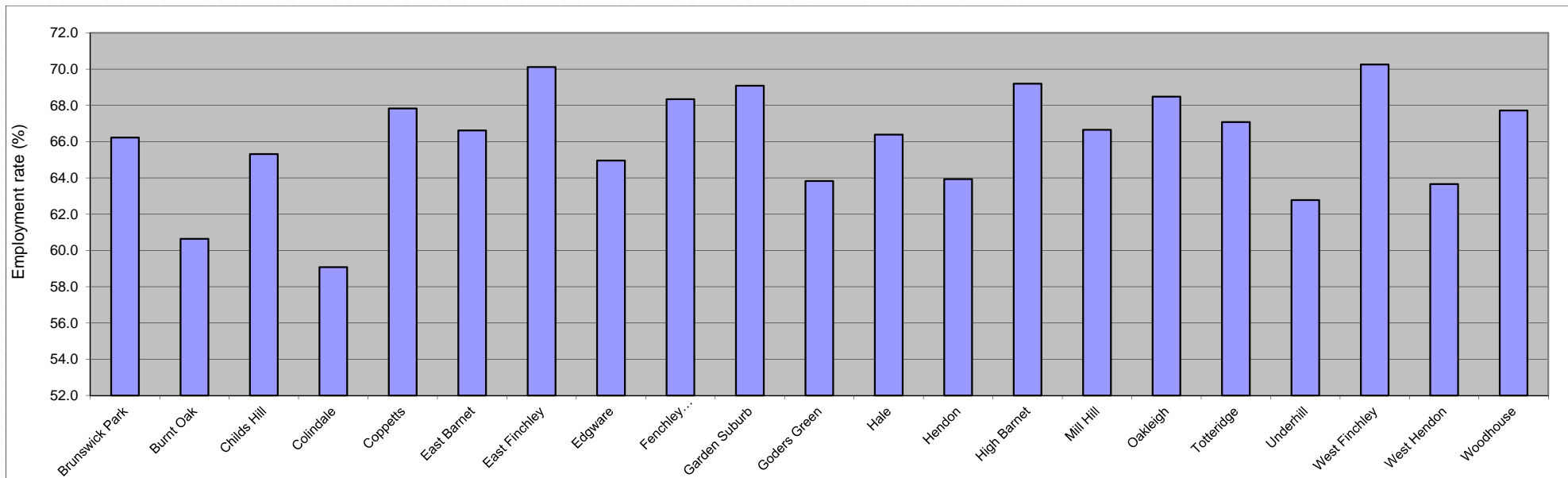


Source: Annual Population Survey, Dec 2013

Employment rates in Barnet have recovered from a dip in 2009

Employment rates in Barnet rose faster than the national average (July 2012 to December 2013)

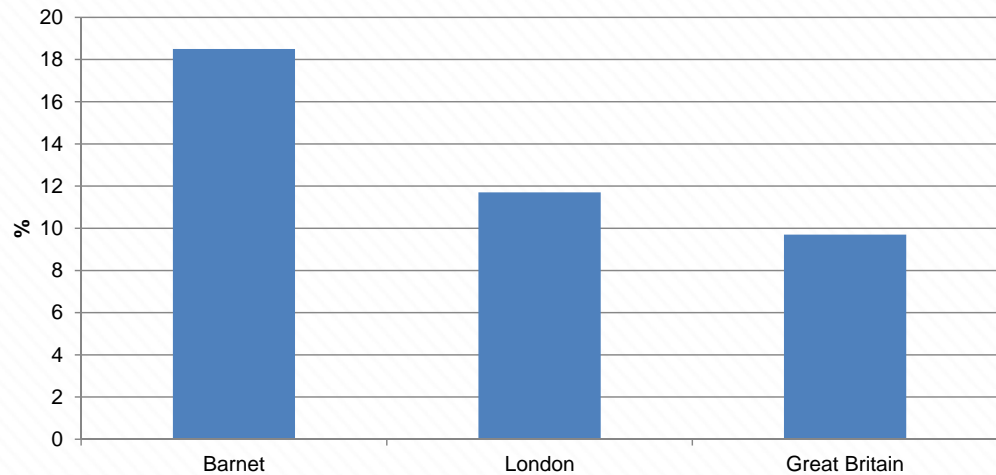
There is big disparity b/w employment rates of wards – e.g. East Finchley (70%); Colindale (59%)



Source: ONS July 2013

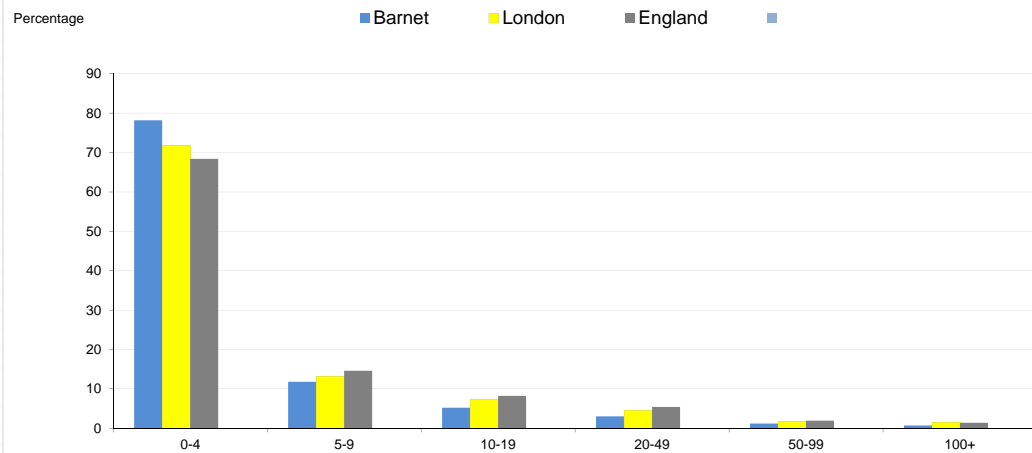
# Employment

% self-employed (16 to 64 years)



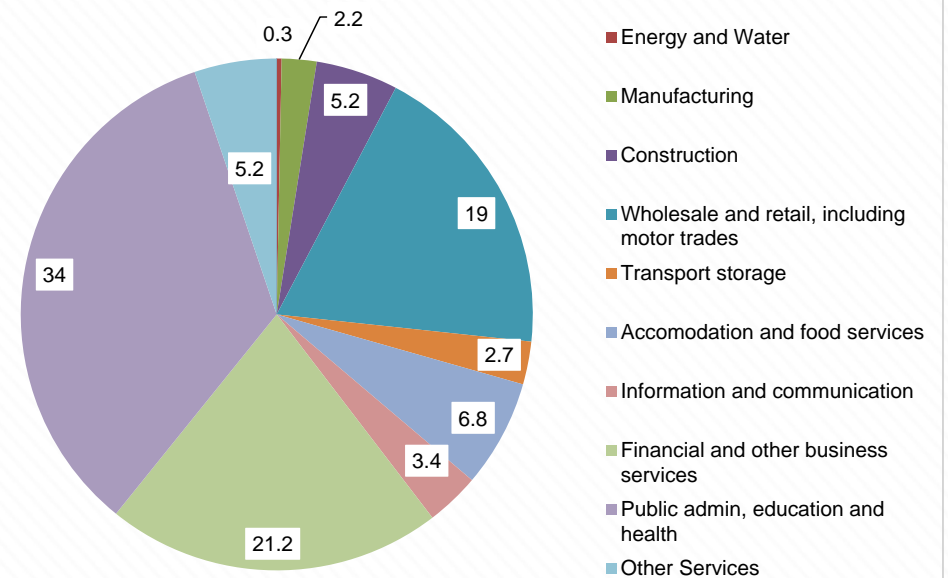
Second highest rate of self employment in London & small companies as employer

Local units in VAT and/or PAYE based enterprises, March 2012



Source: Office for National Statistics

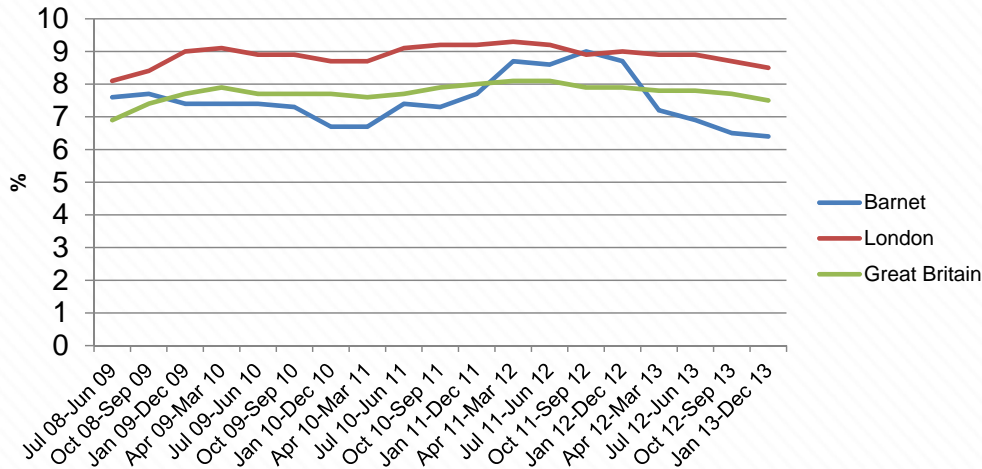
A high % of the working age population employed in finance and the public sector (inc. Education & Health)



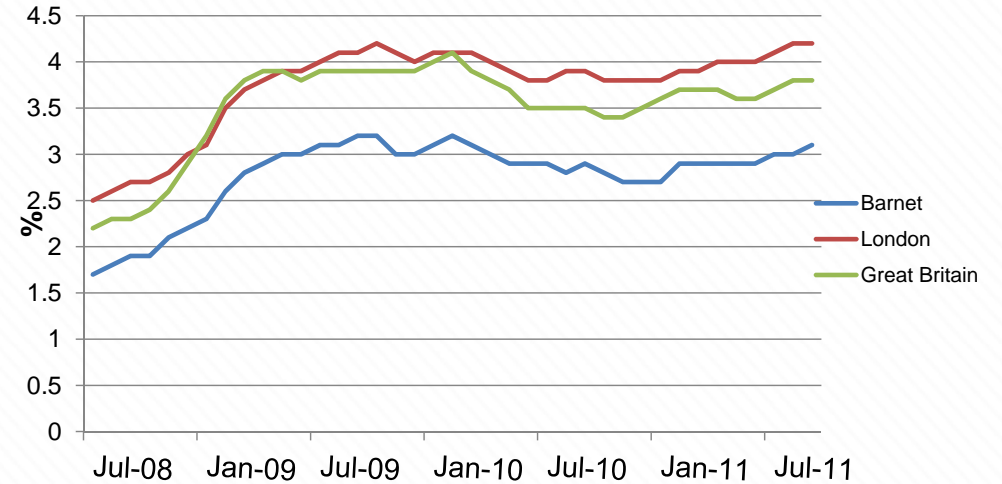
Source: ONS December 2013

# Unemployment

### Unemployment rate as % working age population



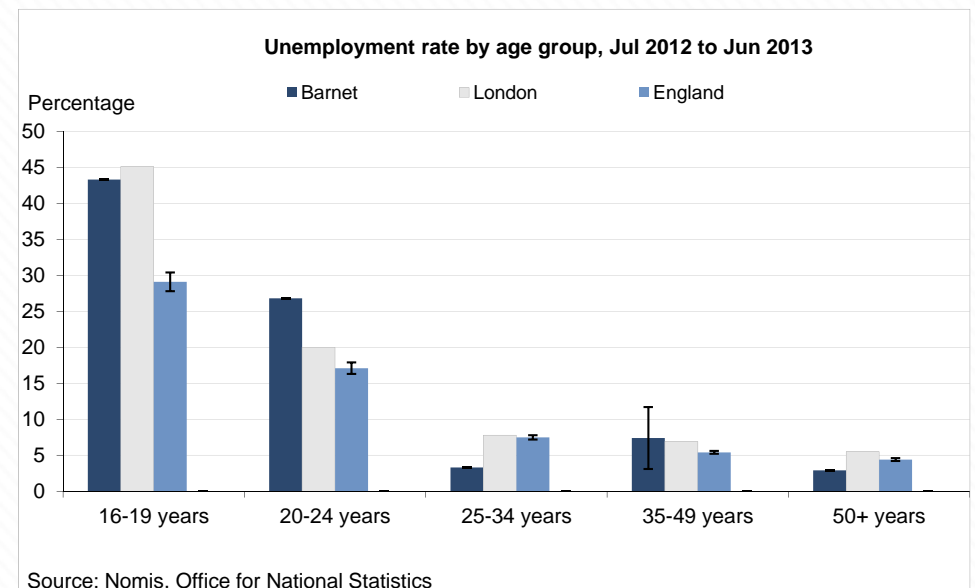
### Claimant count rate



Barnet did not escape the effects of the economic downturn.

In the year to June 2012, 8.6% of the local population was believed to be unemployed – before recovering to 6.9% in the year to June 2013 but still up from the equivalent period in 2008 when local unemployment stood at 4.8%

