

Housing Strategy & Homelessness and Rough Sleeping Strategy Evidence Base

June 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
 - May 2023 – publication of Renters Reform Bill 2023

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



PERSON-CENTRED

A large, diverse borough

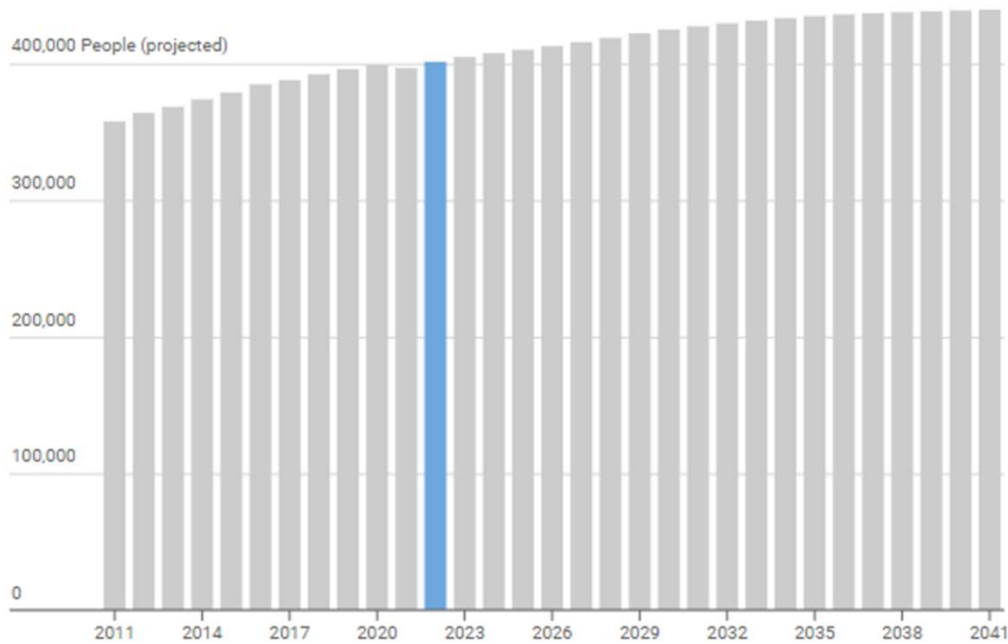


2021 Census – population growth

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

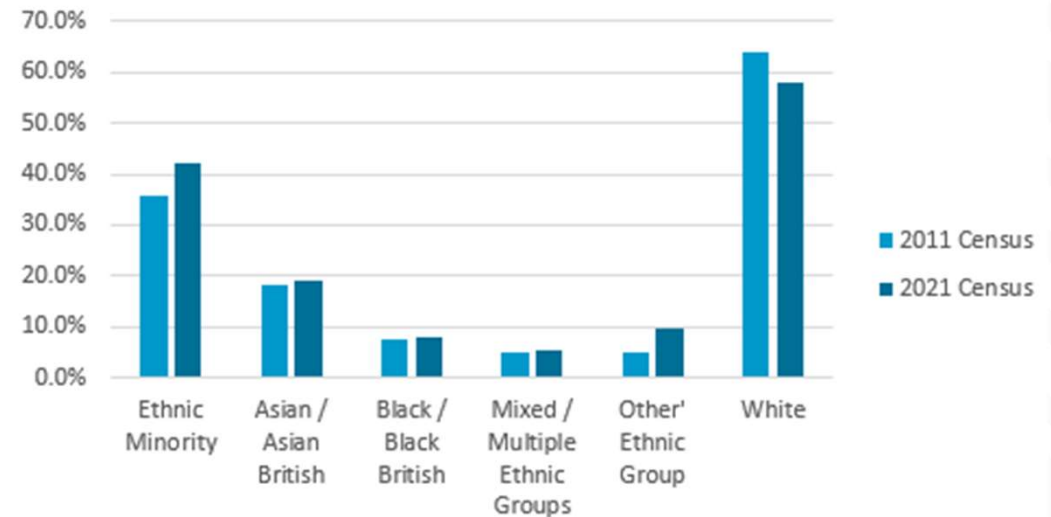
A growing and increasingly diverse population

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%**

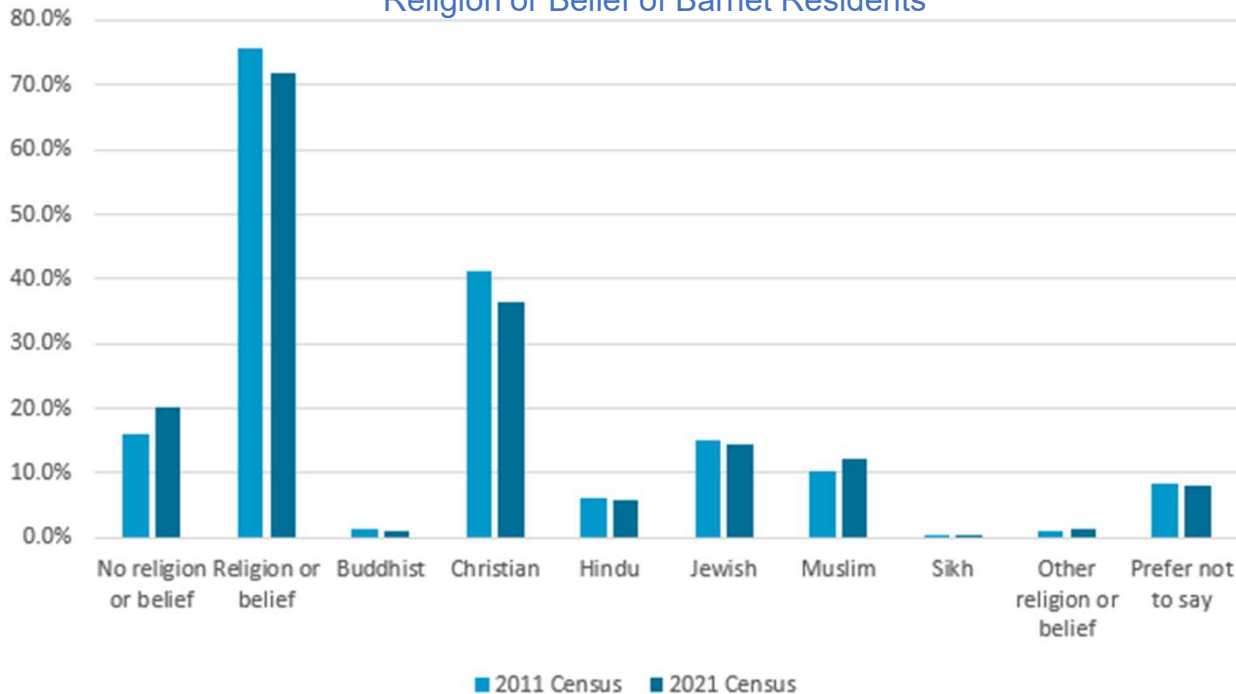
Ethnic Origin of Barnet Residents



- **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.

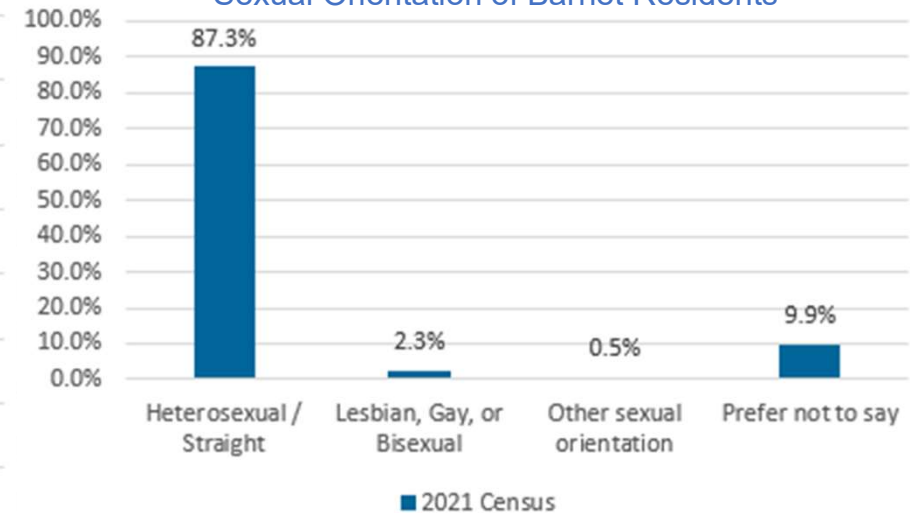
A growing and increasingly diverse population

Religion or Belief of Barnet Residents



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%.

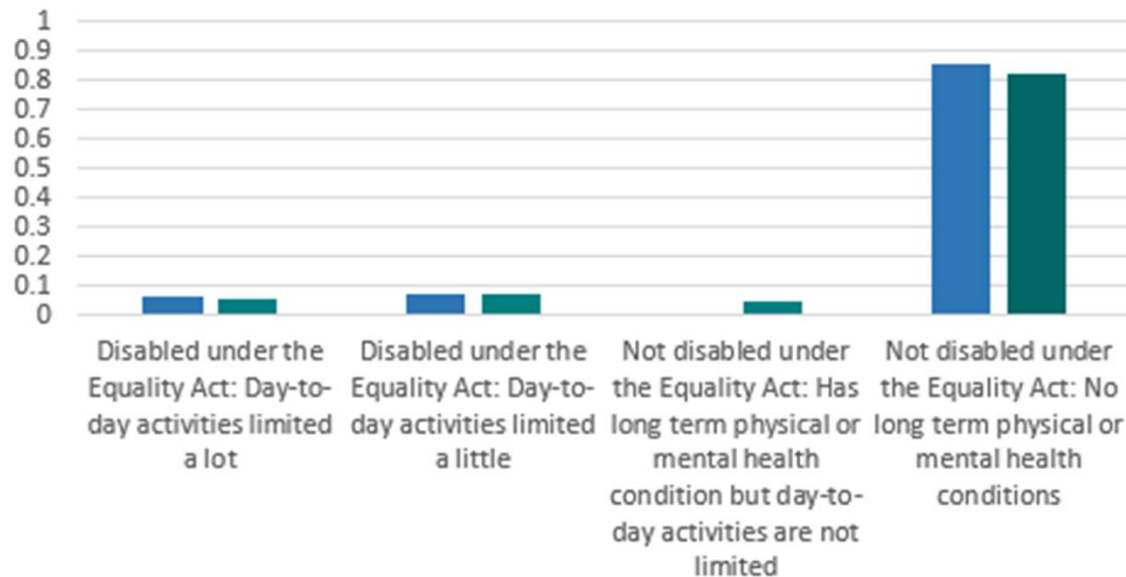
Sexual Orientation of Barnet Residents



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

Barnet residents stating disability under the Equality Act



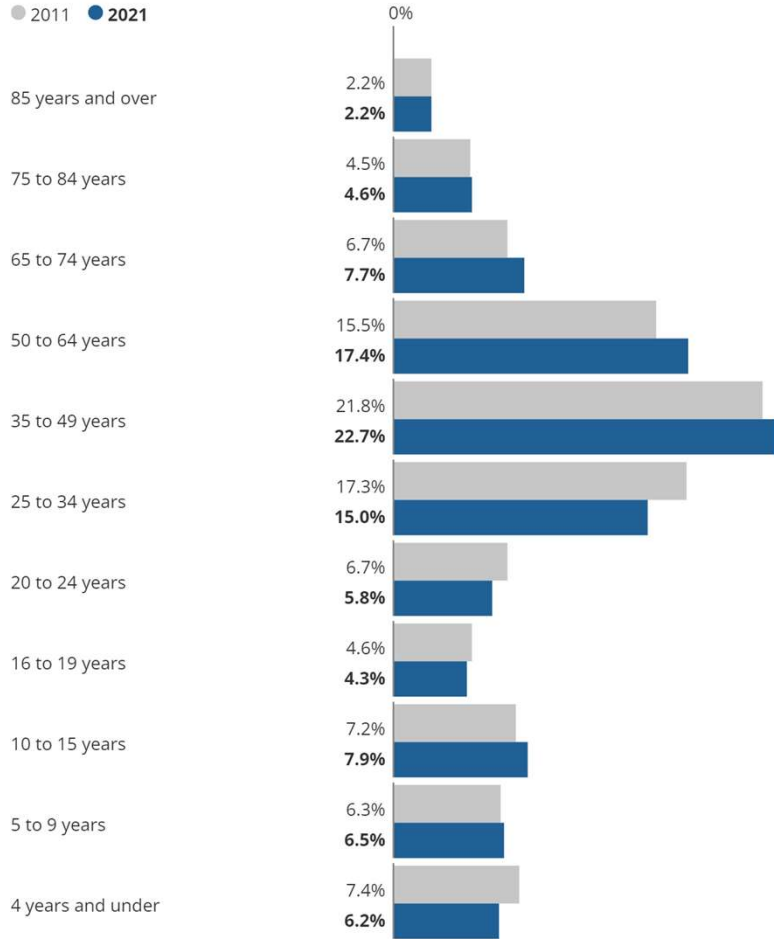
A slight decrease in those who stated they are disabled under the Equality Act 2010 and their day to day activities are limited a lot (**-0.9%** compared to 2011), in those who stated their activities are limited a little (**-0.3%**), and in those who said they are not disabled (**-3.9%**).

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

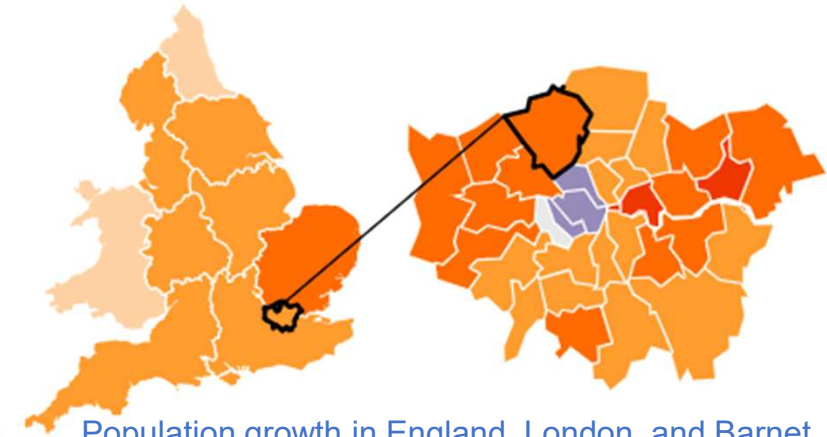
% of residents by age group

● 2011 ● 2021

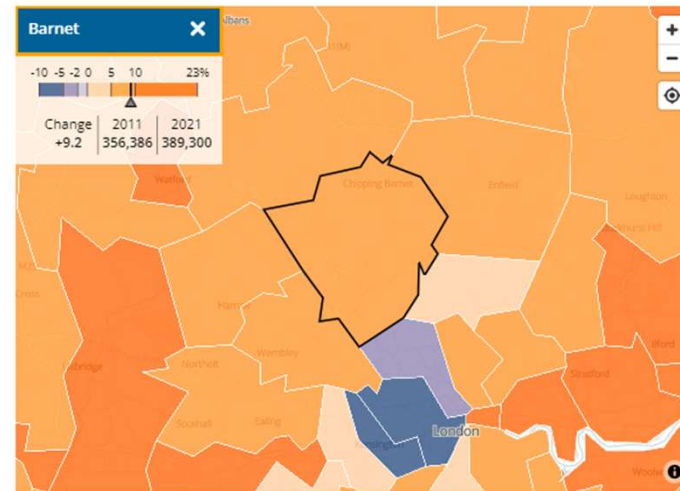


Older age groups increased compared to the 2011 Census (35 to 84). There was a reduction in people younger than 35, with the exception of the group 10-15 years old.

