Housing Strategy
&
Homelessness and Rough Sleeping Strategy

Evidence Base

February 2023

National and Regional Context

- Current Housing Strategy dates from 2019.
- Since then:
  - December 2019 – General Election
  - March 2020 – COVID-19 pandemic starts in UK
  - March 2020 – Everyone In rough sleeping campaign
  - April 2020 – Rent Policy Statement ends rent reduction and allows increases of up to CPI +1%
  - November 2020 – Social Housing White Paper published
  - April 2021 – Domestic Abuse Act 2021 - Royal Assent
  - April 2021 – Fire Safety Act 2021 – Royal Assent
  - May 2021 – London mayoral election
  - December 2021 – Adult Social Care Reform White Paper published
  - February 2022 – Levelling Up White Paper published
  - April 2022 – Building Safety Act 2022 - Royal Assent
  - May 2022 – Barnet local election
  - June 2022 – A Fairer Private Rented Sector White Paper published
  - June 2022 – Social Housing Regulation Bill published
  - September 2022 – 'Ending Rough Sleeping For Good' strategy published
  - November 2022 – confirmation of 7% ceiling for rent increases for 2023/24

National and Regional Context

National

- White Paper – *The charter for social housing residents* (2020)
- Fire Safety Act 2021
- Building Safety Act 2022
- White paper – *People at the heart of care* (2021)
- White Paper – *A fairer private rented sector* (2022)
- White Paper – *Levelling Up the United Kingdom* (2022)
- Strategy – *End Rough Sleeping for Good (2022)*

Commitments:

- 300,000 homes per year by mid-2020s
- £11.5bn affordable homes programme for 180,000 homes
- End rough sleeping by 2024

Regional

London Housing Strategy

- Building homes for Londoners
- Delivering genuinely affordable homes
- High quality homes and inclusive neighbourhoods
- A fairer deal for private renters and leaseholders
- Tackling homelessness and helping rough sleepers

Commitments:

- *Homes for Londoners*
- £4.8bn affordable homes programme 2016-23
- £4bn affordable homes programme 2021-26

Population

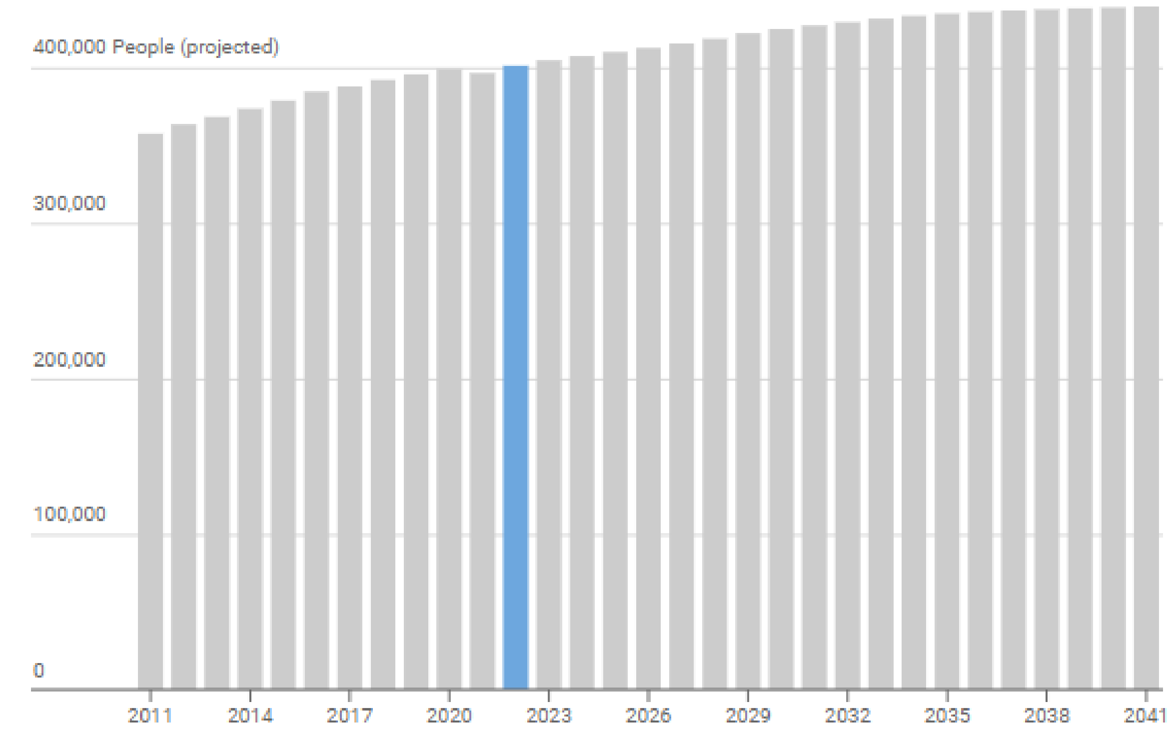
A large, diverse borough

2021 Census – population growth

- 2nd most populated local authority in London
- 17th most populated local authority in England

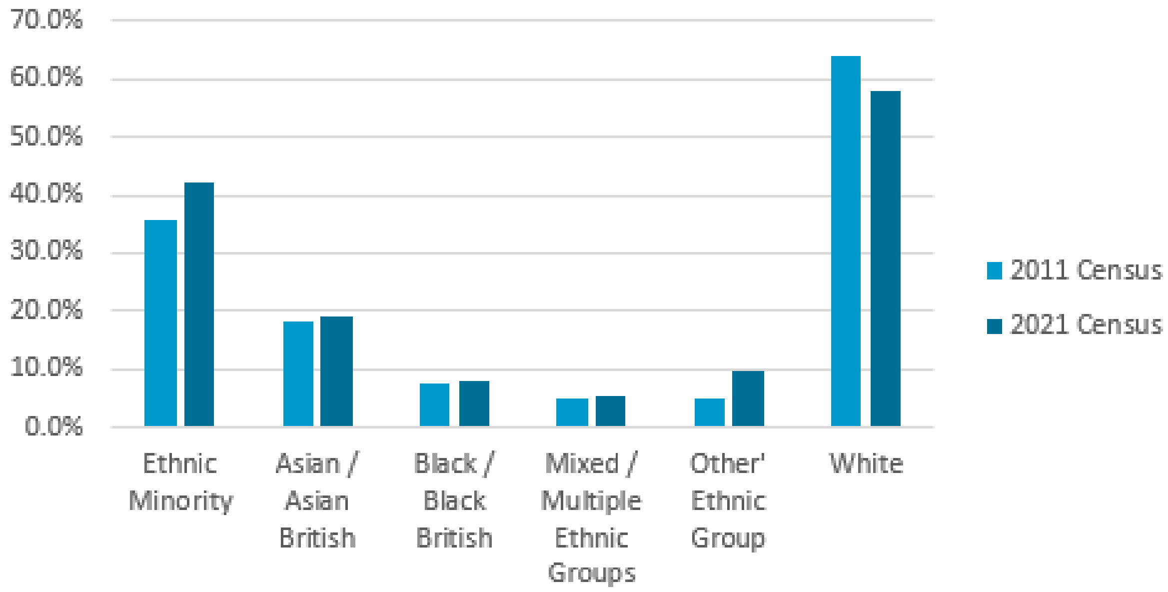
A growing and increasingly diverse population

Projected Population Growth



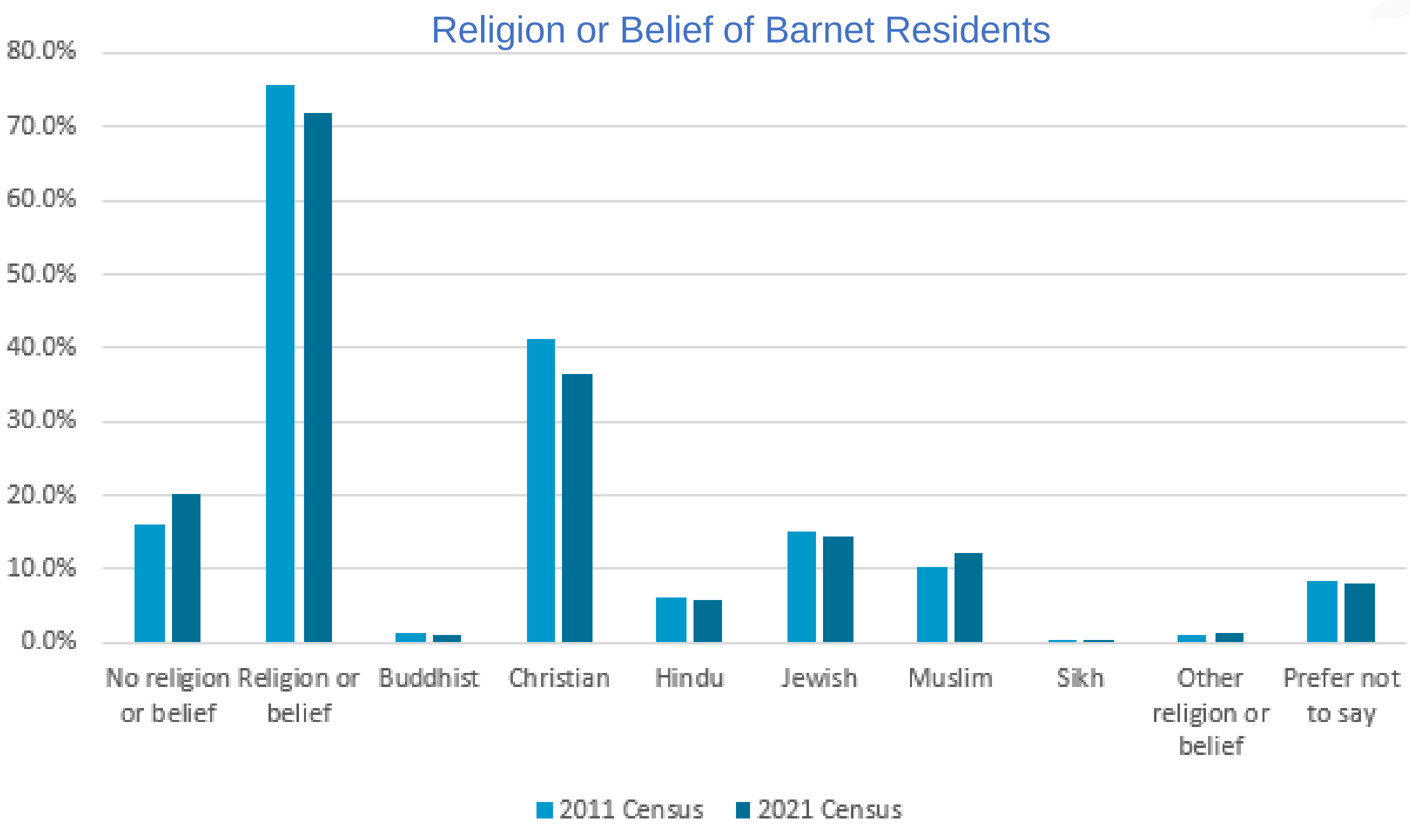
- Barnet's population in 2021 Census: **389,300**
- Increase since 2011 Census: **9.2%**
- Expected population by 2041: **451,040**
- Projected increase: **61,740** / **15.6%**

Ethnic Origin of Barnet Residents

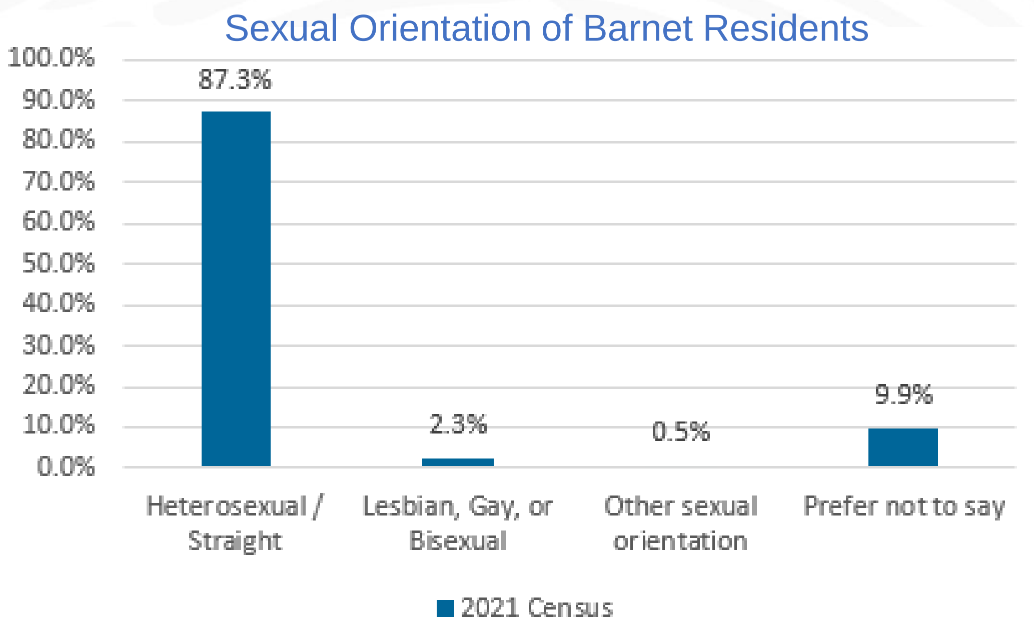


- **182** languages other than English are spoken by pupils in Barnet schools, where Romanian and Arabic are the most common languages spoken after English.
- In secondary schools, **163** languages other than English are spoken, with Polish and Arabic most common.

A growing and increasingly diverse population

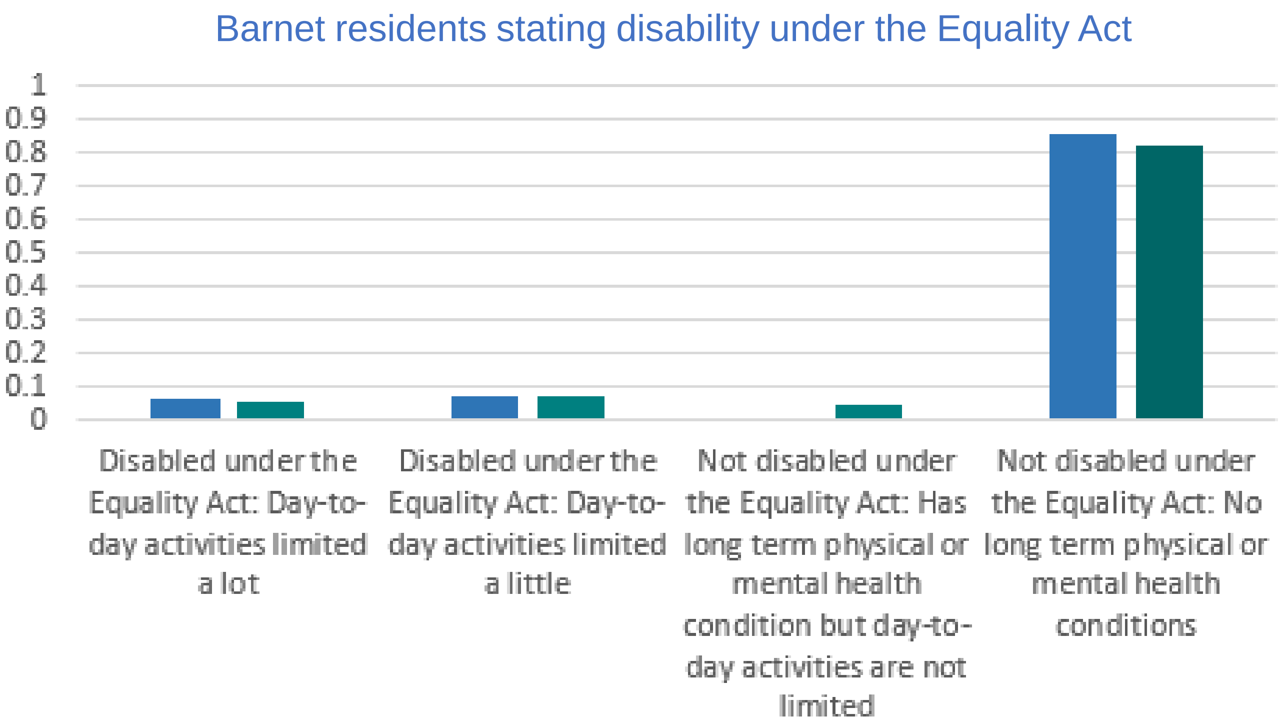


An increase in those with no religion or belief in the 2021 Census compared to 2011 (**+4%**), and a decrease in those with a religion or belief (**-3.9%**). There was a reduction in all religions and beliefs with the exception of Islam, which increased by **1.9%**.



Sexual orientation was captured for the first time in the 2021 Census. Of all London boroughs, Barnet has the highest proportion of residents who are heterosexual or straight, the **23rd** highest who are lesbian, gay, or bisexual, the **13th** highest who have another sexual orientation, and the **4th** highest number of residents who chose not to provide this information.

A growing and increasingly diverse population

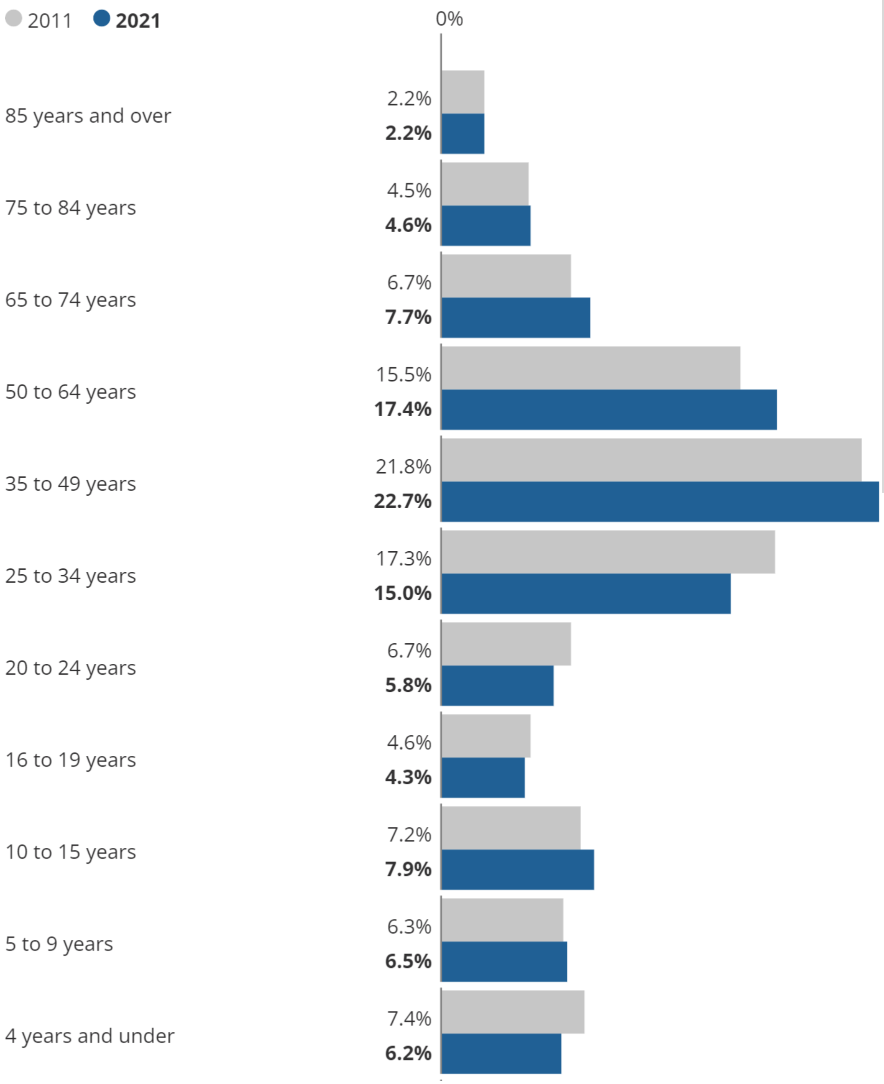


A slight decrease in those who stated they are disabled under the Equality Act 2010 and their day to day activities are limited a lot (**-0.9%** compared to 2011), in those who stated their activities are limited a little (**-0.3%**), and in those who said they are not disabled (**-3.9%**).

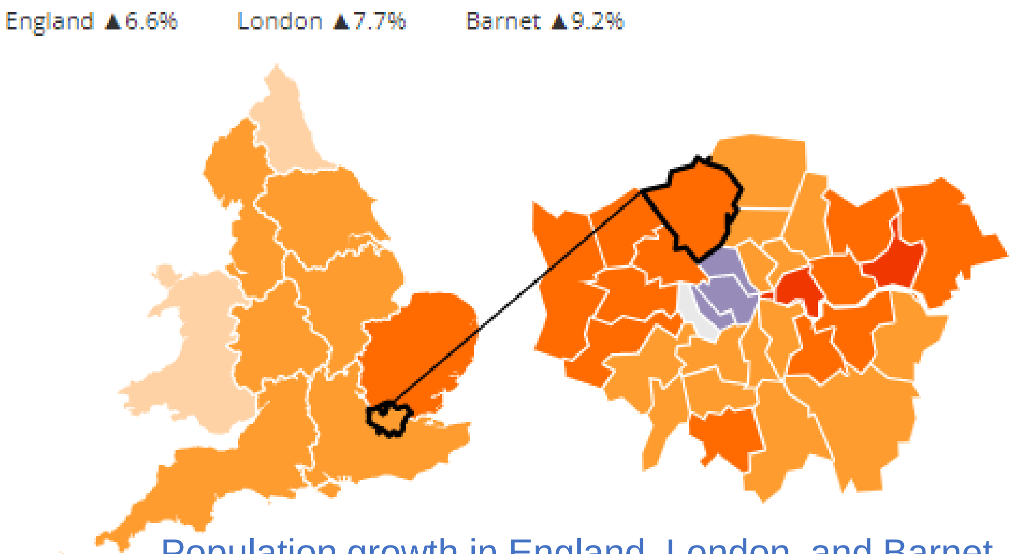
In 2021, information was captured about residents who said they were not disabled but have a long-term physical or mental health condition but their day-to-day activities are not limited, this impacted upon the comparison to 2011.

An increasingly older population

% of residents by age group

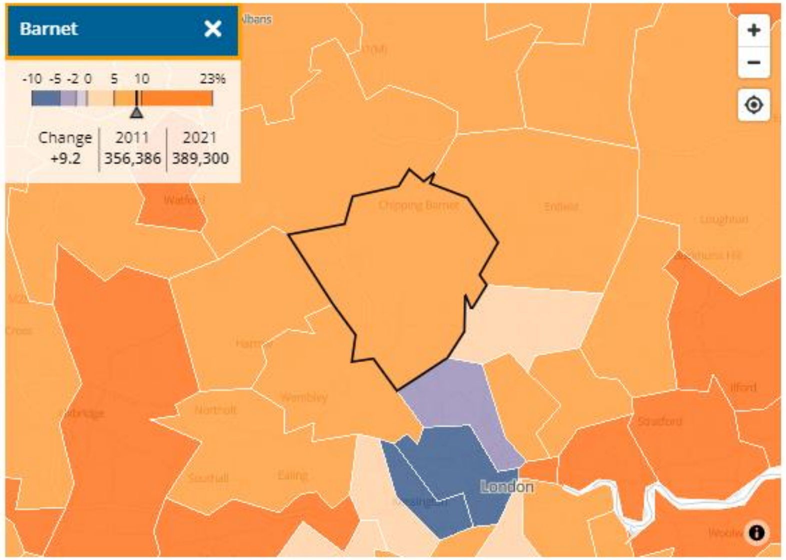


Older age groups increased compared to the 2011 Census (35 to 84). There was a reduction in people younger than 35, with the exception of the group 10-15 years old.