Unemployment highest amongst under 25 age groups

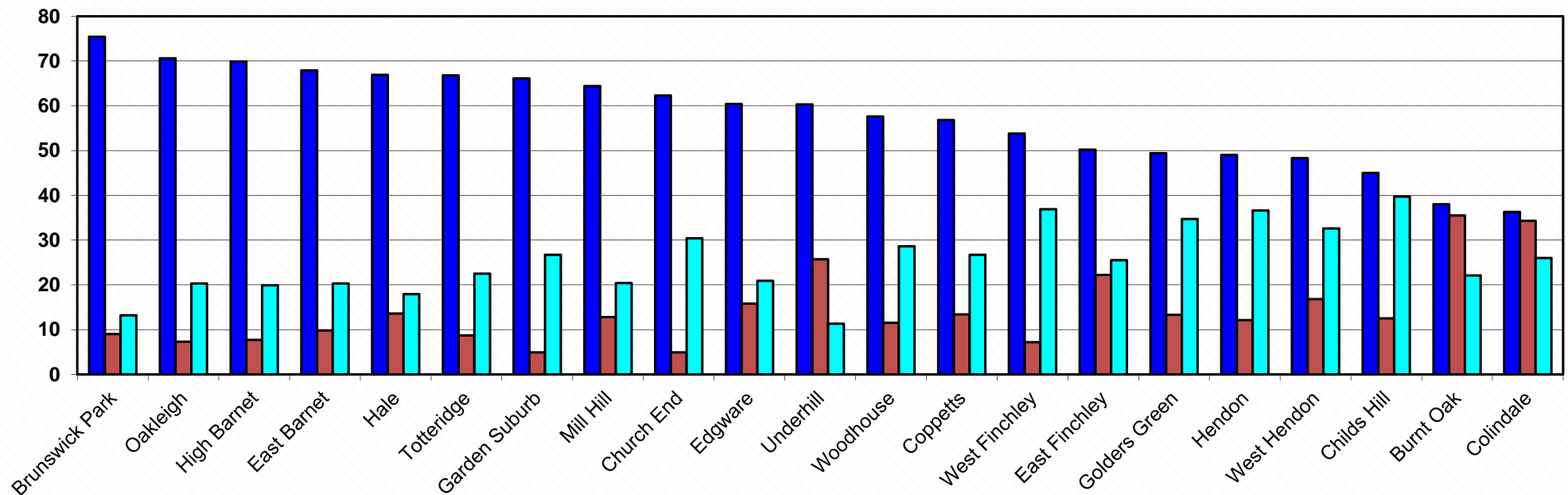
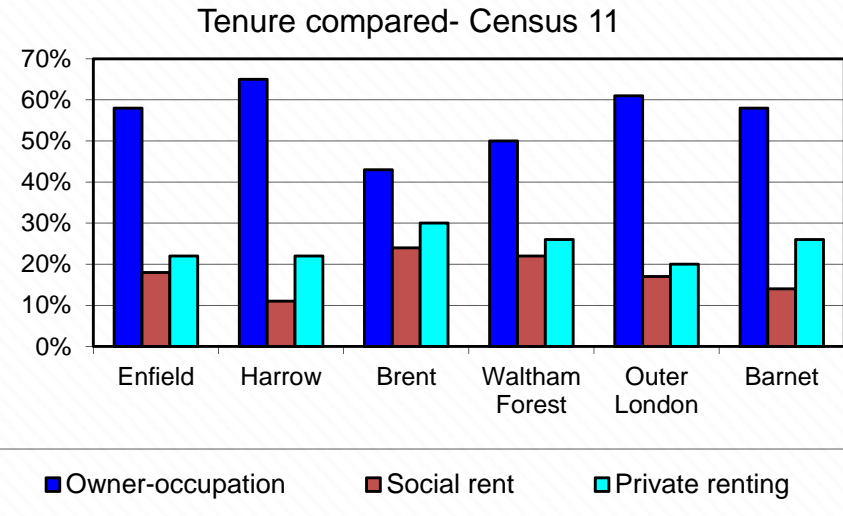
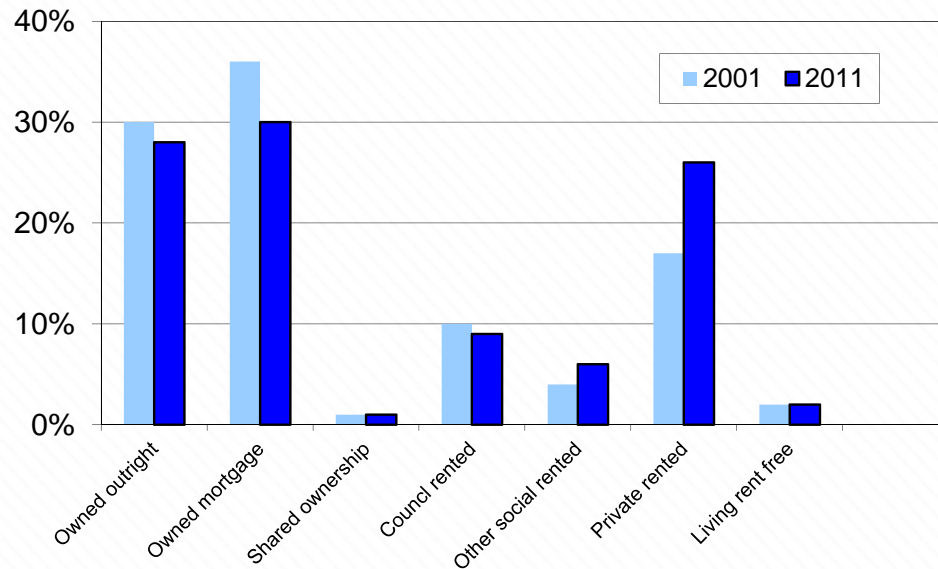


# The Housing Market

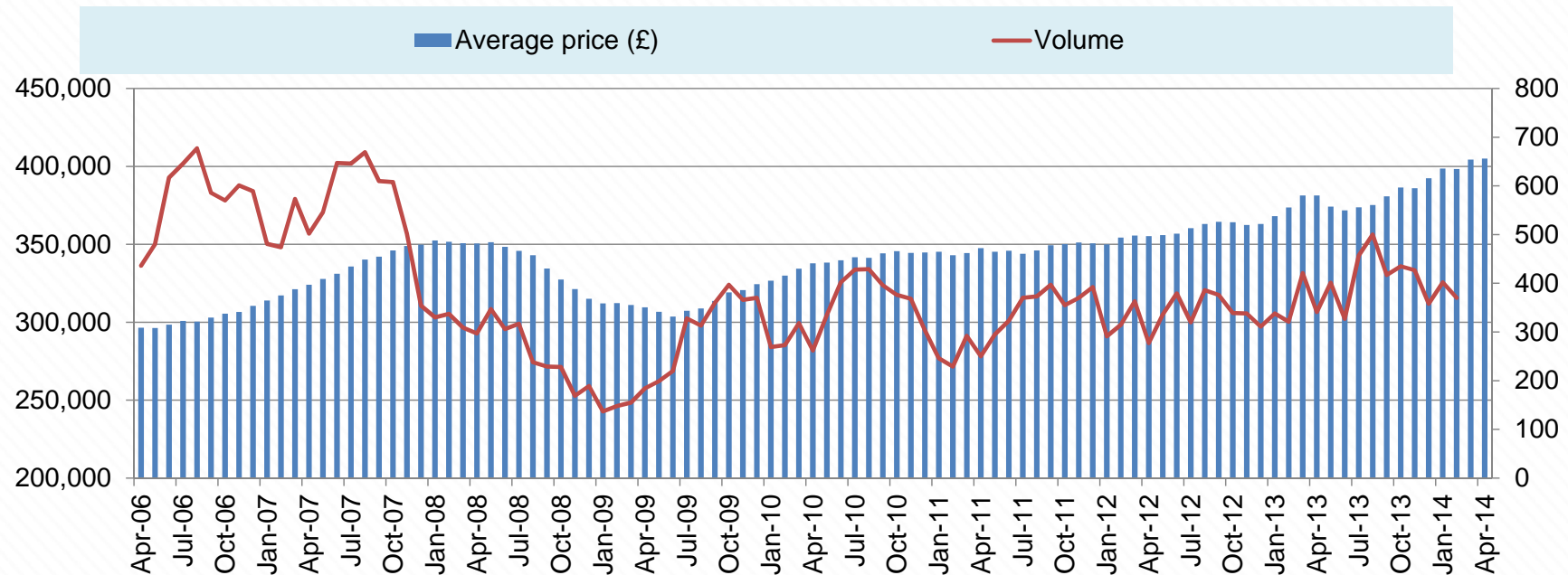




# Private Renting up, Home Ownership down



# House prices in Barnet have recovered but sales volumes have not.....

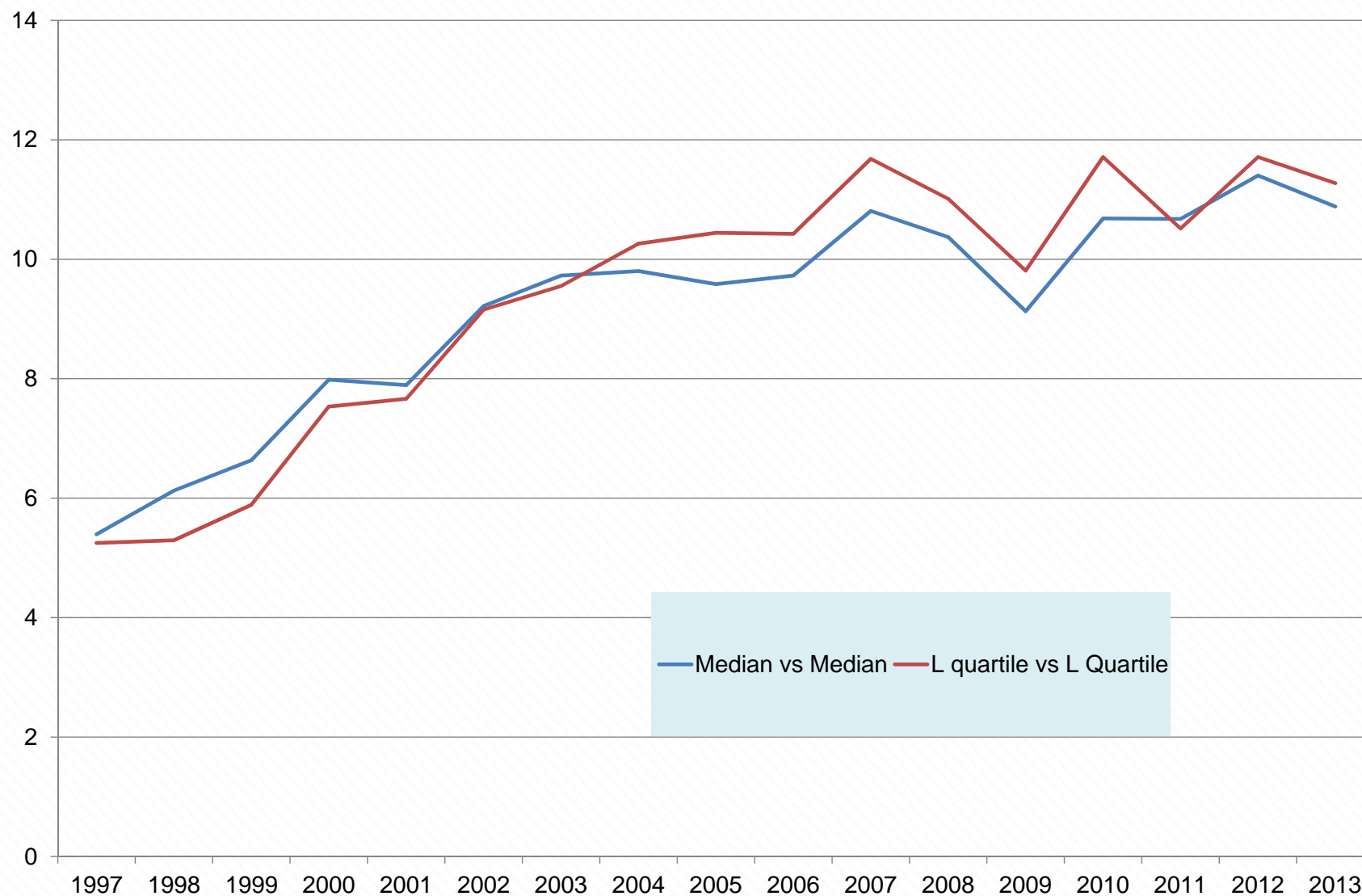


Median house price in Barnet rose by **6.2%** during the year to April 2014. The Barnet median house price in April 2014, **£405,073** is nearly **12X** the Barnet median income.

Top 5 wards mean house prices 2012	
Garden Suburb	£1,070,407
Childs Hill	£829,236
Totteridge	£620,502
Golders Green	£536,558
Finchley Church End	£509,322

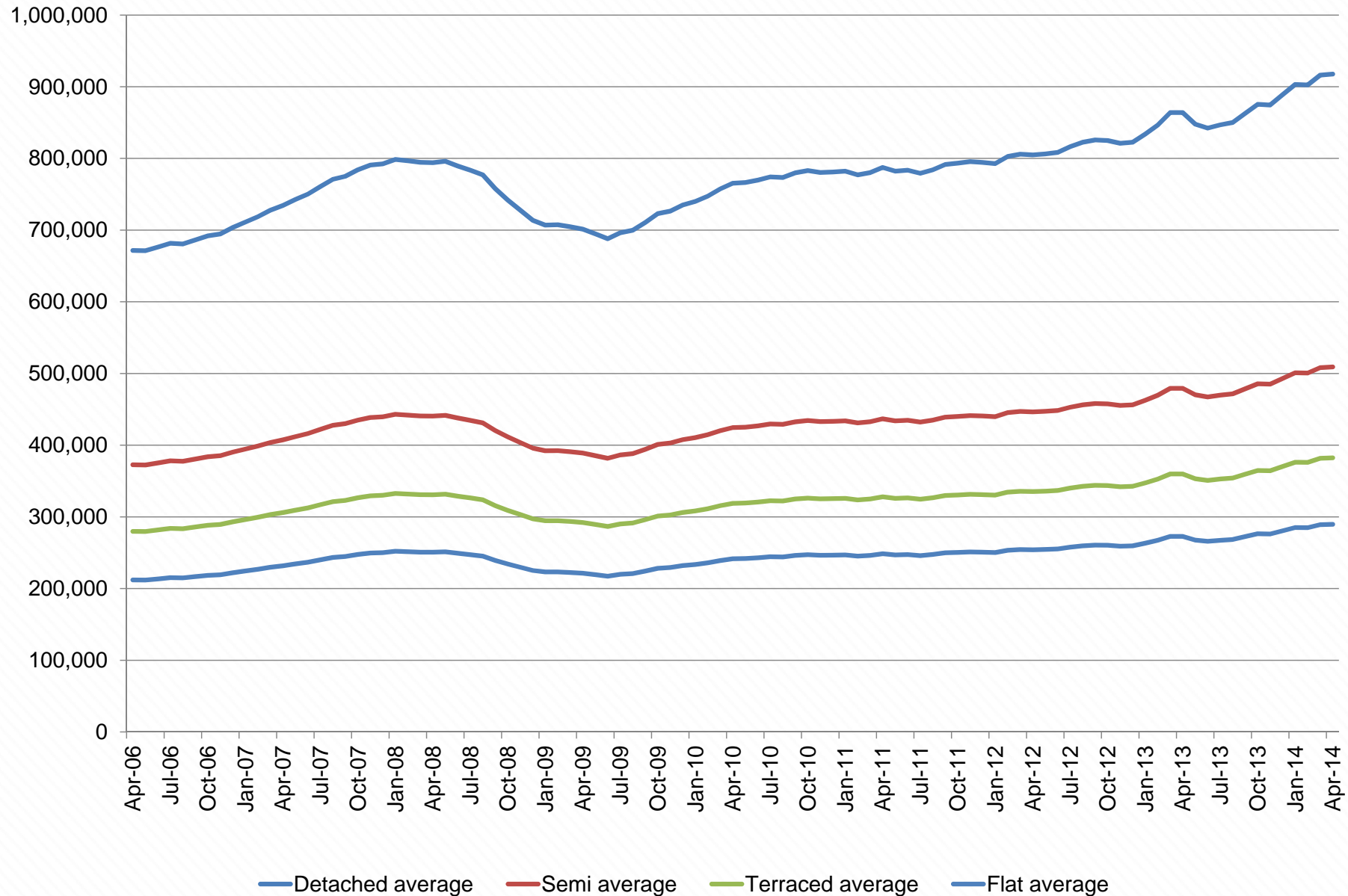
Bottom 5 wards mean house prices 2012	
West Hendon	£342,540
Coppetts	£341,357
East Barnet	£335,208
Colindale	£266,551
Burnt Oak	£232,425