England ▲ 6.6% London ▲ 7.7% Barnet ▲ 9.2%



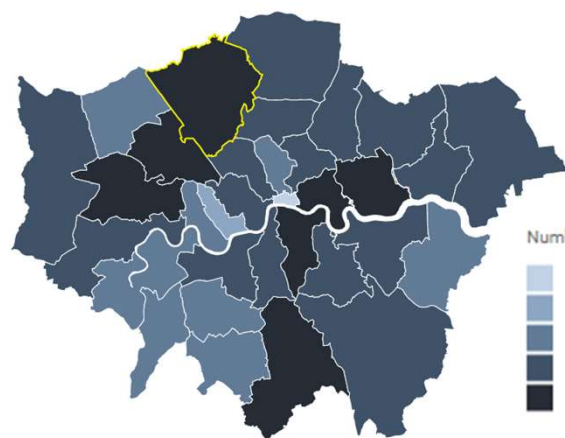
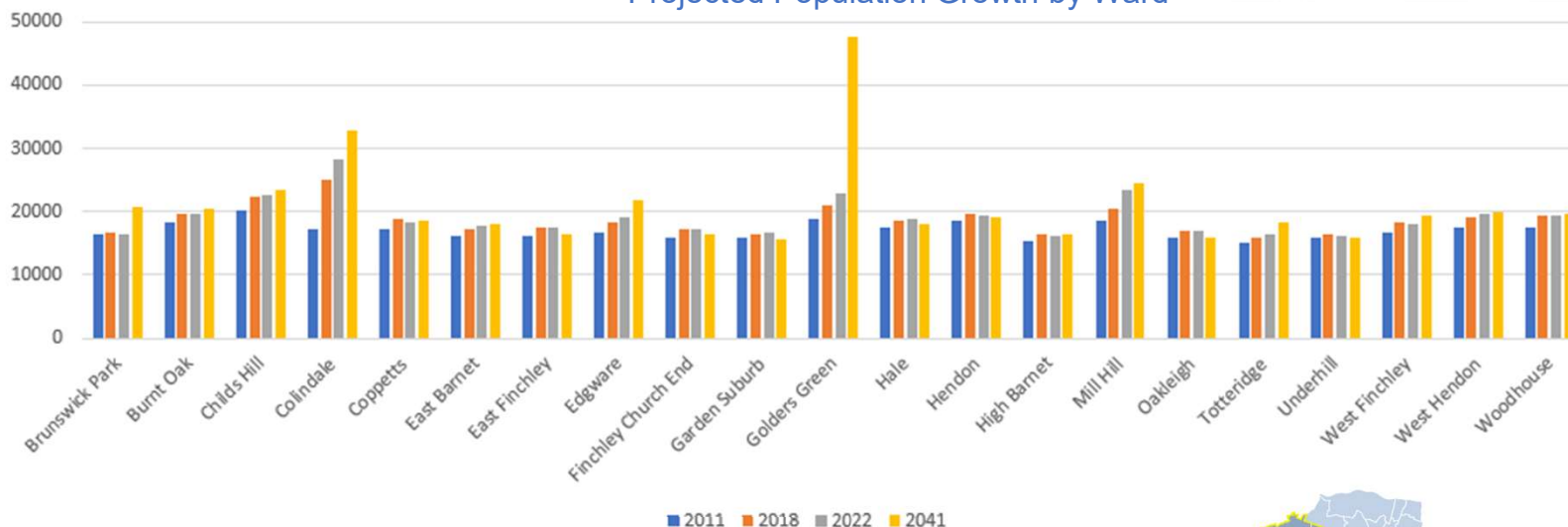
Population growth in England, London, and Barnet



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

A growing population

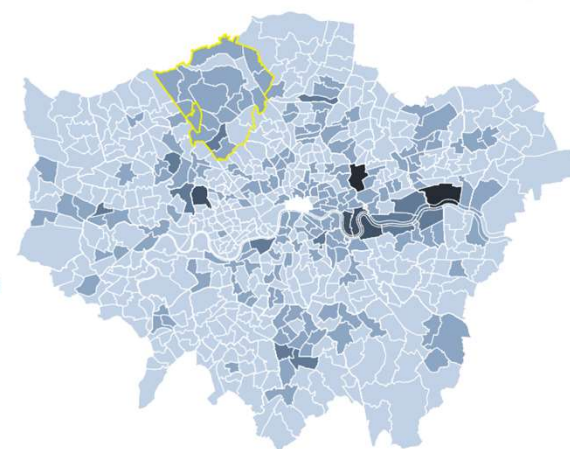
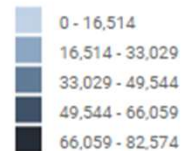
Projected Population Growth by Ward



Number of People in Borough



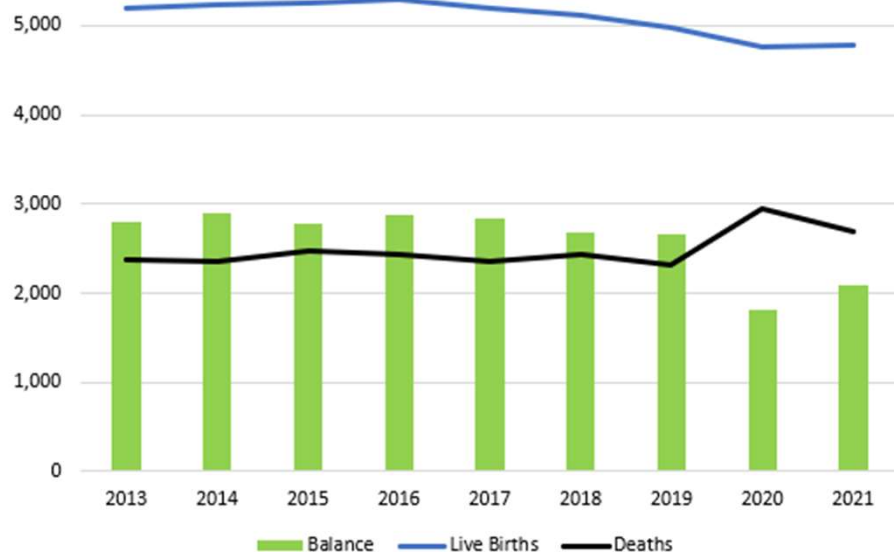
Number of People in Ward



- 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?

Barnet Live Births and Deaths

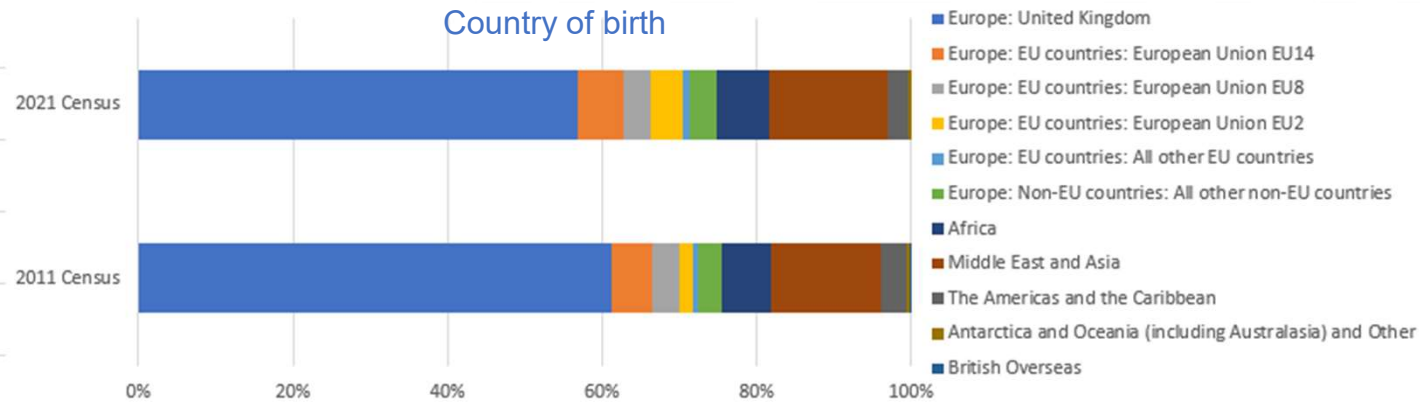
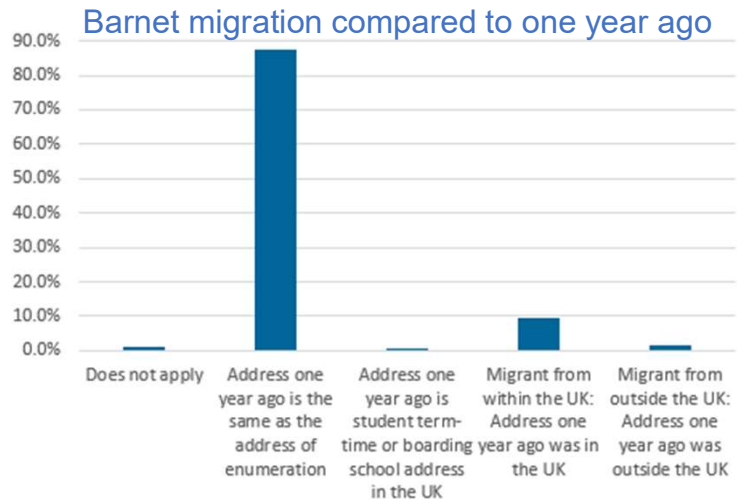
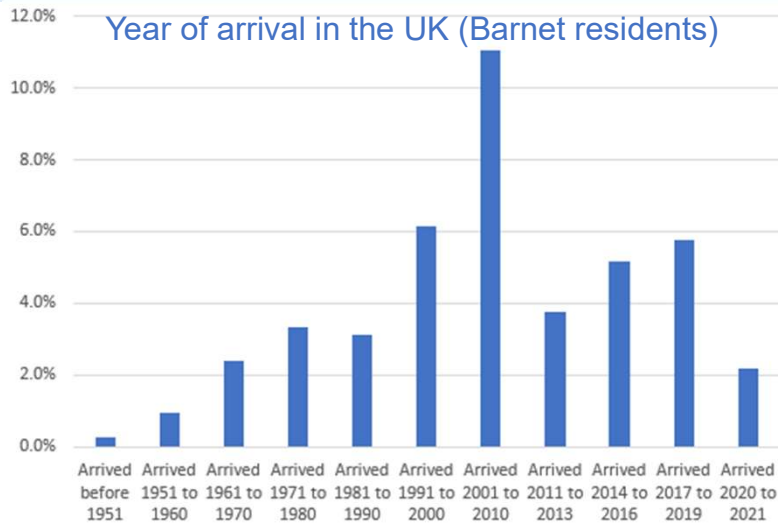


- Net migration (previous 5 years) is about **+1,382** per annum
- International migration (previous 5 years) is about **+4,056** per annum.
- Both are lower than in 2018 (**+2,700** and **+4,600** respectively). We might reasonably expect post-Brexit that there has been a decrease in migration from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

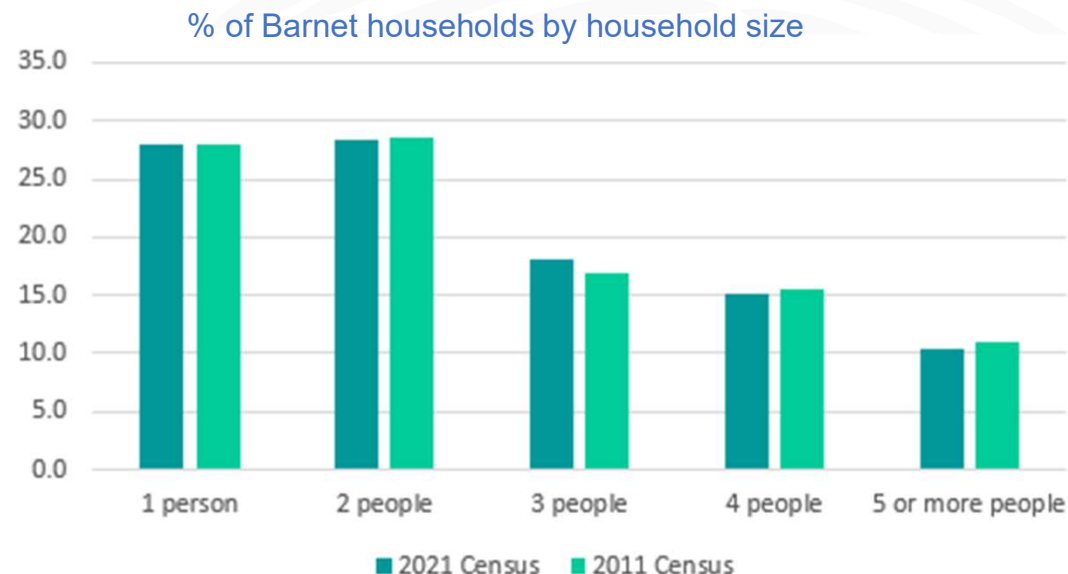
Migration



- 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

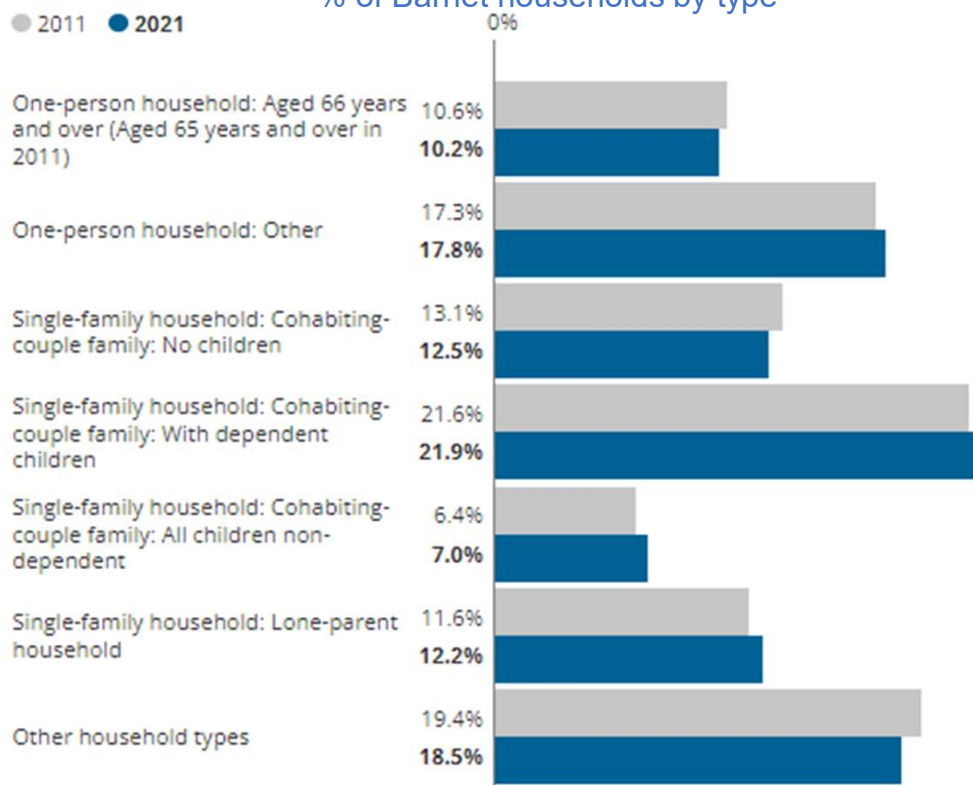
- There are **148,900** households in Barnet (up from 135,900 in 2011)
- There is an increase in smaller properties (1 bedroom **+1.1%**) and larger properties (4 or more bedrooms **+2.6%**).



- 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).