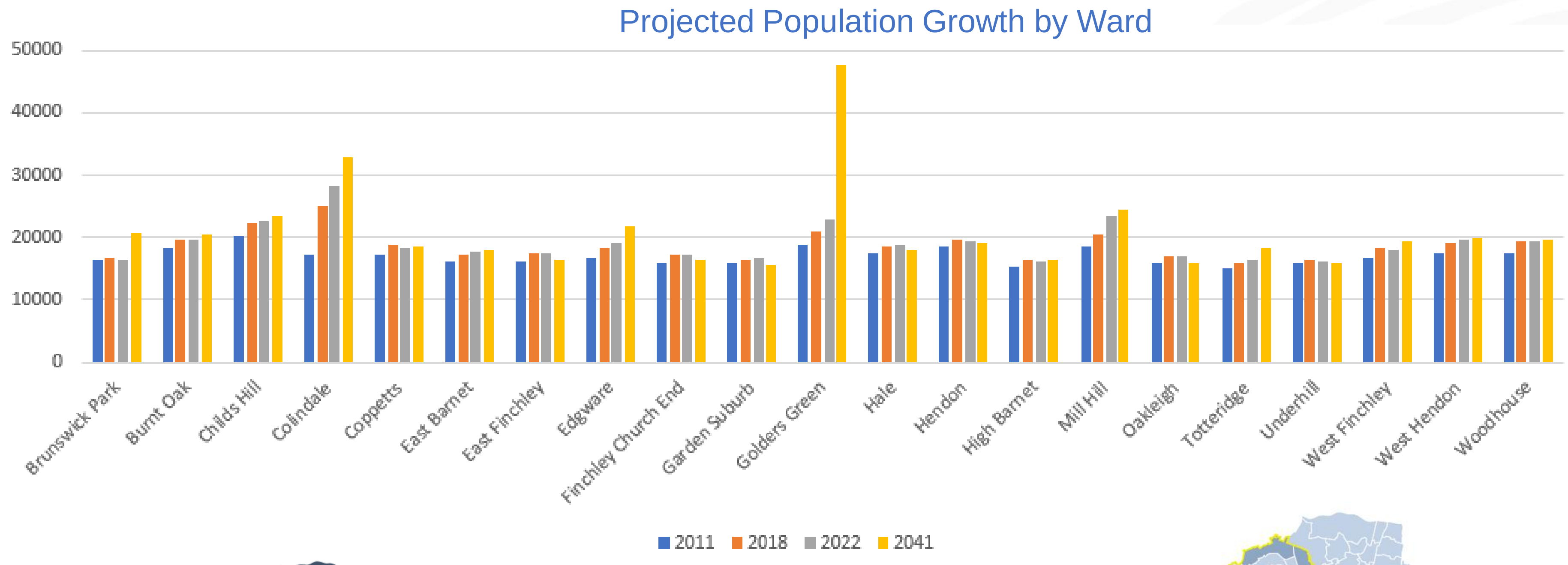
Population growth in England, London, and Barnet

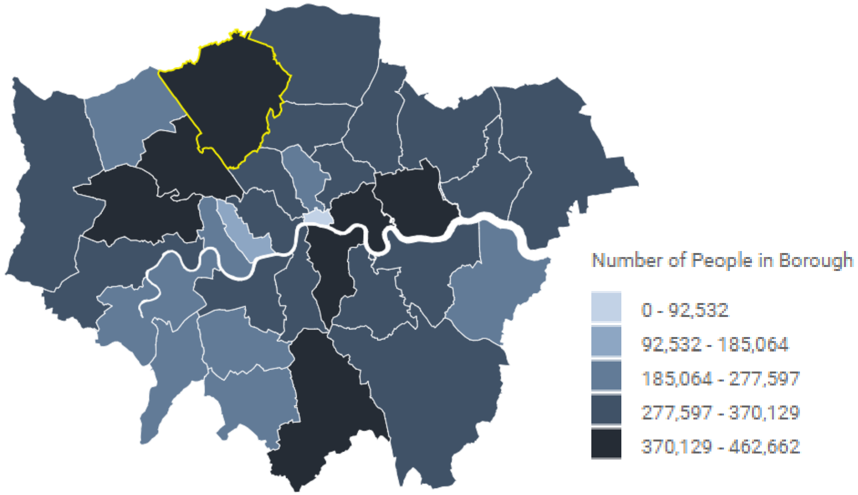
+2 +8 +16%

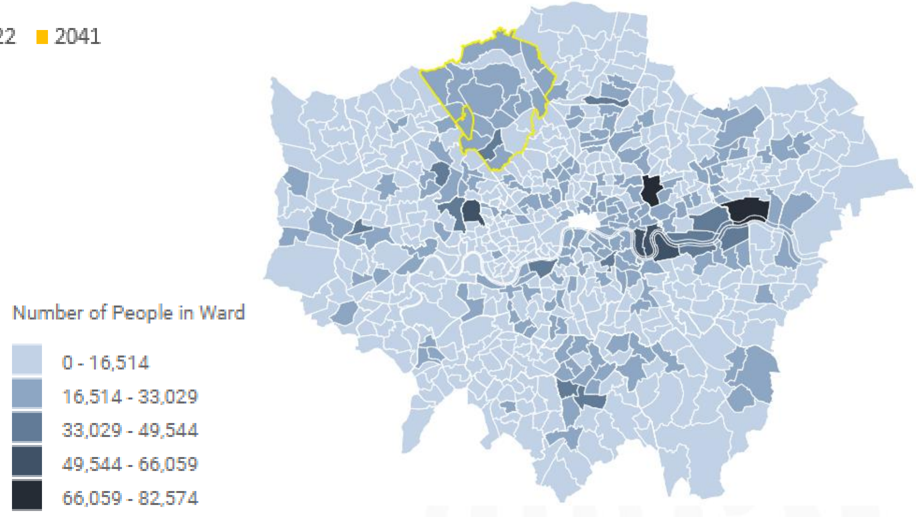


Population growth was higher in Barnet than in England and the London average.

A growing population



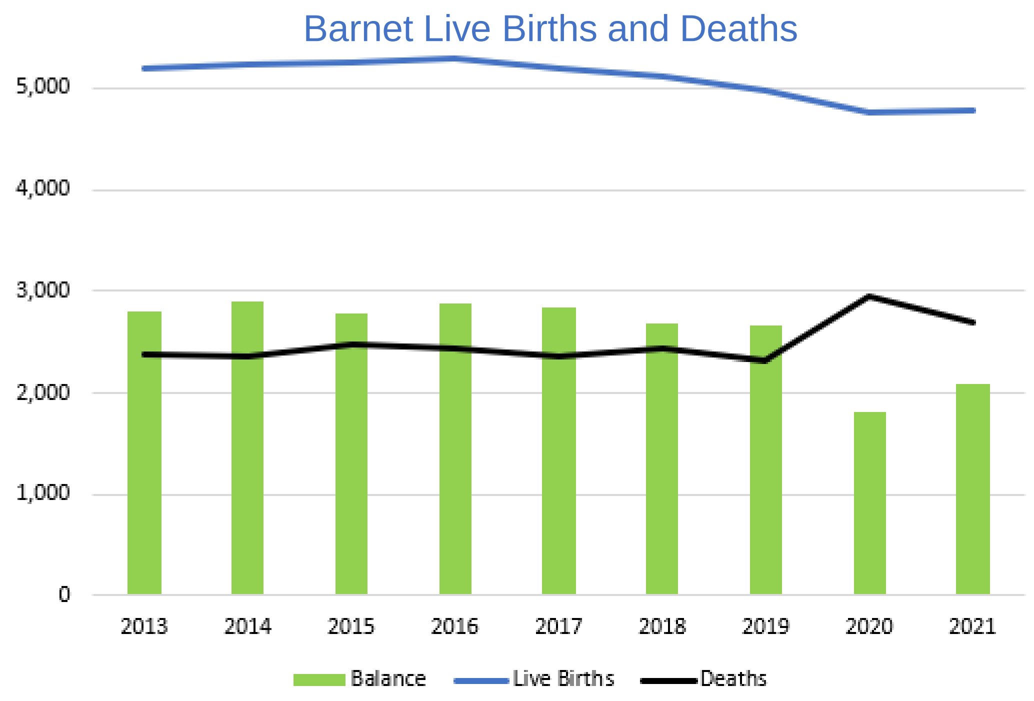




- Largest population increases by wards between 2011 and 2022 were Colindale (**+64.5%**) and Mill Hill (**+26.4%**).
- Smallest increases were Brunswick (**+0.3%**) and Underhill (**+1.1%**).

- Largest projected population increases between 2022 and 2041 are Golders Green (**+107.2%**) and Brunswick (**+25.4%**).
- Smallest projected increases are Garden Suburb (**-6.2%**) and Oakleigh (**-5.3%**).

What's driving population growth?



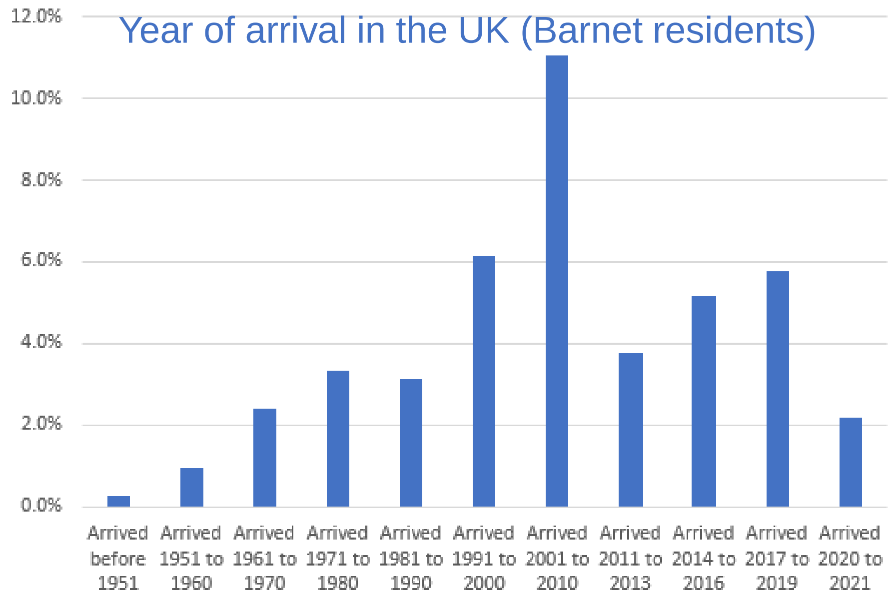
- Net migration (previous 5 years) is about **+1,382** per annum
- International migration (previous 5 years) is about **+4,056** per annum.
- Both are lower than in 2018 (**+2,700** and **+4,600** respectively). We might reasonably expect post-Brexit that there has been a decrease in migration from EU countries and an increase in other international migration.

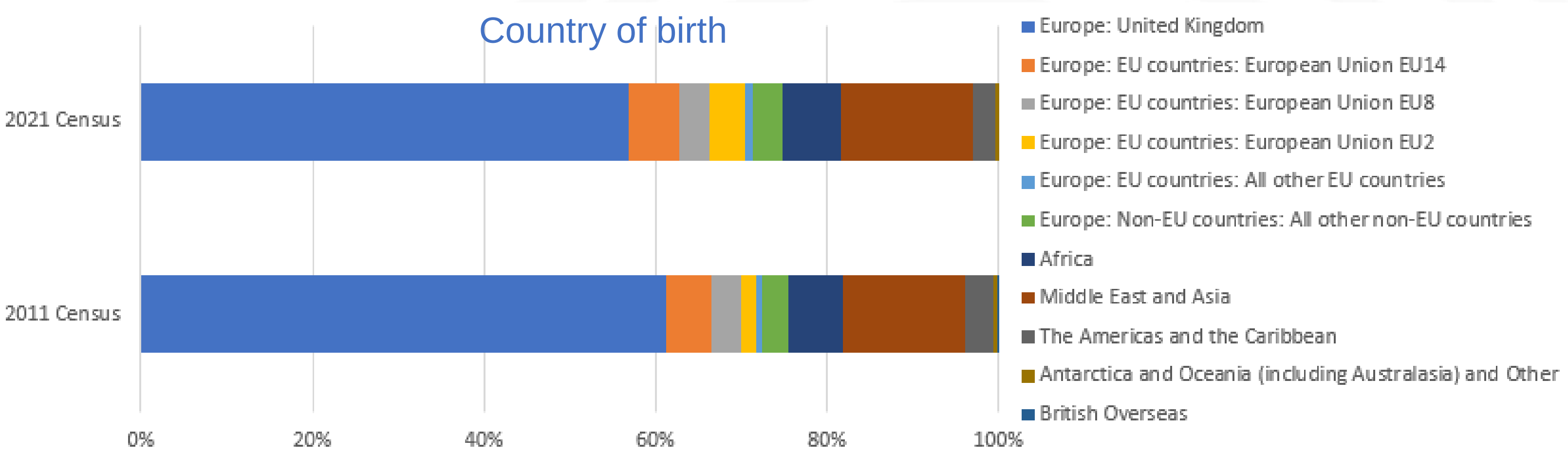
- Net difference between live births and deaths is about **+2,600** per annum (down from +3,000 in 2018)

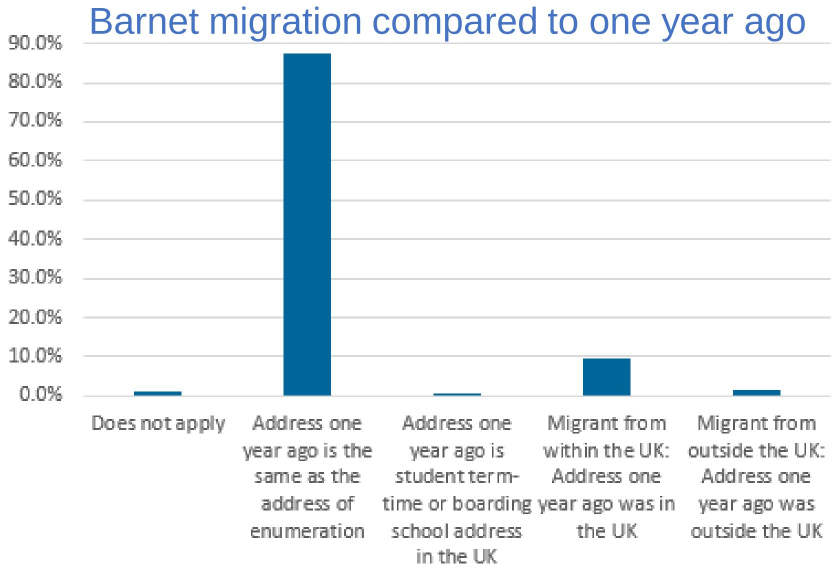
Barnet Migration Figures

		2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	Overall
Long-Term International Migration	**Inflow**	8,311	6,748	6,092	7,720	8,636	8,257	7,622	7,085	7,269	7,395	**75,135**
	Outflow	3,329	3,033	2,793	3,321	2,969	3,450	3,506	2,864	3,792	3,736	**32,793**
	Net	**4,982**	**3,715**	**3,299**	**4,399**	**5,667**	**4,807**	**4,116**	**4,221**	**3,477**	**3,659**	**42,342**
Internal Migration (within UK)	**Inflow**	19,948	20,777	20,664	21,984	21,755	22,812	25,028	25,364	26,583	22,984	**227,899**
	Outflow	21,296	21,611	22,396	23,868	25,134	24,591	28,885	28,084	28,906	25,676	**250,447**
	Net	**-1,348**	**-834**	**-1,732**	**-1,884**	**-3,379**	**-1,779**	**-3,857**	**-2,720**	**-2,323**	**-2,692**	**-22,548**
Overall	**Net Change**	**3,634**	**2,881**	**1,567**	**2,515**	**2,288**	**3,028**	**259**	**1,501**	**1,154**	**967**	**19,794**

Migration



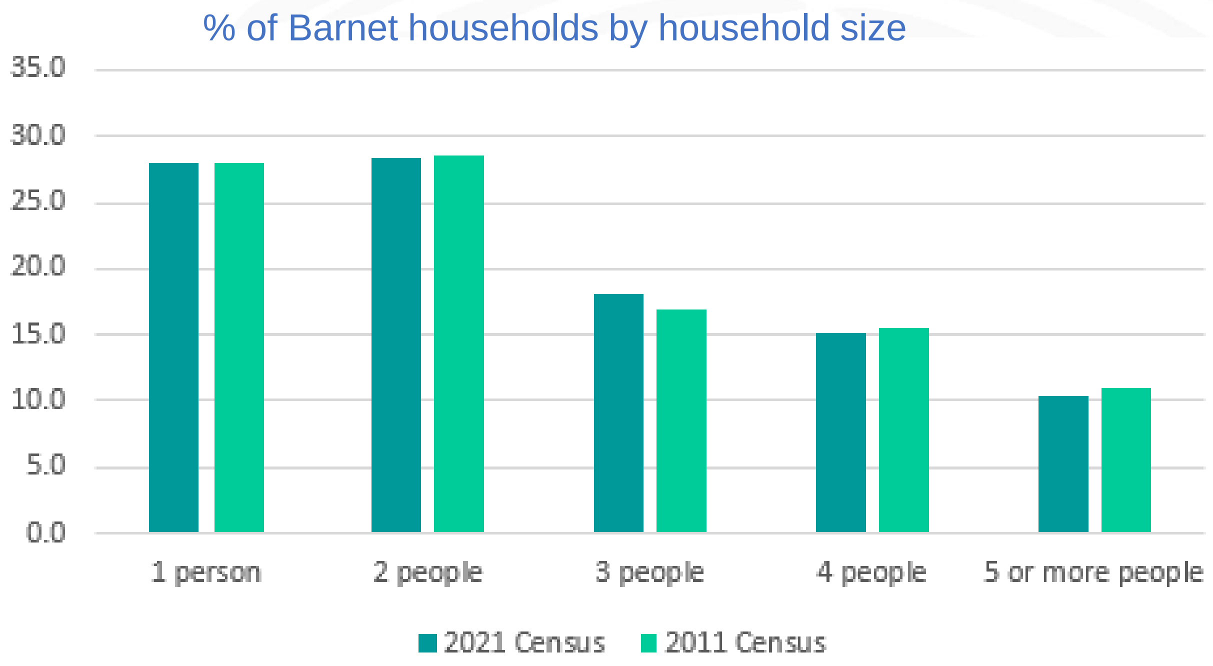




- 58.1% of Barnet residents were born in the UK.
- Migration peaked in 2001-2010, and declined from 2020 when it was likely to be affected by the COVID-19 pandemic and Brexit.
- 87.6% of Barnet residents lived in the same property as a year before the 2021 Census. 9.4% had migrated within the UK, and 1.5% had migrated from outside the UK.
- Reduction in Barnet Residents who were born in the UK compared to the 2011 Census (-4.3%). The largest regional increases were the EU2 countries (Bulgaria and Romania, +2.6%), and the Middle East and Asia (+1%).

The way people live is changing

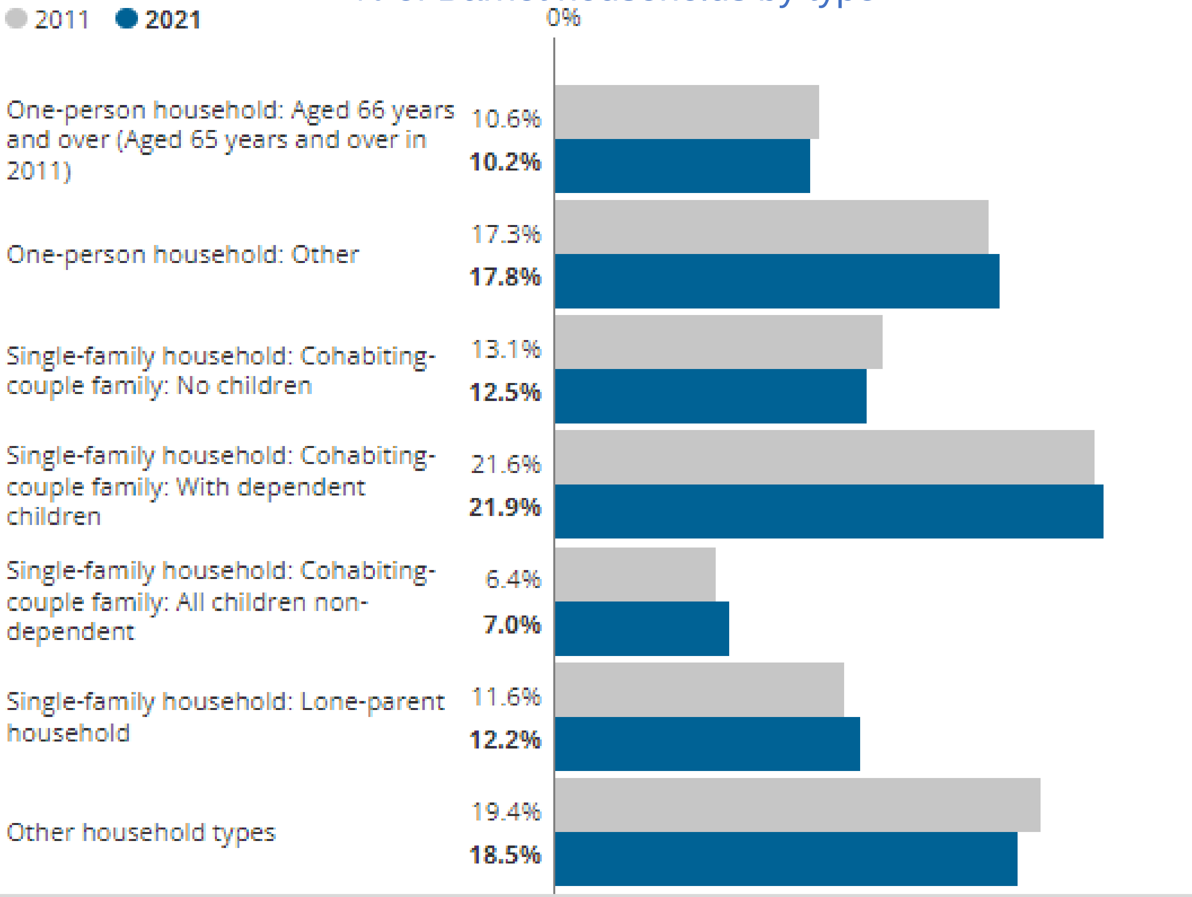
- There are **148,900** households in Barnet (up from 135,900 in 2011)
- There is an increase in smaller properties (1 bedroom **+1.1%**) and larger properties (4 or more bedrooms **+2.6%**).



- There is continued high prevalence of smaller, single person households, with **28%** of residents living alone (**42,300** people),however the most common household size was now 2 people (**28.4%**), and the largest % increase was for 3-people households (**+1%**, with 26,800 households).

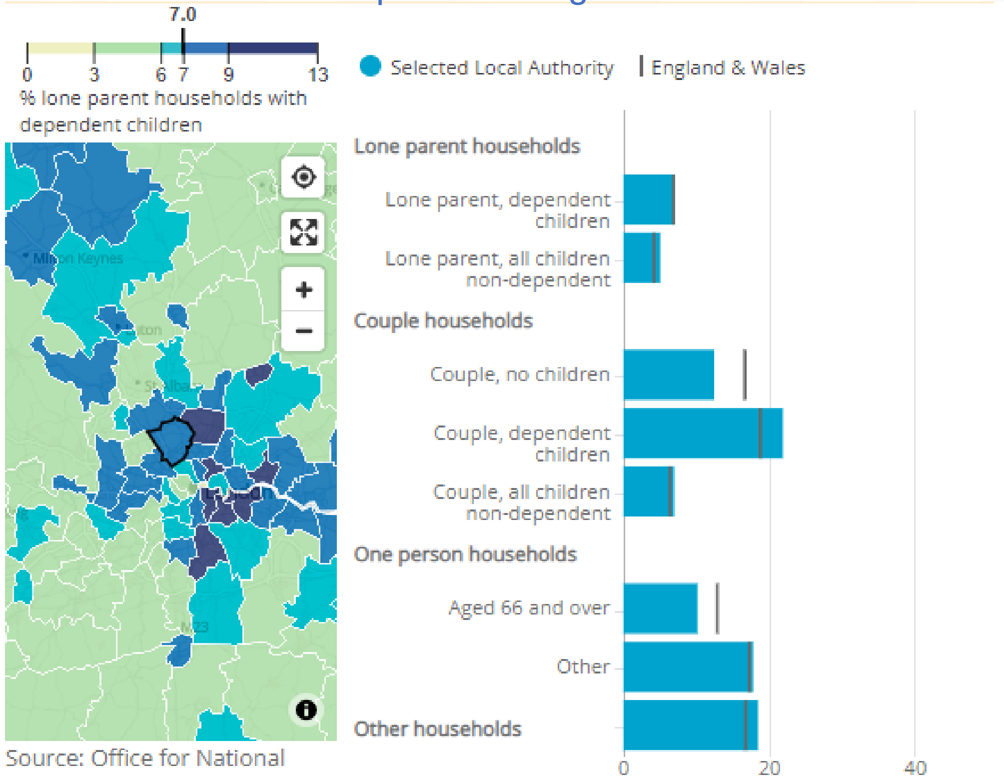
The way people live is changing

% of Barnet households by type



- Compared to 2011, there were more households in Barnet that were one-person households aged up to 65, lone parent family households, and family households with children.