# House price to income ratios in Barnet



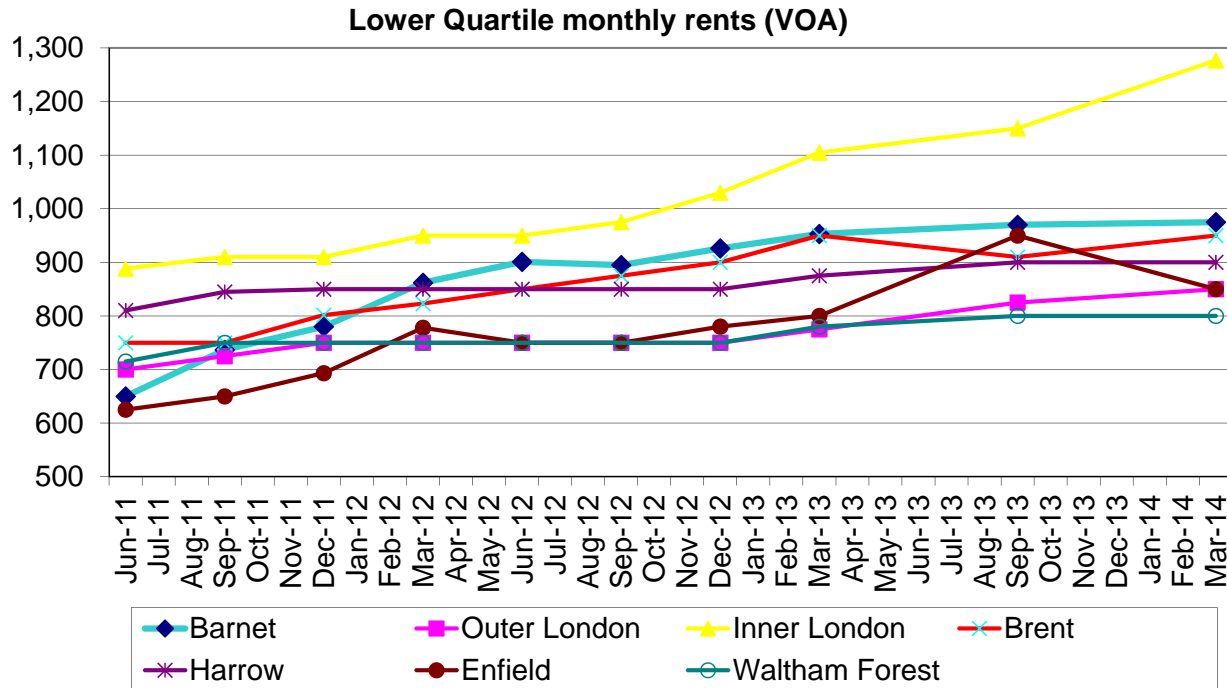


# Average price 'dip' and subsequent 'recovery' reflected across all property sizes..

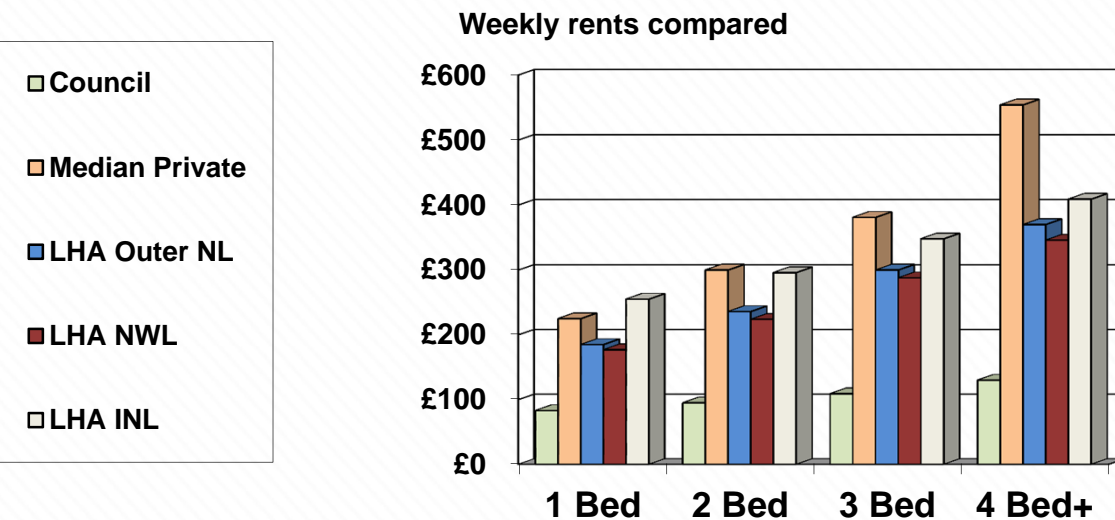




# Private sector rents have increased faster in Barnet



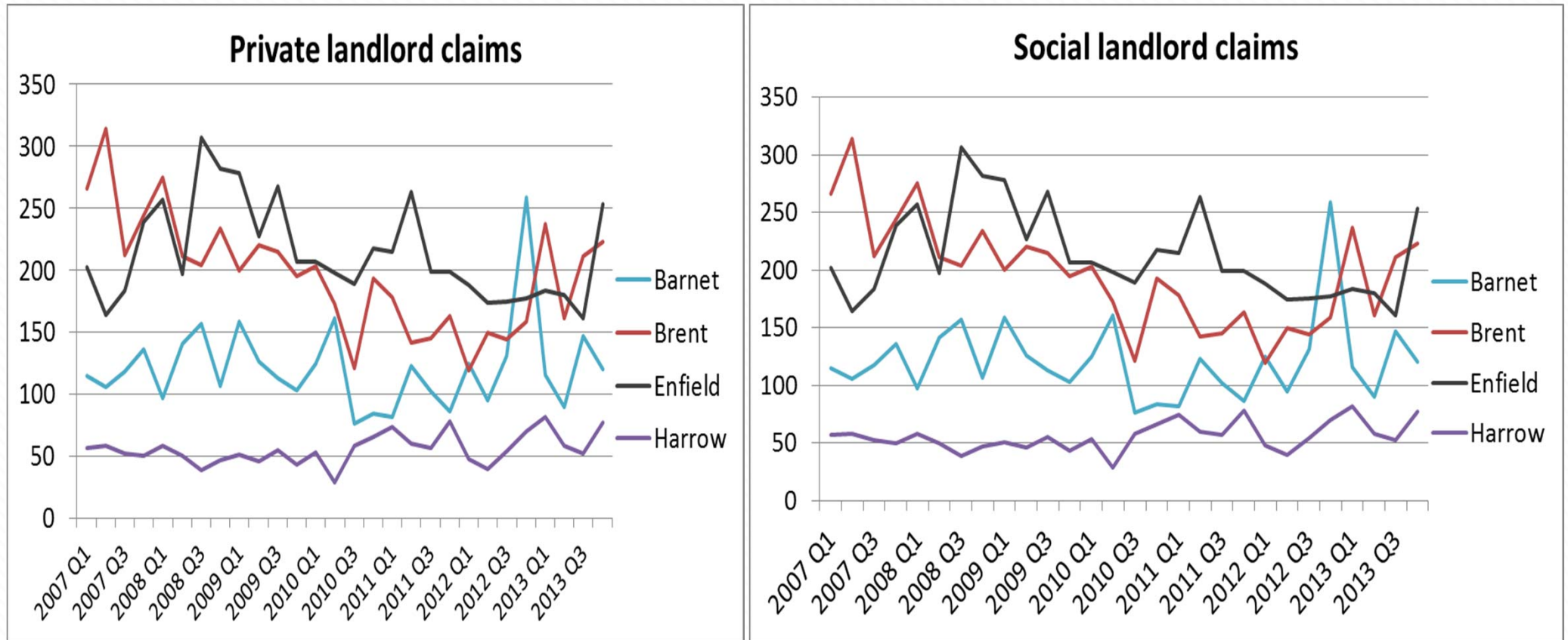
Barnet lower quartile private rents have increased by £325 between June 2011 and March 2014. Barnet was below the average for Outer London and is now the 4<sup>th</sup> most expensive outer London borough



Weekly council rents are approximately 30% of median private sector rents

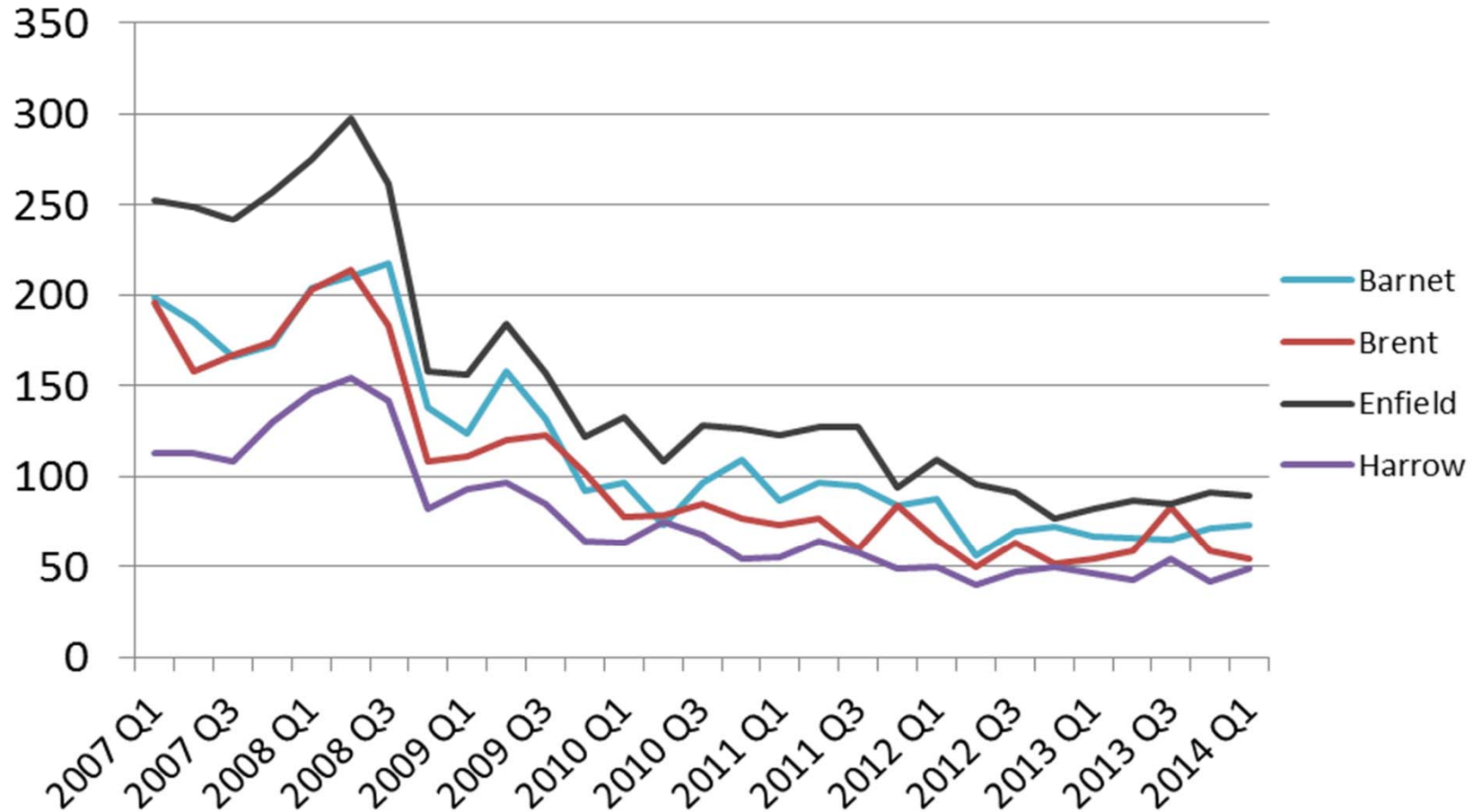
Median private sector rents are higher than Local housing allowance rates in most areas

# Landlord possession claims similar to neighbouring boroughs



# Mortgage possession rates have fallen

## Mortgage claims



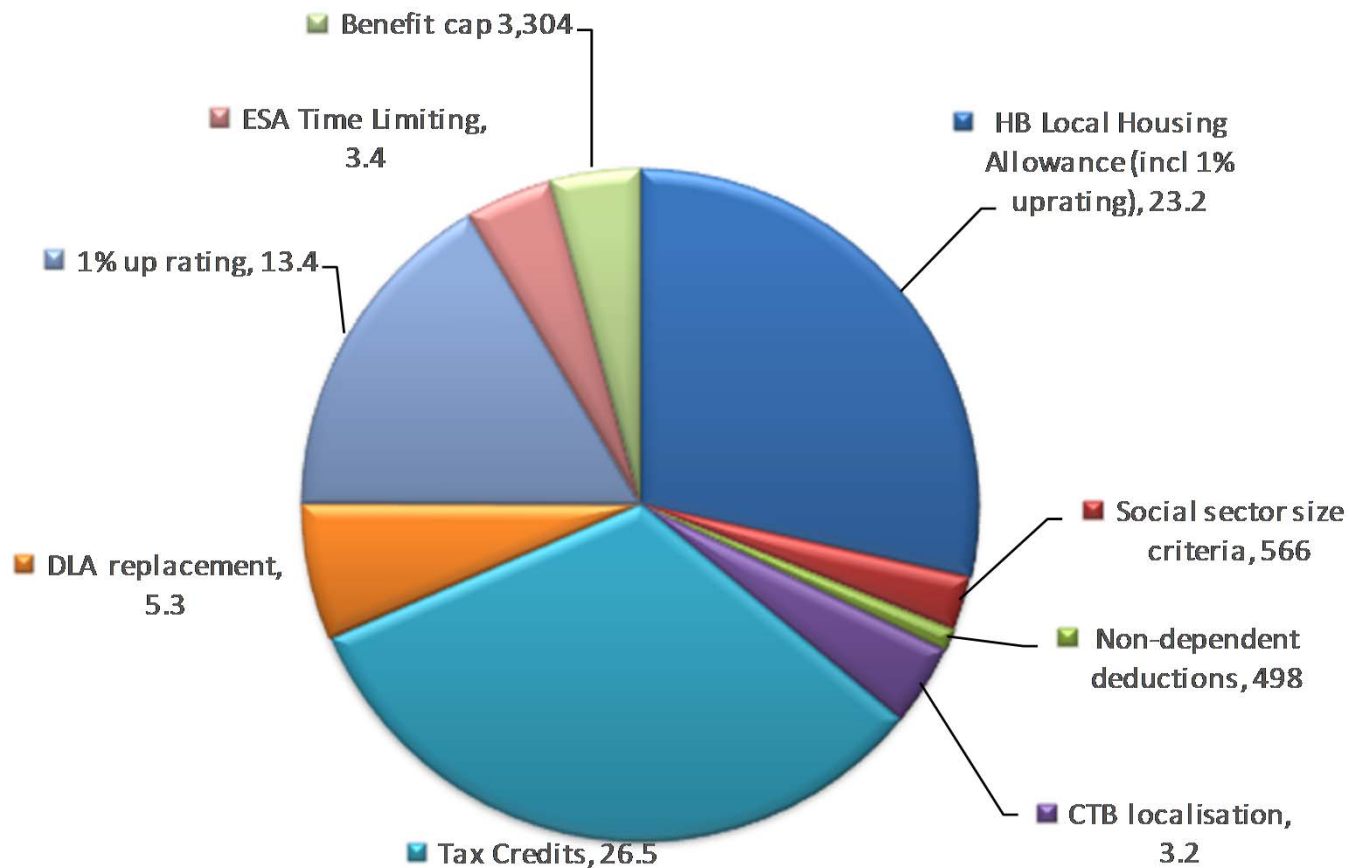






# Broad impact of welfare reforms in Barnet

Welfare reform impacts, 2015/16 (£m)