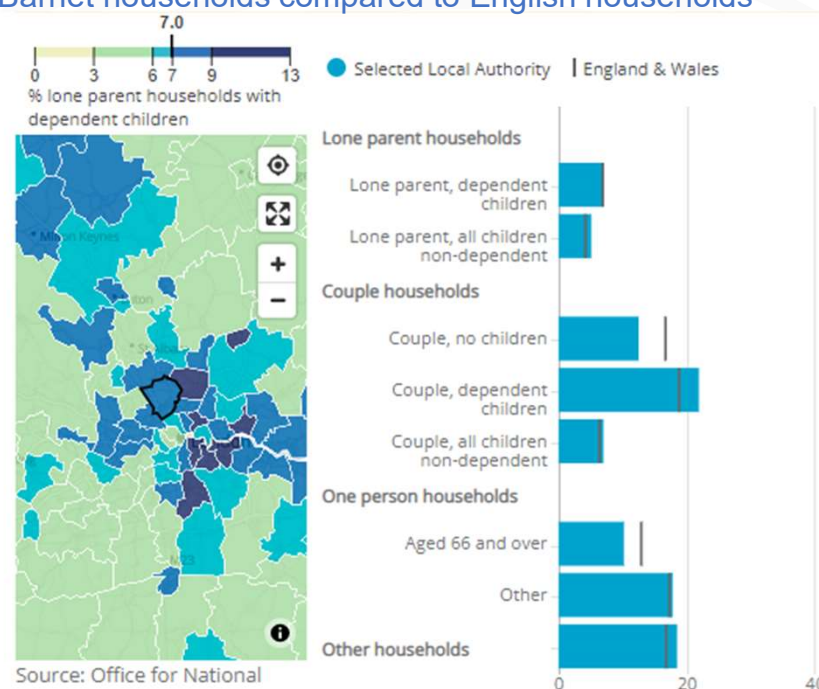
The way people live is changing

% 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



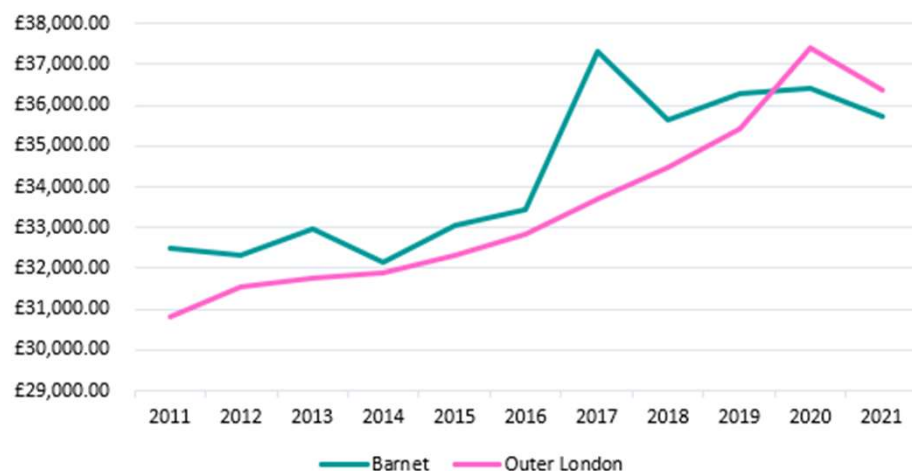
- Compared to the 2011 Census data across England, Barnet had more households with lone parents with dependent and non-dependent children, couples with dependent and non-dependent children, and other households. There were fewer households made up of couples with no children, and those aged 66 and over.

Economy



Relatively high incomes

Average incomes



- 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.

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)

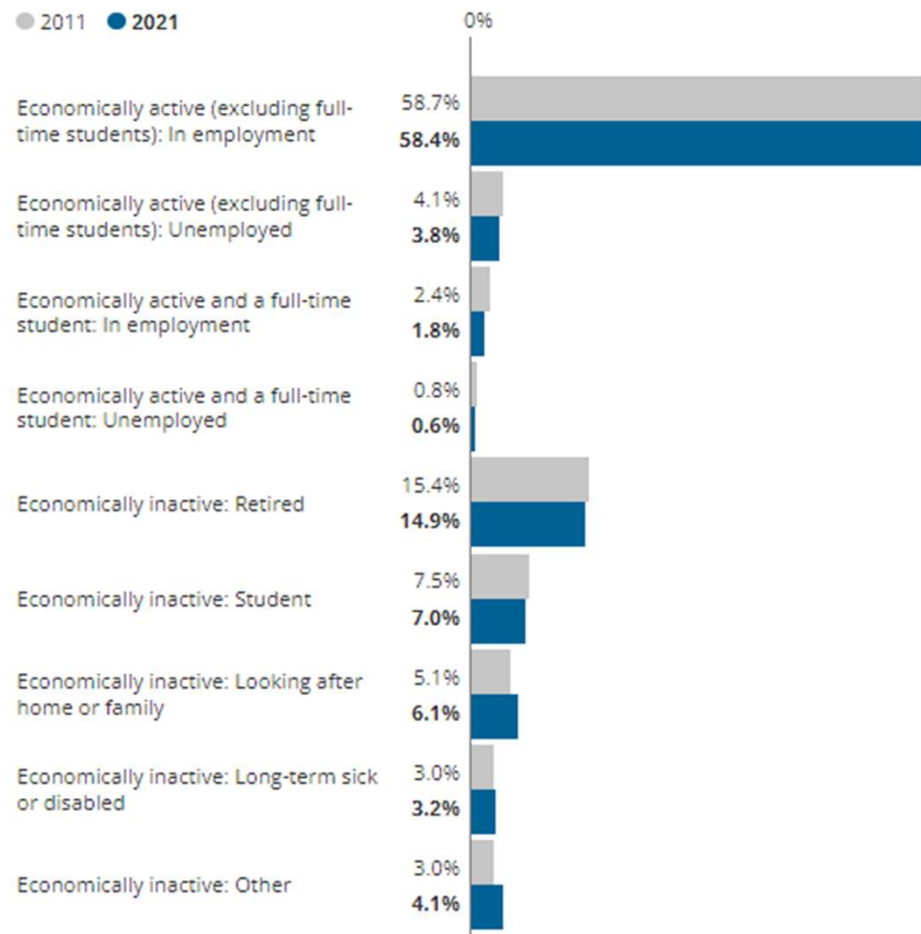
	Barnet	London	Great Britain
Number Of Workless Households	18,600	367,900	2,866,800
Percentage Of Households That Are Workless	15.0	12.2	14.0
Number Of Children In Workless Households	!	171,900	1,249,200
Percentage Of Children Who Are In Households That Are Workless	!	9.5	10.2

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

Employment

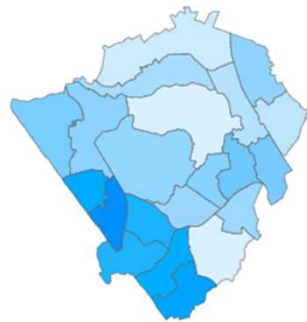
% of Barnet residents aged 16 years and over by economic activity status



- 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.

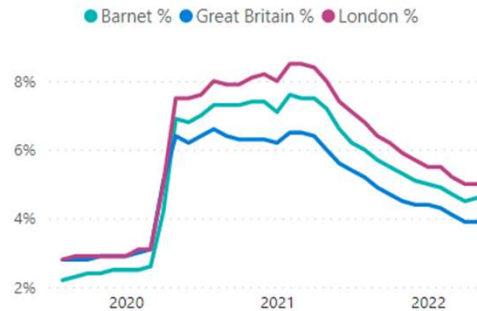
Welfare benefits and welfare reform

11650
Number of Out of Work Benefit Claimants

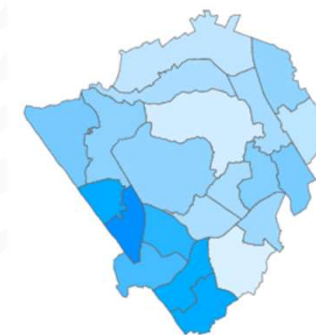


4.6%
% Working Age on Out of Work Benefits

Percent of Working Age on Out of Work Benefits

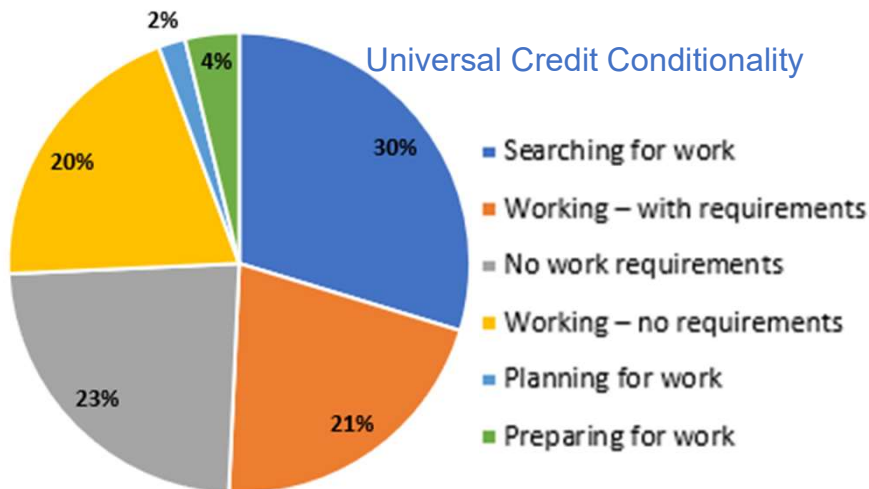
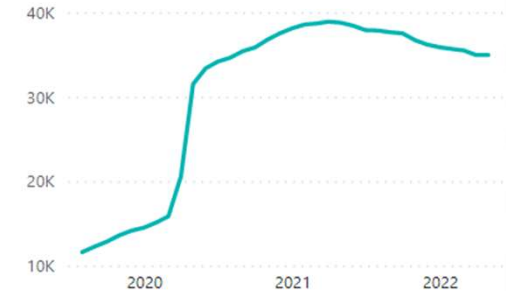


34949
Number of Universal Credit Claimants



9.0%
% Population on Universal Credit

Universal Credit Claimants by Month



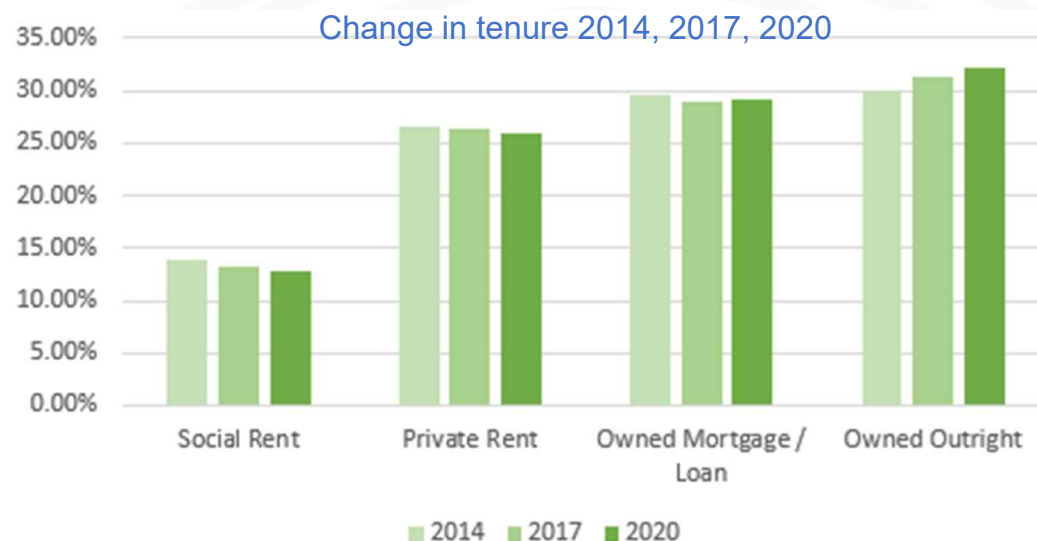
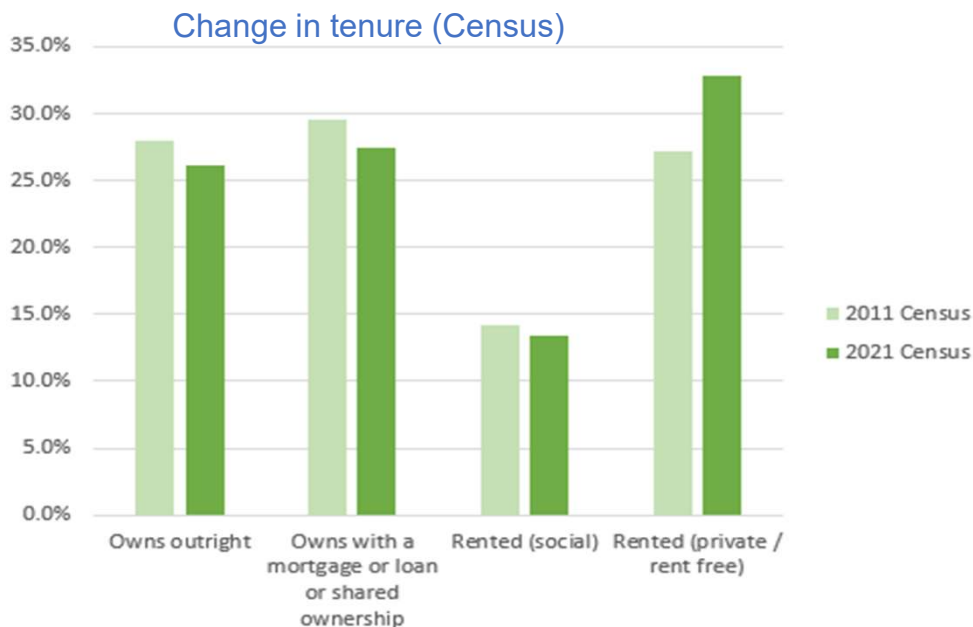
- As of March 2020, the number of Out of Work benefits claimants had risen sharply in Barnet and has been higher than Great Britain's but lower than London's levels. From June 2021 the number has slowly decreased. Barnet wards affected with the highest numbers of unemployment are Colindale, Burnt Oak 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.

The Housing Market



PERSON-CENTRED

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%)

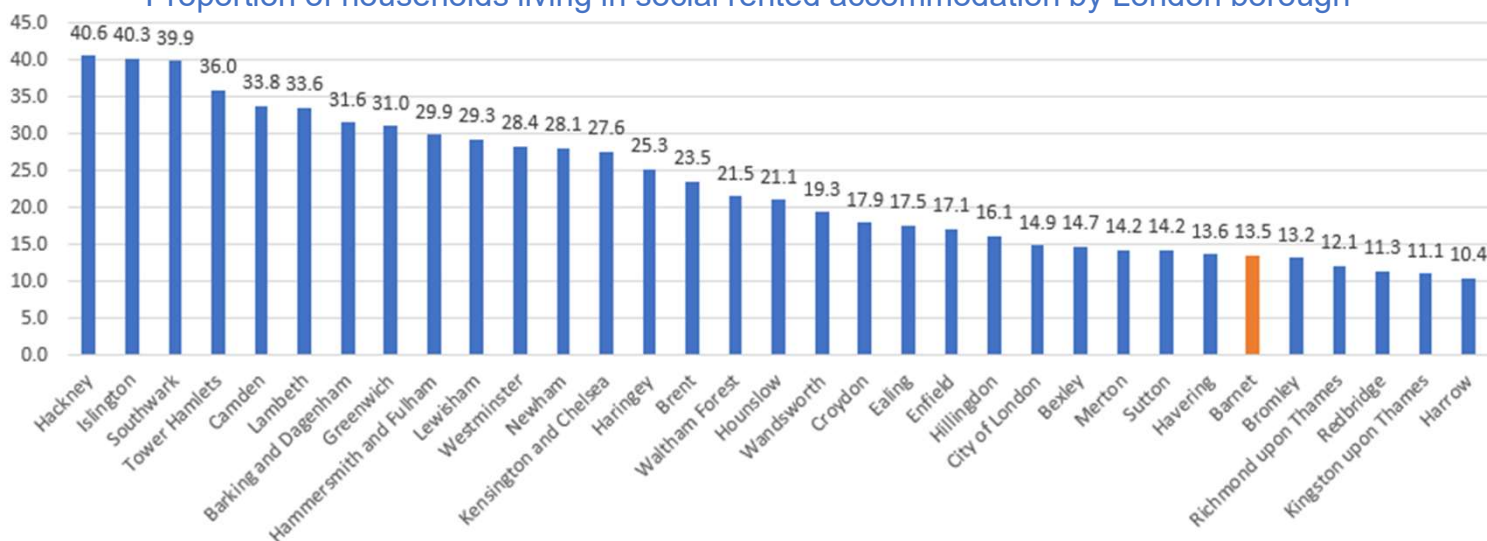
Annual ONS population survey shows a changing picture in the ensuing years. From 2017 to 2020:

- 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.