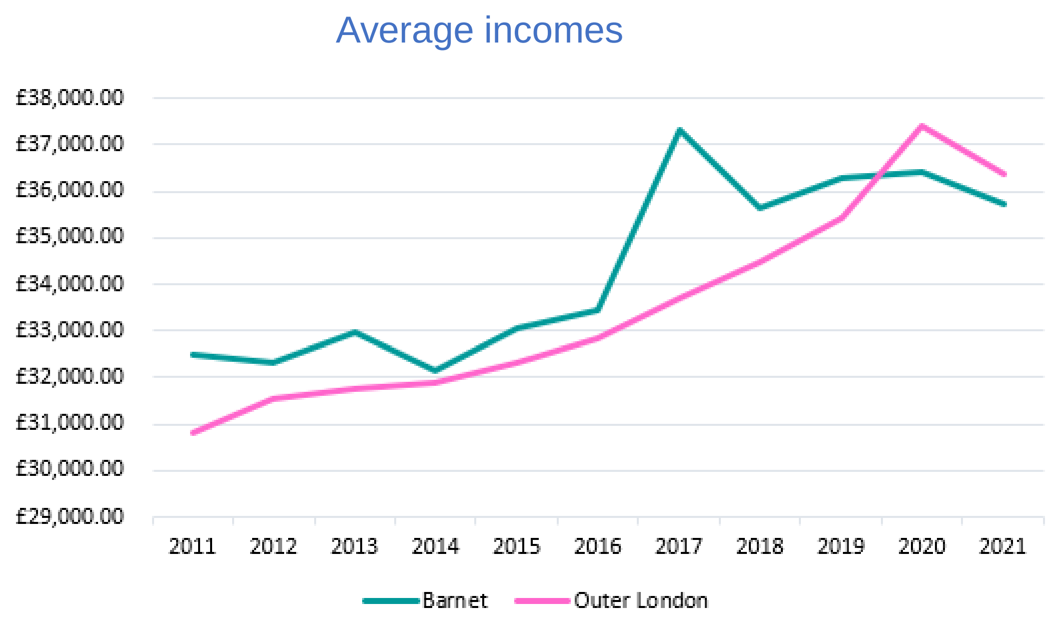
% of Barnet households compared to English households



- Compared to the 2011 Census data across England, Barnet had more households with lone parents with dependent and non-dependent children, couples with dependent and non-dependent children, and other households. There were fewer households made up of couples with no children, and those aged 66 and over.

Economy

Relatively high incomes



Earnings by place of residence (2022)

	Barnet (Pounds)	London (Pounds)	Great Britain (Pounds)
Gross Weekly Pay			
Full-Time Workers	735.6	765.4	642.2
Male Full-Time Workers	756.0	804.9	687.5
Female Full-Time Workers	723.0	713.7	584.5
Hourly Pay - Excluding Overtime			
Full-Time Workers	19.37	20.00	16.37
Male Full-Time Workers	19.26	20.59	16.97
Female Full-Time Workers	19.37	19.35	15.49

Workless Households (Jan-Dec 2021)

	Barnet	London	Great Britain
Number Of Workless Households	18,600	367,900	2,866,800
Percentage Of Households That Are Workless	15.0	12.2	14.0
Number Of Children In Workless Households	!	171,900	1,249,200
Percentage Of Children Who Are In Households That Are Workless	!	9.5	10.2

Economic inactivity (Jul 2021-Jun 2022)

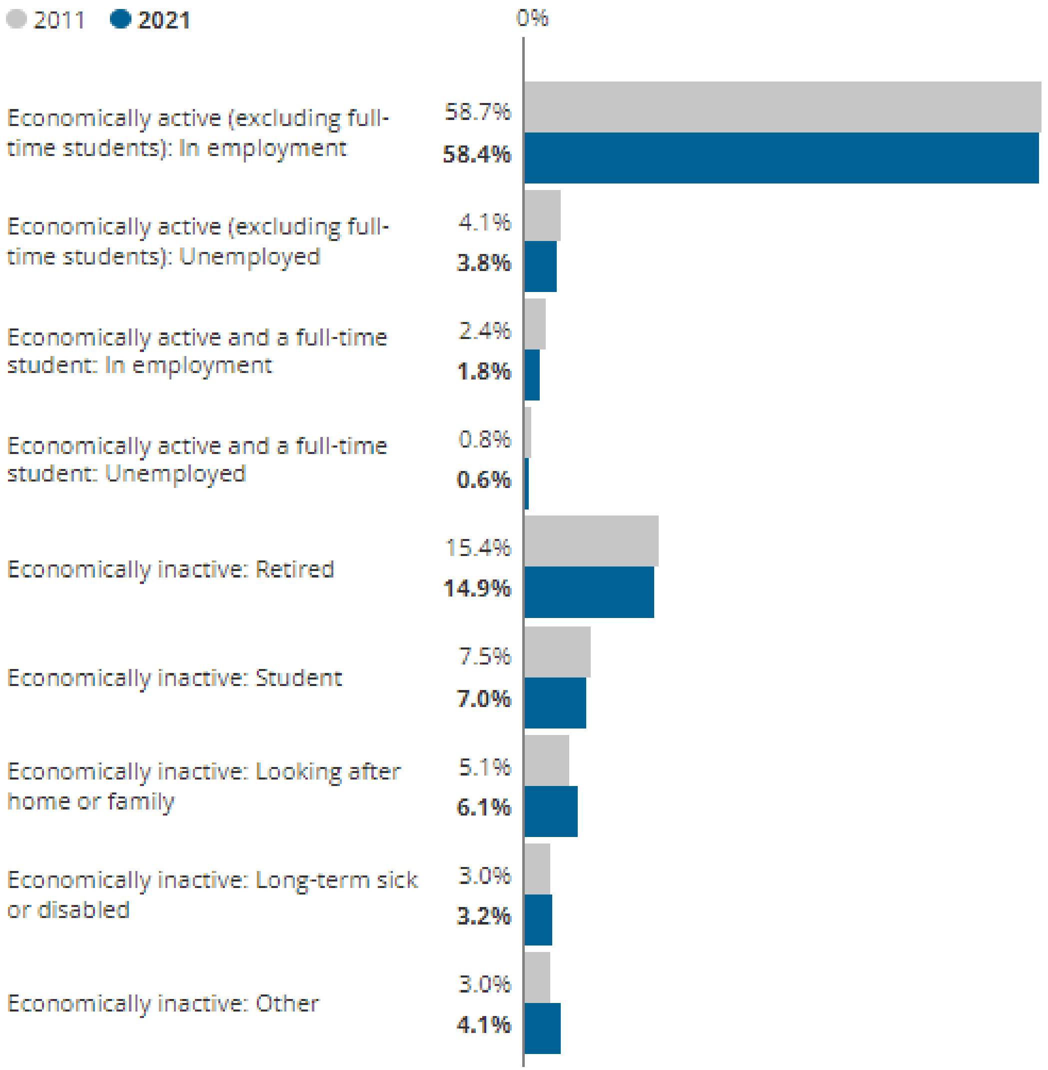
	Barnet (Level)	Barnet (%)	London (%)	Great Britain (%)
All People				
Total	62,000	23.8	20.3	21.4
Student	17,300	27.9	34.2	27.1
Looking After Family/Home	10,600	17.0	23.6	19.7
Temporary Sick	!	!	1.7	2.2
Long-Term Sick	17,500	28.2	19.8	25.4
Discouraged	!	!	#	0.2
Retired	#	#	6.7	13.7
Other	14,200	22.9	13.8	11.6

- Median income in Barnet decreased by **4.5%** between 2017 and 2021, indicating a squeeze on standards of living.
- Median incomes in Outer London and Inner London increased during the same period by 7.6% and 8.5% respectively.

Sources: Nomis – Official Census and Labour Market Statistics; ONS annual survey of hours and earnings – resident analysis; ONS annual population survey

Employment

% of Barnet residents aged 16 years and over by economic activity status



- The 2021 Census took place during the COVID-19 pandemic, which would have affected the labour market.
- The percentage of people aged 16 years and over (excl. full time students) who were employed fell from 58.7% in 2011 to **58.4%**. During the same period, the percentage in London increased from 58.6% to 59.4%.
- The percentage who were unemployed fell from 4.1% to **3.8%**, and the percentage who were retired (economically inactive) decreased from 15.4% to **14.9%**.
- More residents worked short hours (15 hours or fewer per week) – **12.8%** compared to 10.5% in 2011.
- Barnet went from being among the highest 30% of English local authority areas based on its share of residents working short hours to being among the highest **10%**. It had the highest percentage in Greater London.

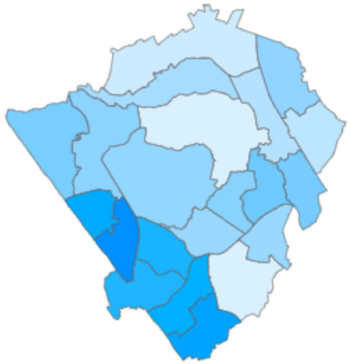
Welfare benefits and welfare reform

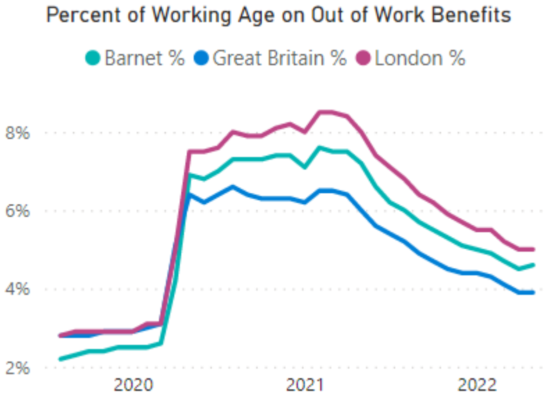
11650
Number of Out of Work Benefit Claimants

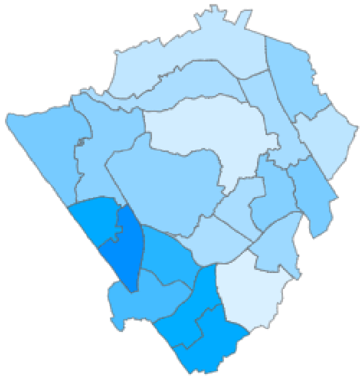
4.6%
% Working Age on Out of Work Benefits

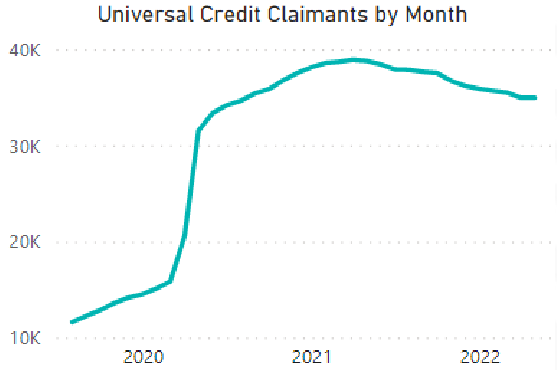
34949
Number of Universal Credit Claimants

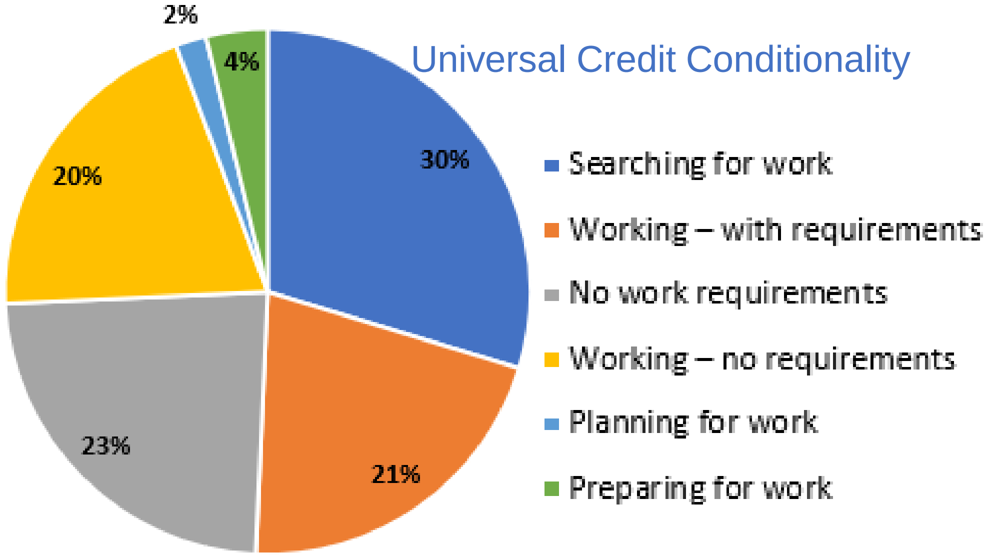
9.0%
% Population on Universal Credit









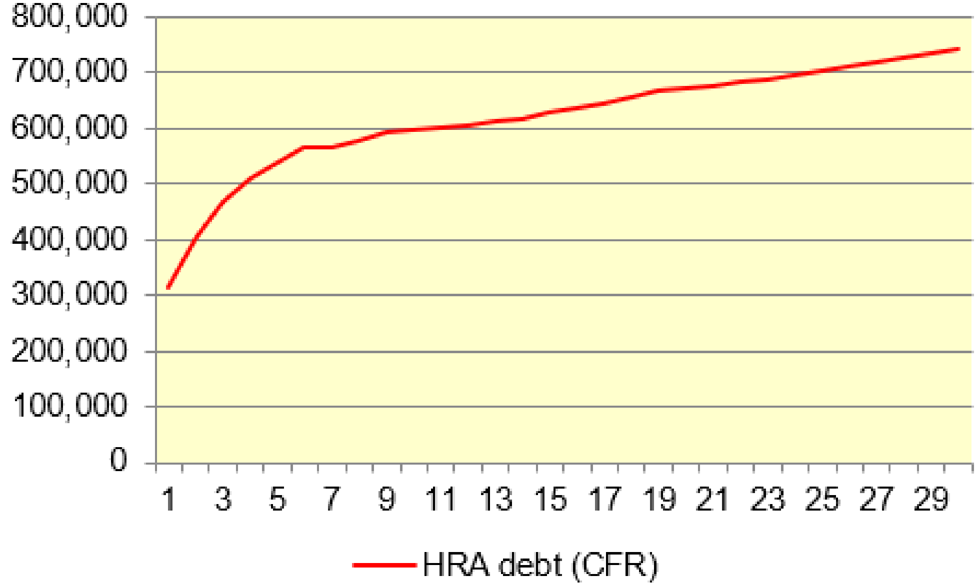


- As of March 2020, the number of Out of Work benefits claimants has risen sharply in Barnet and has been higher than Great Britain's but lower than London's levels. From June 2021 the number has slowly decreased. Barnet wards affected with the highest numbers of unemployment are Colindale, Burnt Oak and Child's Hill.
- The number of Universal Credit Claimants has more than doubled since 2020 and is equal to **9.9%** of Barnet's population. The most affected wards are Colindale, Burnt Oak and Child's Hill, with Hendon, Golder's Green, West Hendon and Woodhouse following closely behind.

Sources: gov.uk Universal Credit statistics

Financing the strategy

Housing Revenue Account Business Plan



General Fund Medium Term Financial Strategy

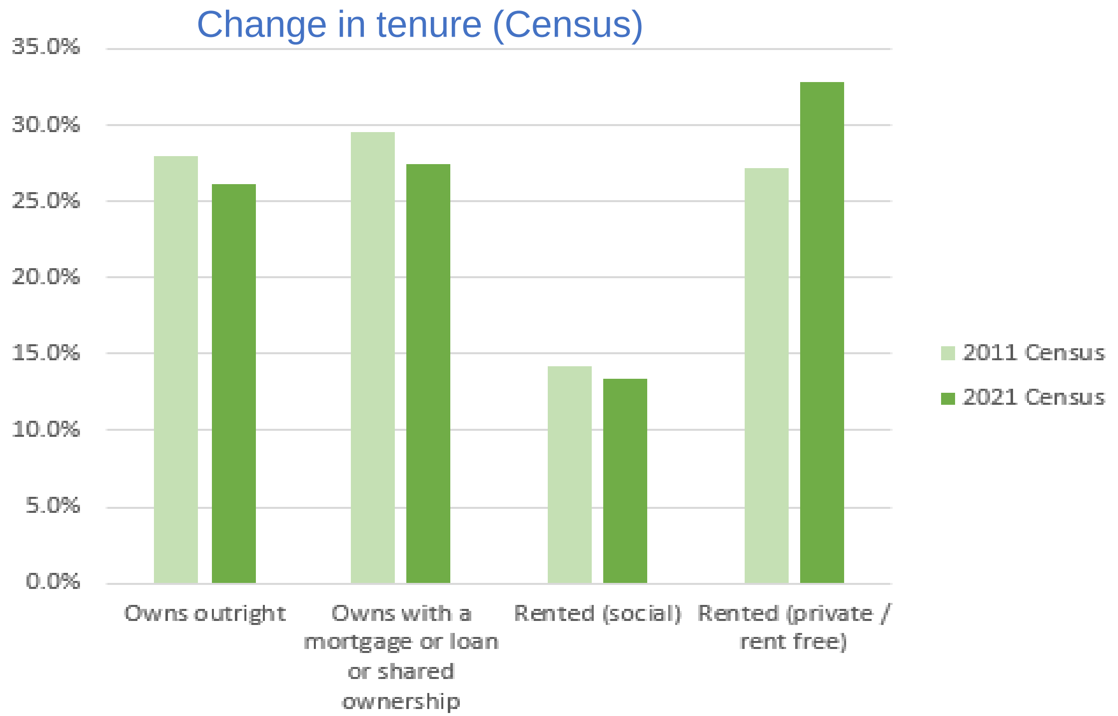
2022/23 approved budget through MTFS March 2022 Full Council	2022/23 Budget (£)	2023/24 (£)	2024/25 (£)	2025/26 (£)	2026/27 (£)
Expenditure	31,197,791	30,791,145	29,590,261	29,482,966	29,482,966
Income	-25,854,760	-25,955,760	-26,085,760	-26,099,760	-26,099,760
Net Expenditure	5,343,031	4,835,385	3,504,501	3,383,206	3,383,206
		-507,646	-1,838,530	-1,959,825	-1,959,825

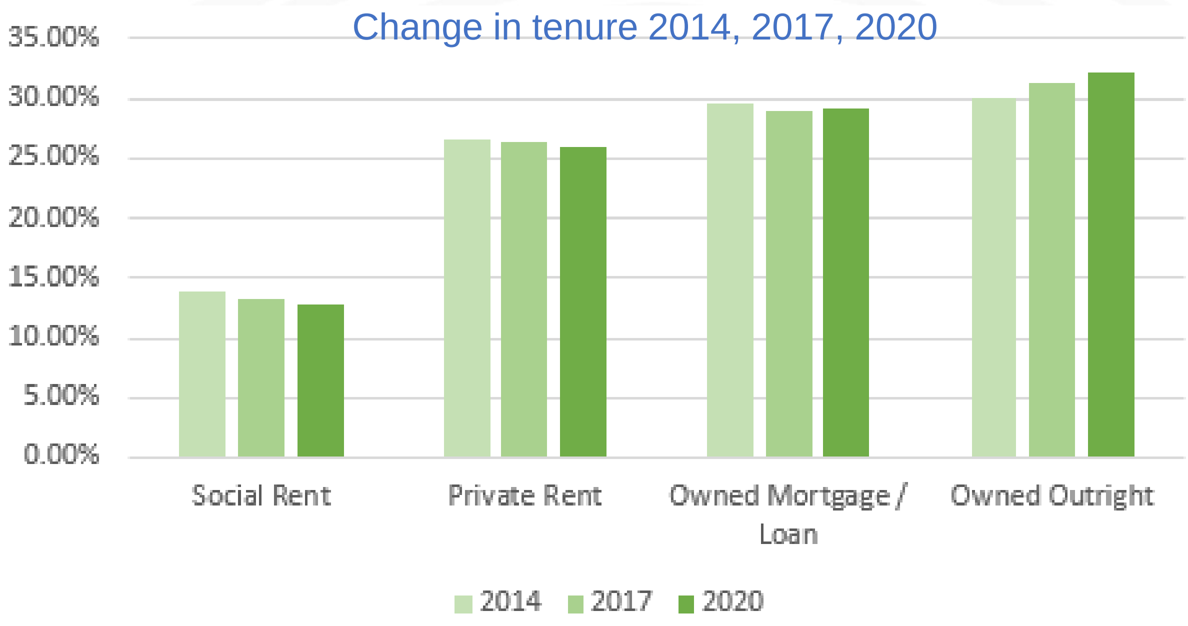
- Housing Revenue Account Business Plan as at February 2022 shows we are operating within minimum reserve levels.
- All fire safety works included in HRA – totally £47.4m.

- General Fund Medium Term Financial Strategy includes future budget savings and pressures.
- Issues that may affect the MTFS include rental income from temporary accommodation (TA), impact of cost of living increases, the capital programme for Opendoor Homes for affordable TA, private sector landlord incentives, and reductions in FHS Grant.

The Housing Market

Tenure shift





2011 Census showed significant shift in tenure:

- Increase in Private Renting (**+53%**)
- Reduction in owner-occupation (**-12%**)
- Increase in council / housing association renting (**+6%**)

2021 Census showed continued tenure shift:

- Increase in Private Renting (**+5.6%**)
- Reduction in owner-occupation (**-3.9%**)
- Reduction in social rented (**-0.8%**)

Annual ONS population survey shows a changing picture in the ensuing years. From 2017 to 2020:

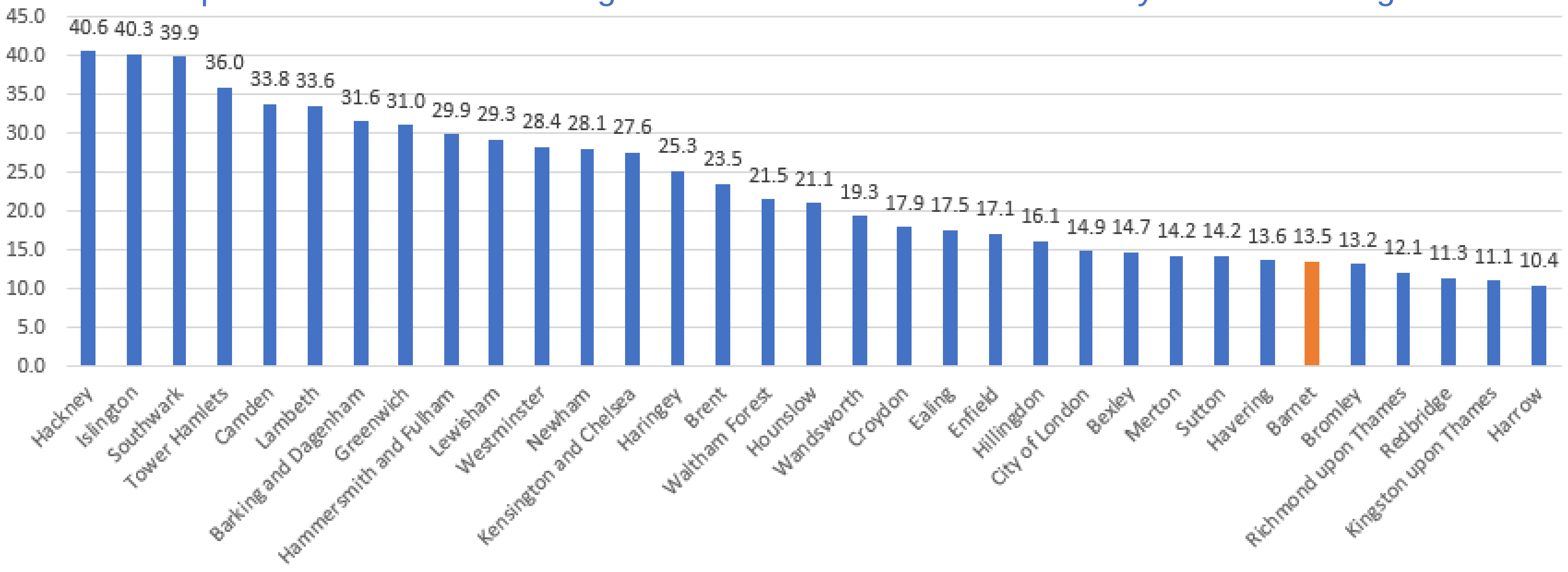
- Decrease in council / housing association renting (**-0.41%**)
- Decrease in private renting (**-0.41%**)
- Increase in owner-occupation – especially in those owning their property outright (**+0.82%**)

In the 2021 Census results, Barnet had the **28th** highest proportion of households in social rented properties in London, the **12th** highest in private rented, the **12th** highest owner-occupied, and **10th** highest owned outright.