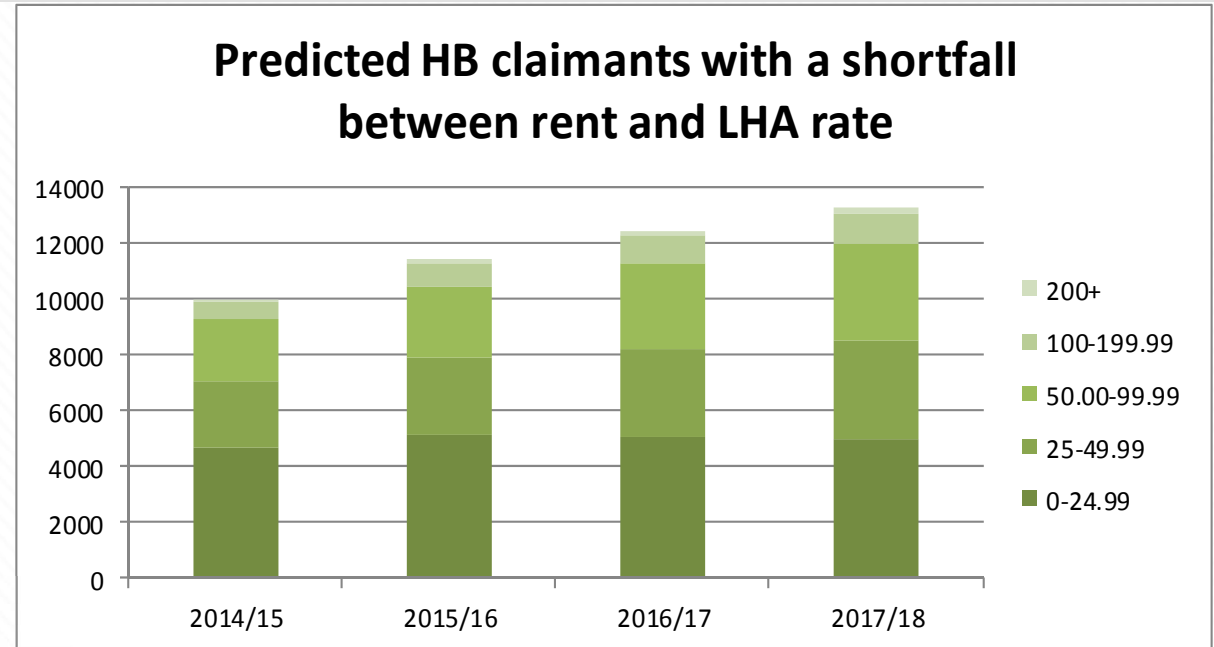
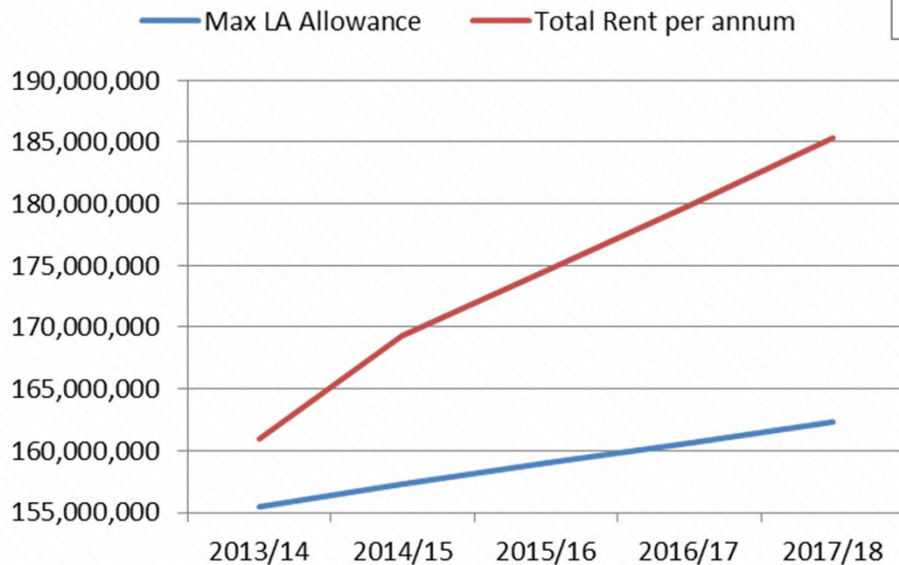


Barnet is in the **top 10%** of **325 English LAs** for 3 key indicators:

- **7<sup>th</sup>** biggest loser for working age households claiming benefit
- **12<sup>th</sup>** biggest loser on spare room subsidy
- **16<sup>th</sup>** biggest loser on HB LHA

# The reality of the housing situation in Barnet makes rent increasingly unaffordable

In Feb 2014 there were **over 9,000** households with a shortfall between their LHA rate and their rent.



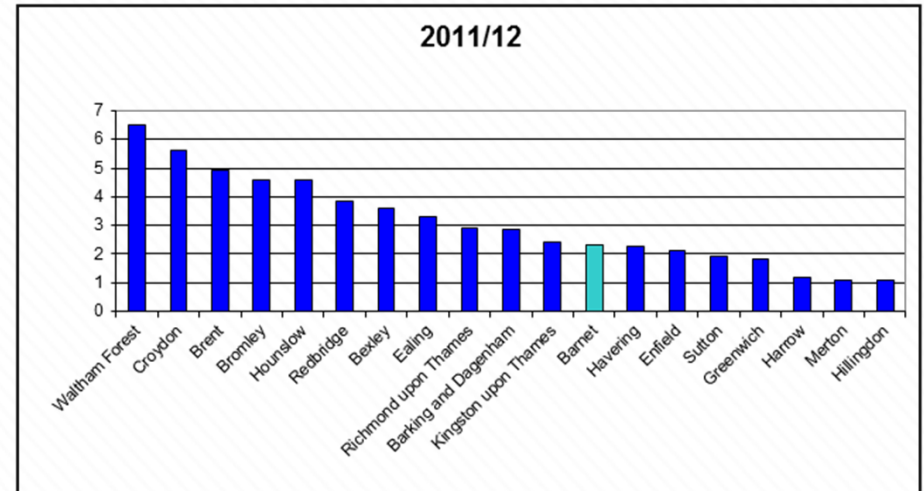
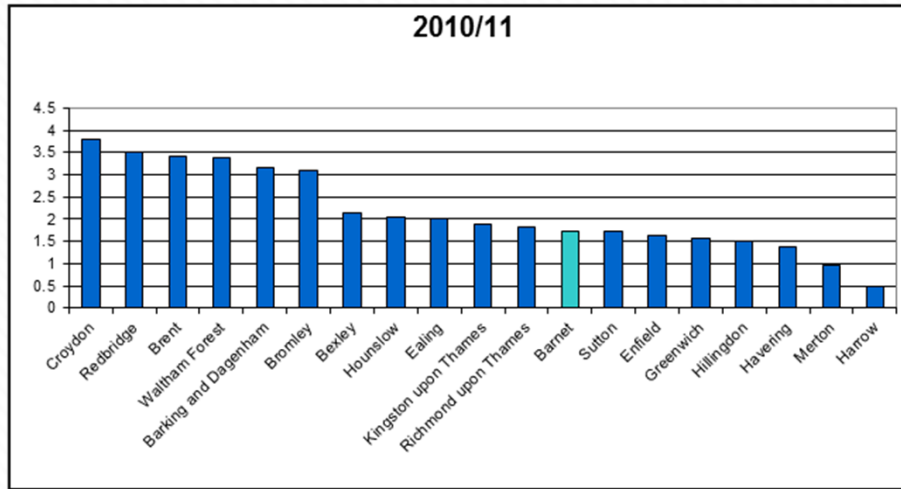
Rents rose 9% in Barnet in 2012/13 and LHA rates are set to rise just 4% a year from April '14. (some areas this will be 1%)

by 2017 **over 4,000** households in Barnet could have a shortfall of £50 or more a week

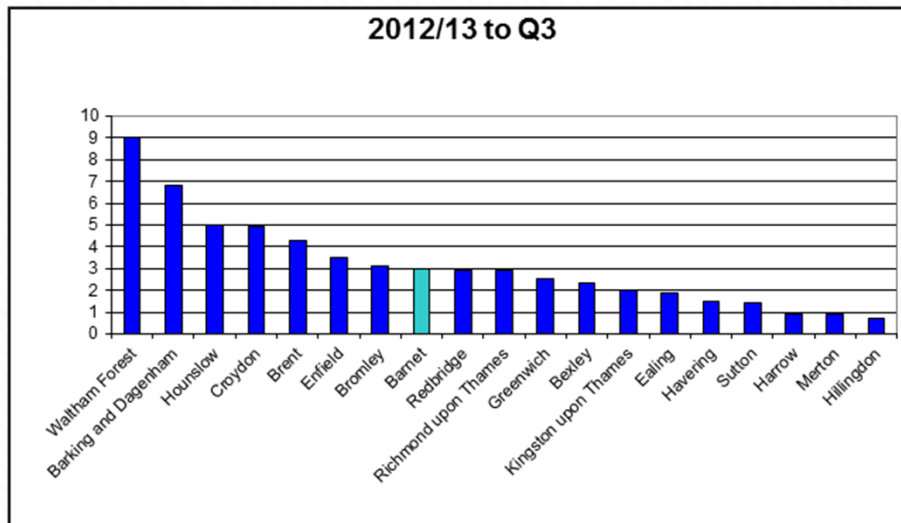
# Homelessness



# Homeless has increased in Barnet



## Homeless acceptances per 1,000 population



Barnet has gone from rank 11 out of 19 Outer London boroughs in 2010/11 to rank 7 by quarter 3 2012/13.

Acceptances in Barnet have risen from 1.7 to 3 per thousand population since 2010.



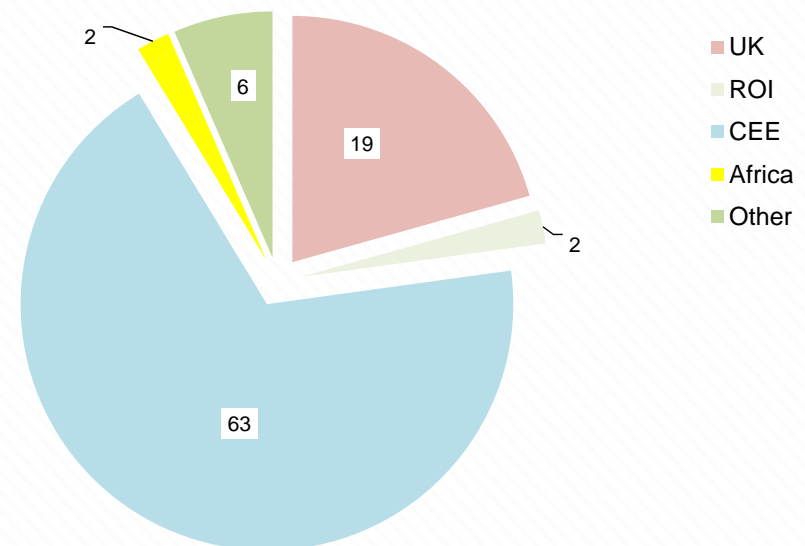
# Increase in rough sleepers



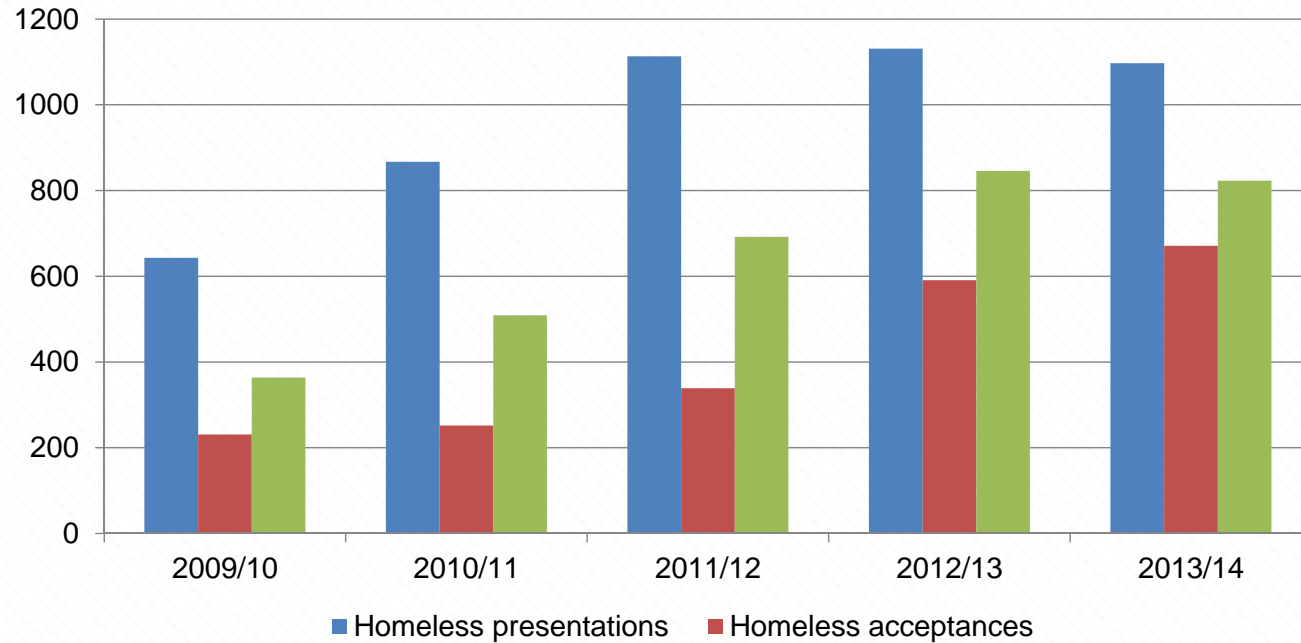
**70** more persons seen sleeping rough in Barnet in 2012/13 than in 2011/12.

2012/13 increase represents a large group of Romanians seen sleeping rough on two separate nights between Sept 2012 and April 2013.

Rough sleepers in Barnet by nationality (2012/13)

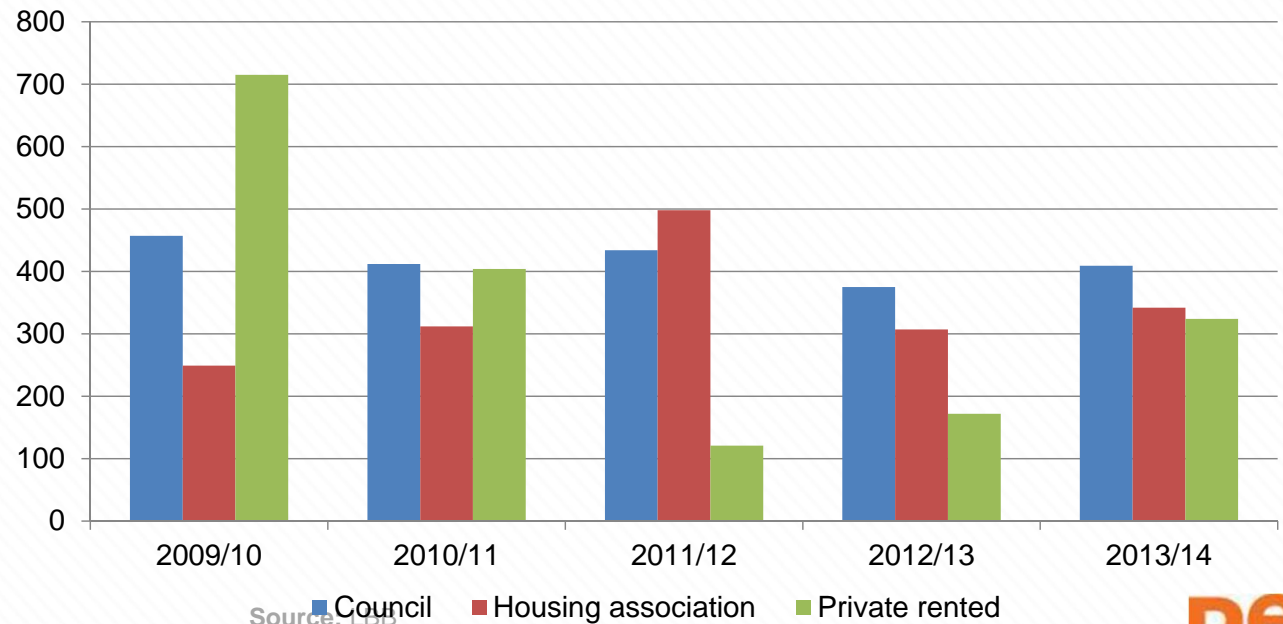


# Housing supply for homeless people has reduced



Homeless Applications have increased along with acceptances and admissions to temporary accommodation