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%).

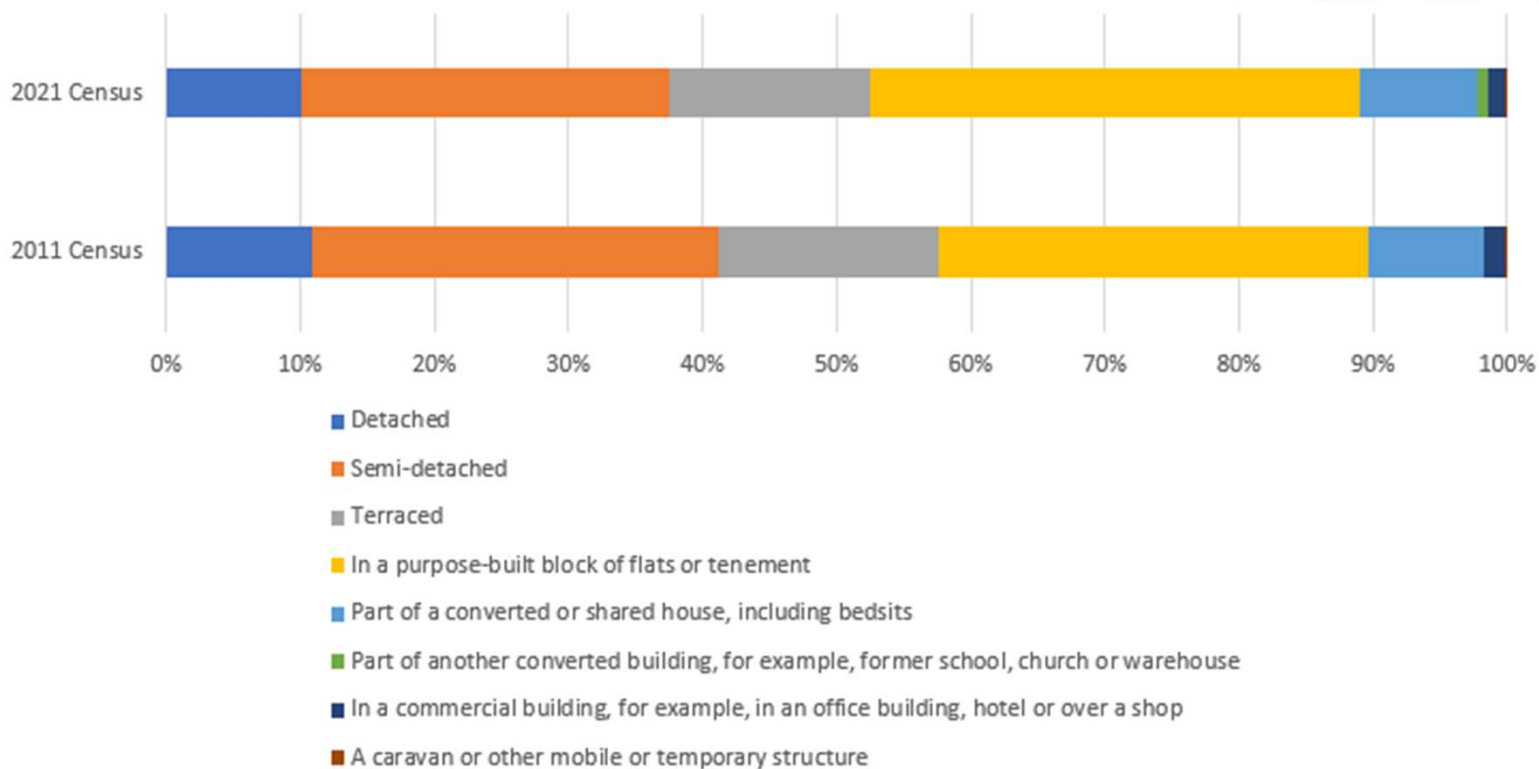
Top 10 Barnet MSOAs with highest proportion of social rented accommodation

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%

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).

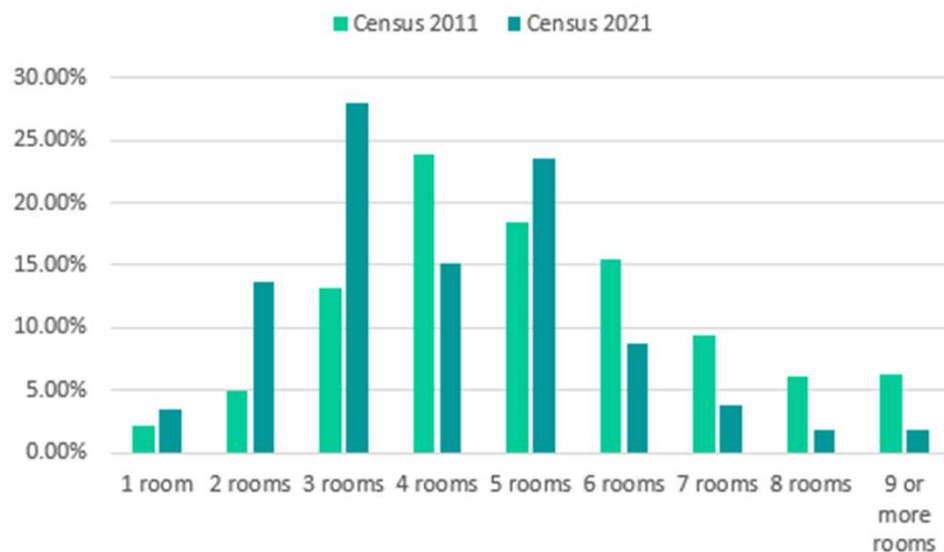
Increase in purpose-built blocks of flats

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.

Property sizes

% of Barnet properties by number of rooms



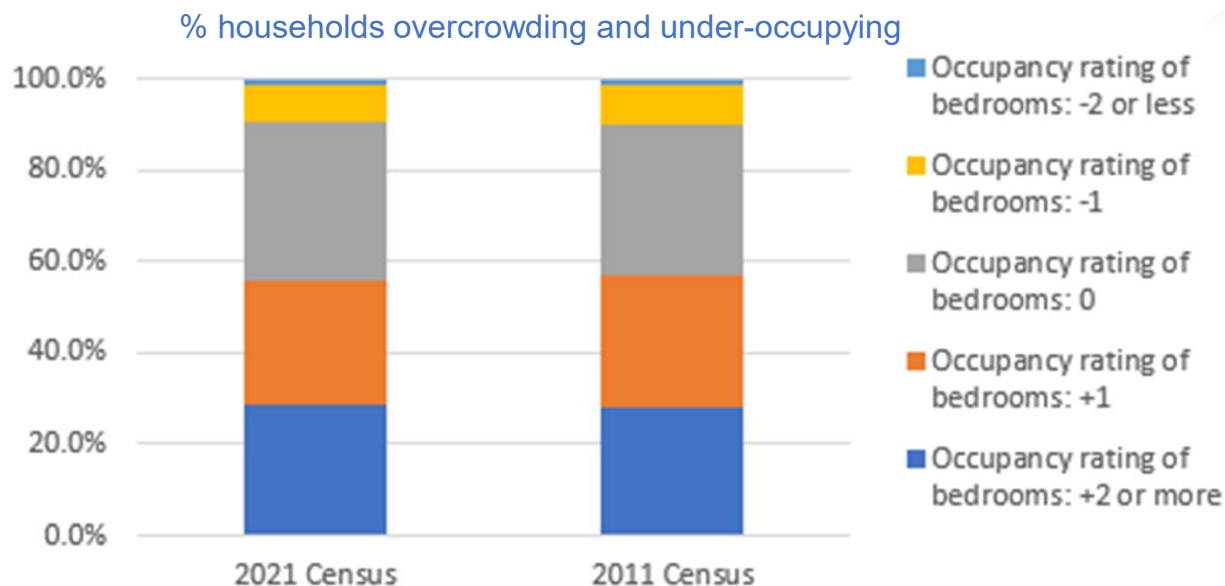
- Compared to 2011, there were fewer larger properties in Barnet, with a particular increase in the number of properties with 2-3 rooms.

% of Barnet properties by number of bedrooms



- 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

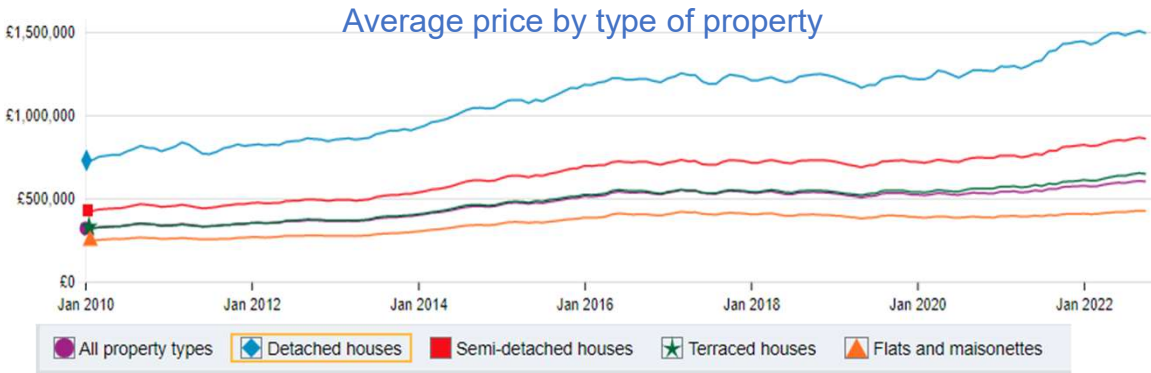


- Overcrowding and underoccupancy in Barnet was broadly comparable in 2011 and 2021.
- Around a fifth of households in Burnt Oak and Watling Park (**20.8%**) and Grahame Park (**19.3%**) were overcrowded. This was about 2.2 times higher than the average % of overcrowded households in Barnet (**9.4%**).

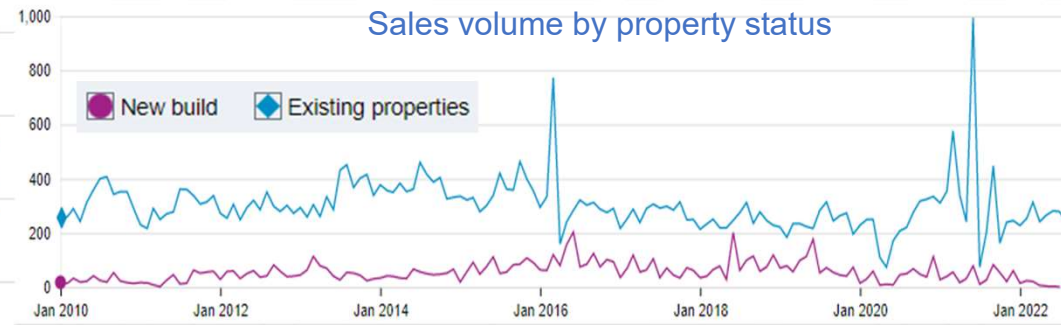
- Slightly fewer households were overcrowded in 2021 (**-0.1%** by 2 bedrooms or fewer and **-0.5%** by 1 bedroom)
- Slightly fewer households were under-occupying by 1 bedroom in 2021 (**-0.9%**)
- Slightly more households were under-occupying by 2 bedrooms or more in 2021 (by **+2.1%**).
- In 2021, 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

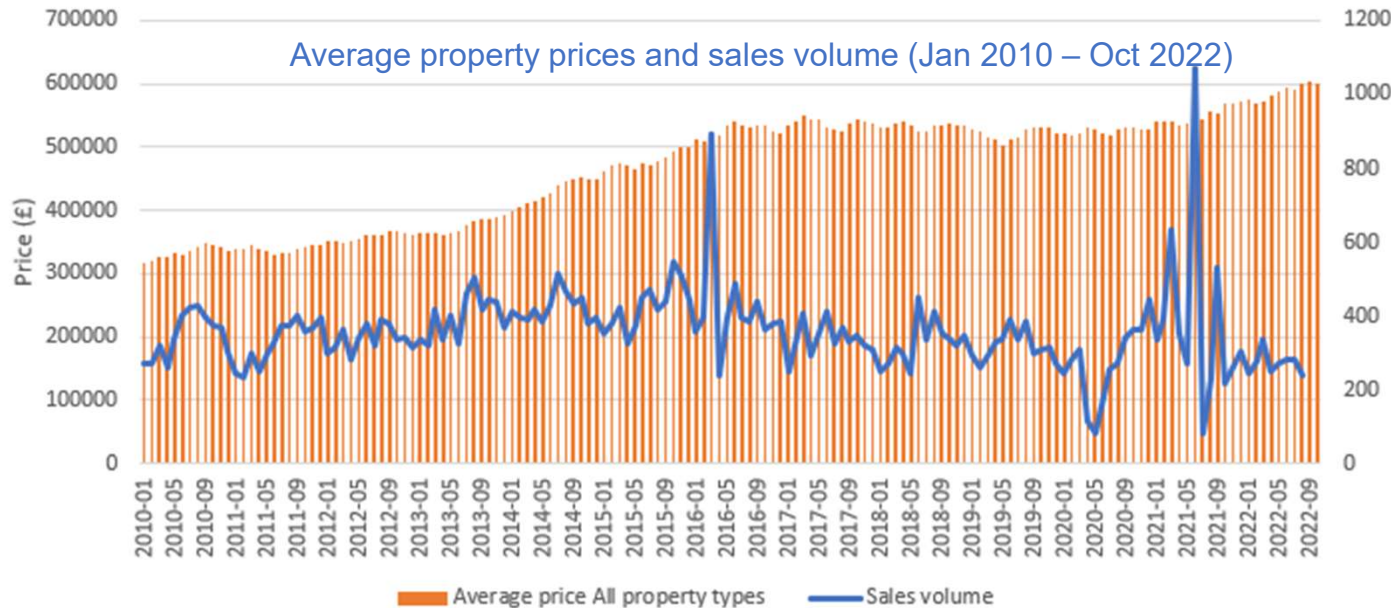
Average price by type of property



Sales volume by property status



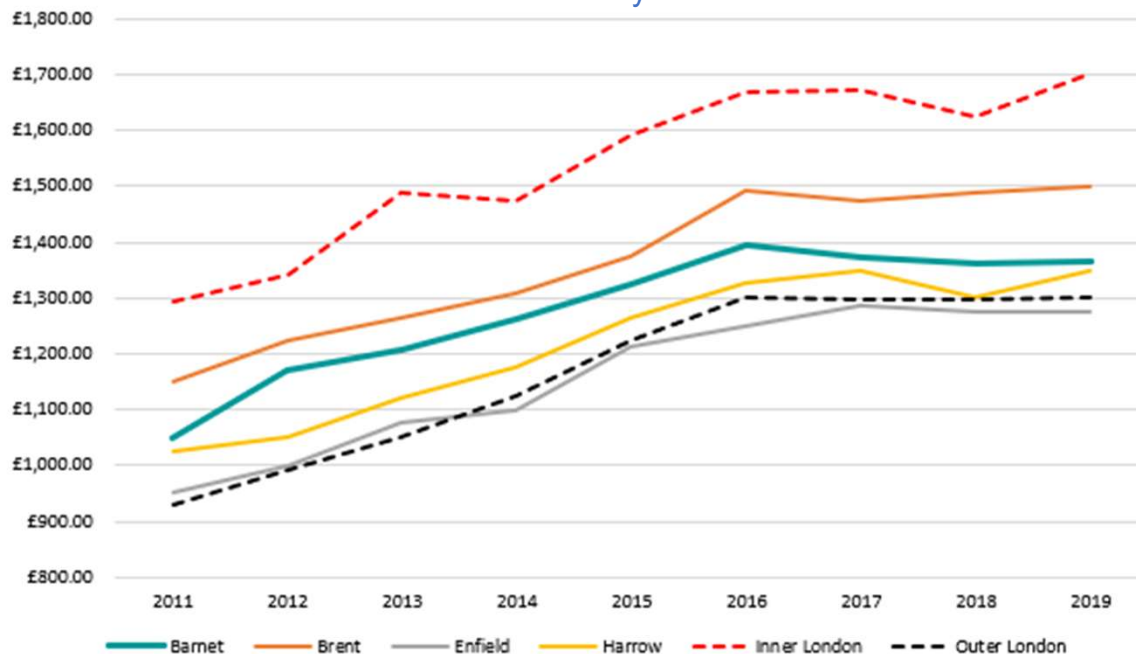
Average property prices and sales volume (Jan 2010 – Oct 2022)