Sources: 2011 and 2021 Census; ONS sub-national estimates of households by tenure

Social rented accommodation

Proportion of households living in social rented accommodation by London borough



Of all London boroughs in the 2021 Census, Barnet had the sixth smallest proportion of households living in social rented accommodation.

About half of Grahame Park's households were renting socially; this was triple the average of households in England (17.1%), and 2.2 times as high as that of London (22.8%).

Top 10 Barnet MSOAs with highest proportion of social rented accommodation

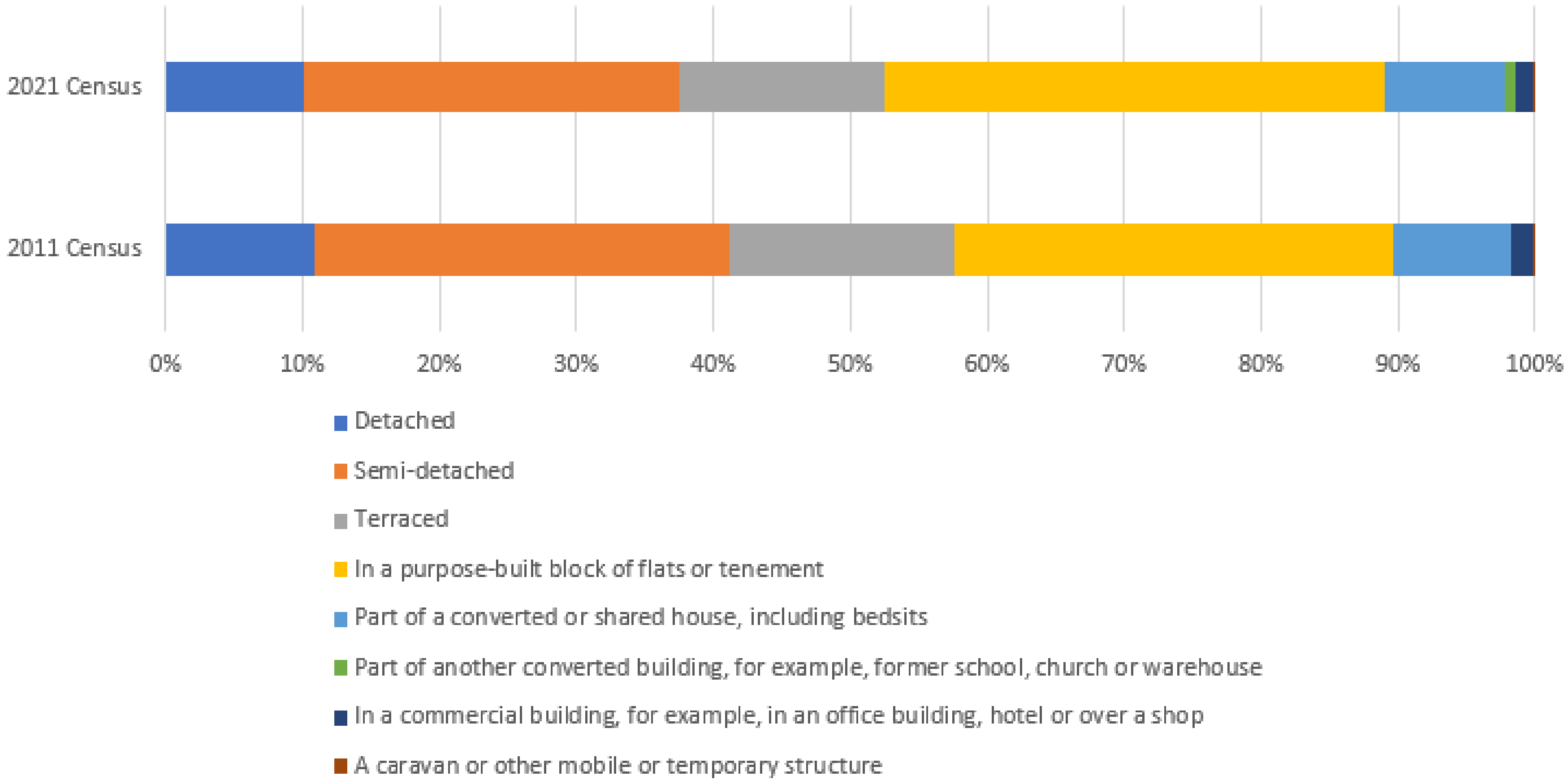
Rank	MSOA	% Social rented (2021)
1	Grahame Park	50.6%
2	Burnt Oak & Watling Park	31%
3	Ducks Island & Underhill	29%
4	Mill Hill Broadway	27.5%
5	Brent Cross & Staples Corner	27.4%
6	Fallow Corner	25.1%
7	Childs Hill	24.8%
8	Colney Hatch	21.2%
9	Colindale	17.9%
10	Mill Hill East	17.7%

Top 10 Barnet MSOAs with highest increase in social rented accommodation

Rank	MSOA	% Increase in social rented
1	Colindale	170.3%
2	New Barnet West	64%
3	High Barnet & Hadley	57.5%
4	Hendon Park	42.3%
5	North Cricklewood	41.1%
6	Golders Green South	34%
7	Golders Green North	24.4%
8	Osidge	17.3%
9	Hampstead Garden Suburb	13.7%
10	Mill Hill Park	12.9%

Sources: 2011 and 2021 Census

Accommodation type



- 2021 Census showed an increase in residents living in purpose-built flats (**+4.8%**), which was the property type most lived-in within the borough.
- The largest decrease in property types was semi-detached properties (**-2.5%**), which was the second most common property type (**27.5%** of all households).

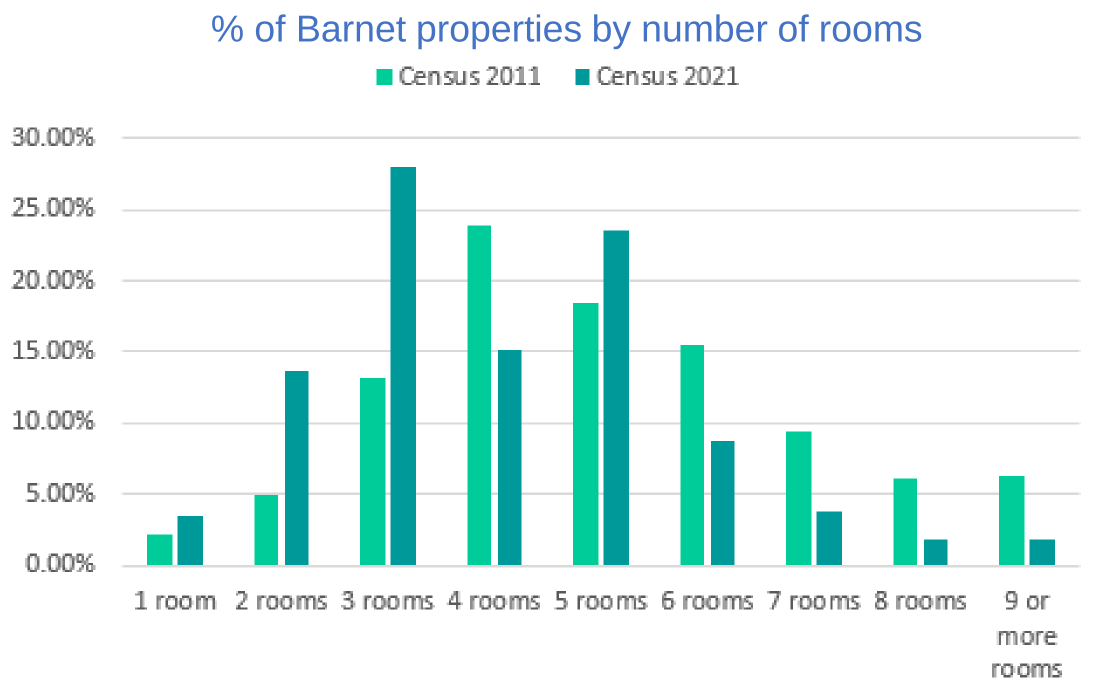
Increase in purpose-built blocks of flats

Rank	MSOA	% Change in purpose-built block of flats or tenement from 2011 to 2021
1	Colindale	239.4%
2	Mill Hill East	69%
3	Oakleigh Park	42.5%
4	Golders Green South	41.8%
5	Grahame Park	37.1%
6	Golders Green North	35.6%
7	Totteridge & Barnet Gate	33.6%
8	Mill Hill Park	31.1%
9	Edgware Central	30.8%
10	North Cricklewood	30%

- 2021 Census showed the highest % increase of purpose-built blocks of flats or tenements in Barnet's Middle Super Output Areas (MSOA) was Colindale, followed by Mill Hill East and Oakleigh Park.
- This demonstrates the substantial development and regeneration that have undergone in Colindale.

Sources: ONS Census 2011 and 2021

Property sizes

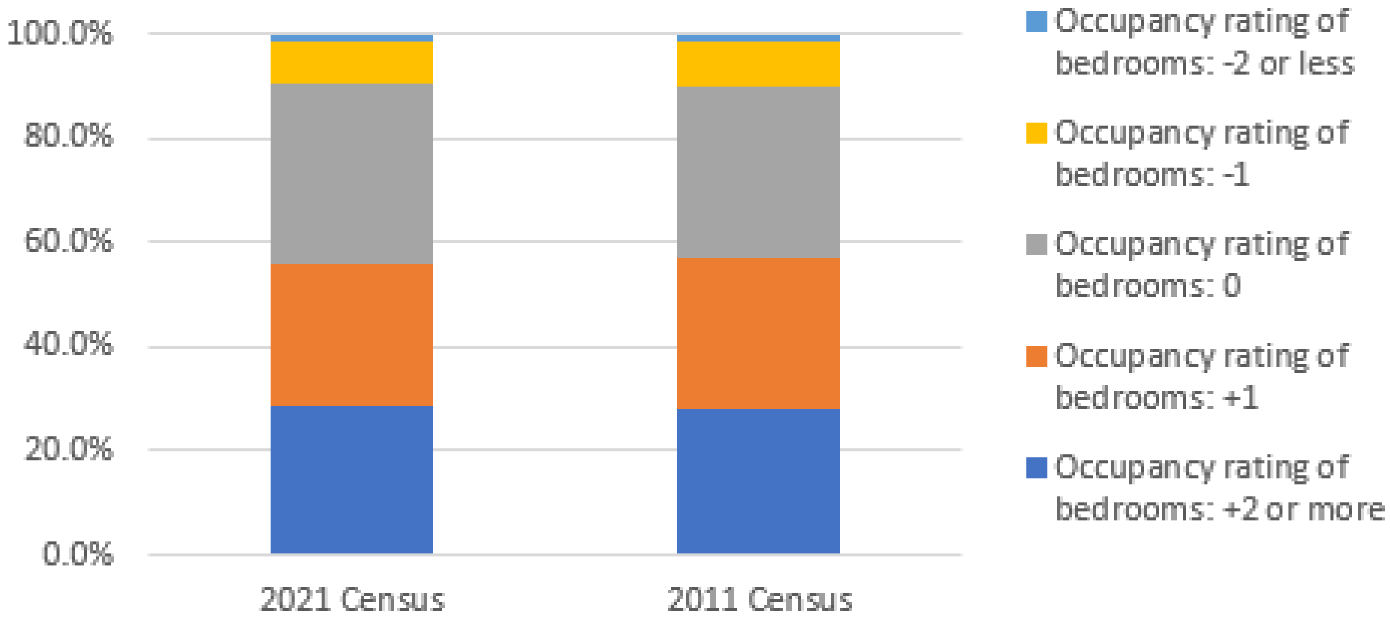


- Compared to 2011, there were fewer larger properties in Barnet, with a particular increase in the number of properties with 2-3 rooms.

- Compared to 2011, there were more 1-bedroom properties and properties with 4 or more bedrooms.
- Most dwellings in Barnet remain 2- or 3-bedroom properties.

Overcrowding and underoccupancy

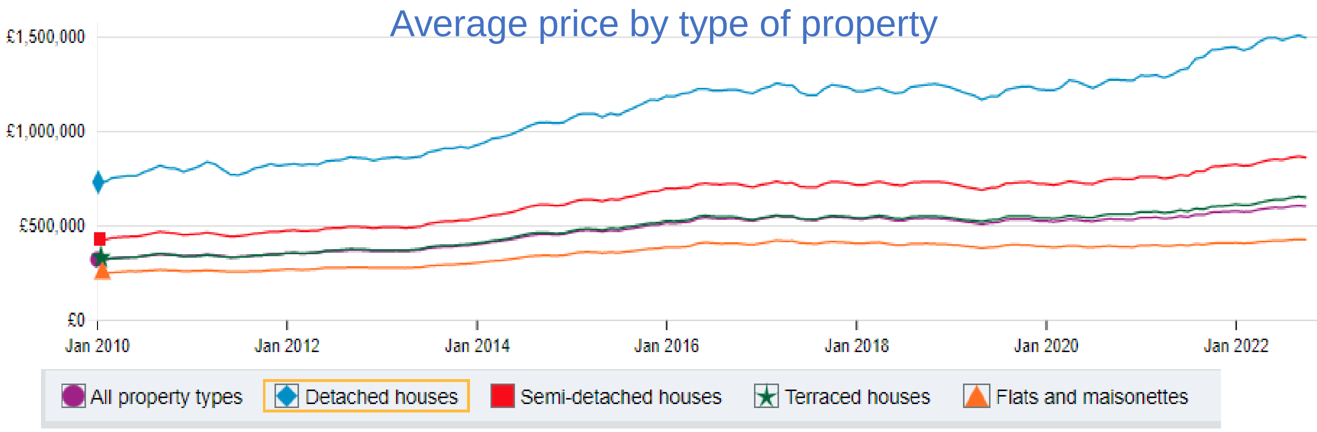
% households overcrowding and under-occupying

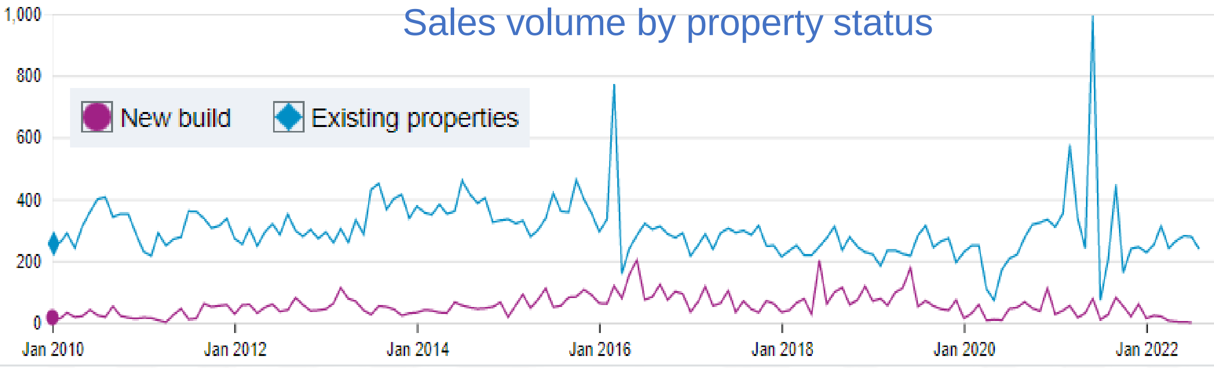


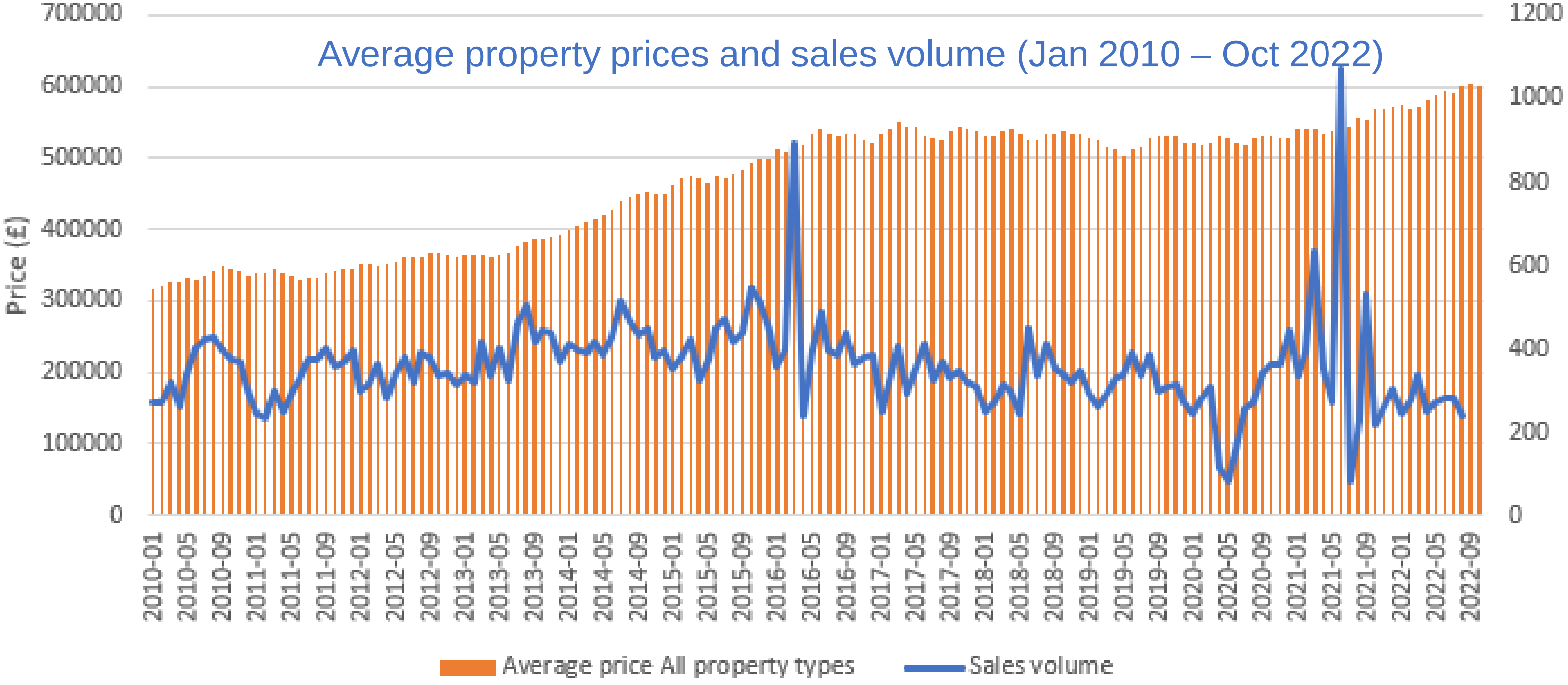
- Overcrowding and underoccupancy in Barnet was broadly comparable in 2011 and 2021.
- Around a fifth of households in Burnt Oak and Watling Park (**20.8%**) and Grahame Park (**19.3%**) were overcrowded. This was about 2.2 times higher than the average % of overcrowded households in Barnet (**9.4%**).

- Slightly fewer households were overcrowded in 2021 (**-0.1%** by 2 bedrooms or fewer and **-0.5%** by 1 bedroom)
- Slightly fewer households were under-occupying by 1 bedroom in 2021 (**-0.9%**)
- Slightly more households were under-occupying by 2 bedrooms or more in 2021 (by **+2.1%**).
- In 2021, 13,966 households were overcrowded.
- Barnet's average of overcrowded households was about double the average of England (4.4%), and less than London overall (11.1%). Barnet was ranked **11th** of all London boroughs for the least number of households with overcrowded bedrooms.

Average house prices



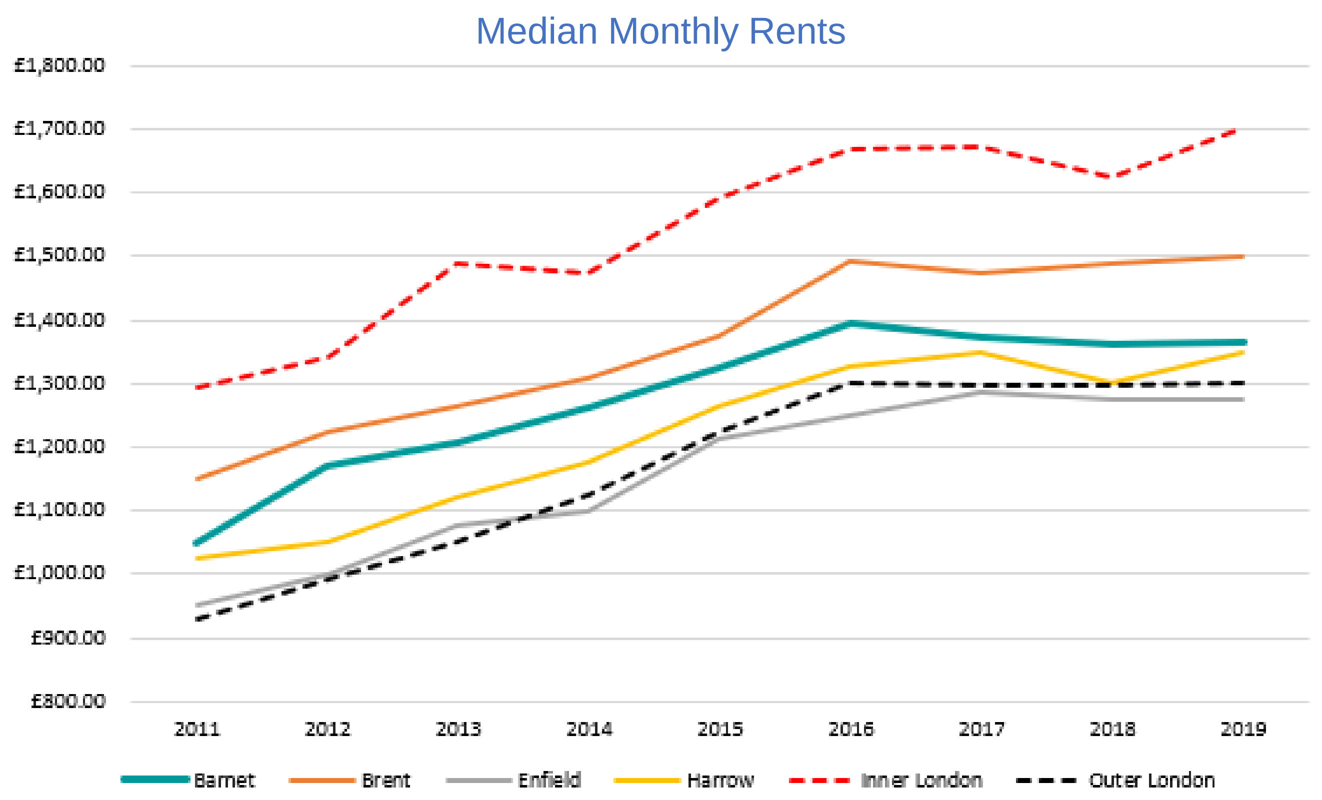




- Average property prices in Barnet rose by **13.6%** between January 2019 and October 2022, which was approx. 15 x the average income of £39,700.