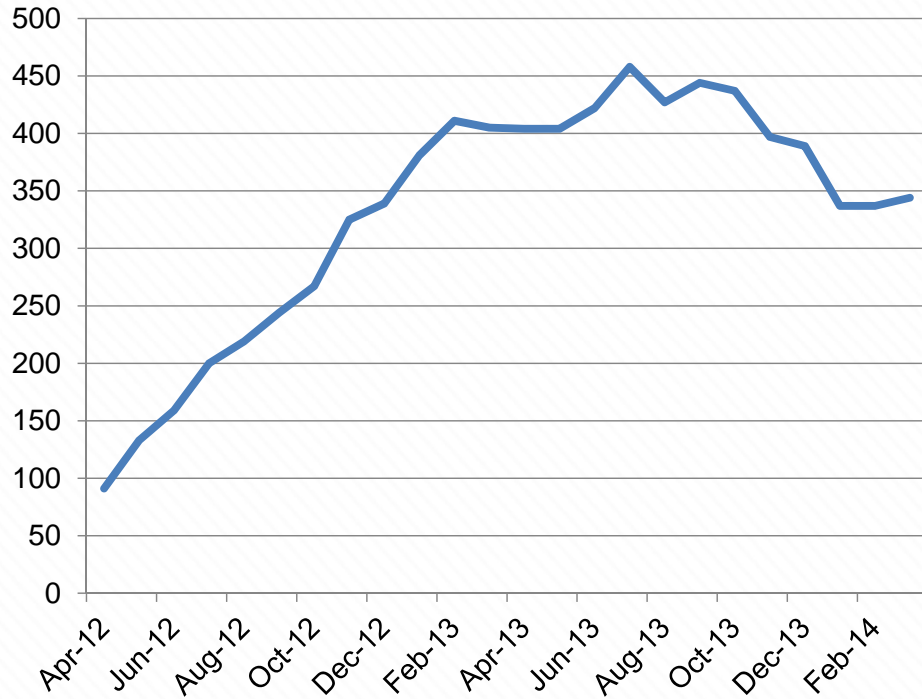
The supply of private rented homes available to housing applicants reduced from 2009/10 but had improved since 2012/13



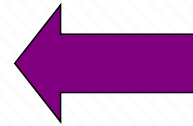
Source: LBB

# This means the cost of temporary housing is rising

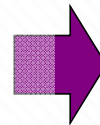
### Units procured above subsidy rate



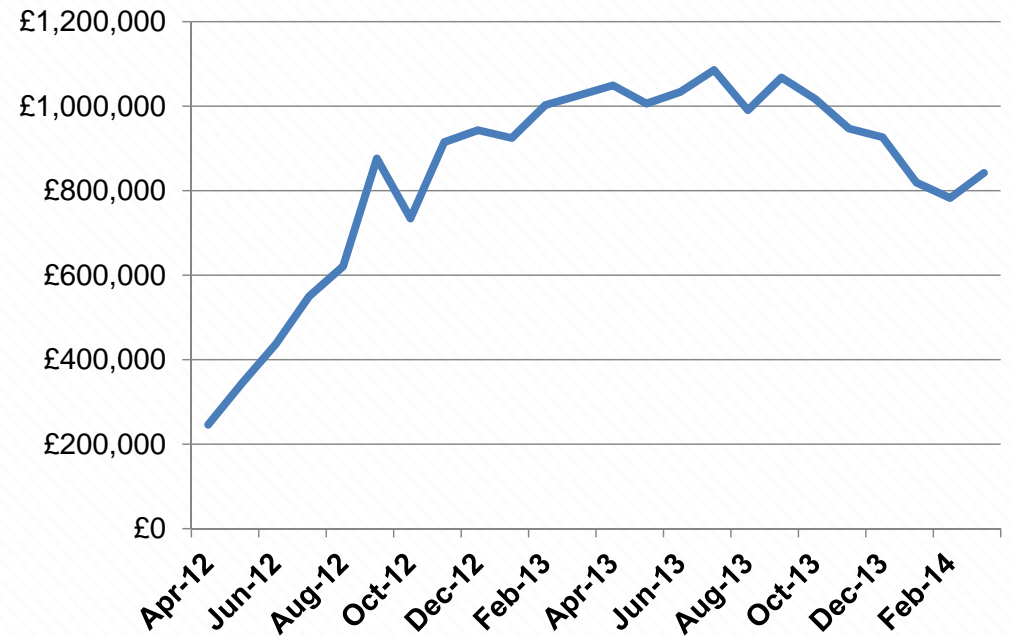
Higher private rents means it costs the council more to procure temporary accommodation for homeless families



At the end of last year the council had spent more than £1m above the subsidy level limit



### Cost to the council



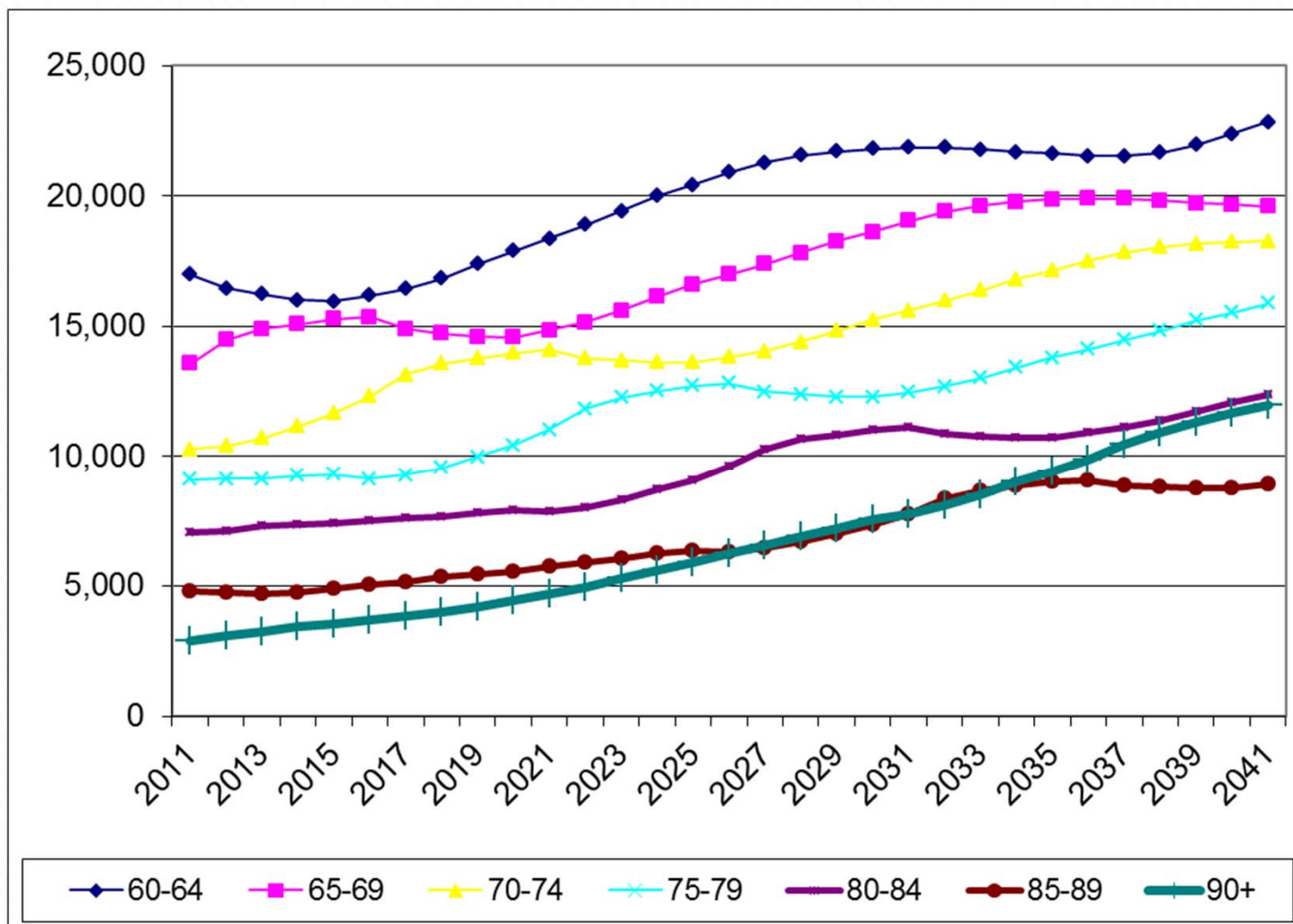


# Older People





# Growing older population

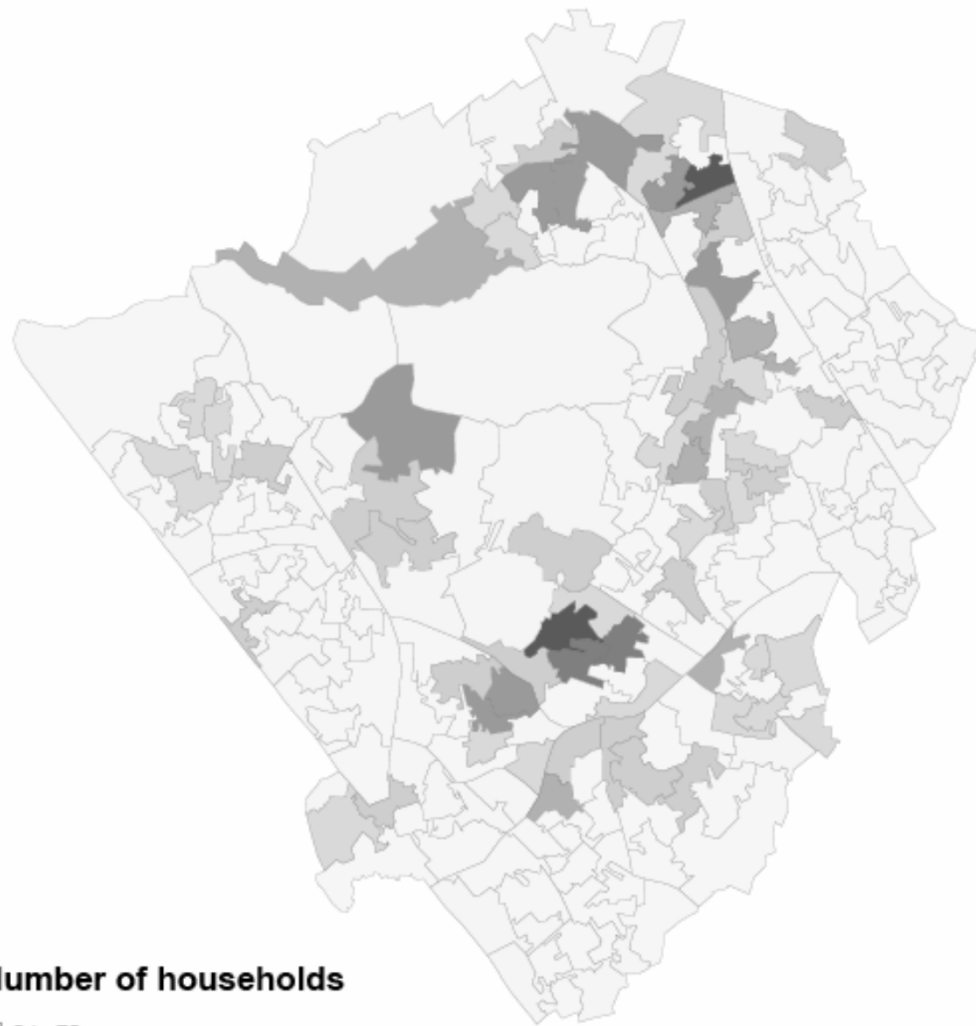


The over 60 population 64,690 and is projected to be 109,849 by 2041- an increase of 41%.

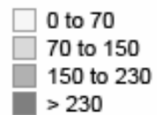
The over 90s population is set to increase from under 3,000 in 2011 to almost 12,000 in 2041.

There will be more over 90 year olds than 85-89 year olds from 2035.

# Where older person households are located



## Number of households



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London Borough of Barnet.  
OS Licence No LA100017674 2011  
Mosaic data 2010 - Copyright Experian 2010

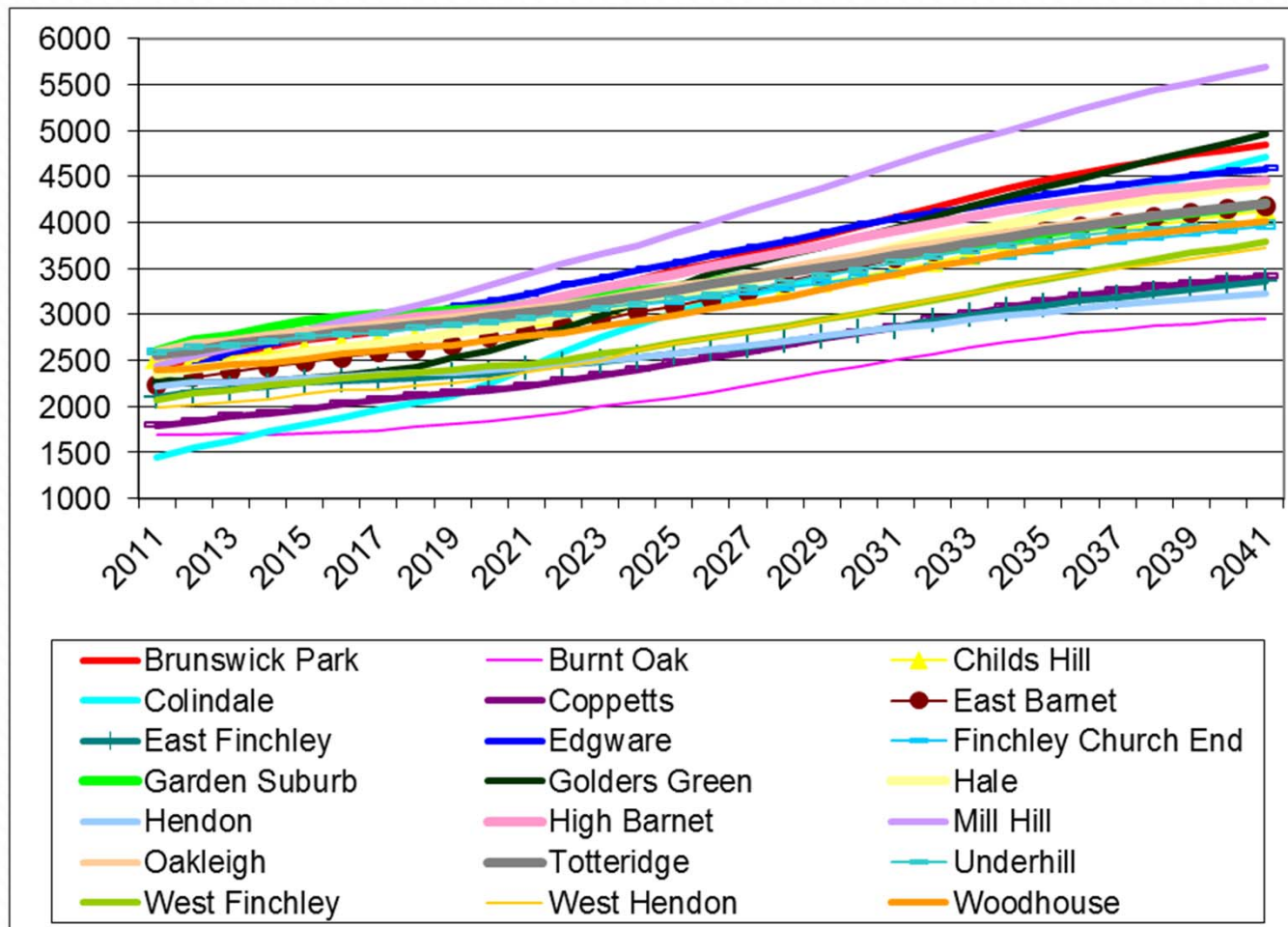
According to the Mosaic customer profiling tool two areas that have high numbers of older people are **Totteridge** and in the centre of the borough near **Finchley Church End** and **Mill Hill**.