- 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 Rents

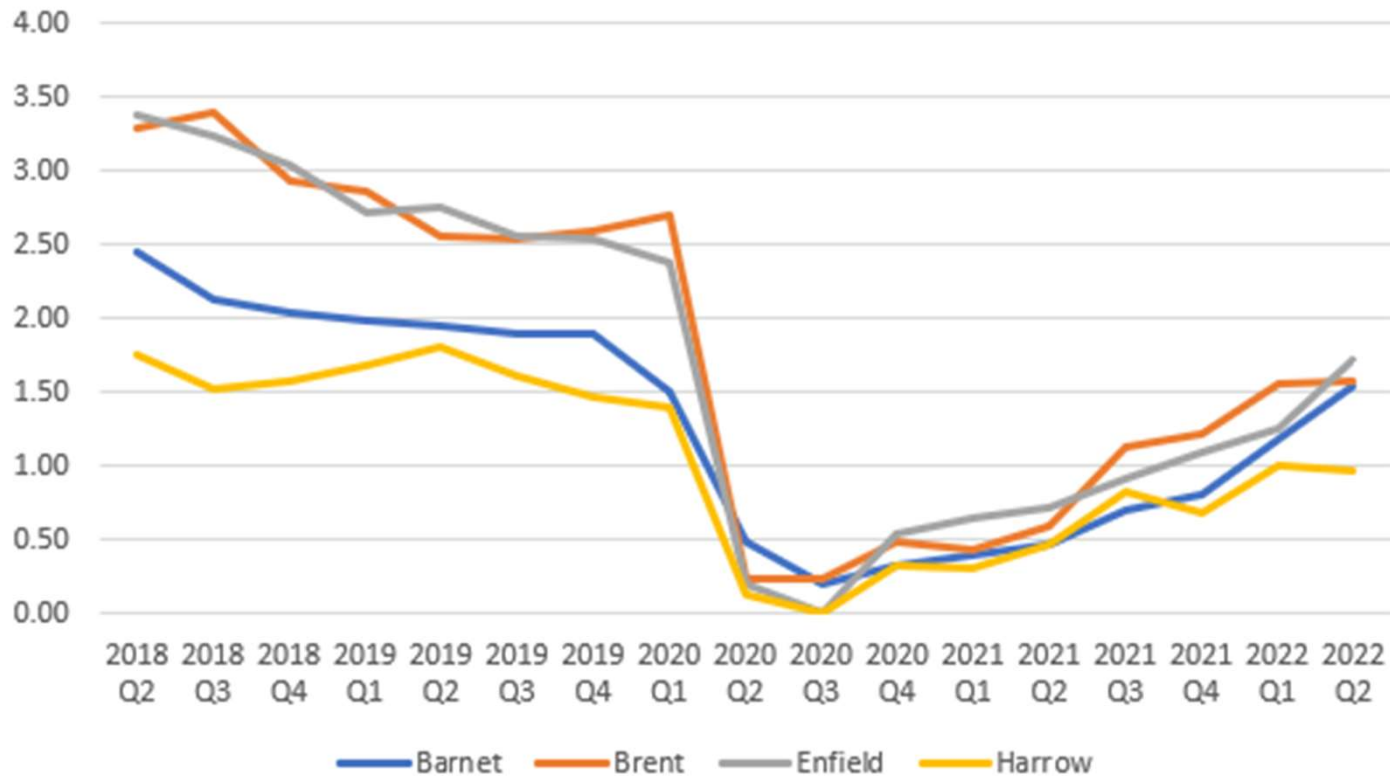


- Median monthly rent in Barnet in 2019 was **£1,365** compared to Outer London’s median of **£1,300**.
- Average rental prices decreased by **0.6%** between 2017 and 2019.

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%

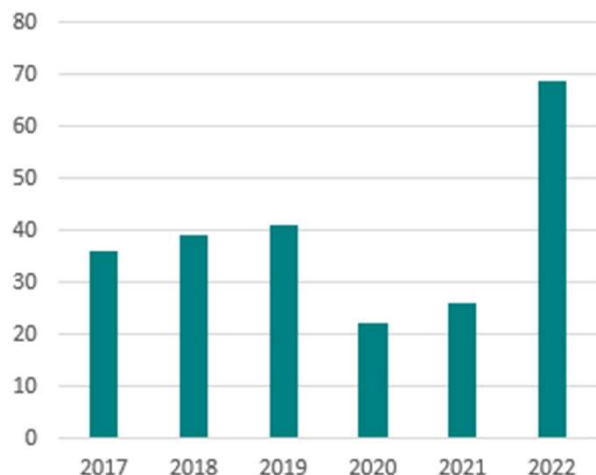
Landlord claims per 1,000 population



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

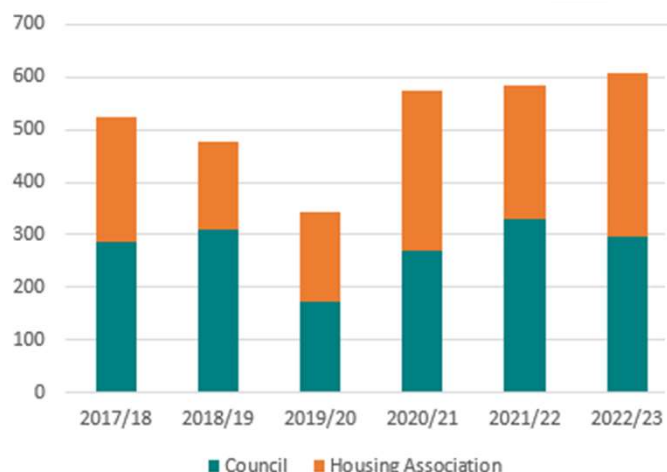
Right to buy and social housing lettings

Council homes sold under the Right to Buy



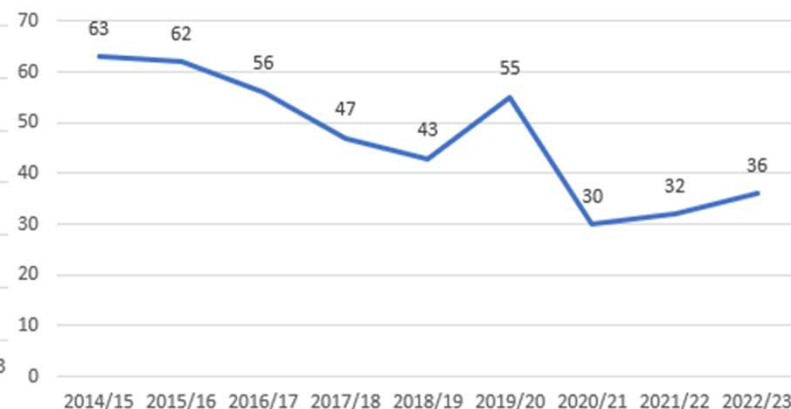
- The number of council homes sold under the Right to Buy increased steadily from 2017-19, but was impacted by the COVID-19 pandemic.
- There was a significant increase in sales in 2022.

Social housing lettings in Barnet



- The number of social housing lettings in Barnet has increased slightly in recent years, with council housing making up **49%** of all lets in 2022/23 compared to 57% in 2021/22.

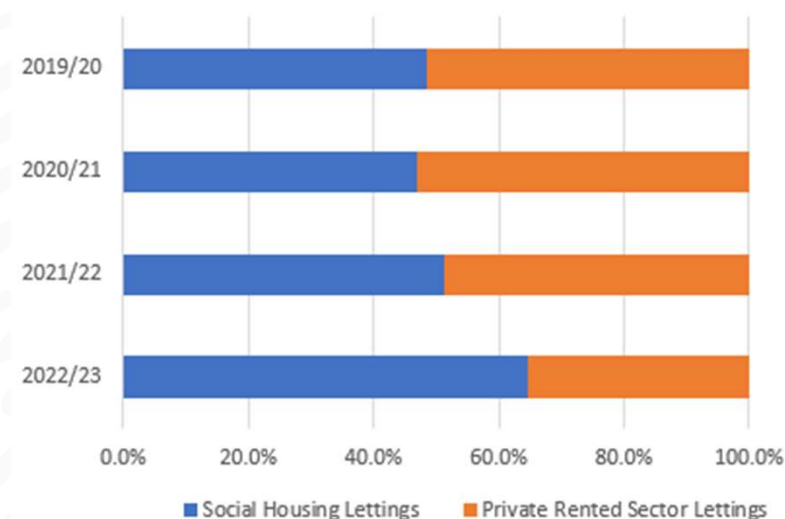
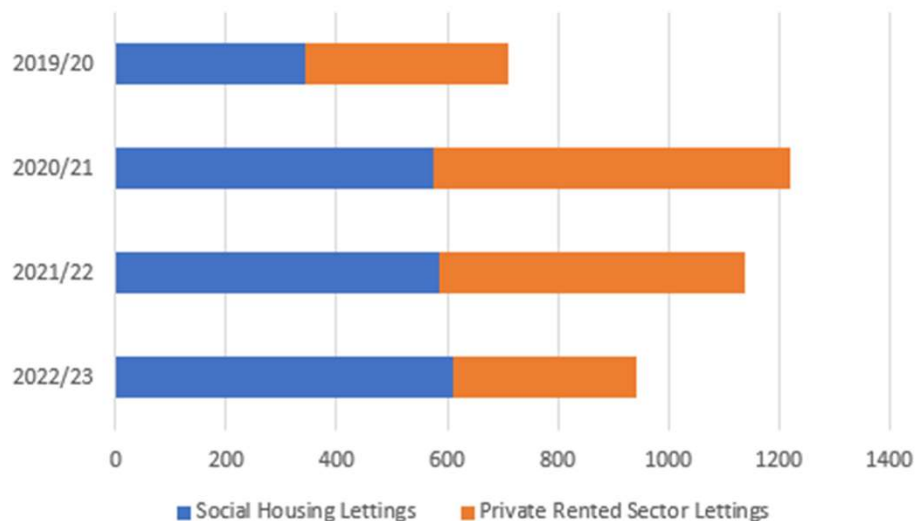
'Trade-downs' in Barnet



- The number of 'trade-downs', where council tenants downsize from a larger property to a smaller one, has also been decreasing, with a slight upturn over the past three years.

Social housing and private rented sector lettings

Proportion of social housing and private rented sector lettings



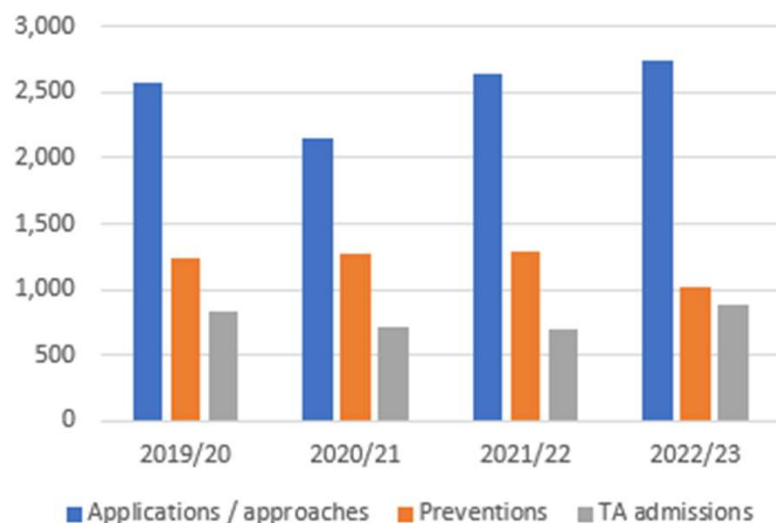
- Barnet has historically had strong access to the private rented sector, which has helped to lower the numbers in temporary accommodation.
- The private rented sector is contracting, and fewer private rented sector lettings are now being made.

Homelessness

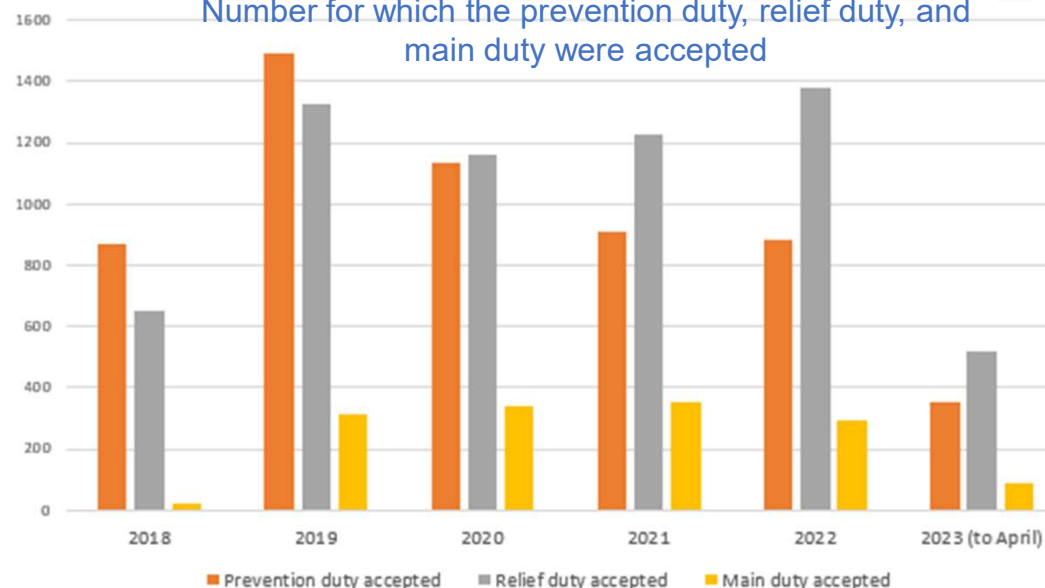


Homelessness – applications

Applications, Preventions, and TA Admissions

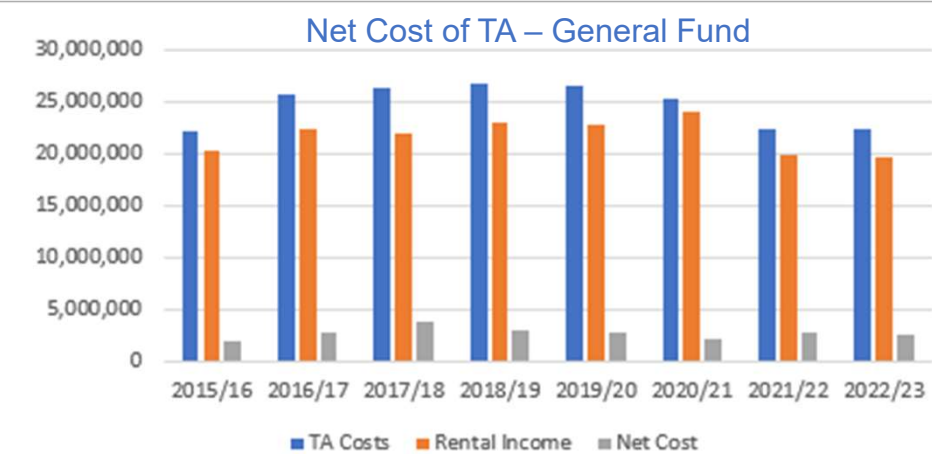
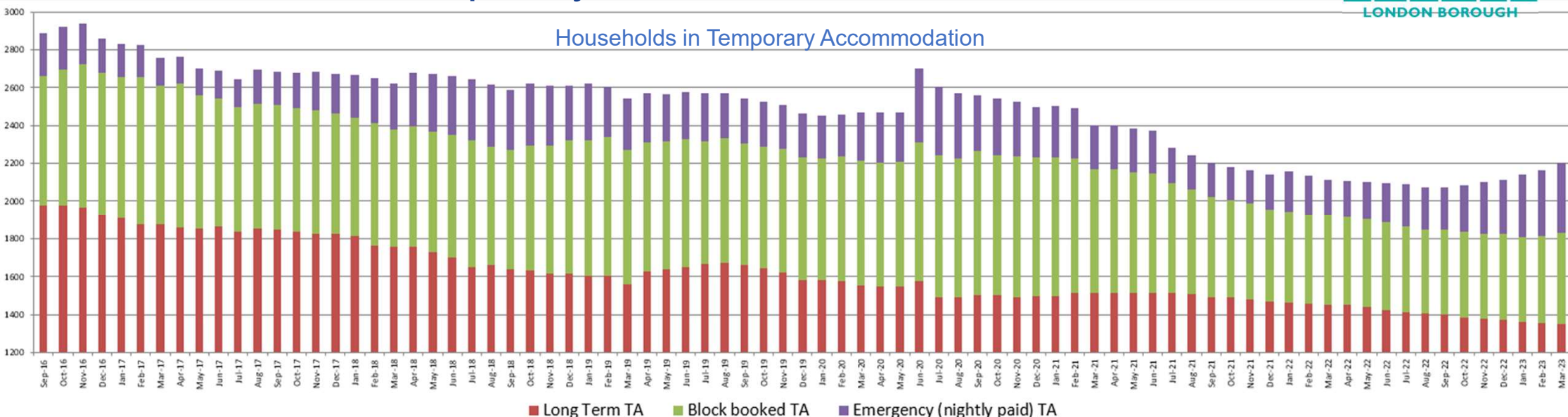