- The average property price in Barnet in October 2022 was **£600,389** (£422,846 for flats and maisonettes, £646,296 for terraced houses, £857,639 for semi-detached houses, and £1,491,095 for detached houses)

Private sector rents

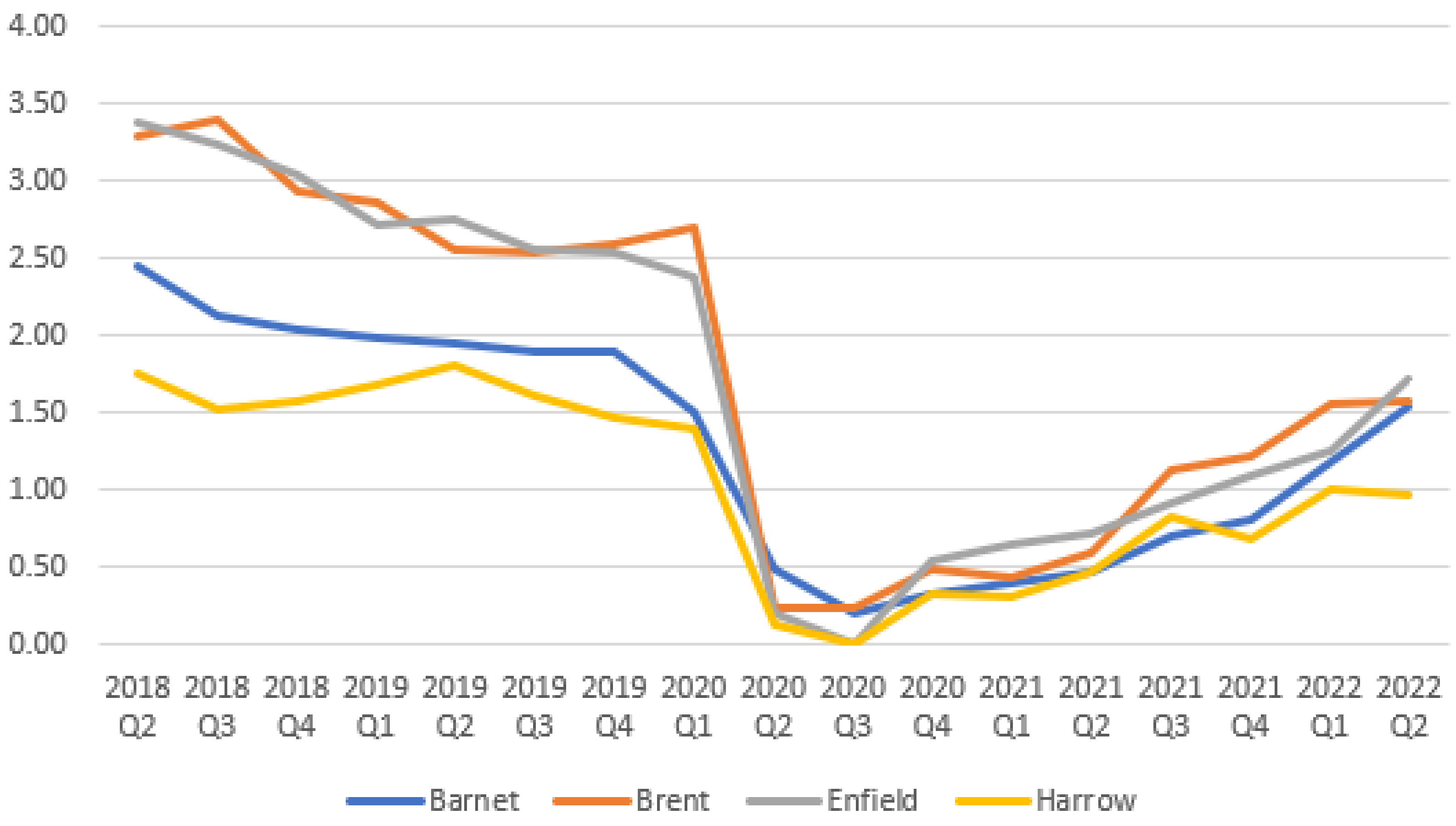


- Median monthly rent in Barnet in 2019 was **£1,365** compared to Outer London's median of £1,300.
- Average rental prices decreased by **0.6%** between 2017 and 2019.

Barnet Median Rent Prices

	2011	2012	2013	2014	2015	2016	2017	2018	2019
Av. Rental Price	£ 1,048.33	£ 1,170.25	£ 1,206.50	£ 1,264.00	£ 1,325.00	£ 1,393.50	£ 1,372.50	£ 1,363.00	£ 1,365.00
Change (%)	-	*11.6%*	*3.1%*	*4.8%*	*4.8%*	*5.2%*	*-1.5%*	*-0.7%*	*0.1%*

Landlord claims per 1,000 population

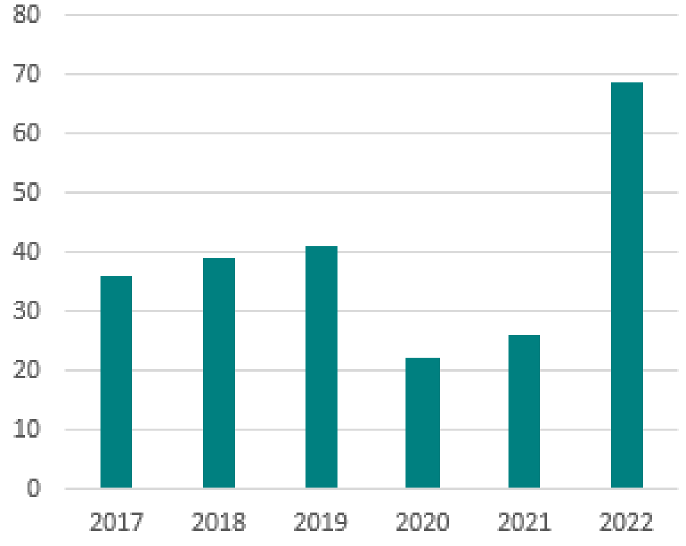


- Compared to neighbouring boroughs.
- Includes claims, repossessions, outright orders, and suspended orders, across accelerated landlords, private landlords, and social landlords.

Source: gov.uk mortgage and landlord possession statistics

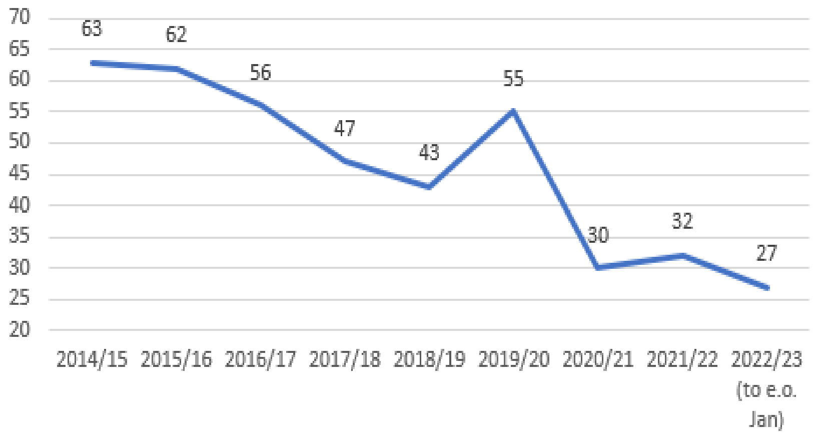
Right to buy and social housing lettings

Council homes sold under the Right to Buy



Social housing lettings in Barnet

'Trade-downs' in Barnet



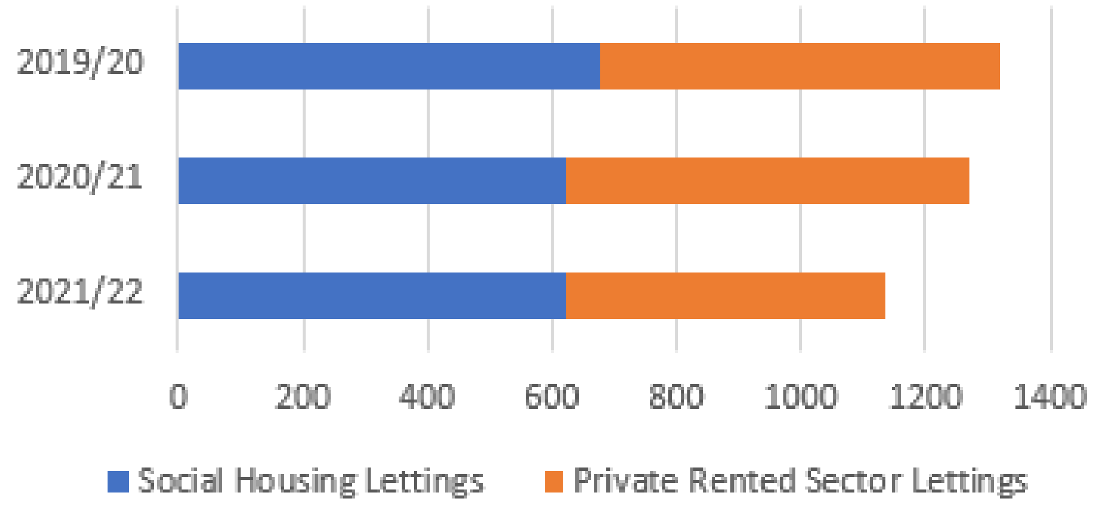
- The number of council homes sold under the Right to Buy increased steadily from 2017-19, but was impacted by the COVID-19 pandemic.
- There was a significant increase in sales in 2022.

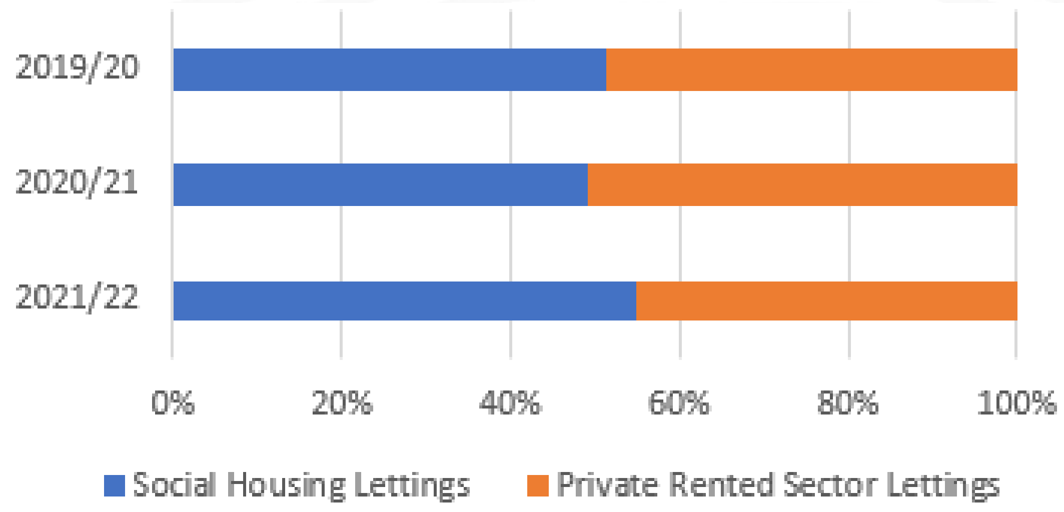
- The number of social housing lettings in Barnet in 2021/22 was lower than the previous two years, with council housing making up **66%** of all lets compared to 58% in 2020/21.

- The number of 'trade-downs', where council tenants downsize from a larger property to a smaller one, has also been decreasing.

Social housing and private rented sector lettings

Proportion of social housing and private rented sector lettings



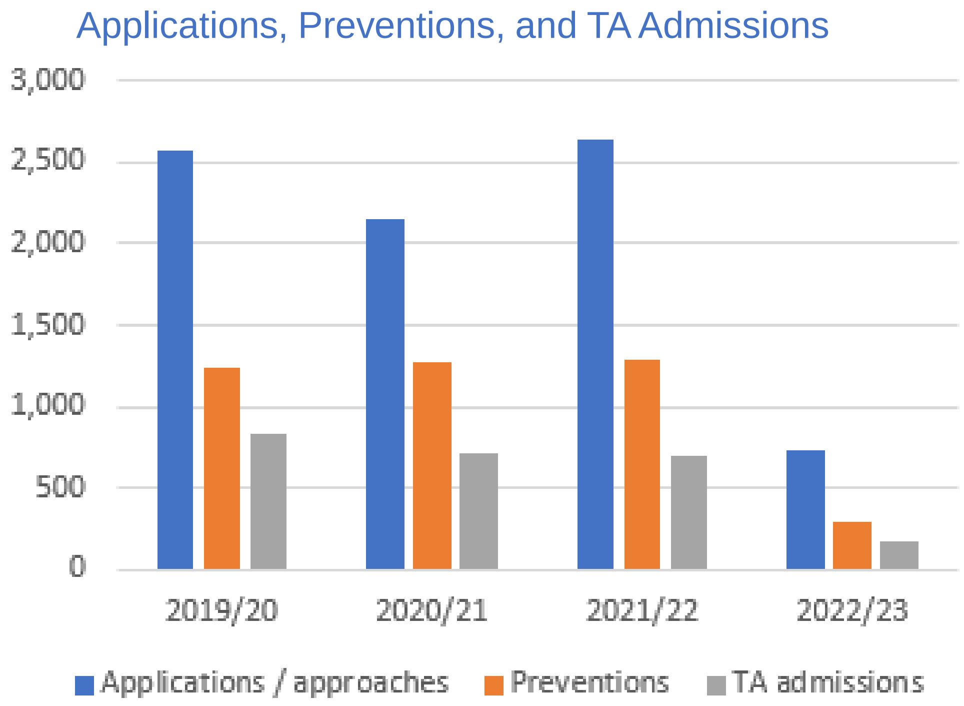


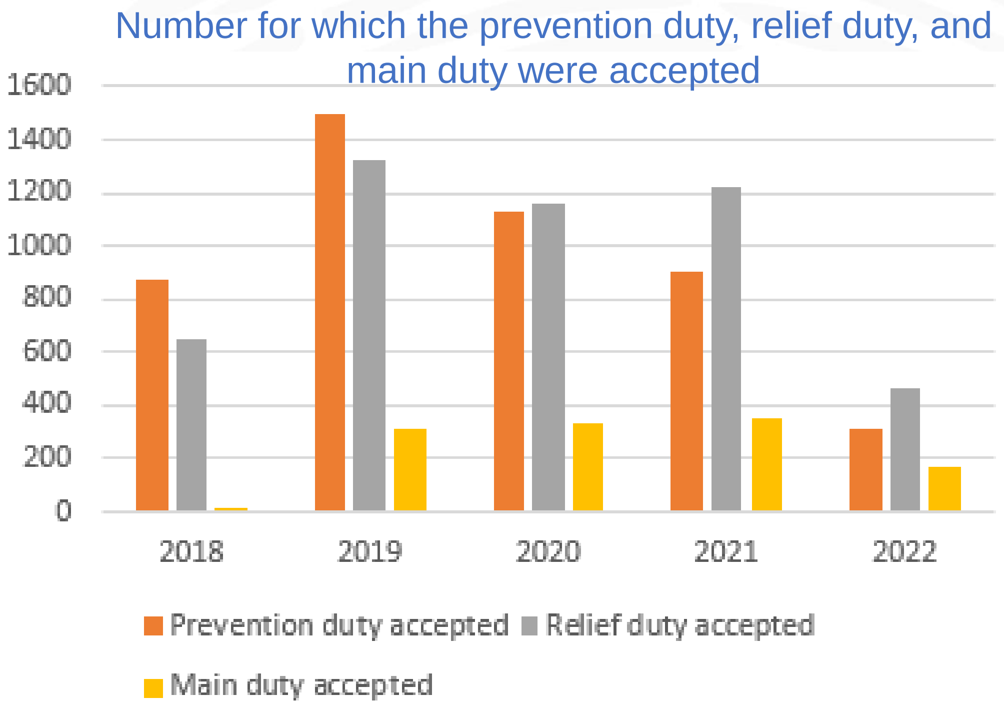
- Barnet has historically had strong access to the private rented sector, which has helped to lower the numbers in temporary accommodation.

- The private rented sector is contracting, and fewer private rented sector lettings are now being made.

Homelessness

Homelessness – applications

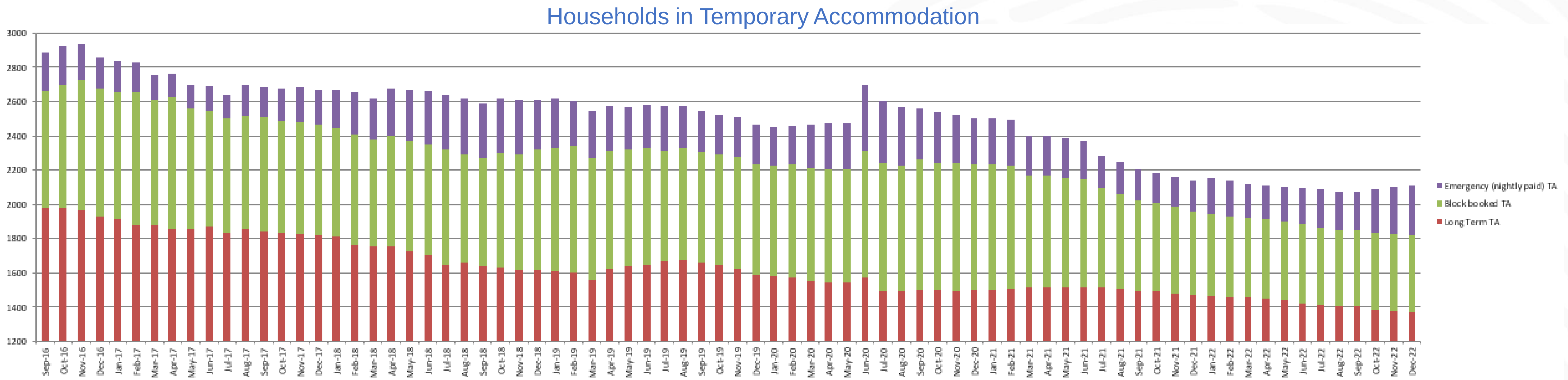


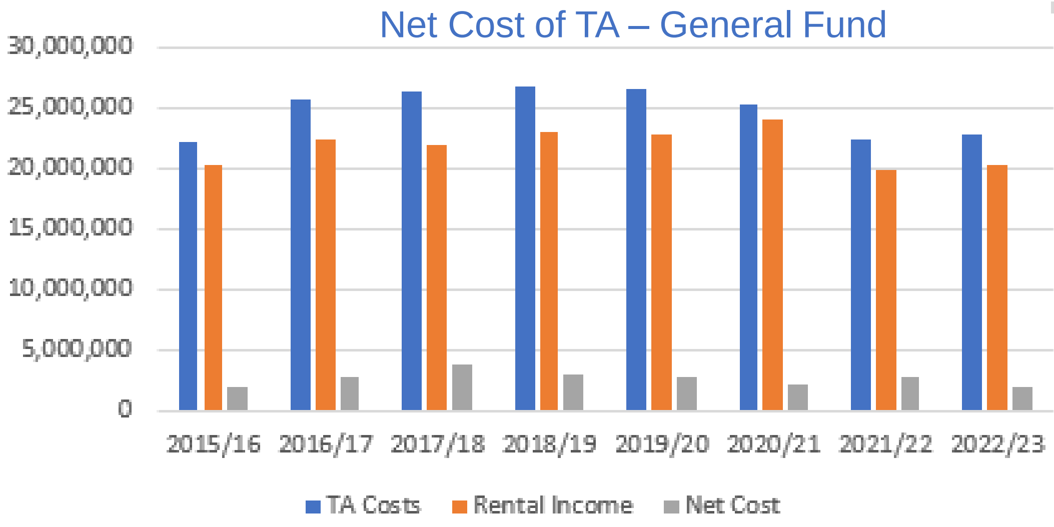


- Homelessness applications have remained high, but preventions have increased slightly.

- The number of households for which the prevention duty was accepted has declined since 2019, however the number of households for which the relief duty was accepted and the main duty was accepted has remained fairly consistent.

Homelessness – temporary accommodation

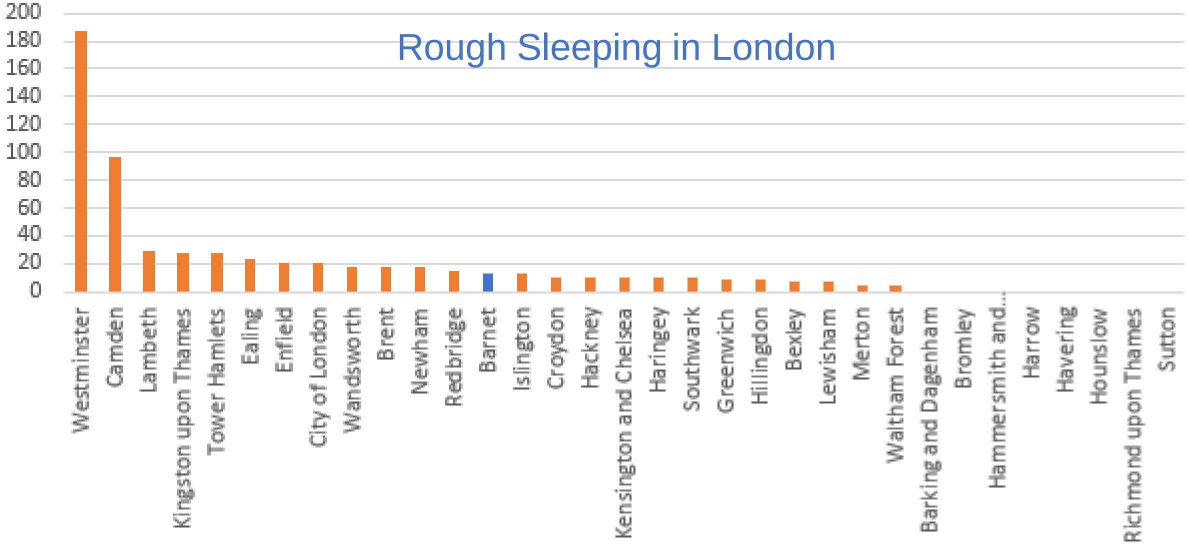


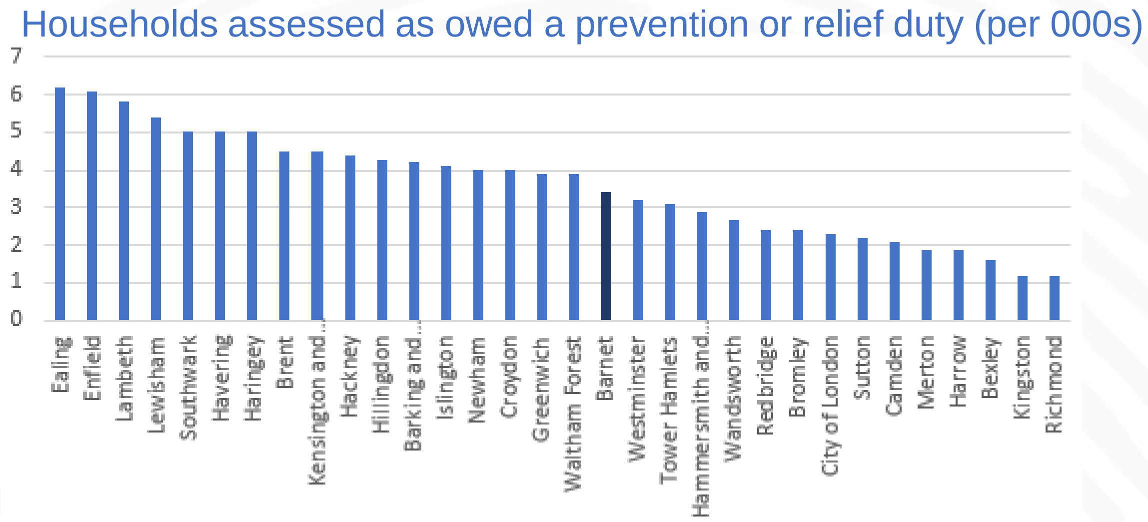


- Use of TA had been reducing and in August and September 2022 was at its lowest in over 10 years; however, numbers in TA have started to rise again due to challenges in the supply of suitable accommodation, including in the private rented sector.