# Town Centre Footfall

	By Age (%)					
	0-20	21-30	31-40	41-50	51-60	over 60
Brent Street	3.9	28.6	20.8	16.4	12.9	17.4
Burnt Oak	5.4	21.1	21.3	18.6	13.5	20
Chipping Barnet	4.3	18.4	17.6	19.8	16.1	23.7
Colindale	4.4	24.9	22.4	18.1	13.2	17.1
Cricklewood	3.6	25.9	23.1	17.6	12.9	16.8
East Finchley	2.3	22.6	22.3	18.4	13.6	20.8
Edgware	5.4	22	21.3	18.6	13.6	19.1
Finchley Church End	2.8	21.4	22.5	18.7	13.6	21.1
Golders Green	3.4	27.4	22.4	16.2	12.9	17.7
Hendon Central	4.2	30.5	22.7	16.3	11.9	14.3
Mill Hill	4.6	18.1	20.3	19.3	14.7	23
New Barnet	2.3	21.6	20.9	20.7	15.3	19.2
North Finchley	3.5	18.9	20.1	19.8	14.9	22.7

Data on mobile phone usage from Telefonica suggests that generally areas in the east of the borough have visits from a higher proportion of older people.

# Growth of older households by ward



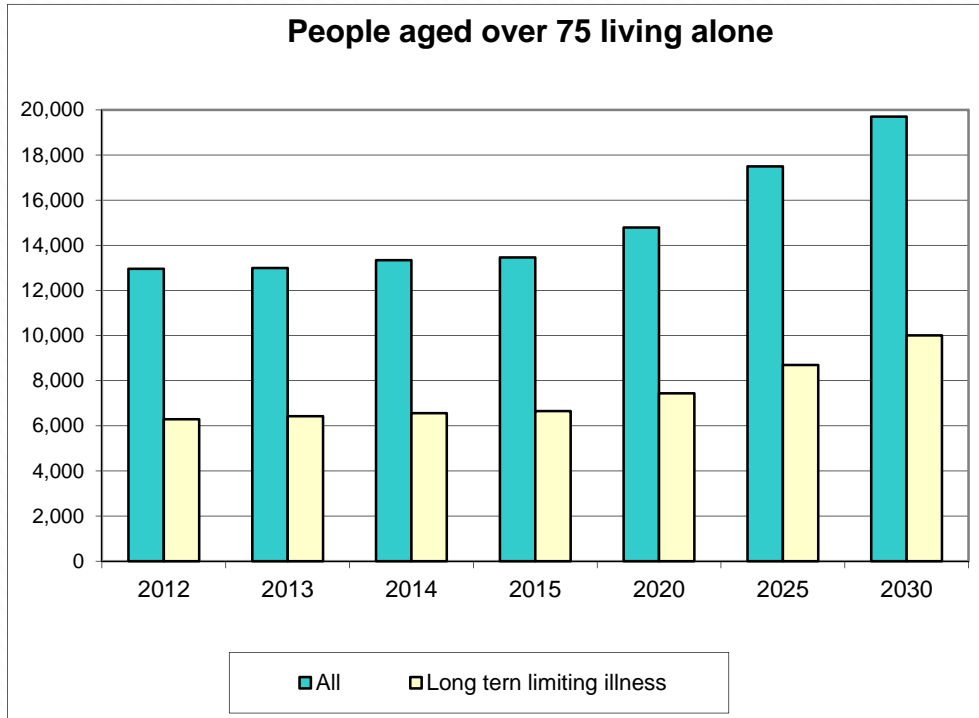
In 2011 the ward with the highest number of people over 65 was **Oakleigh** followed by Finchley Church and Garden Suburb.

All wards are expected to see a growth in the number of older people.

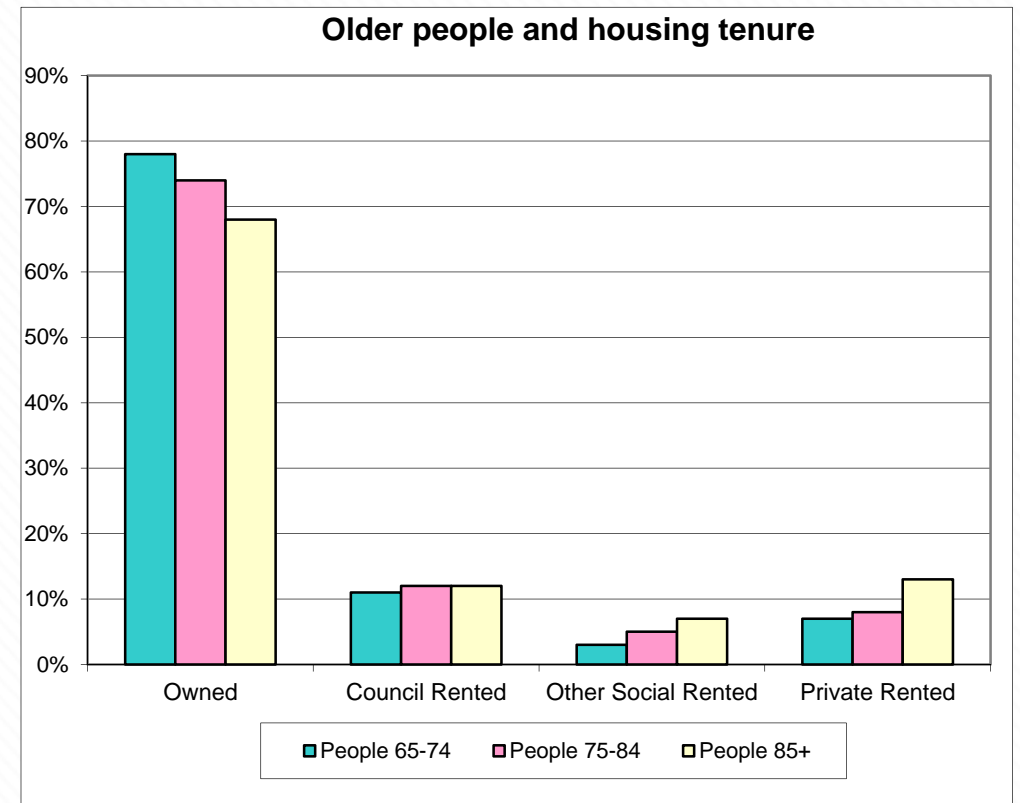
In 2041 the most populous ward for people over 65 will be **Mill Hill**, then **Golders Green** and **Brunswick Park**.



# Older people living alone and tenure



The majority of older people own their own home but 12% of the over 75s live in the private rented sector.



More older people will be living alone in future years, including those with a long term limited illness.

# Chronic and long-term conditions of over 65s

	2010	2015	2020	% Increase
With a limiting long-term illness	20,359	22,593	24,583	21%
With longstanding health condition caused by a stroke	1,101	1,219	1,345	22%
With longstanding health condition caused by a heart attack	2,329	2,576	2,831	22%
With diabetes	5,861	6,514	7,144	22%
With dementia	3,778	4,185	4,743	26%
With depression	4,179	4,624	5,025	20%
Unable to manage a mobility activity on own	9,466	10,409	11,617	23%
Unable to manage a self-care activity on own	16,943	18,608	20,618	22%
Unable to manage a domestic task on own	20,644	22,679	25,159	22%

By 2020, many chronic and long term illnesses are projected to increase by more than 20%.

Over 65s living with dementia will increase by 26%

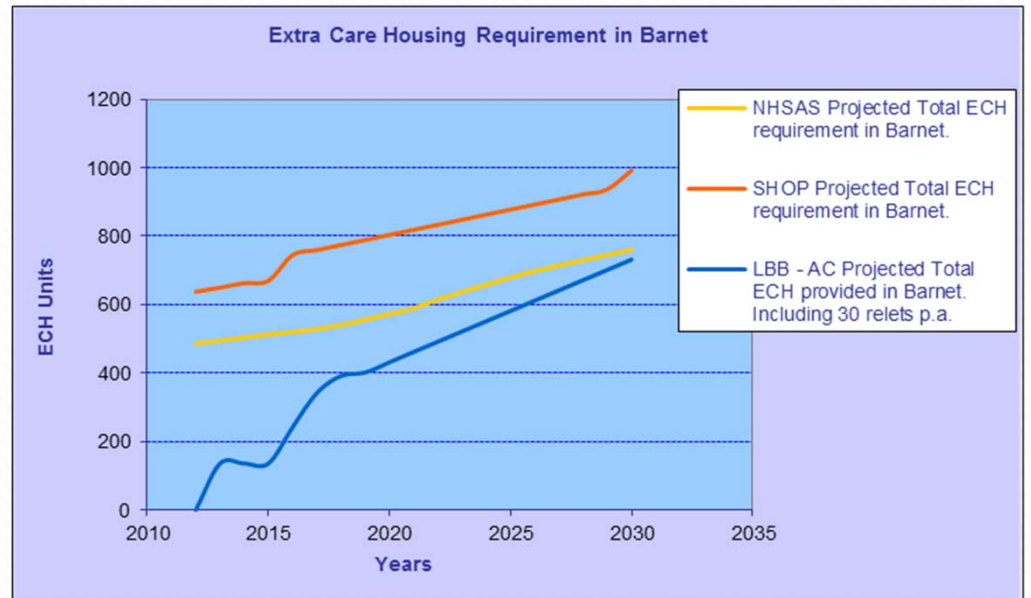
# Older people falling in their home..

	Number of people	As proportion of those falling each year
fall each year	18,083	-
fall twice or more	7,817	43%
attend A/E	2,567	14%
call an ambulance	2,567	14%
sustain a fracture	1,283	7%
sustain fracture to hip	420	2%

Using estimates produced by Department of Health on the number of falls and their consequences for a typical PCT, the following figures were extrapolated for Barnet. *Based on a total population of 343,088 and a population aged 65+ of 47,253*

# Growing demand for care from an ageing population

	Service Users in 2012	By 2017	By 2022	By 2027
All Users	7525	+732	+1464	+2298
18-64	2663	+190	+270	+352
65-74	813	+105	+124	+178
75-84	1636	+10	+220	+414
85+	2413	+427	+850	+1354
Residential	1078	+111	+230	+362
18-64	354	+25	+39	+51
65-74	88	+11	+13	+19
75-84	211	+1	+28	+53
85+	425	+75	+150	+239
Nursing	363	+42	+93	+148
18-64	28	+2	+4	+5
65-74	38	+5	+6	+8
75-84	102	+1	+14	+26
85+	195	+34	+69	+109



- In 2011/12 roughly two-thirds of Barnet's social care users are aged 65 or over and a third are aged 85 or over.
- These proportions may well increase as over the next five years there will be 4,459 more residents aged 65 or over (a 9.2% increase) and 1,424 more residents aged over 85 (a 17.7% increase), compared to average growth of only 8.1% expected in the Barnet population as a whole.