Number for which the prevention duty, relief duty, and main duty were accepted



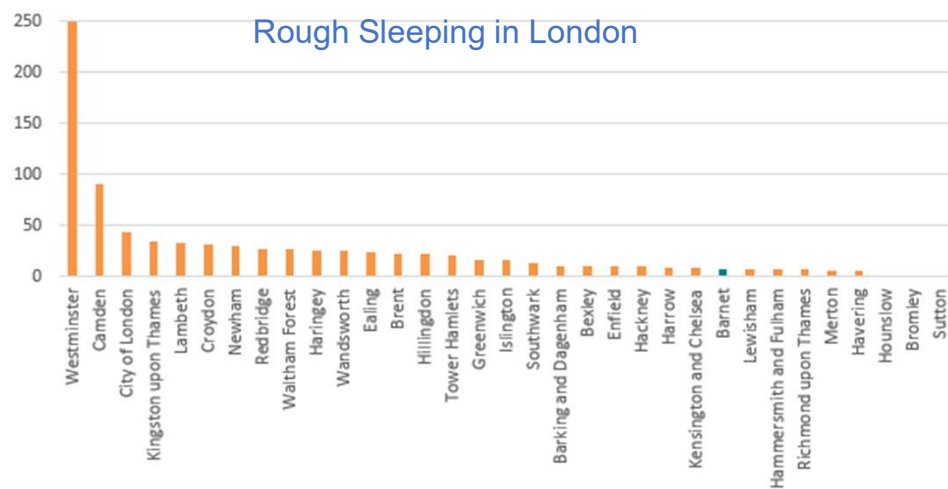
- Homelessness applications have increased, and preventions have reduced slightly.
- The number of households for which the prevention duty was accepted has declined since 2019, however the number of households for which the relief duty was accepted has increased slightly and the main duty was accepted has remained fairly consistent.

Homelessness – temporary accommodation

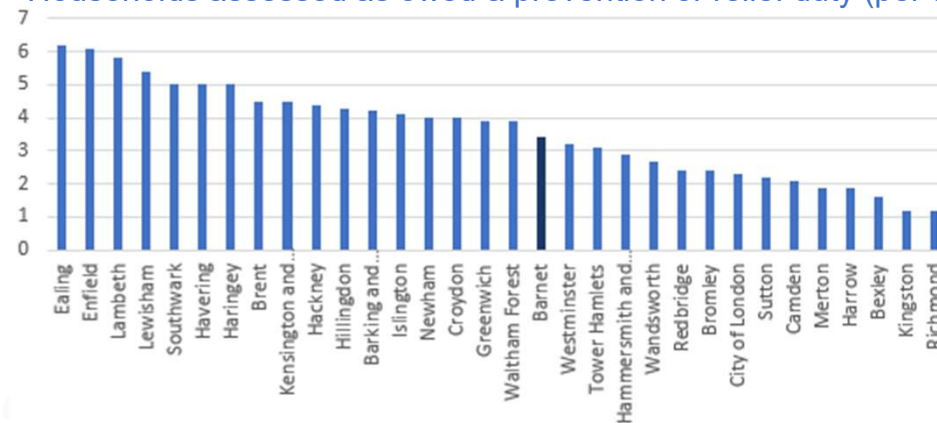


- Use of TA had been reducing and in August and September 2022 was at its lowest in over 10 years; however, numbers in TA have started to rise again due to challenges in the supply of suitable accommodation, including in the private rented sector.
- The net cost of temporary accommodation for 2022/23 (£20,283,745) was slightly higher than the previous year (£19,881,015).
- There was a significant upsurge in TA demand in the last quarter of 2022/23 as a result of the cost of living crisis. Households in TA increased from 2,111 in December 2022, to 2,202 in March 23. The number is expected to rise through 2023/24.
- Net costs are inclusive of TA payments, TA landlord incentives, TA rental income, and SDI rental income and costs.

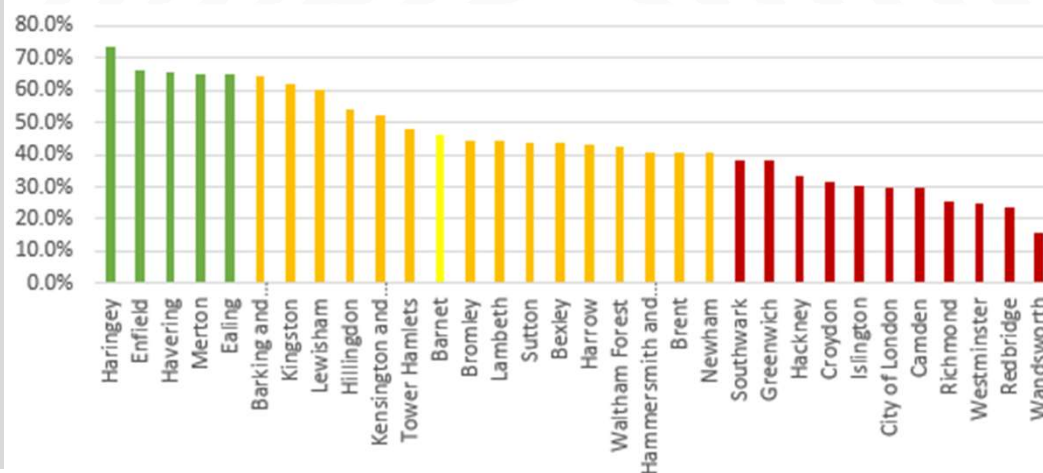
Homelessness performance comparison



Households assessed as owed a prevention or relief duty (per 000s)



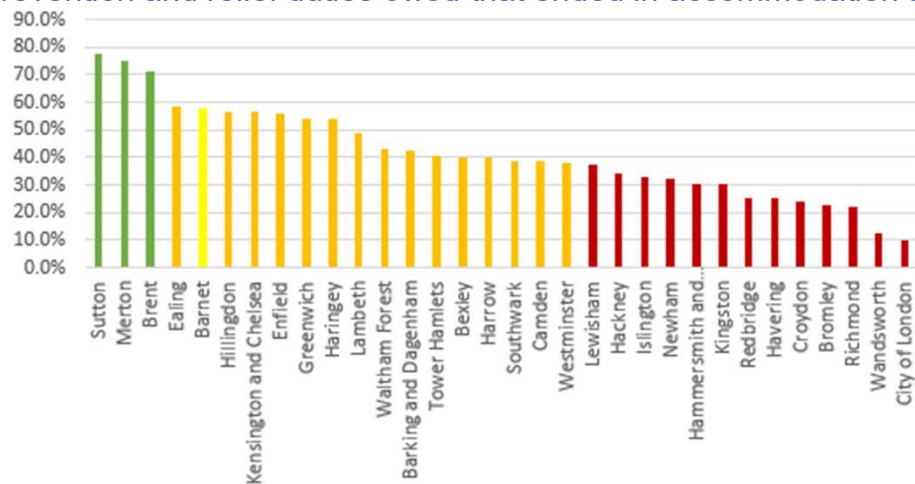
% owed a duty being accepted at prevention stage



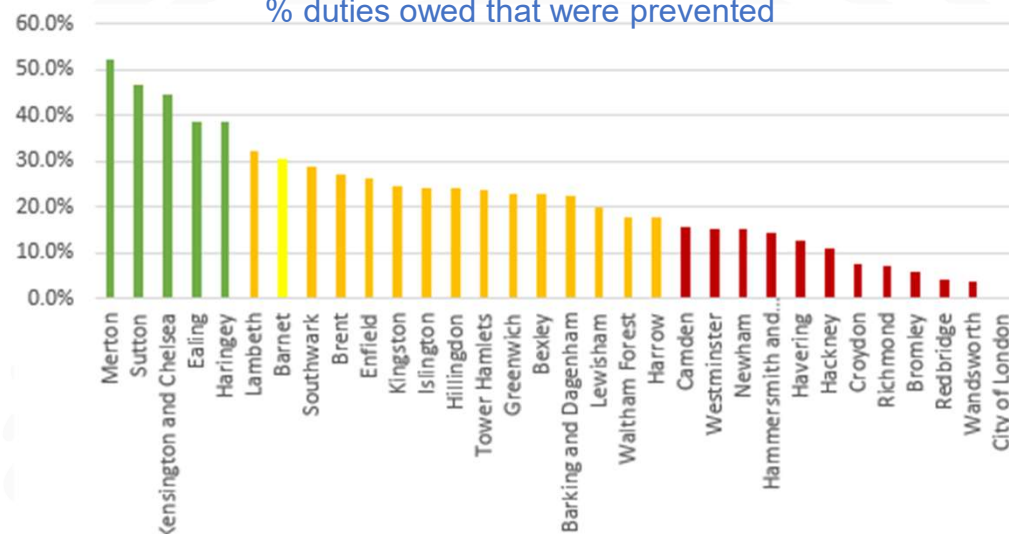
- Rough sleeping lower than London average in Barnet, and was lower in 2022 than all previous years except 2020.
- In the January – March 2022 quarterly data return on local authorities' actions under statutory homelessness legislation, Barnet performed in the middle two quartiles nationally.
- 12 of 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.

Homelessness performance comparison

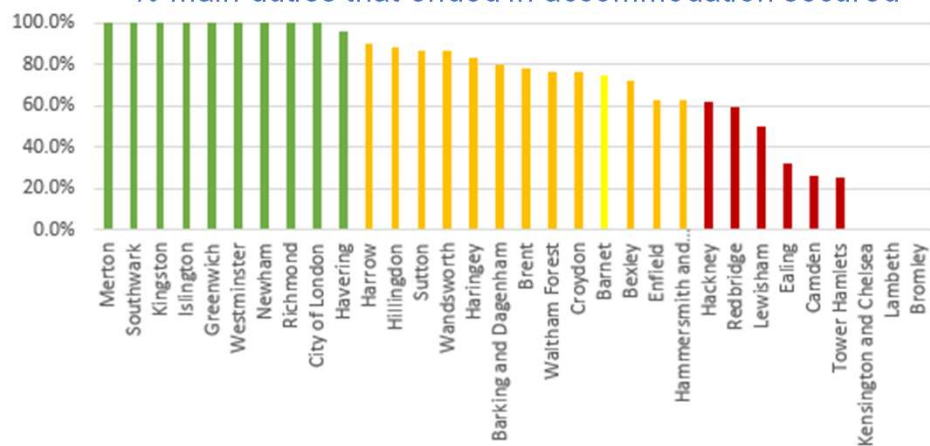
% prevention and relief duties owed that ended in accommodation secured



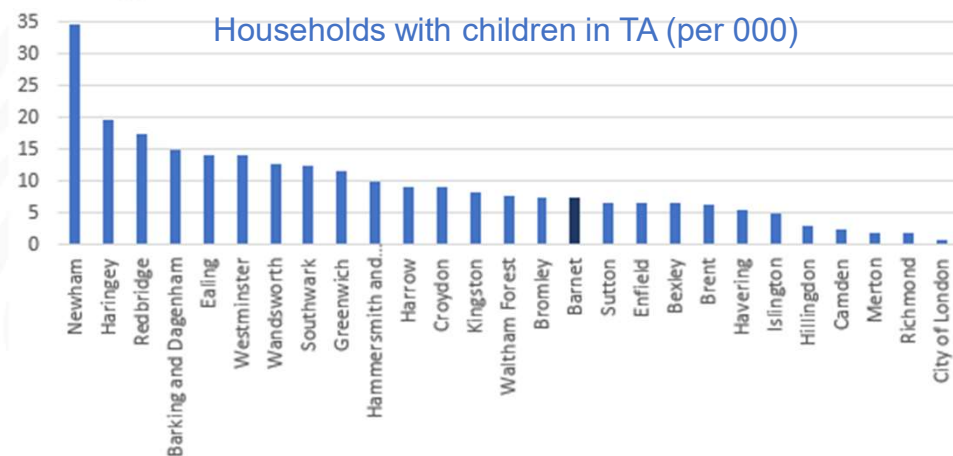
% duties owed that were prevented



% main duties that ended in accommodation secured

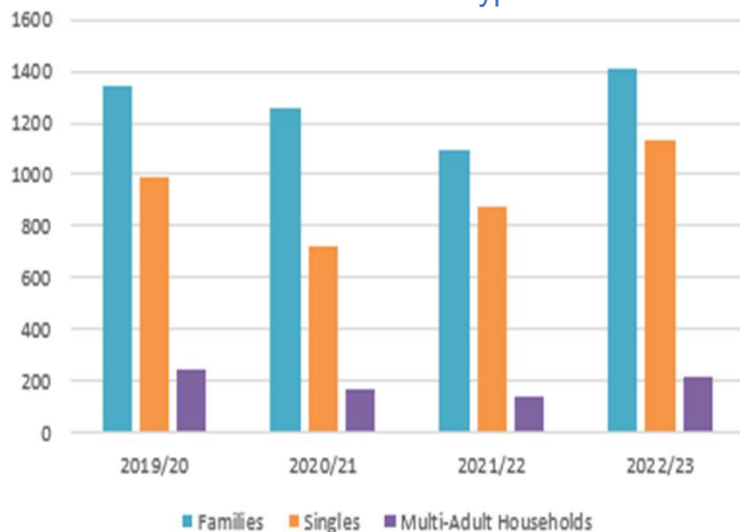


Households with children in TA (per 000)

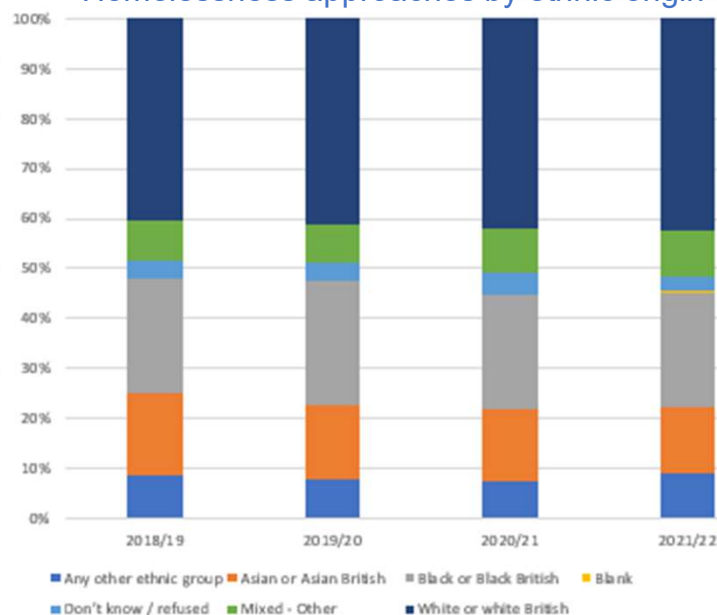


Characteristics of households approaching as homeless

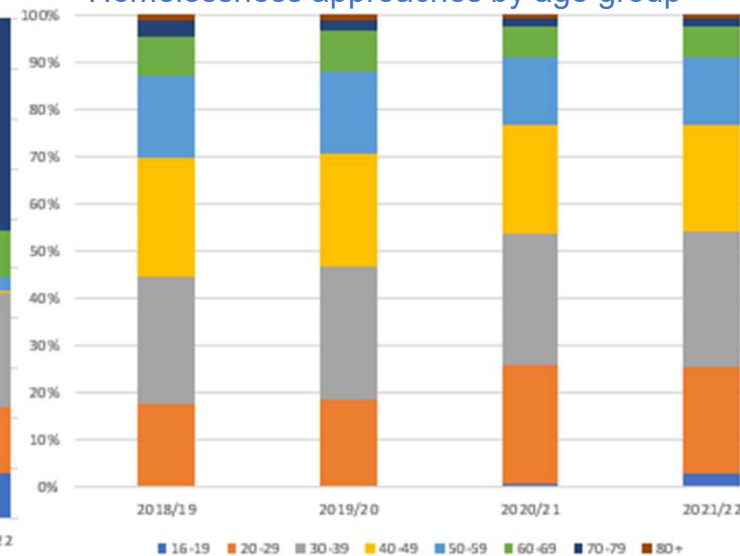
Homelessness applications opened by household type



Homelessness approaches by ethnic origin



Homelessness approaches by age group



- An increase in the number of households approaching for advice (**3,283** in 2019/20 and **4,332** in 2022/23) as well as in cases opened.
- The proportion of women has increased slightly to **55.8%**.
- A shift in the type of household, with more single applications opened (**41%** of cases in 22/23).