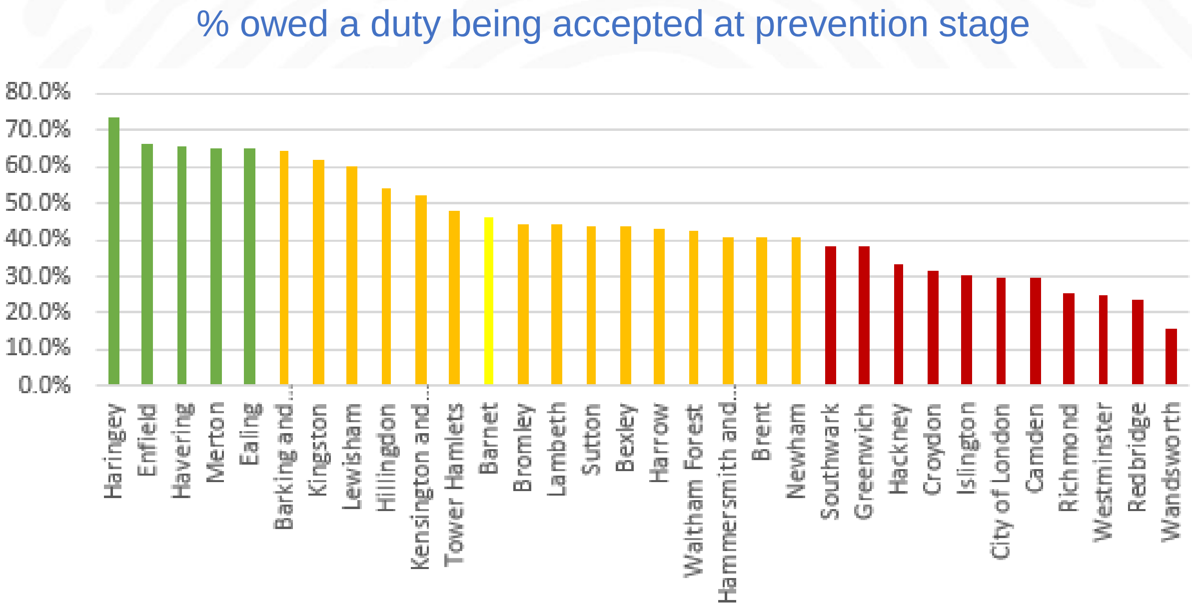
- The projected net cost of temporary accommodation for 2022/23 is slightly lower than the previous year due to underspending on landlord incentives; the package currently offered is not competitive enough with the private market and in comparison with some other boroughs, resulting in less willingness for landlords to take on TA clients in private tenancies.
- Net costs are inclusive of TA payments, TA landlord incentives, TA rental income, and SDI rental income and costs.

Homelessness performance comparison



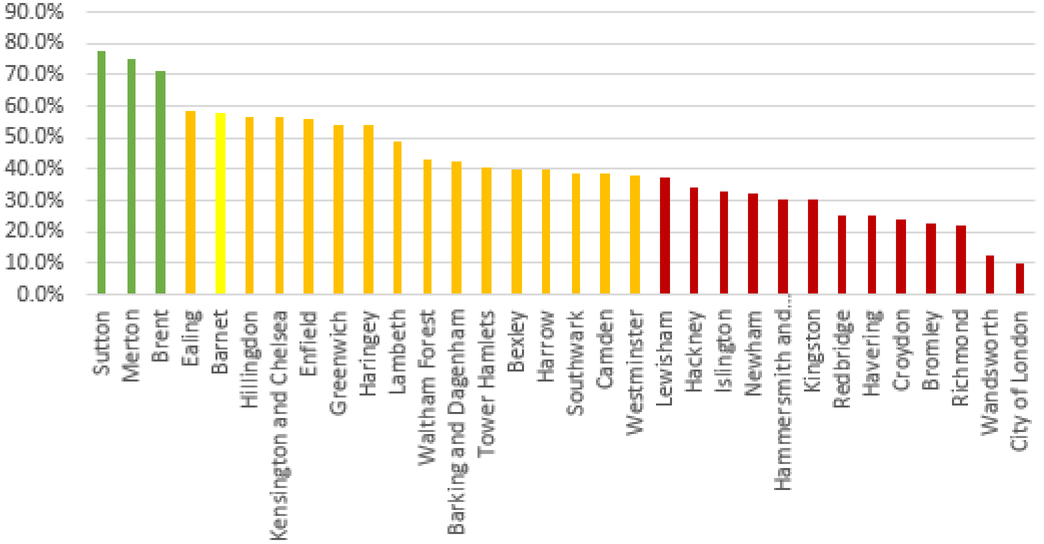


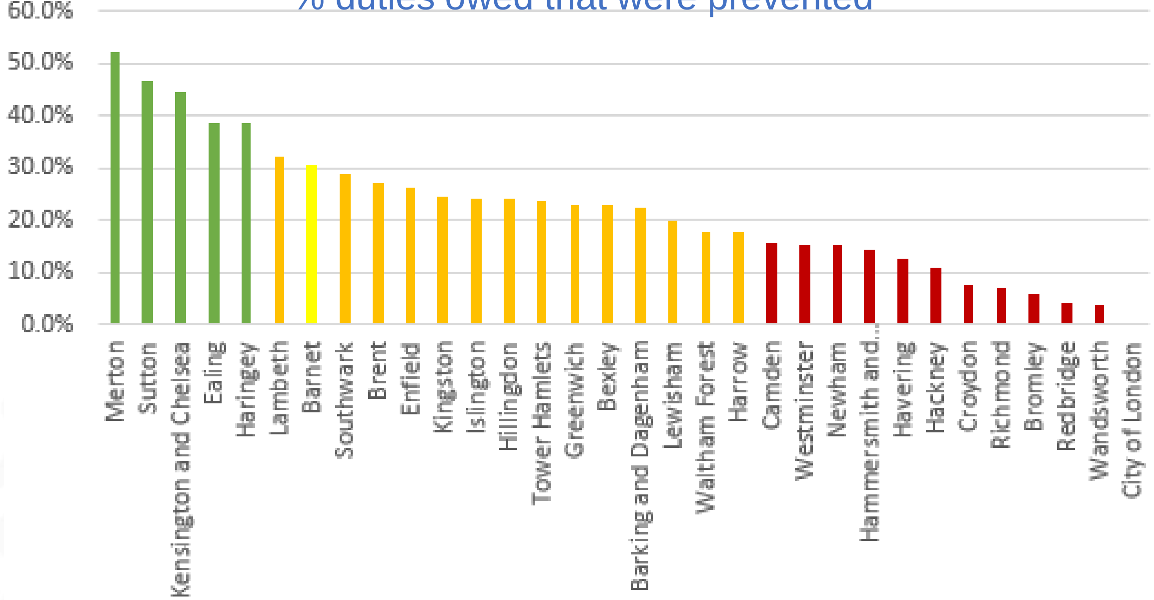
- Rough sleeping lower than London average in Barnet, and was lower in 2020 and 2021 than previous years.
- In the January – March 2022 quarterly data return on local authorities' actions under statutory homelessness legislation, Barnet performed in the middle two quartiles nationally.
- 12 of 27 London boroughs had no households with children in B&B accommodation for over 6 weeks, including Barnet.
- 26 of 27 London boroughs had no 16-17 year olds in B&B accommodation, including Barnet.

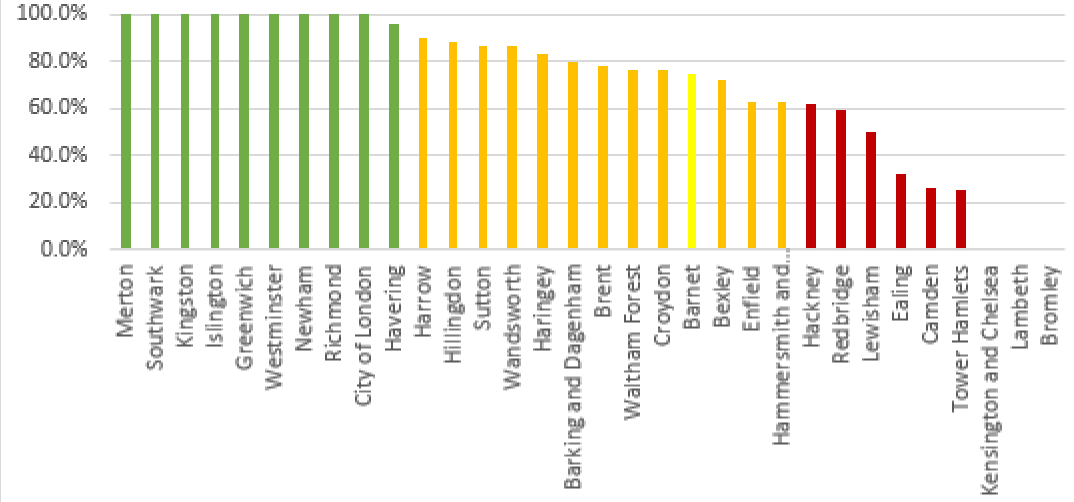


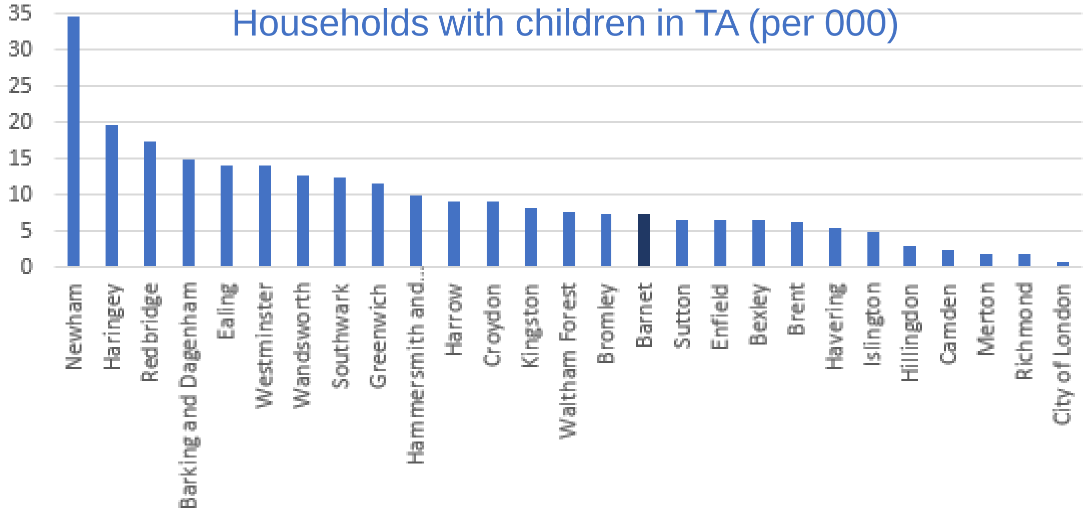
Source: DLUHC Annual Rough Sleeping Snapshot in England (Autumn 2021) , DLUHC H-CLIC Performance Dashboard Jan-Mar 2022

Homelessness performance comparison



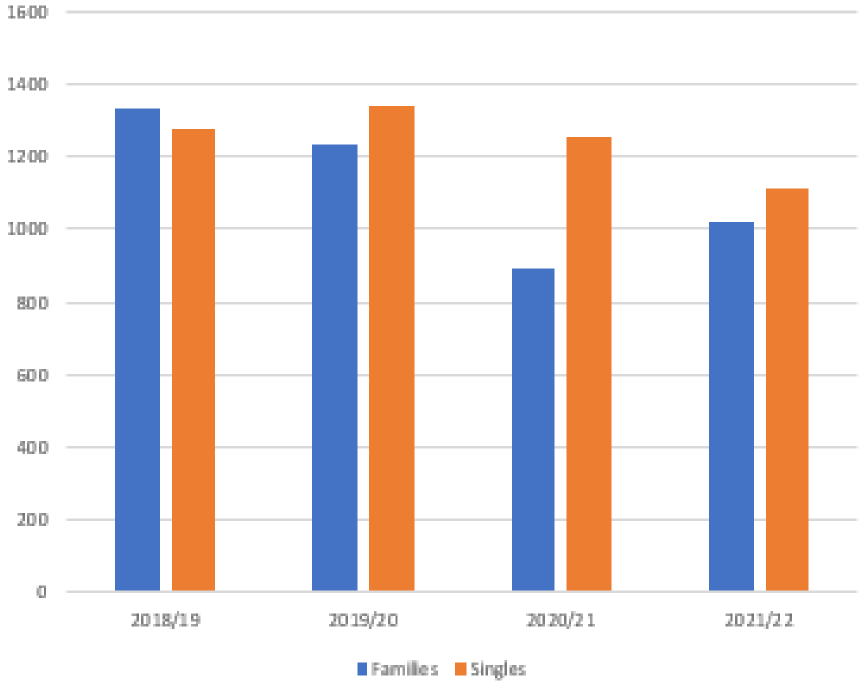




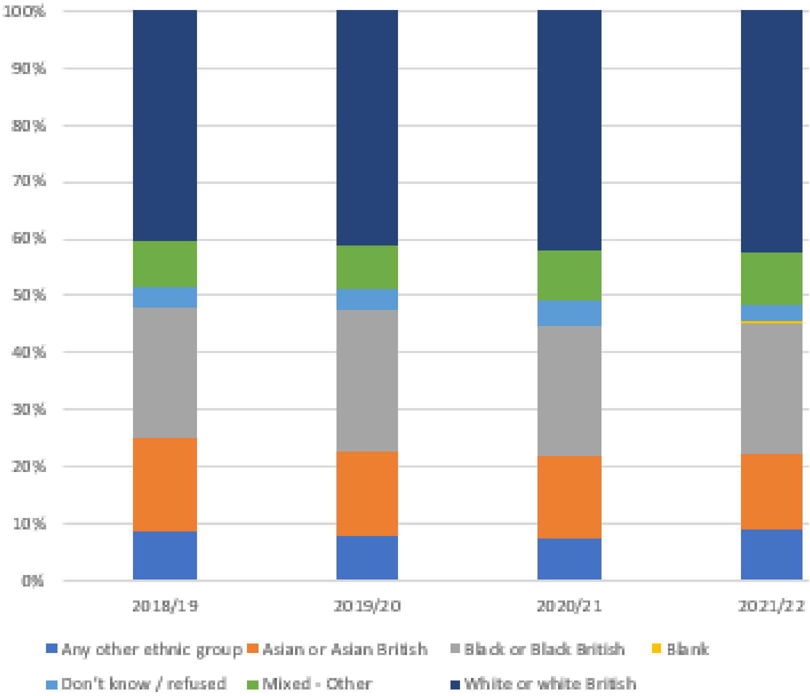


Characteristics of households approaching as homeless

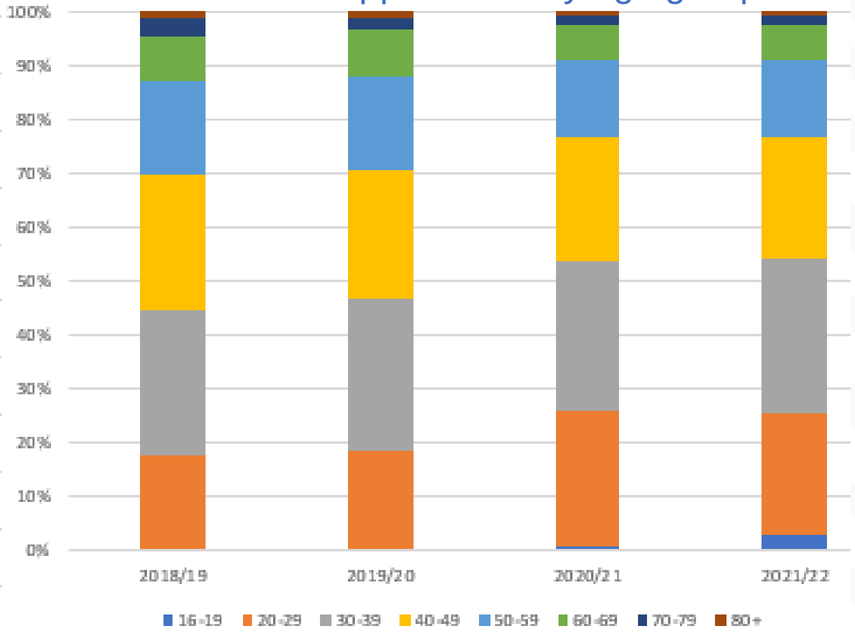
Homelessness approaches by household type



Homelessness approaches by ethnic origin



Homelessness approaches by age group



- A decrease in the number of households approaching as homeless (**2,608** in 2018/19 and **2,134** in 2021/22).
- The proportion of women has increased slightly to **55.8%**.
- A shift in the type of household, with more singles approaching from 2019/20 to 2020/21 (**52%** of cases in 20/21).

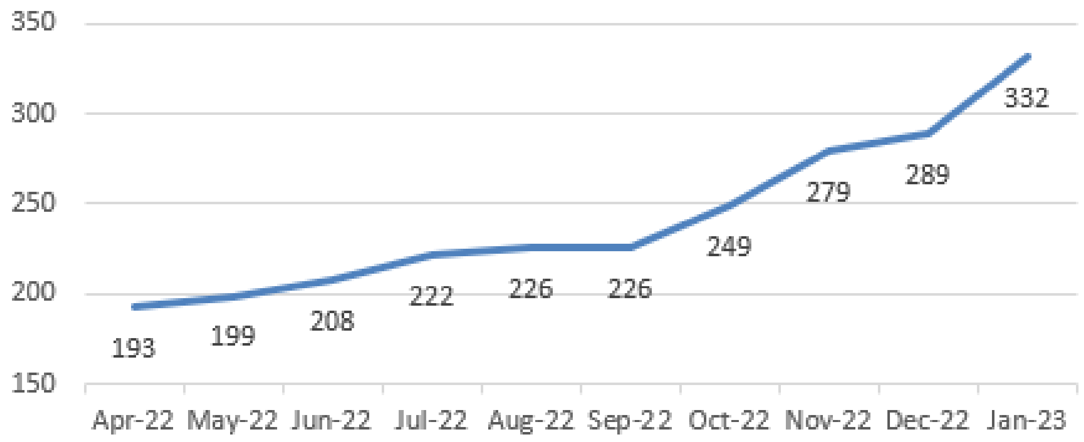
- High representation of those from an ethnic minority background, with those from a Black / Black British background highly represented (**23%**) alongside those from a White background (**42%**) in 2021/22.
- The age group 30-39 remains the most common, however there has been an increase in younger people approaching, with **3%** aged 16-19 in 2021/22.

Rising homelessness demand

Homelessness approaches by household type

Period	Q2 2021/22	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Q3 2022/23
Homelessness approaches from the private rented sector	145	142	166	170	170	283

Households in emergency temporary accommodation



Households in bed and breakfast accommodation

Period	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23
Households in B&B accommodation	92	90	84	97	109	120	121	138
Families in B&B for more than 6 weeks	1	0	0	0	0	0	1	3

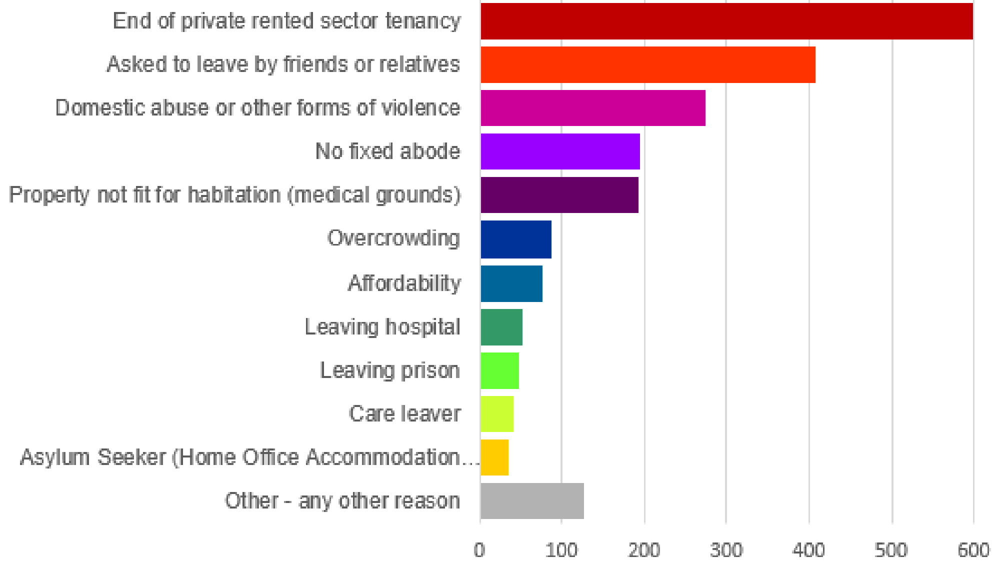
- Barnet Homes is seeing an increase in approaches for housing assistance from the private rented sector.
- There has also been a growing number of households that need to be housed in emergency temporary accommodation in 2022/23.
- In the past, Barnet Homes has rarely needed to use bed and breakfast accommodation. Since April 2018, only 18 families have been housed in shared facilities B&B accommodation beyond the 6-week statutory limit; four (22%) of these breaches have occurred since December 2022.

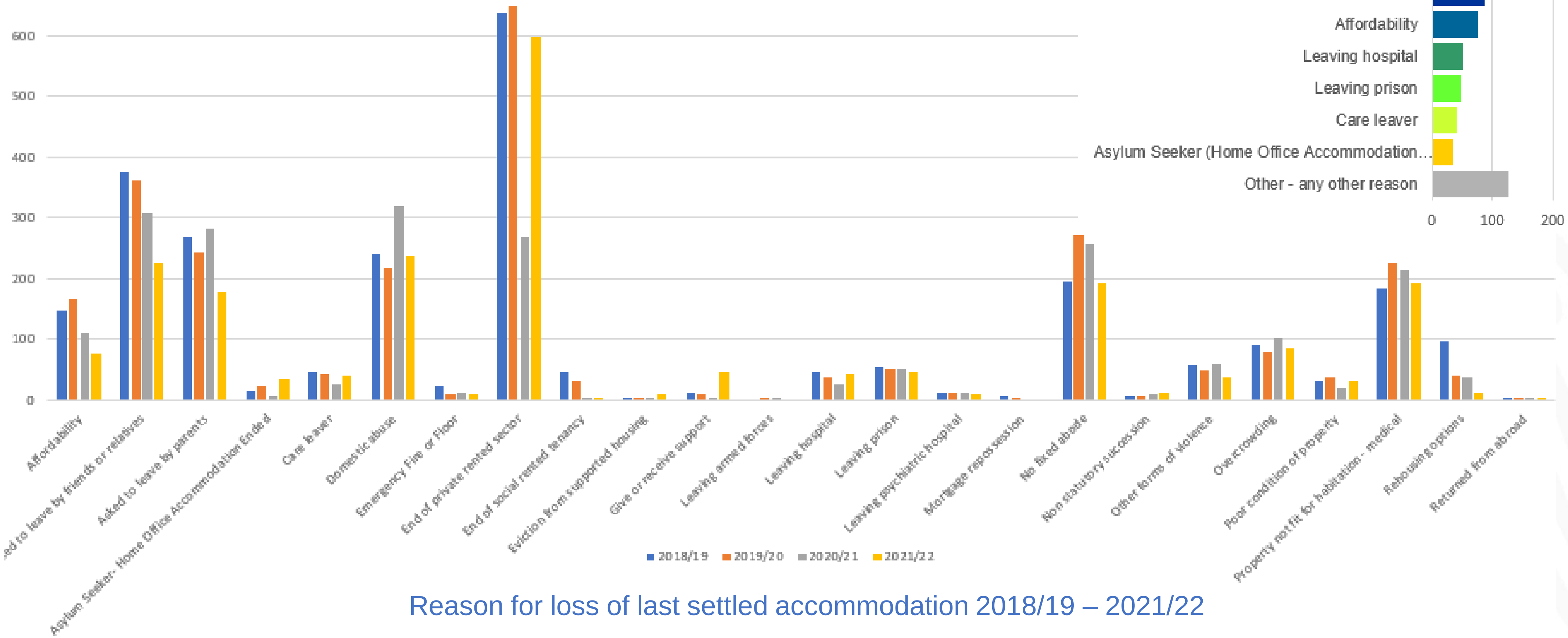
Source: Barnet Homes

Reasons for approaching as homeless

- End of private rented sector tenancy remains the most common reason for approaching as homeless – from 2018/19 it increased by 3.6% to **28.1%** in 2021/22.
- Other common reasons for approaching as homeless in 2021/22 were domestic violence (**11.2%**), asked to leave by family or friends (**10.6%**), no fixed abode (**9.1%**), and property not fit for habitation (medical) (**9%**).