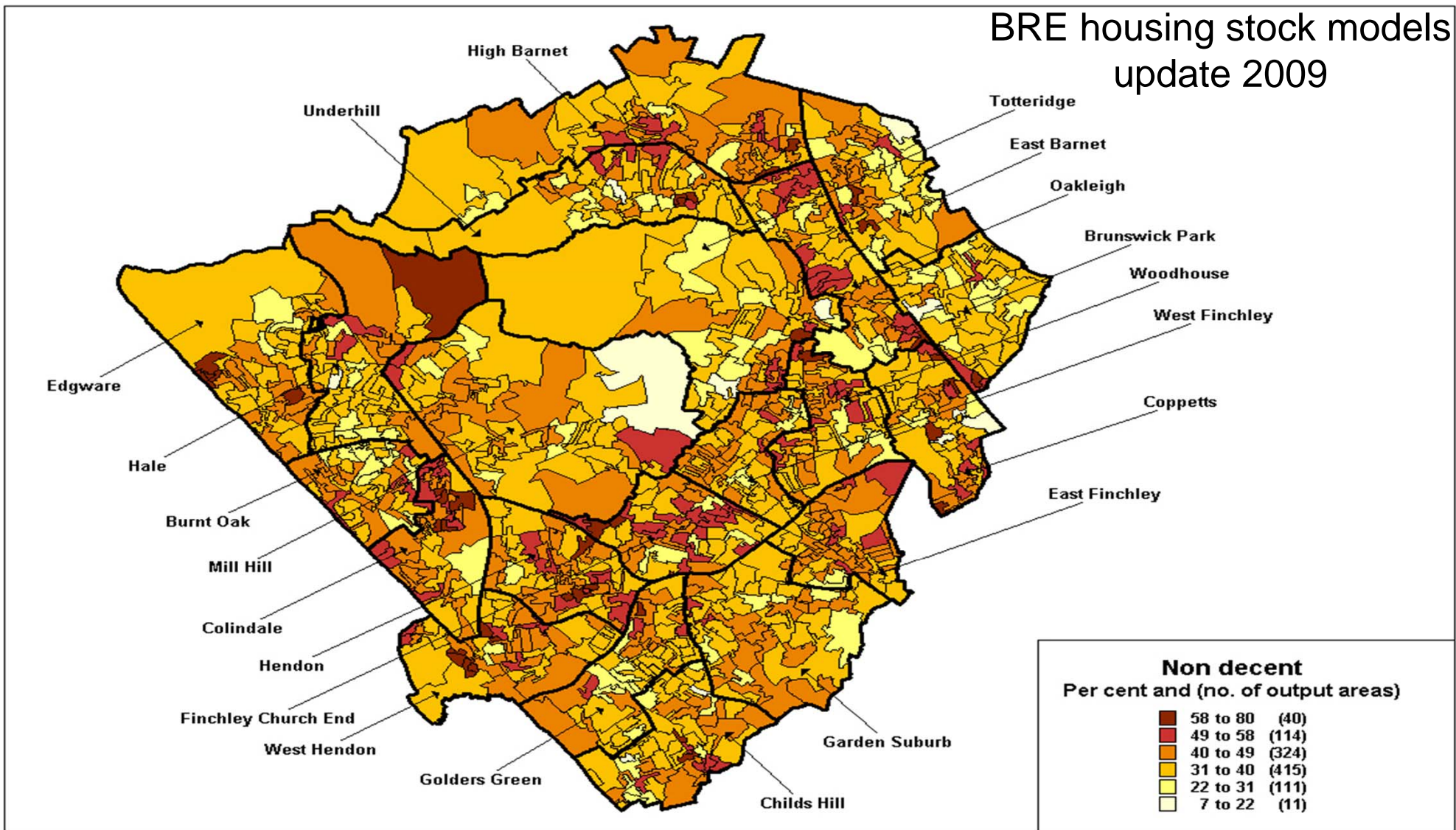


# Stock Condition & Empty Homes



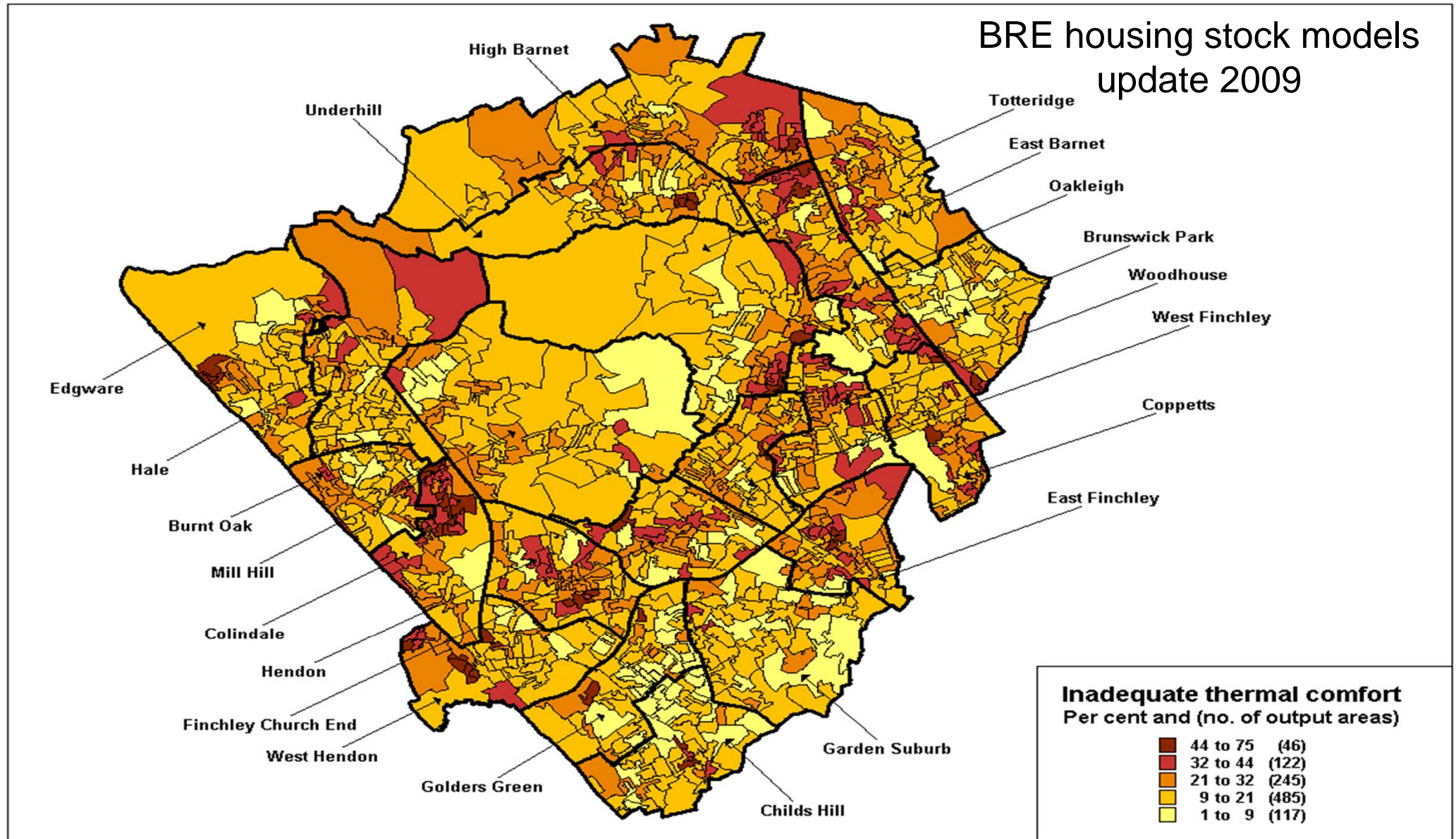
# Non decent homes in the private sector

BRE housing stock models  
update 2009

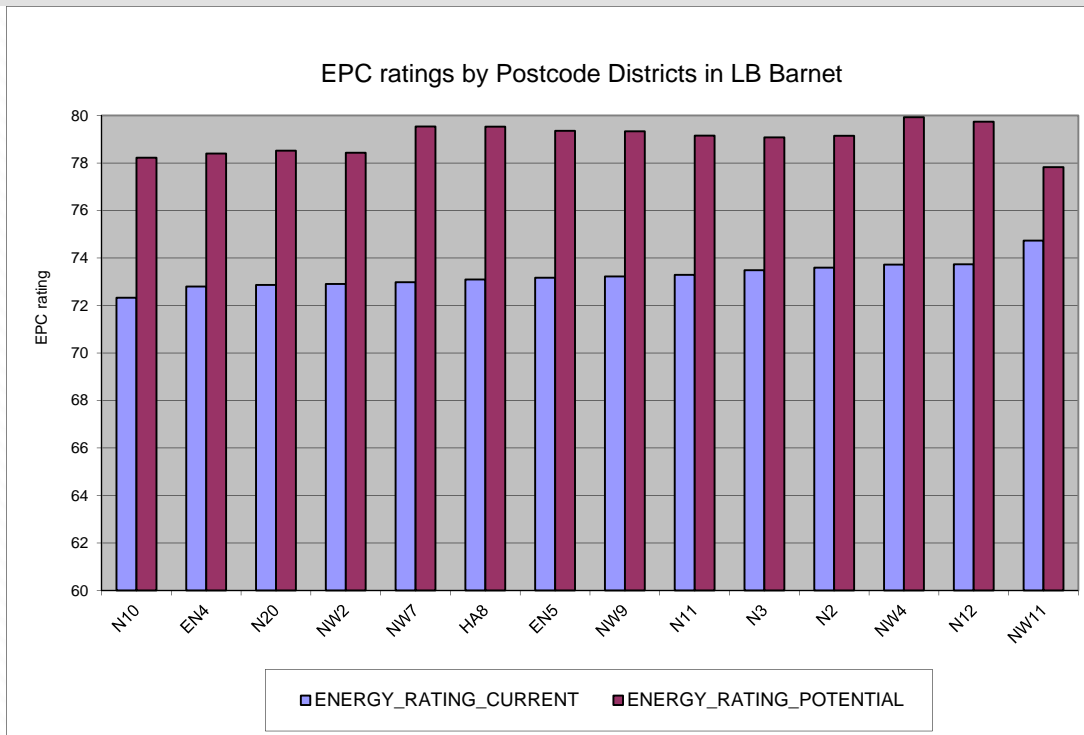




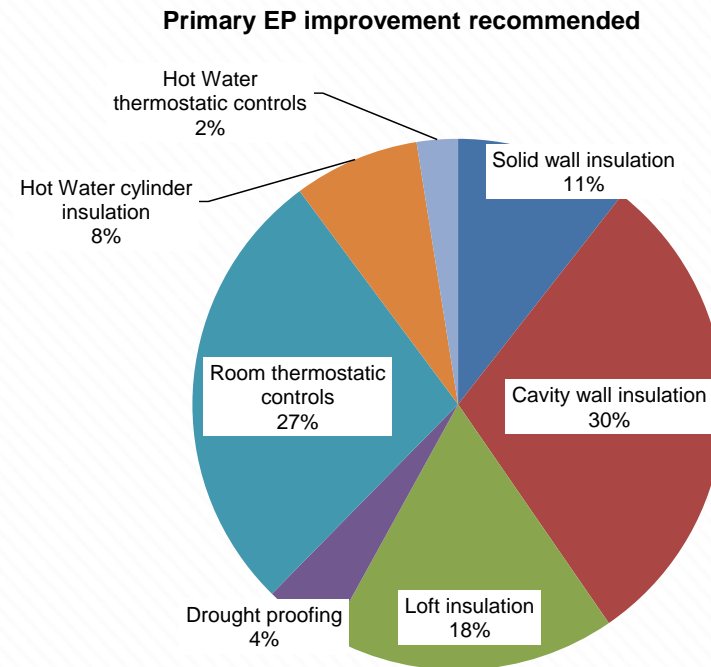
# Inadequate thermal comfort in the private sector



# Energy Performance Certificates



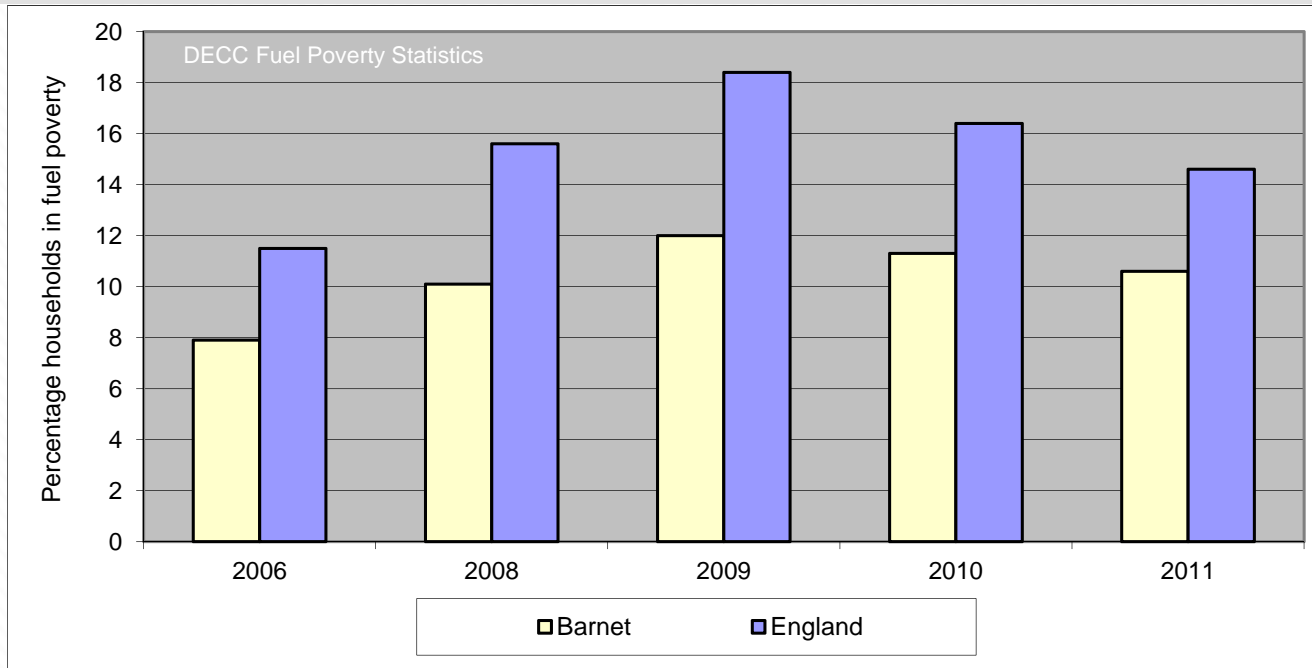
The EPC data suggests most residential properties in Barnet are within 10 percentage points of their full energy performance EPC potential.



The most cited EP improvements are cavity wall insulation and room thermostatic control installation.

Post Code	N10	EN4	N20	NW2	NW7	HA8	EN5	NW9	N11	N3	N2	NW4	N12	NW11
EPC rated properties	132	334	317	347	461	654	781	553	435	587	496	723	806	630

# Fuel poverty & excess winter deaths

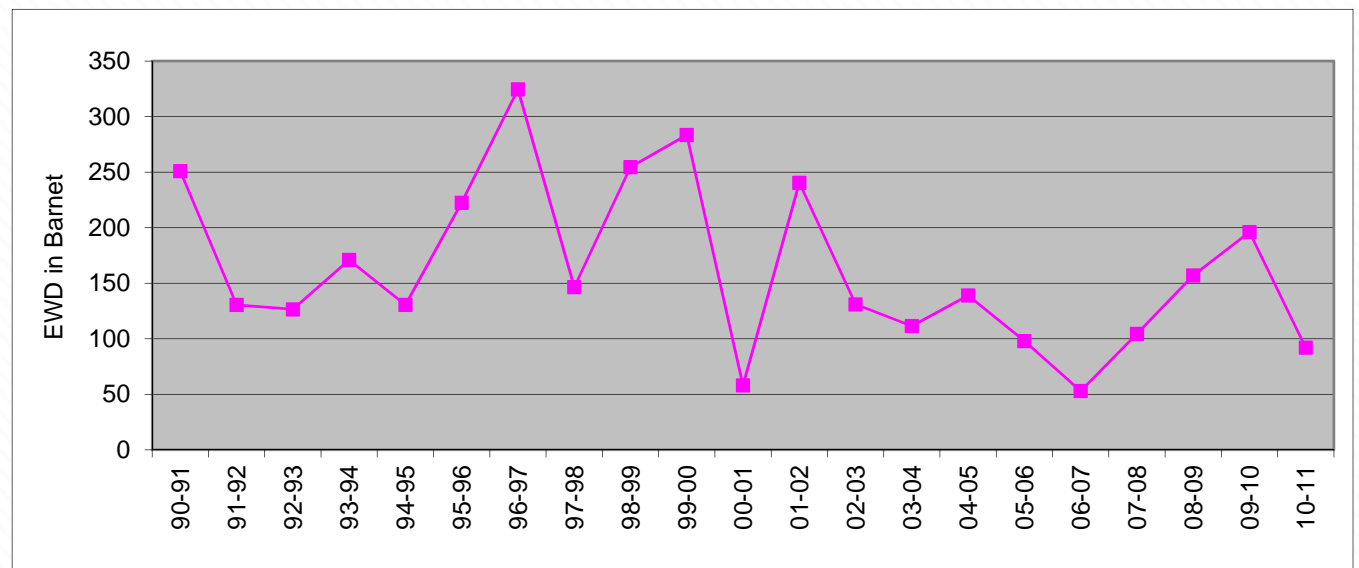


In 2011 **10.6%** of Barnet's households, or **13,628** homes, were fuel poor.

This is, however, still 4 percentage points lower than the average for England as a whole.

The level of excess cold hazards is considered an issue given the increasing numbers of older residents in Barnet.