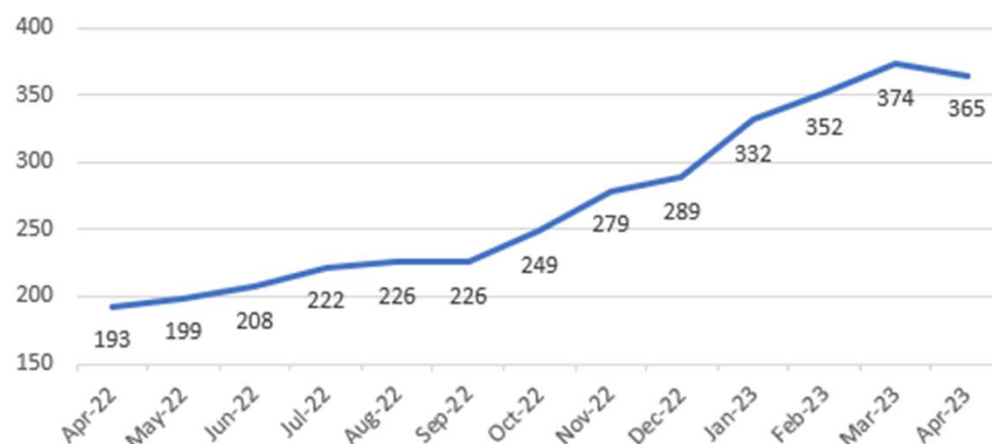
- High representation of those from an ethnic minority background, with those from a Black / Black British background highly represented (**23%**) alongside those from a White background (**42%**) in 2021/22.
- The age group 30-39 remains the most common, however there has been an increase in younger 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	Q4 2022/23
Homelessness approaches from the private rented sector	145	142	166	170	170	283	308

Households in emergency temporary accommodation



Households in bed and breakfast accommodation

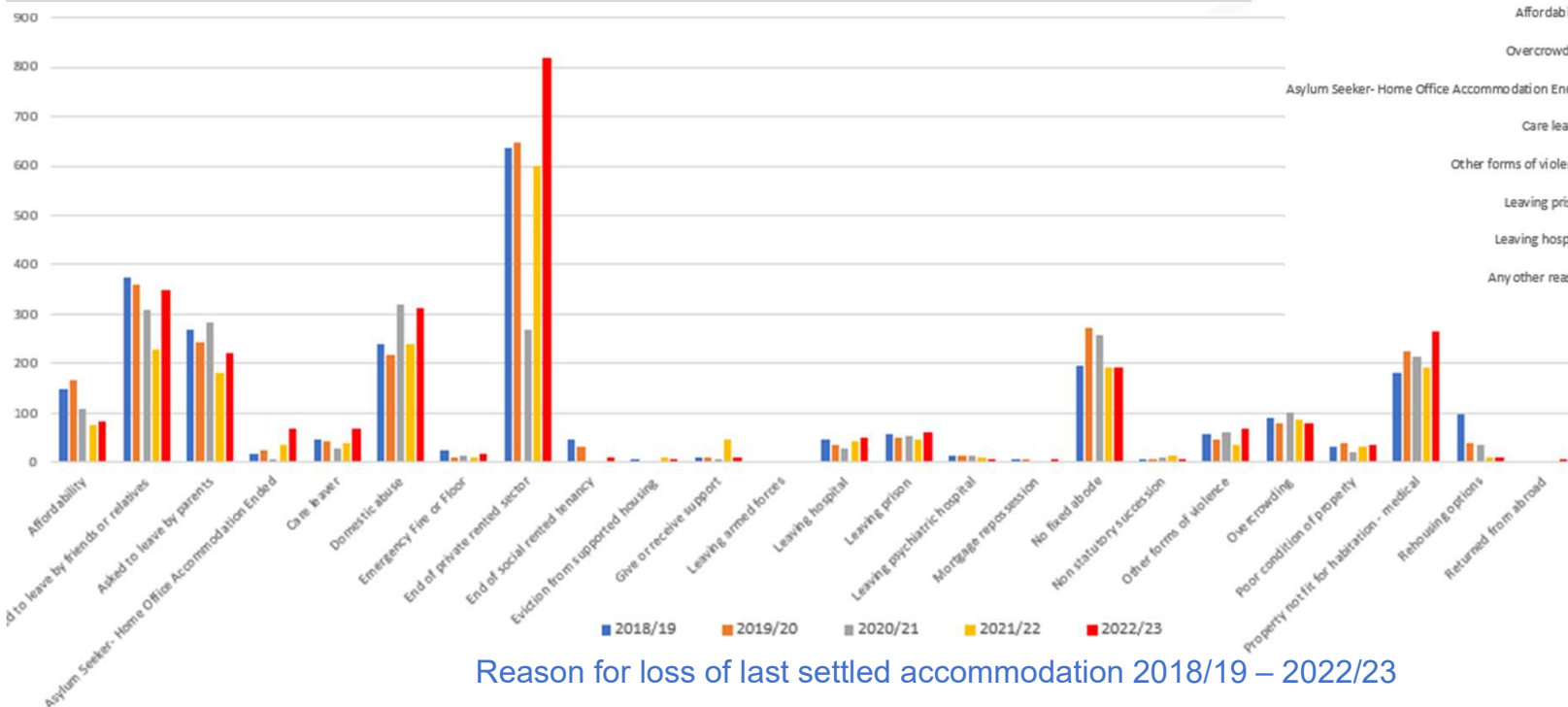
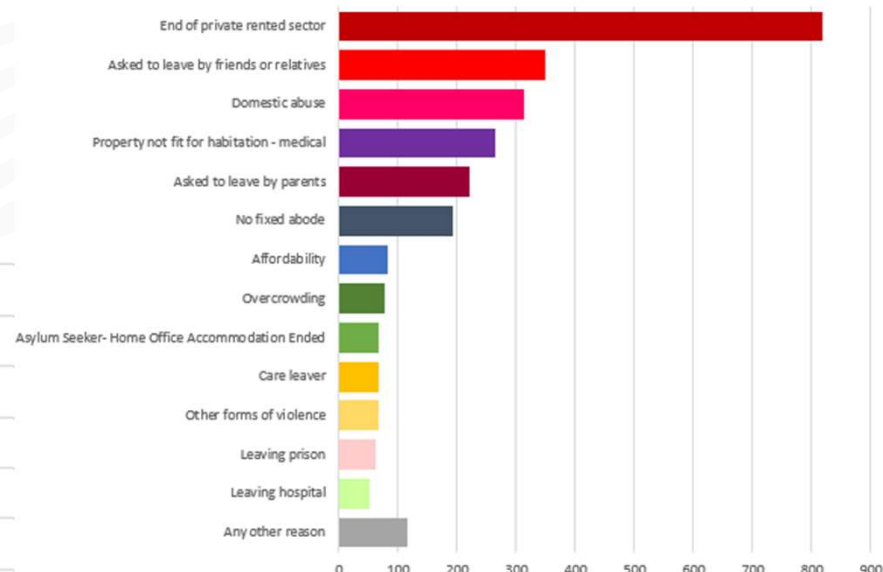
Period	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23
Households in B&B accommodation	92	90	84	97	109	120	121	138	156	177	161
Families in B&B for more than 6 weeks	1	0	0	0	0	0	1	3	4	2	3

- 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.

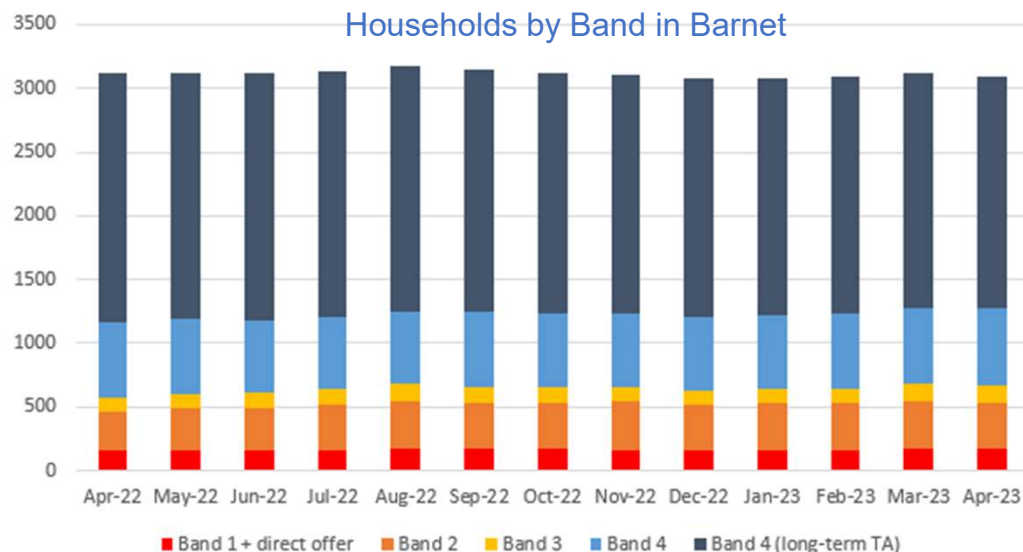
Reasons for approaching as homeless

- End of private rented sector tenancy remains the most common reason for approaching as homeless – from 2018/19 it increased by 5.2% to **29.7%** in 2022/23 and continues to grow.
- Other common reasons for approaching as homeless in 2022/23 were asked to leave by family or friends (**12.7%**), domestic violence (**11.4%**), property not fit for habitation (medical) (**9.6%**), asked to leave by parents (**8%**), and no fixed abode (**7%**).

Reason for loss of last settled accommodation 2022/23



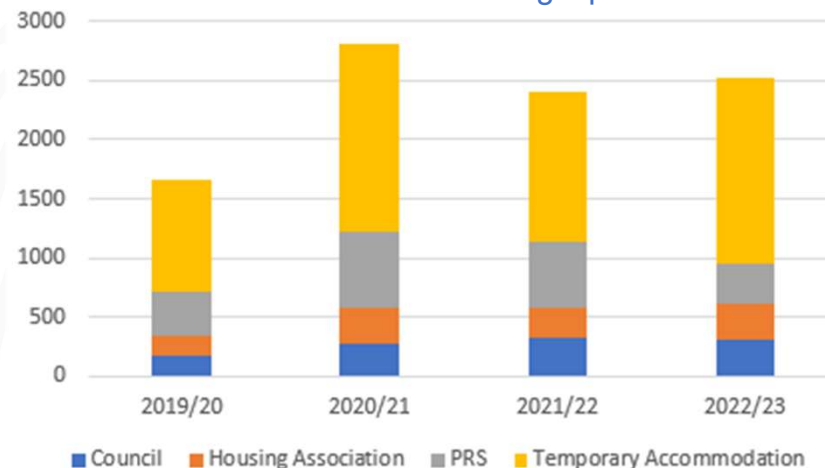
Housing needs



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

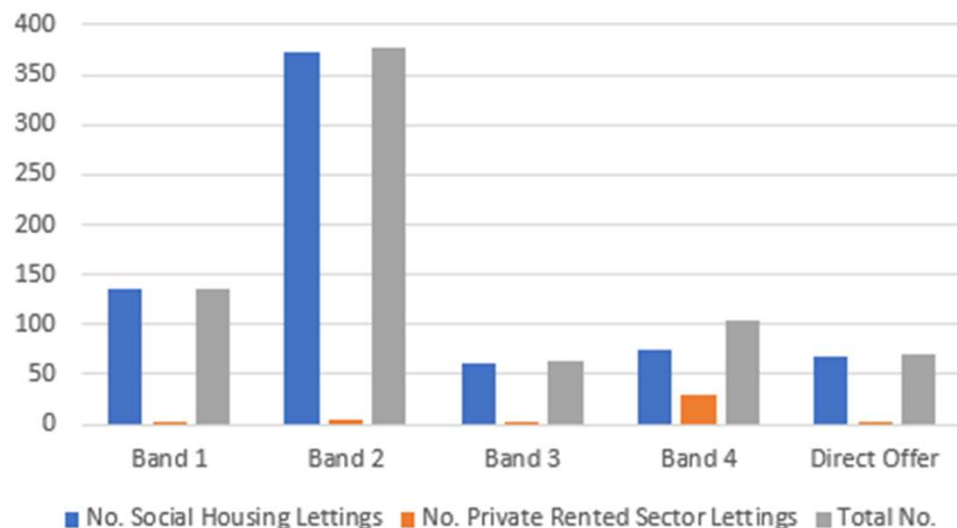
- The supply of social rented / affordable homes has fallen slightly.
- Since April 2021 the private rented market has become increasingly challenging, with a reduction in supply of 35% across London, PRS rents increasing by 16% in 2022, and more households declining PRS offers.