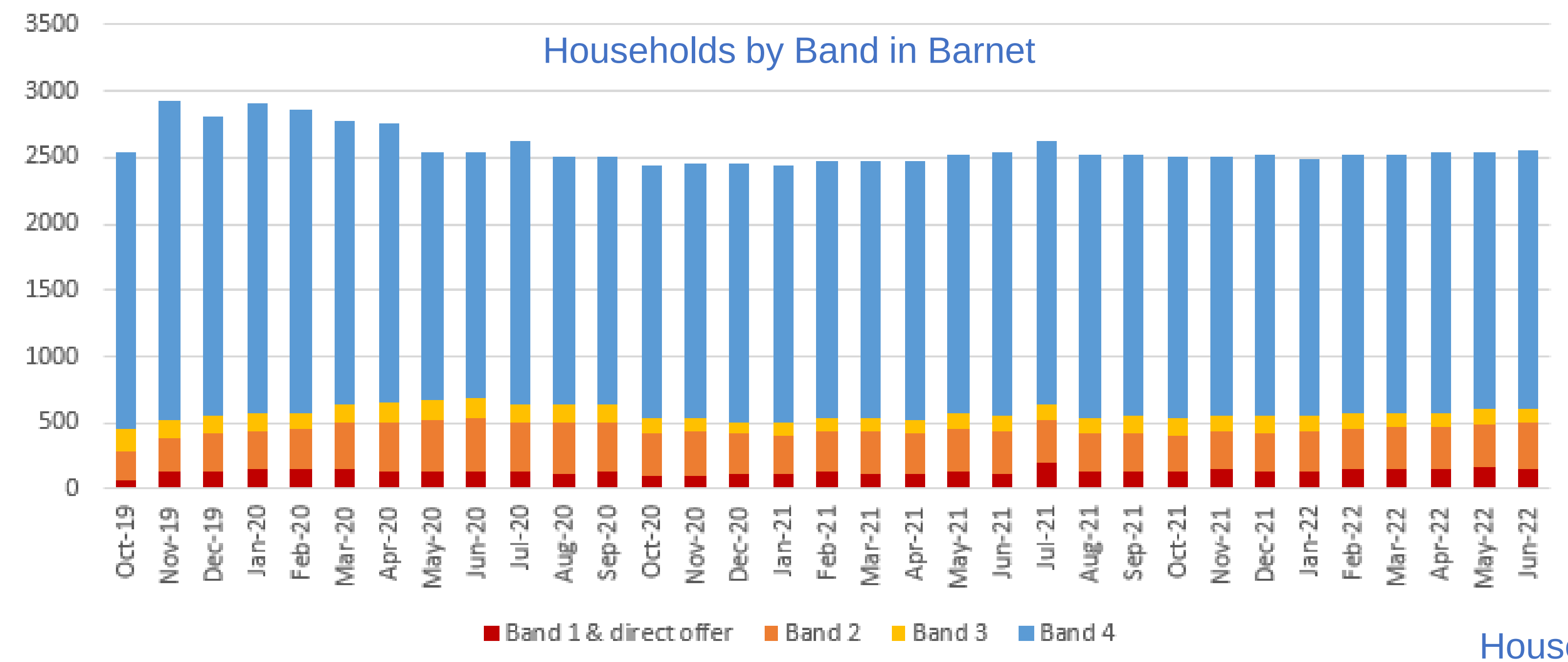
Reason for loss of last settled accommodation 2021/22





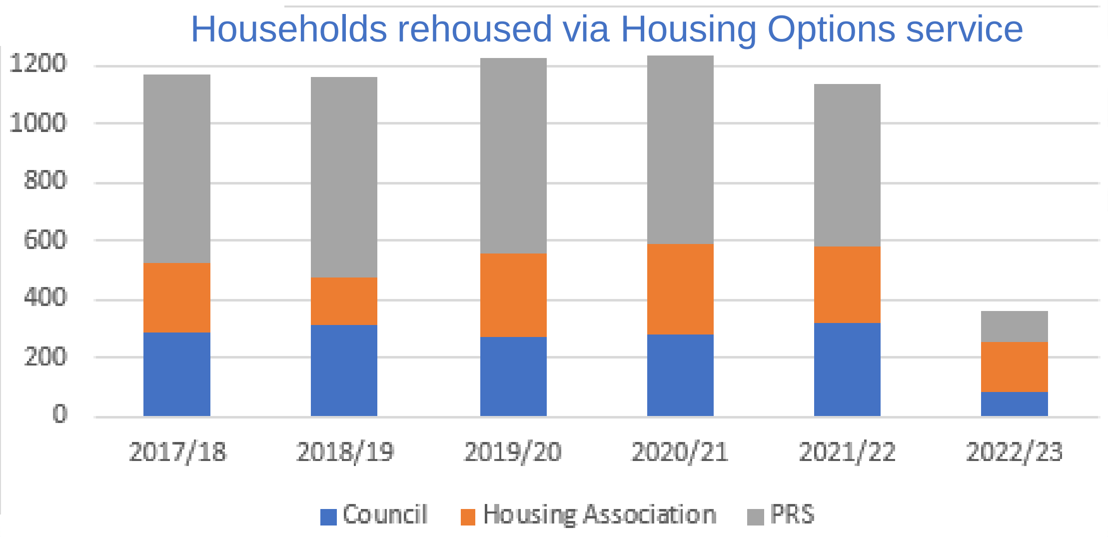
Reason for loss of last settled accommodation 2018/19 – 2021/22

Housing needs



- Housing demand has remained high, with an increase in households being placed in Bands 1 and 2.

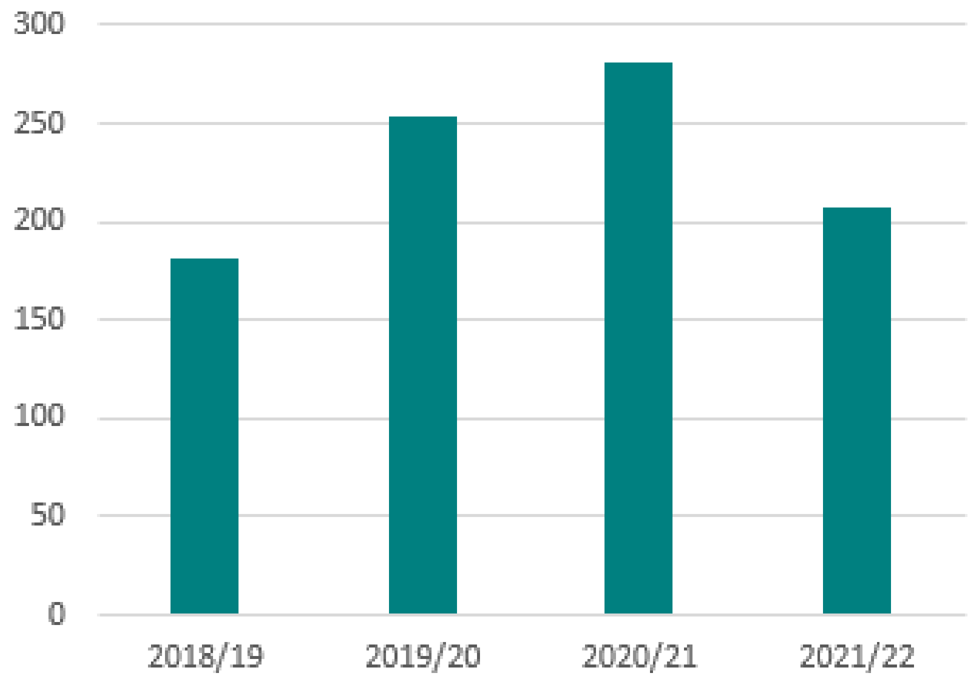
- The supply of social rented / affordable homes has fallen slightly.
- Since April 2021 the private rented market has become increasingly challenging, with a reduction in supply of 35% across London, PRS rents increasing by 16% in 2022, and more households declining PRS offers.



Source: Barnet Homes

Homelessness prevention – sustaining existing accommodation

Number of households supported to remain in their accommodation



- High numbers of households have in the past been supported to remain in their households as part of Barnet Homes' homelessness prevention work, including through use of financial interventions such as Discretionary Housing Payments.

- It is becoming increasingly challenging to sustain people in their existing tenancies due to affordability constraints, and an increase in private sector landlords exiting the market.

Source: Barnet Homes

Housing supply and high priority demand

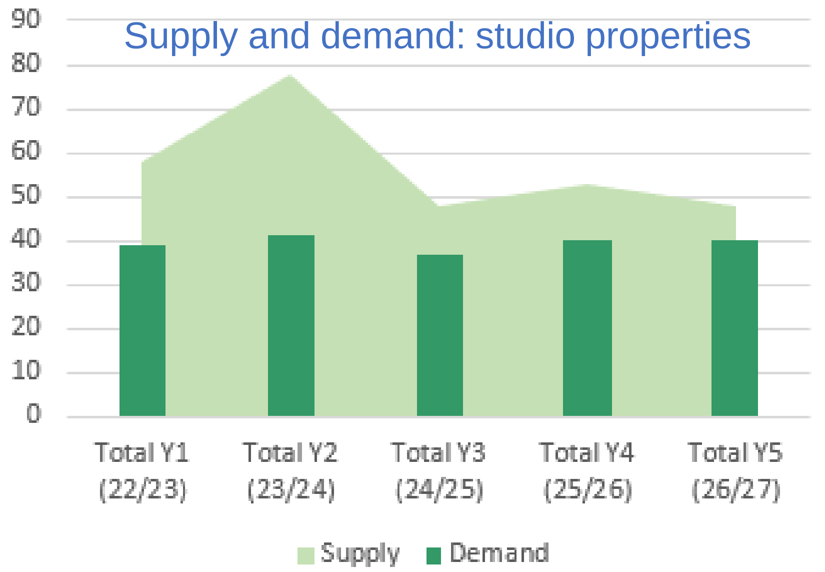
Projected supply vs. demand						
Bed size	Category	Y1 22/23	Y2 23/24	Y3 24/25	Y4 25/26	Y5 26/27
Studios	Supply	77	84	60	71	60
	Demand	39	40	38	40	40
	Difference	38	44	22	31	20
1-beds	Supply	365	277	294	342	347
	Demand	353	428	445	340	405
	Difference	12	-151	-151	2	-58
2-beds	Supply	375	233	318	320	474
	Demand	142	224	205	172	217
	Difference	233	9	113	148	257
3-beds	Supply	227	140	195	237	207
	Demand	288	296	305	274	276
	Difference	-61	-156	-110	-37	-69
4-beds	Supply	73	49	44	62	66
	Demand	155	162	152	155	159
	Difference	-82	-113	-108	-93	-93

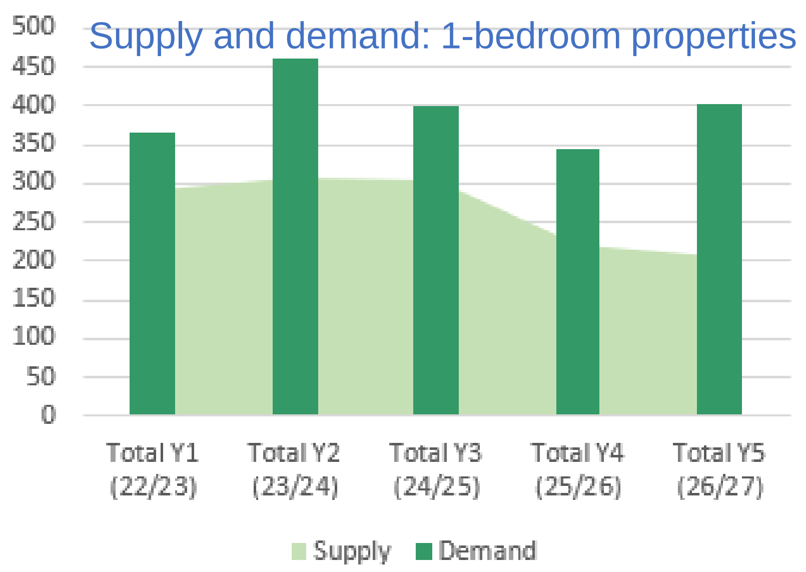
- Focusing on the demand from housing applicants in Bands 1 and 2, direct offers, and regeneration and ad-hoc decanting schemes, there are particular housing supply pressures regarding 1-bedroom properties, 3-bedroom properties, and 4-bedroom properties.

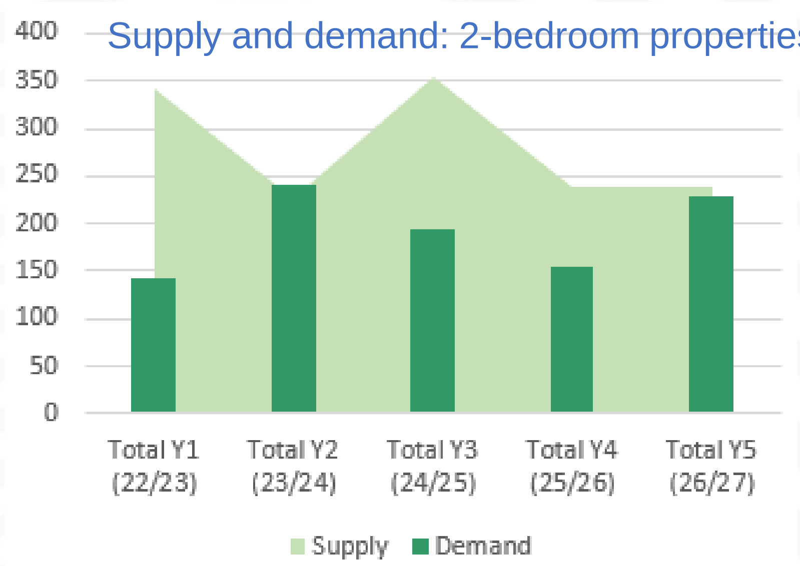
- There is also a limited expected supply of wheelchair-adapted properties to meet the present need from Band 1 applicants.

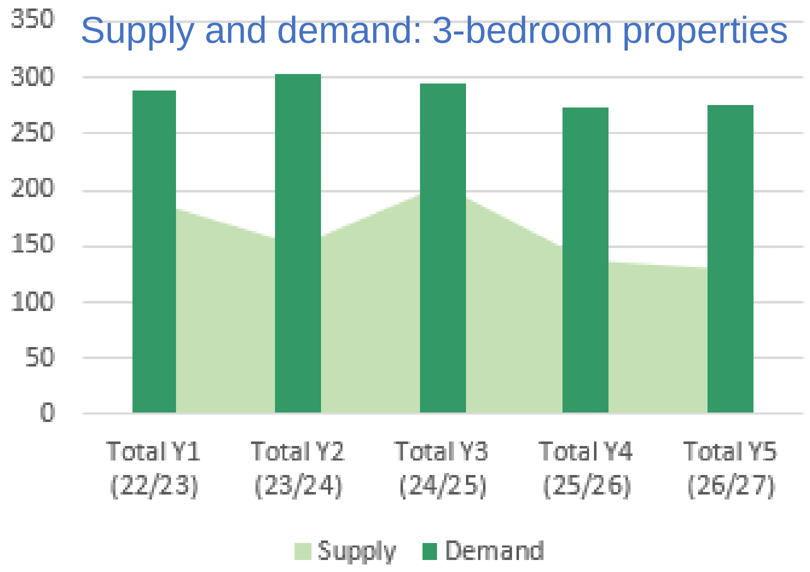
Source: Barnet Homes

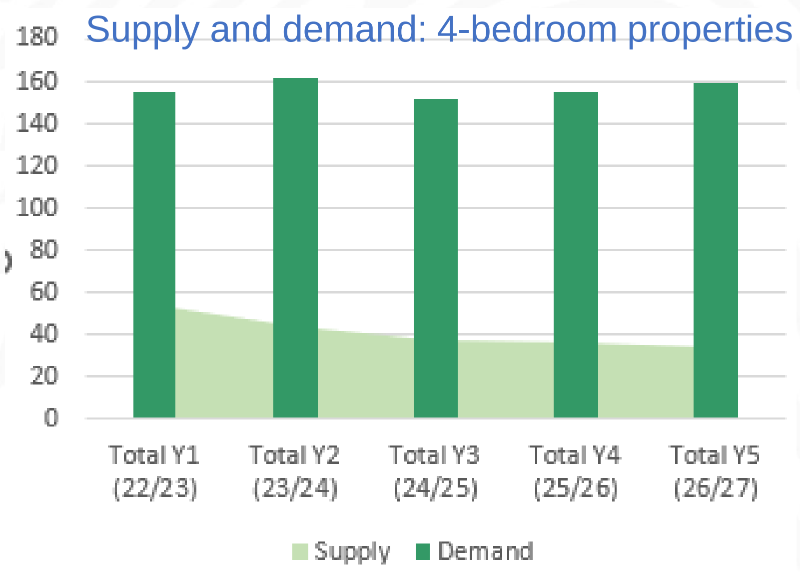
Housing supply and high priority demand







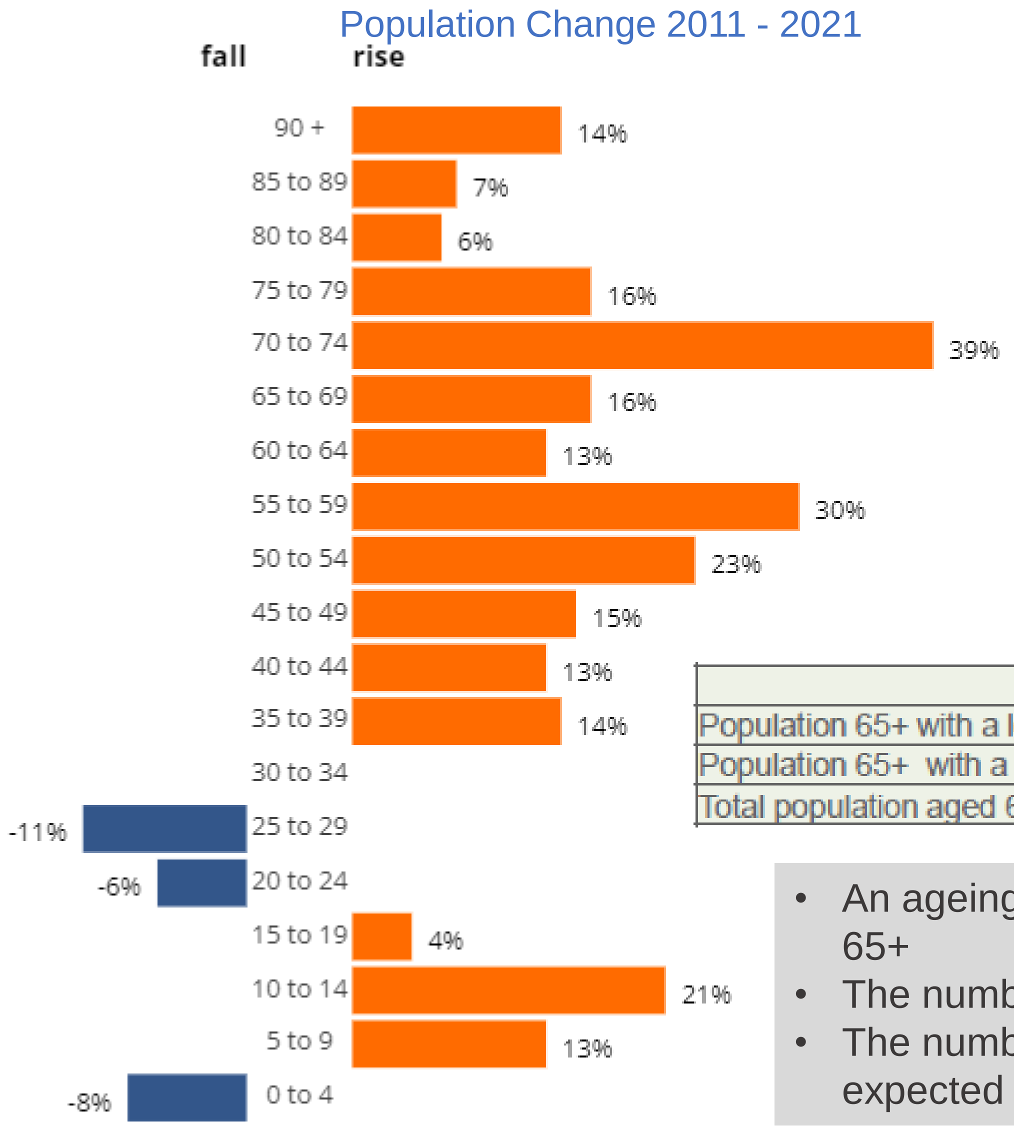


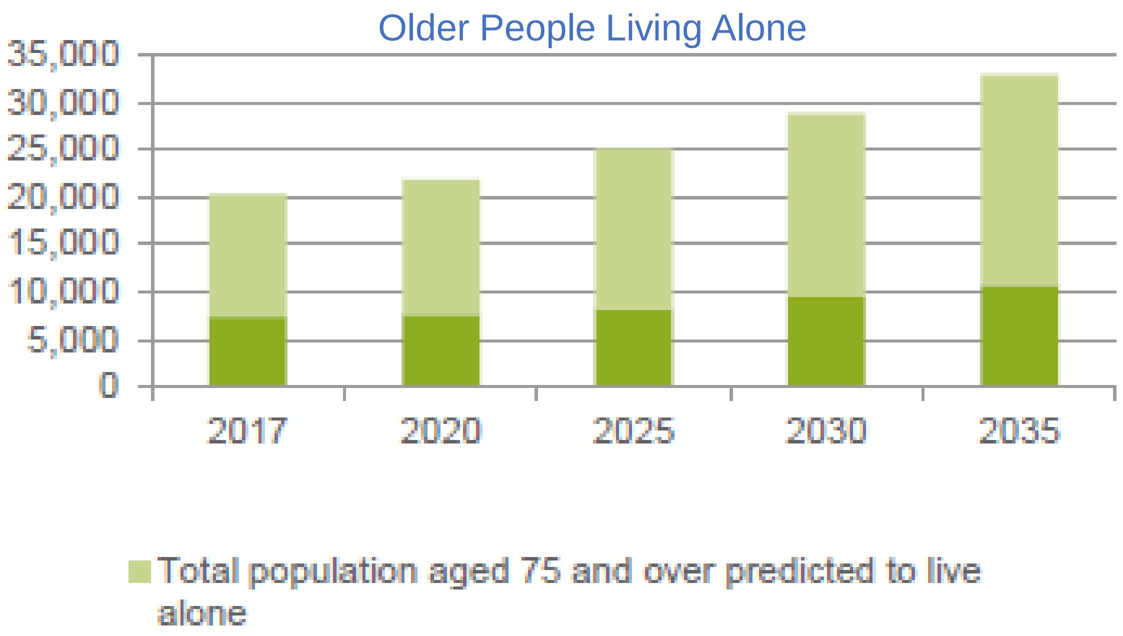


Source: Barnet Homes

Older People

Older people



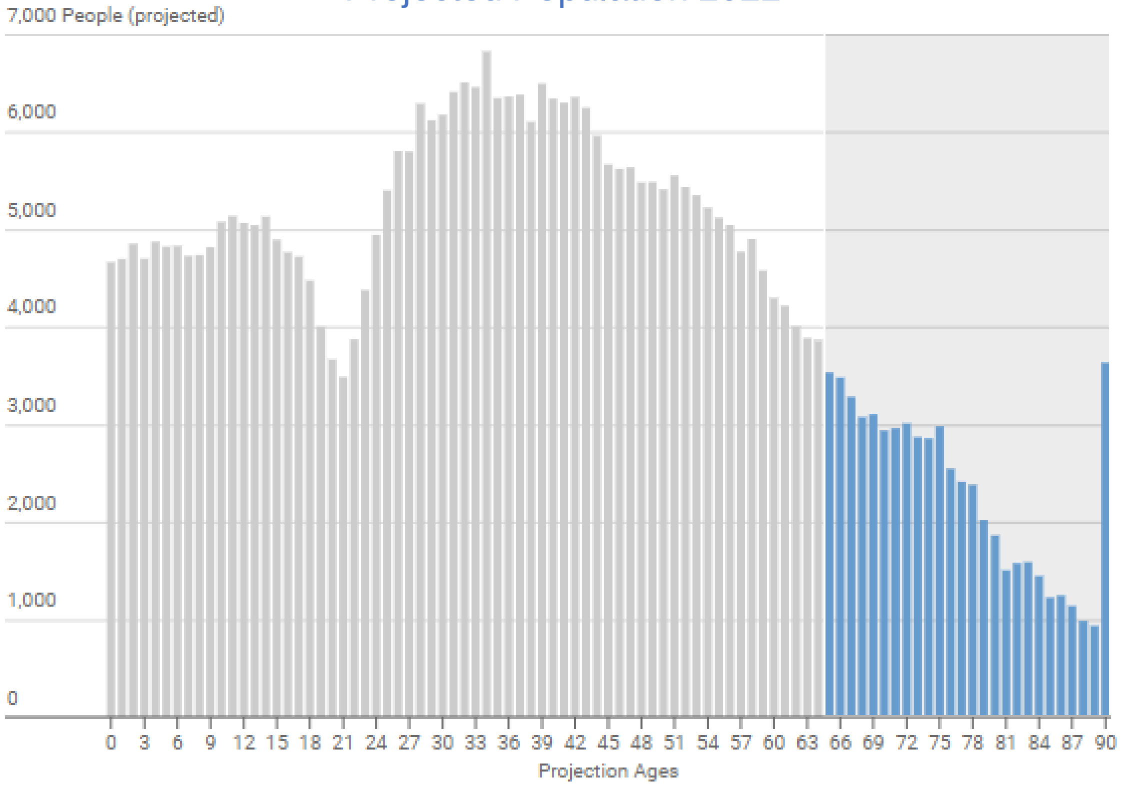


	2017	2020	2025	2030	2035
Population 65+ with a long term illness whose day-to-day activities are limited a little	13,151	14,102	16,138	18,512	21,061
Population 65+ with a long term illness whose day-to-day activities are limited a lot	11,804	12,725	14,696	17,011	19,727
Total population aged 65 and over predicted to have dementia	4,136	4,502	5,236	6,261	7,407