On average there are **125** EWD every year in Barnet over period 2001 – 2011

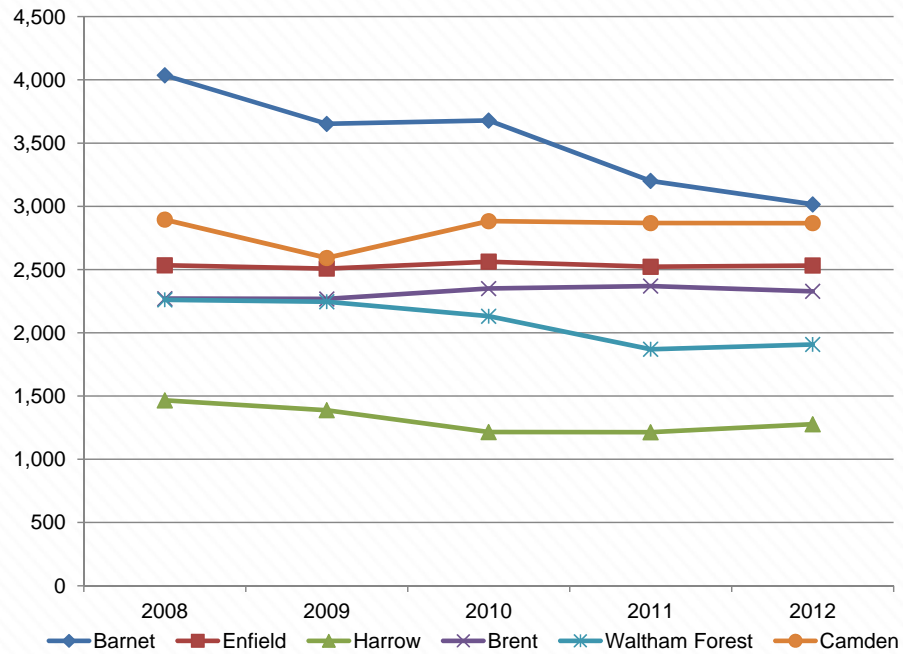


Source: DECC

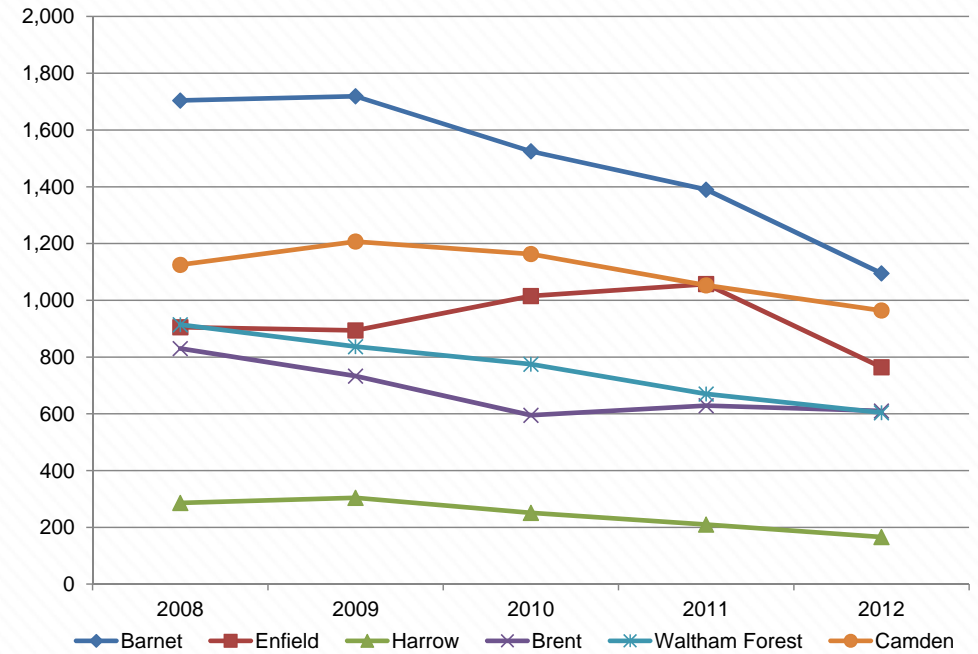


# More vacant dwellings than in neighbouring boroughs

All vacant dwellings 2008 to 2012



Long term vacant dwellings 2008 to 2012



# Long-term empty property survey 2012

Occupancy Status	Number	%
Being Demolished	2	0.16%
Occupied following previous advice from Environmental Health	48	4%
Reoccupied	205	16%
Second property	1	0.08%
Occupied following notice by Environmental Health	1	0.08%
Other reason	1	0.08%
Still empty (at least 12 months)	985	79%
Total properties inspected	1,243	

# Housing Supply & Demand

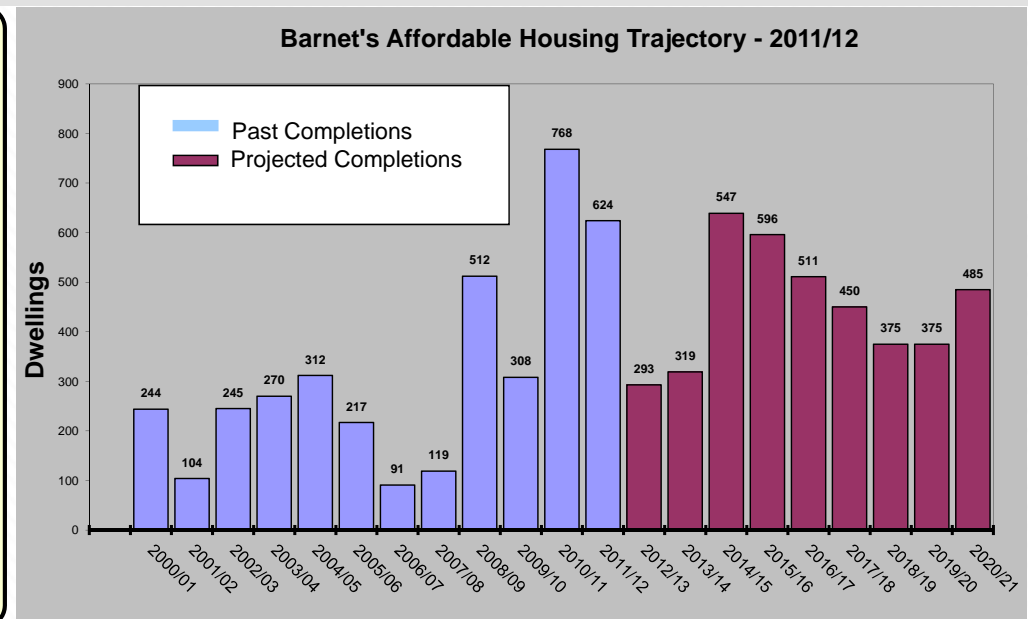
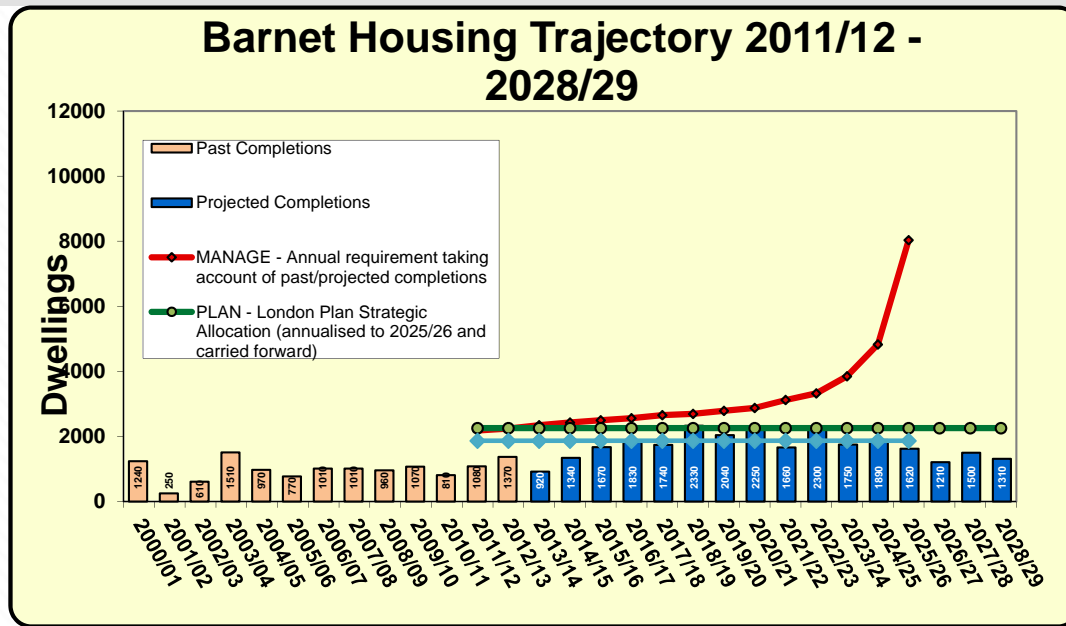




# Delivery- high capacity to deliver new homes

<b>Delivery</b>	<b>London Plan Target for new homes</b>	<b>% of LP Target</b>	<b>% of Population</b>
<b>Barnet</b>	<b>10,635</b>	<b>31.51%</b>	<b>18.20%</b>
<b>Camden</b>	<b>2,500</b>	<b>7.41%</b>	<b>13.20%</b>
<b>Enfield</b>	<b>2,760</b>	<b>8.18%</b>	<b>16.00%</b>
<b>Hackney</b>	<b>5,775</b>	<b>17.11%</b>	<b>12.70%</b>
<b>Haringey</b>	<b>4,100</b>	<b>12.15%</b>	<b>13.20%</b>
<b>Islington</b>	<b>4,610</b>	<b>13.66%</b>	<b>12.20%</b>
<b>Westminster</b>	<b>3,375</b>	<b>10.00%</b>	<b>14.60%</b>

# Barnet Housing trajectories

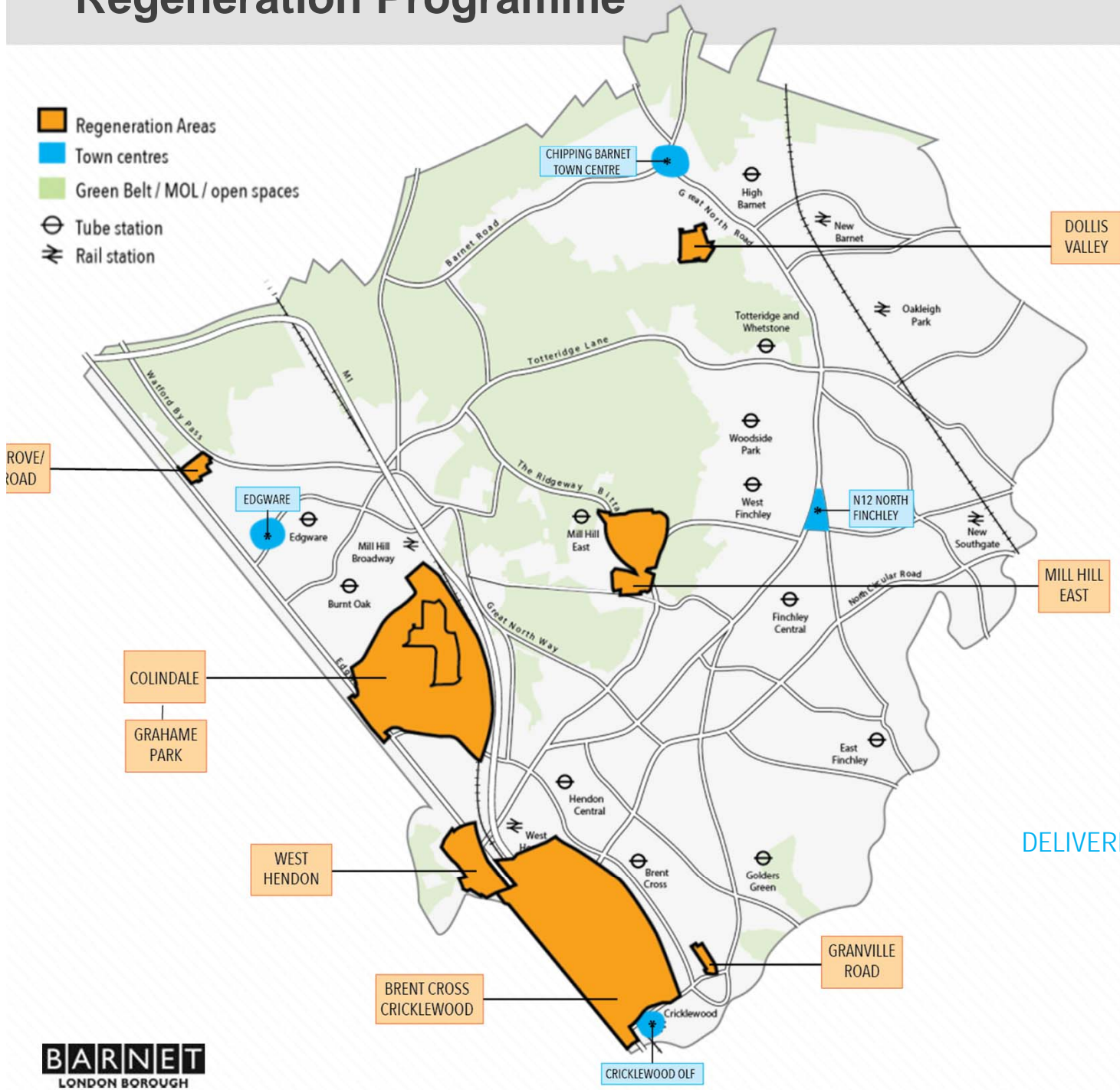


Capacity for more than 27,300 additional housing by 2028/29

More than 3,900 additional affordable housing by 2020/01

Residential completions 2004 - 2012 financial years – breakdown by housing type												
Unit Type	Number of bedrooms											
	1	%	2	%	3	%	4	%	5+	%	Total	%
Flats	2267	33	3813	56	712	10	44	1	7	0	6843	83
Houses	110	8	171	12	566	41	382	28	160	11	1389	17
<b>Total number of units</b>	<b>2377</b>	<b>29</b>	<b>3984</b>	<b>48</b>	<b>1278</b>	<b>16</b>	<b>426</b>	<b>5</b>	<b>167</b>	<b>2</b>	<b>8232</b>	<b>100</b>

# Majority of the new housing will be delivered through the Barnet Regeneration Programme



**15,000+**  
NEW HOMES BUILT OVER THE  
LIFETIME OF THE  
REGENERATION SCHEMES

**450**  
NEW JOBS IN  
NEXT 5 YEARS

**10**  
SCHOOLS ACROSS  
PRIMARY, SECONDARY &  
HIGHER EDUCATION LEVELS

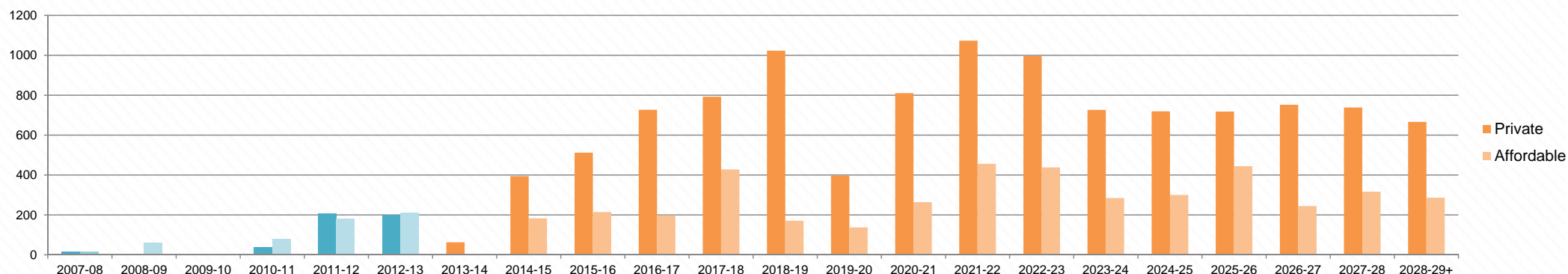
**+91,509**  
SQM OF RETAIL & COMMERCIAL SPACE  
DELIVERED IN BRENT CROSS SHOPPING CENTRE

**c£25m+**  
NEW HOMES BONUS



# Housing & Growth (Regeneration only)

Housing delivery: Priority Estates, Brent Cross Cricklewood & Mill Hill East



- The 2012/13 housing target for completions was 404 units of housing. By March 2013, the number of completions for the year was 469 units, of which 212 were affordable.

## Housing delivery in 2012/13

	Qtr 1	Qtr 2	Qtr 3	Qtr 4	2012/13 Totals
<b>Private</b>	<b>129</b>	<b>20</b>	<b>0</b>	<b>108</b>	<b>257</b>
<i>Regeneration Estates</i>	<i>129</i>	<i>20</i>	<i>0</i>	<i>108</i>	<i>257</i>
<i>Mill Hill East</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
<b>Affordable</b>	<b>39</b>	<b>8</b>	<b>0</b>	<b>165</b>	<b>212</b>
<i>Intermediate</i>	<i>3</i>	<i>3</i>	<i>0</i>	<i>28</i>	<i>34</i>
<i>Rented</i>	<i>36</i>	<i>5</i>	<i>0</i>	<i>137</i>	<i>178</i>
<b>Total</b>	<b>168</b>	<b>28</b>	<b>0</b>	<b>273</b>	<b>469</b>

- The 2013/14 housing target is 39 private housing units and 0 affordable housing units in the Priority Estates.
- 2014/15 will see a significant increase in housing completions.