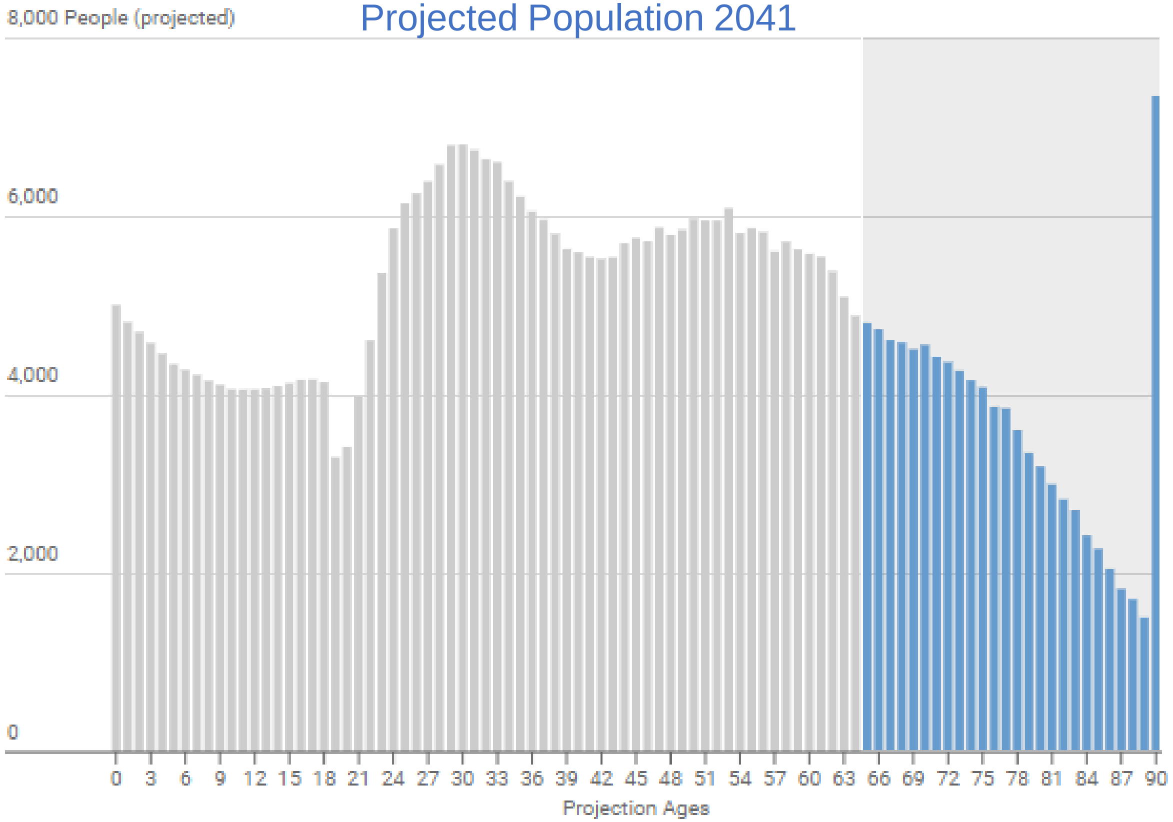
- An ageing population, although below the national average: **18.3%** increase in those aged 65+
- The number of people living alone is expected to increase.
- The number of older people with long-term limiting health conditions and dementia is expected to increase.

Older people

Projected Population 2022



Projected Population 2041

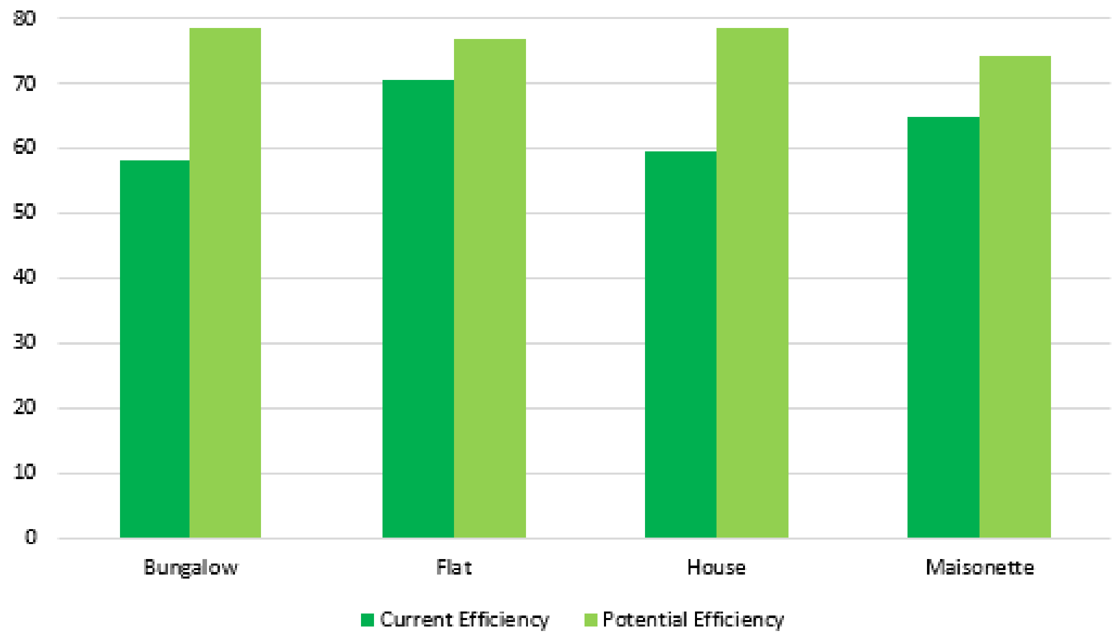


- Projections indicate an increase in people aged over 65 in Barnet by 2041.
- Population of those aged 0-17 projected to decrease by 11.6% by 2041.
- Population of those aged 18-64 projected to increase by 5.7% by 2041.
- Population of those aged 65+ projected to increase by 56% by 2041.

Stock Condition and Empty Homes

Stock condition

Current and potential energy efficiency by property type



Domestic property energy efficiency rating

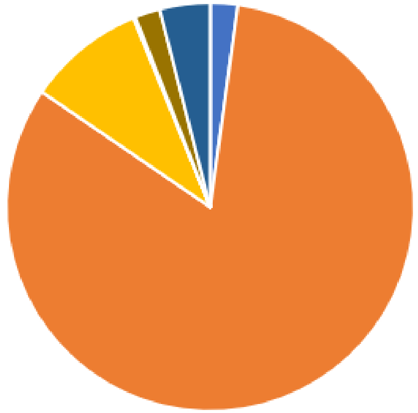
Ratings	Energy Rating (%) 2022	Energy Rating (%) 2018
A (92+)	0.2%	0.1%
B (81-91)	14.6%	12.3%
C (69-80)	30.5%	27.4%
D (55-68)	37.2%	36.5%
E (39-54)	14.7%	18.5%
F (21-38)	2.2%	4.4%
G (1-20)	0.4%	0.9%

- Across all postcode areas, domestic properties have an average of **9.4** improvement points to reach potential energy efficiency levels (down from 11 in 2018).
- On average, flats in Barnet have the highest current levels of energy efficiency (average score 70), while bungalows (58) and houses (60) are the lowest.

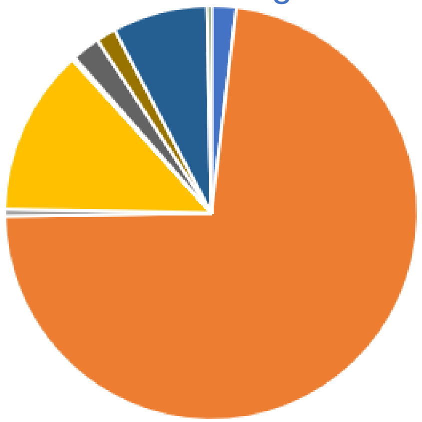
- Most domestic properties in Barnet have a current energy performance certificate rating of either C or D.
- Since 2018, the proportion of domestic properties with an EPC of B, C, or D has increased, and of A, E, F, and G has decreased.

Central heating and renewable energy

Central heating 2011



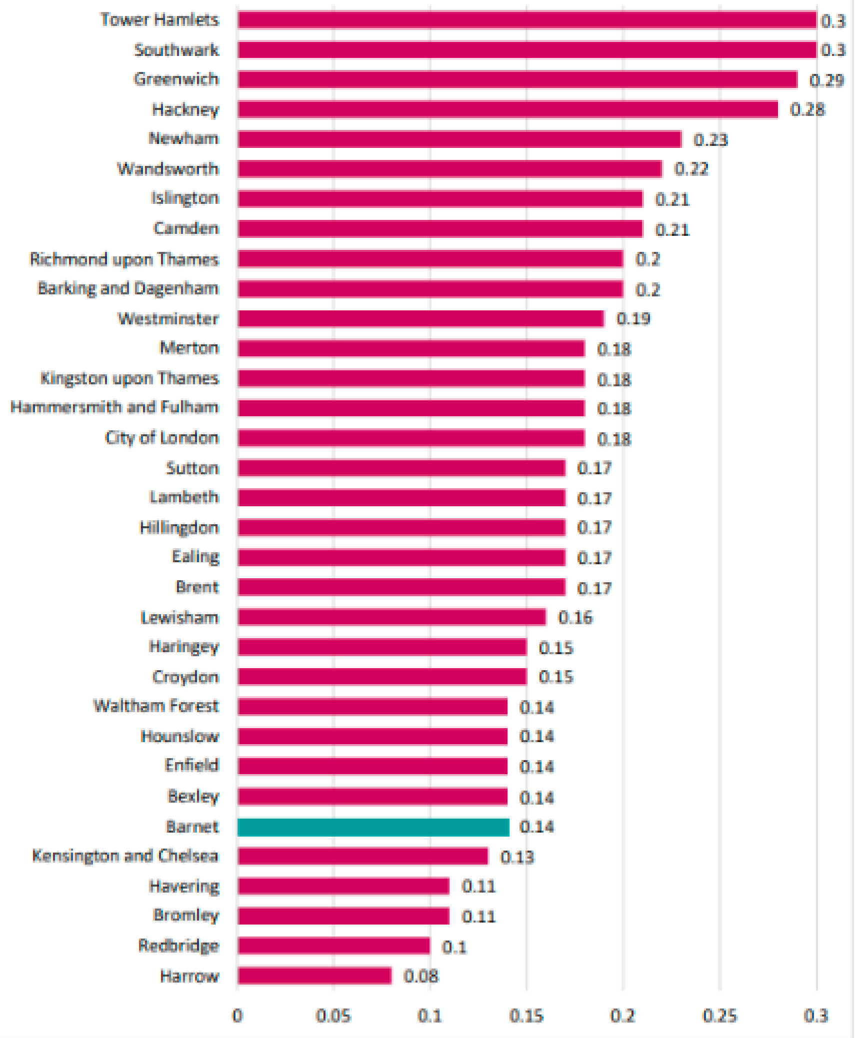
Central heating 2021



- Most households rely on gas central heating (**72.8%**), although this had reduced by 9% compared to 2011.
- The 2021 Census captured more information about central heating types – including separating mains and tank/bottled gas, separating wood and solid fuel, and adding district/communal heating and renewable energy only. **0.1%** of Barnet households had renewable energy central heating only in 2021.
- There was a slight reduction in households without central heating, from 2.2% to **1.9%** (2,886 households in total in 2021)

- Barnet ranked **24th** out of 33 London boroughs for the percentage of households that used renewable energy for central heating in 2021.
- Barnet had the **18th** highest percentage (0.34%) of households with two or more types of central heating including renewable energy.

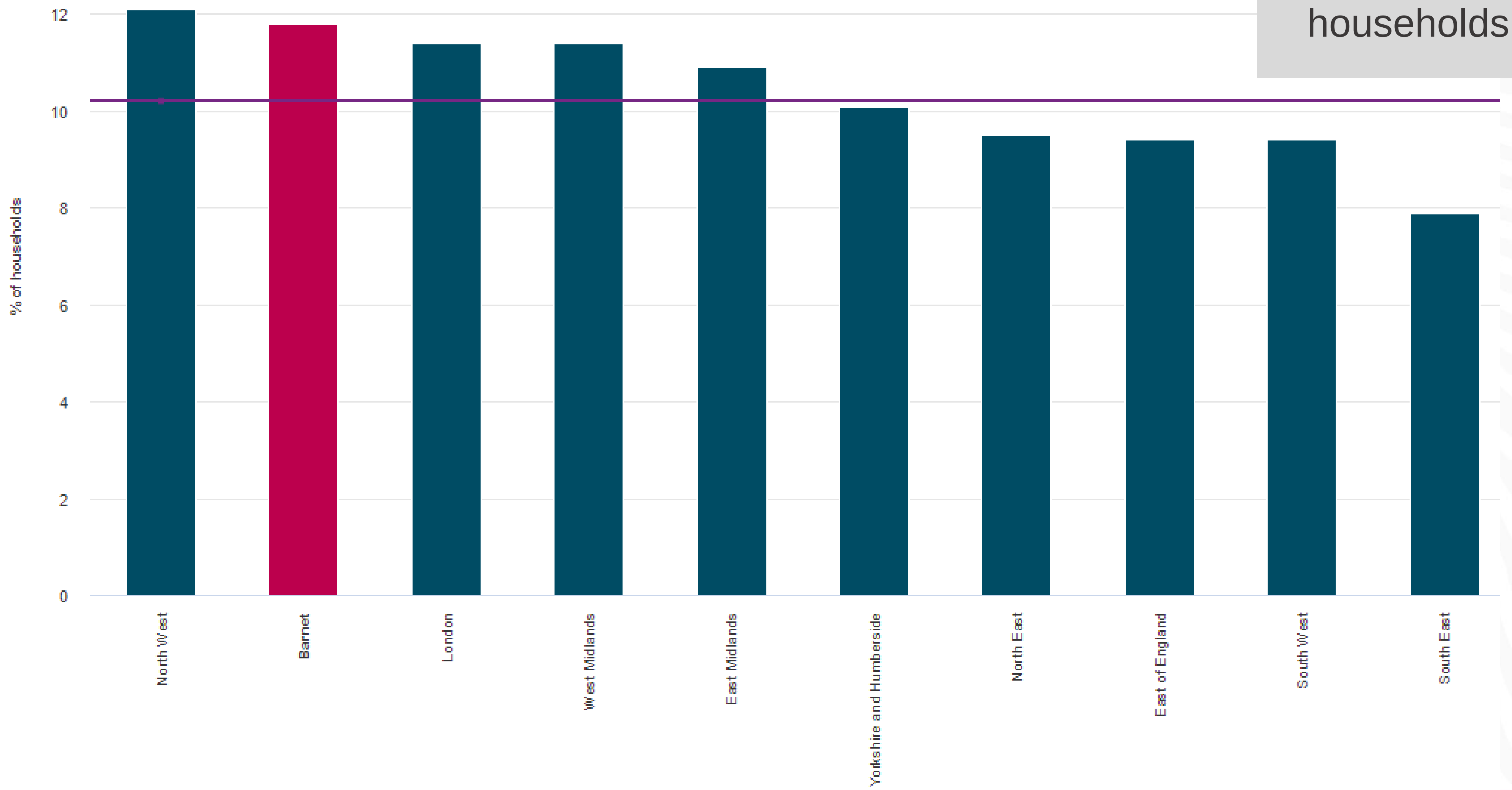
% of households with renewable energy for central heating



Sources: ONS Census 2011 and 2021

Fuel poverty

Percentage of households in fuel poverty (LIHC) (2018) – Barnet and English regions



- In 2018 **11.8%** of Barnet households were fuel poor.

Housing Supply and Demand

Delivery of new homes

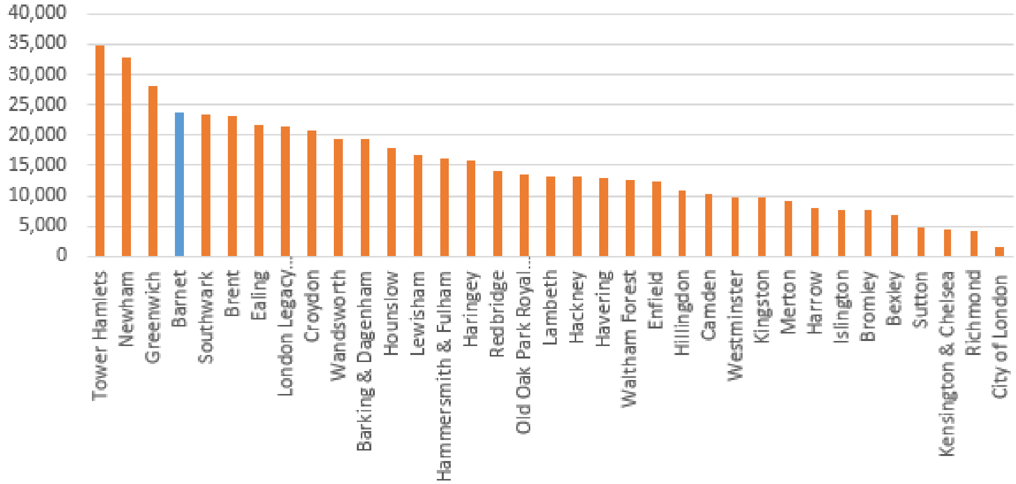
- **2,086** new homes delivered on regeneration schemes between 2018 and 2020
- **1,572** new homes to be delivered on regeneration sites, of which **520** will be for affordable rent, and **1,052** will be affordable homes for purchase

Barnet Homes	2023	2024	2025	2026	Type
Stag House	51				Extra Care
Cheshire House	51	75			Extra Care
Upper Lower Fosters		142			100% affordable
Broadfields			30		100% affordable
The Grange			50		100% affordable
Little Strand		35			100% affordable
Coppetts	16				100% affordable
Burnt Oak Rooftop		18			100% affordable
Potential future programmes			10	600	Mix of 100% & 50% affordable
Total	118	270	90	600	

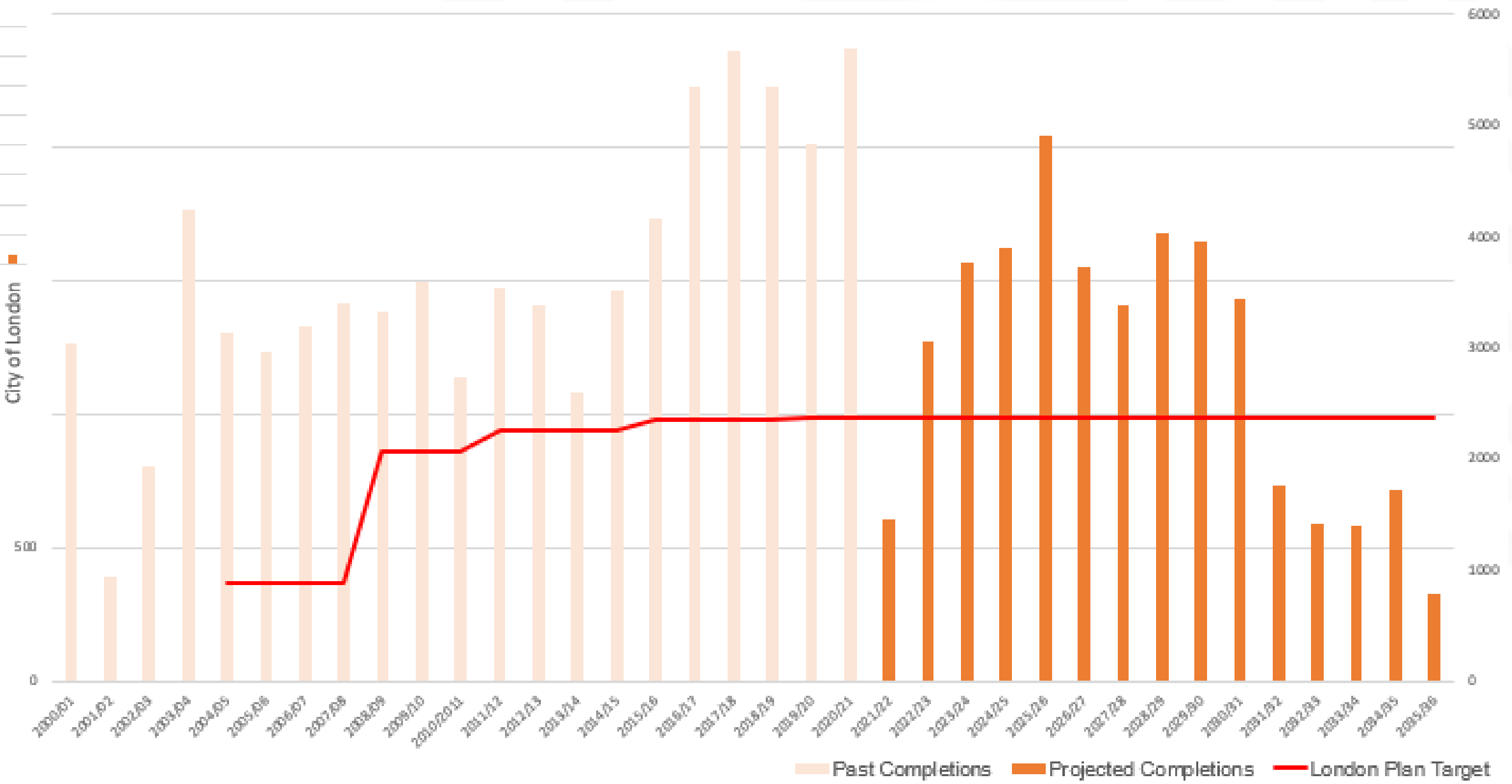
Regeneration sites	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Dollis Valley	42			94							
Granville Road	28	18									
West Hendon		78	71	34	96	19					
Grahame Park			209		190	66	72	78	190	229	11
Total	70	96	280	128	286	85	72	78	190	229	11

Context – targets for delivery of new homes in London

The London Plan's ten-year targets for housing completions in each London planning authority (2019/20 to 2028/29)



Barnet's London Plan housing trajectory



Barnet's housing trajectory shows that the borough will exceed the target in the London Plan.