Households rehoused via Housing Options service

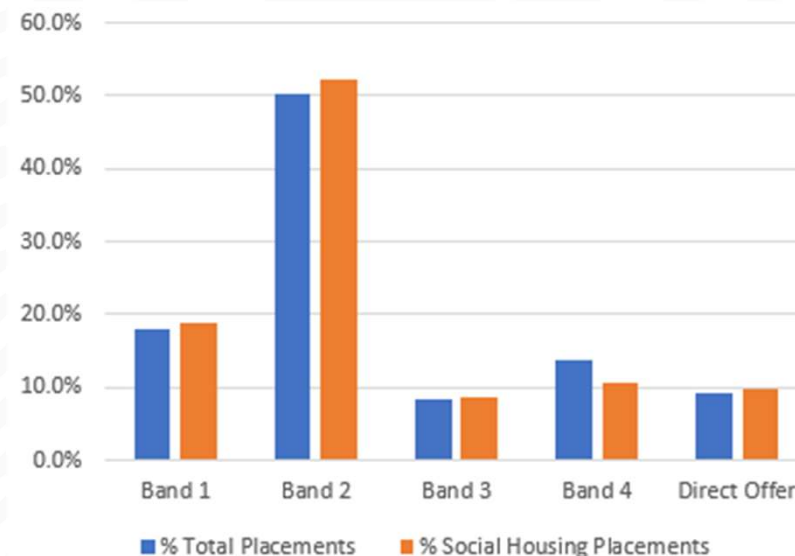


Housing placements by band

Placements (in numbers) from 1 July 2022 – 30 June 2023



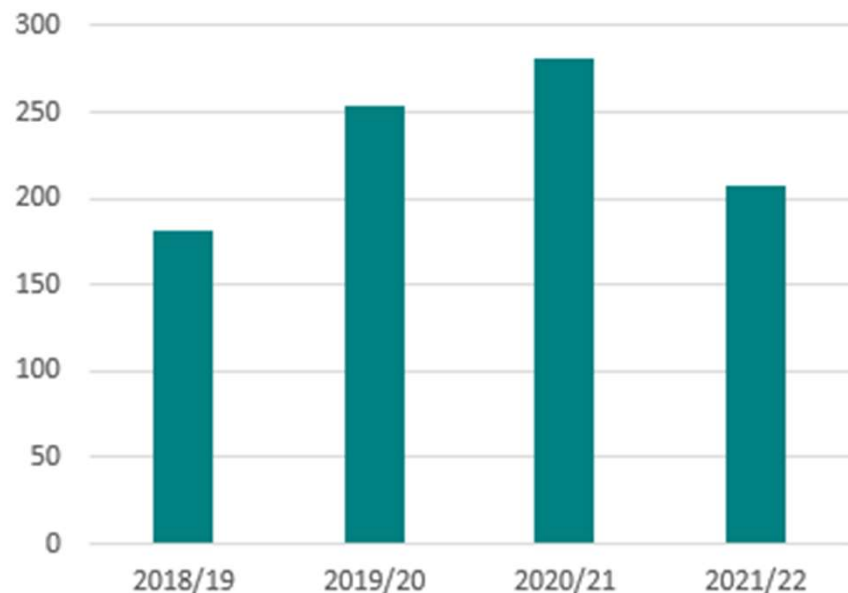
Proportion of placements (%) by band from 1 July 2022 – 30 June 2023



- Whilst the majority of placements affect Bands 1 and 2 and direct offers, in the period 1 July 2022 – 30 June 2022, 19.1% of Barnet’s social housing placements were made for applicants in Bands 3 and 4.

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.

Housing supply and high priority demand

Highest priority demand vs supply by bedroom size

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

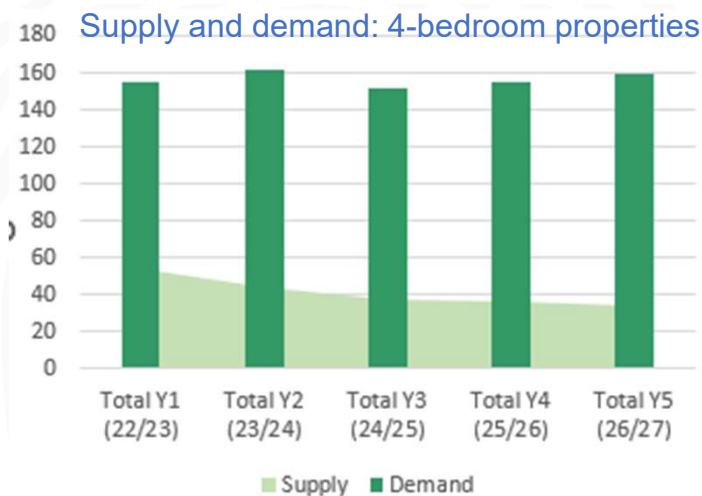
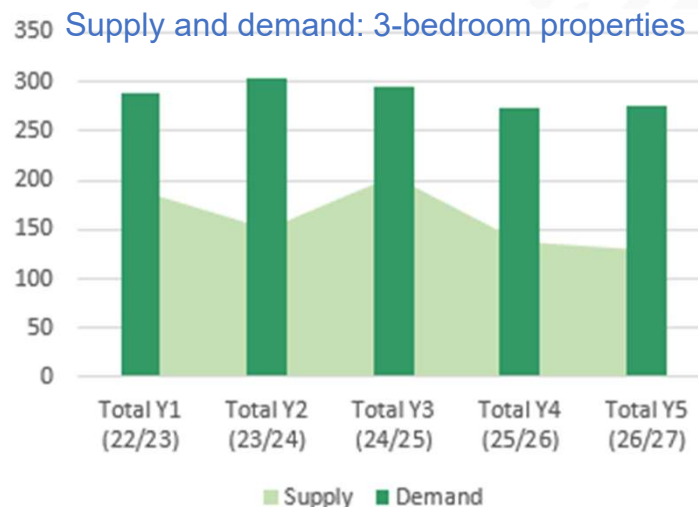
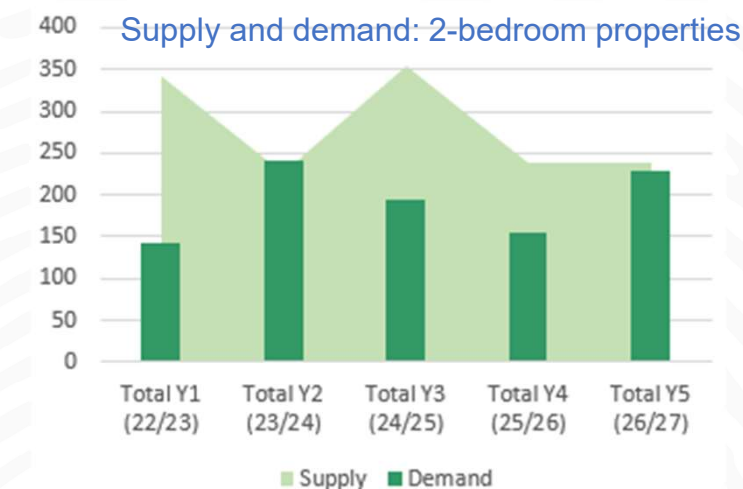
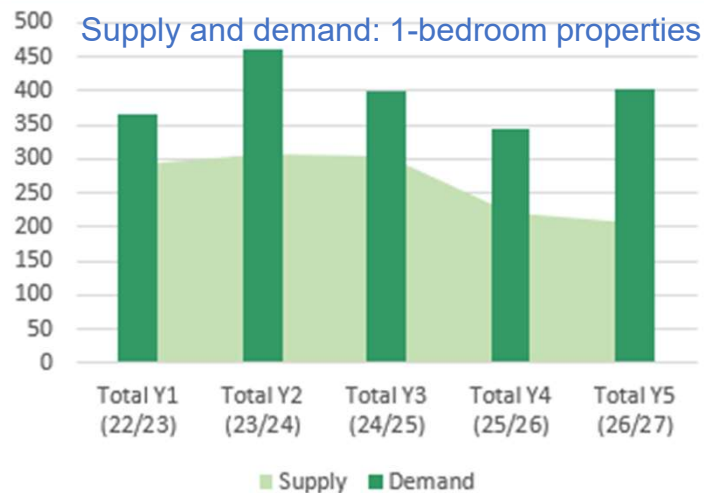
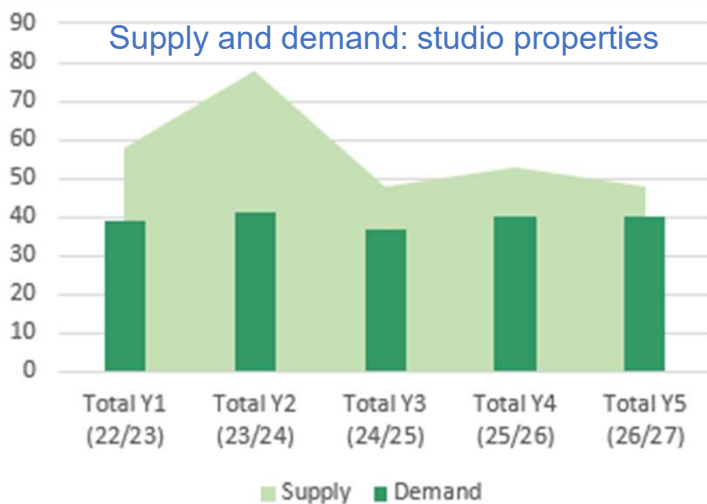
- Focusing on the demand from housing applicants in the highest priority Bands 1 and 2, direct offers, and regeneration and ad-hoc decanting schemes, there are particular housing supply pressures regarding 1-bedroom properties, 3-bedroom properties, and 4-bedroom properties.
- There is also a limited expected supply of wheelchair-adapted properties to meet the present need from Band 1 applicants.

All housing need by bedroom size – snapshot (26 June 2023)

Band / Bedroom Need	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms	5 Bedrooms	6 Bedrooms	7 Bedrooms	Total
Band 1	53	23	27	14	7			124
Band 2	160	53	71	55	6	2		347
Band 3	36	27	50	9	8			130
Band 4	276	115	174	32	6		1	604
Band 4 (Long-Term TA)	476	719	443	111	19	2	1	1,771
Direct Offers	18	9	3	1				31
Total Banded	1,019	946	768	222	46	4	2	3,007
Not Banded	716	435	214	59				1,424
Total	1,735	1,381	982	281	46	4	2	4,431

- Whilst the housing supply and high priority demand model looks at the housing needs of those who most urgently need to be housed who have the highest priority for housing, overall housing need in the borough outstrips supply across all property sizes. There are presently not enough homes of any size to meet the total demand.
- There is also demand for housing for refugees; whilst there is a small amount of known one-, two- and three-bedroom need for Ukrainian households living in temporary accommodation, future overall needs for refugee households remain uncertain and have the potential to grow.

Housing supply and high priority demand



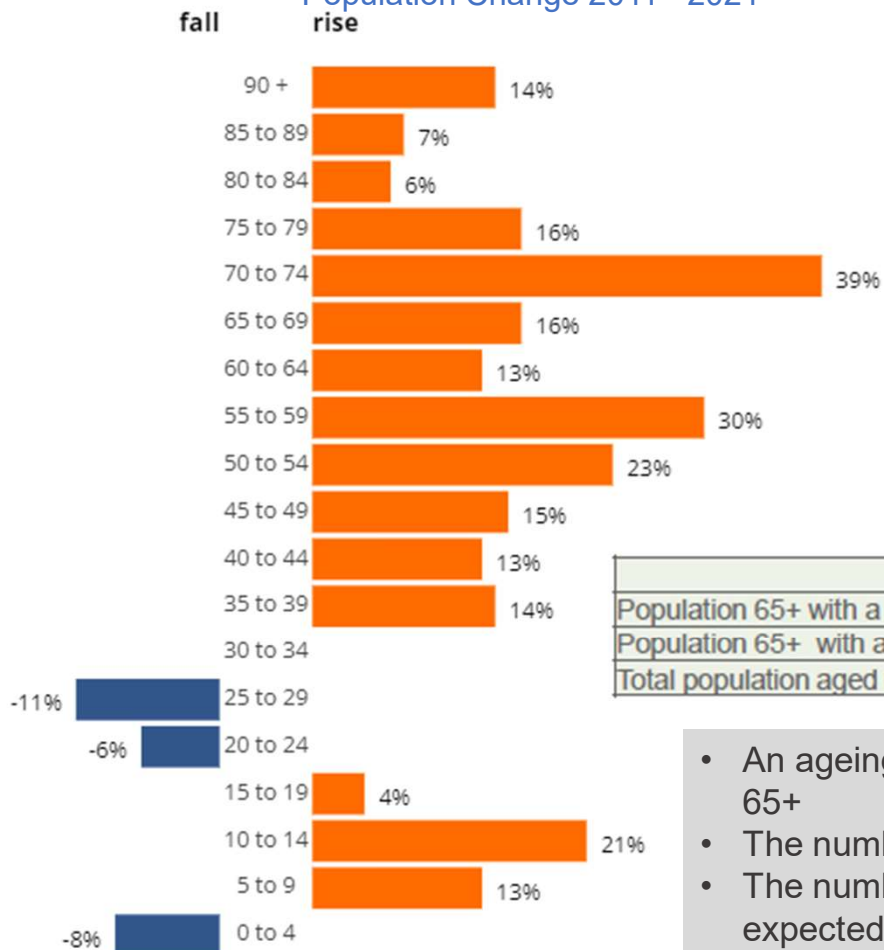
- Note: this shows projections only for Bands 1 and 2, direct offers, and regeneration and ad-hoc decanting schemes.
- A full snapshot of housing need by property size is included on the previous slide, and evidences significant demand across all property sizes.

Older People

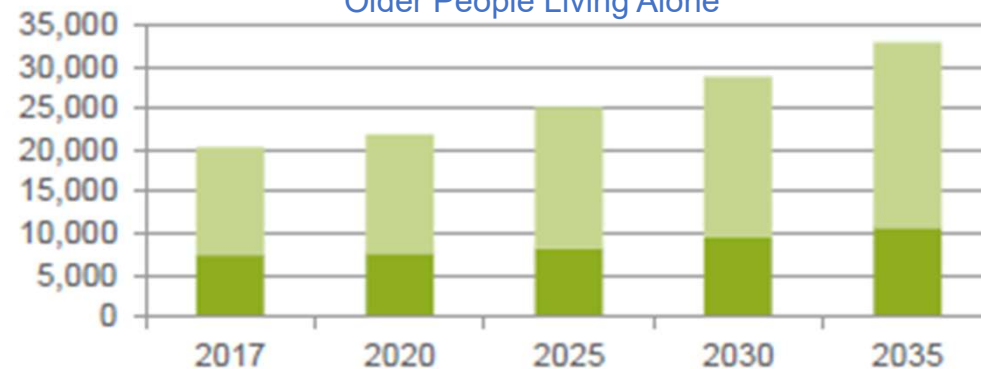


Older people

Population Change 2011 - 2021



Older People Living Alone



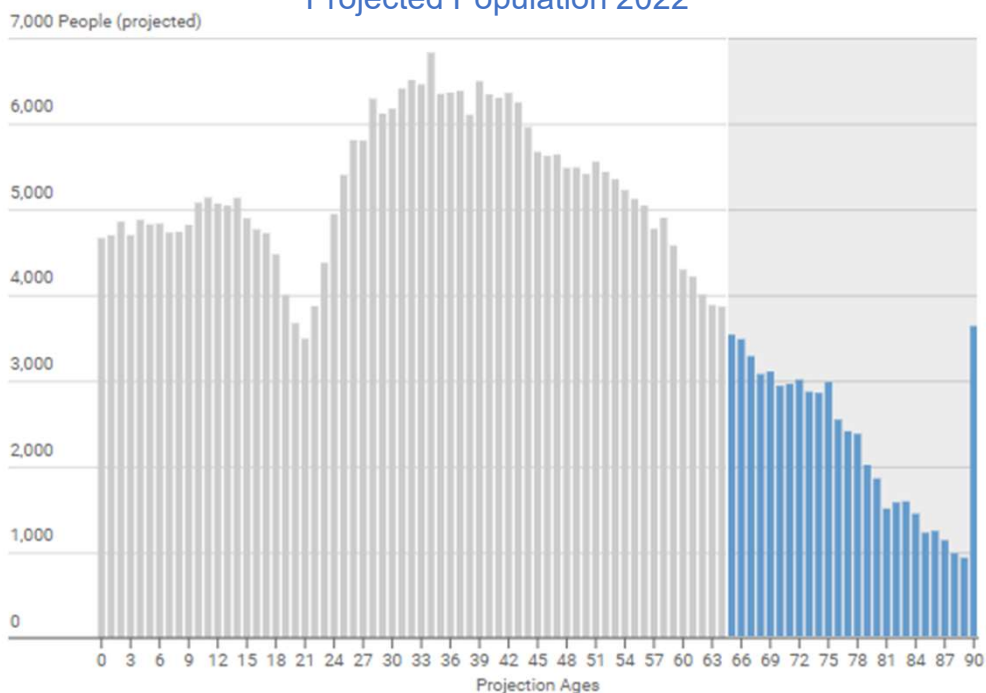
■ Total population aged 75 and over predicted to live alone

	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

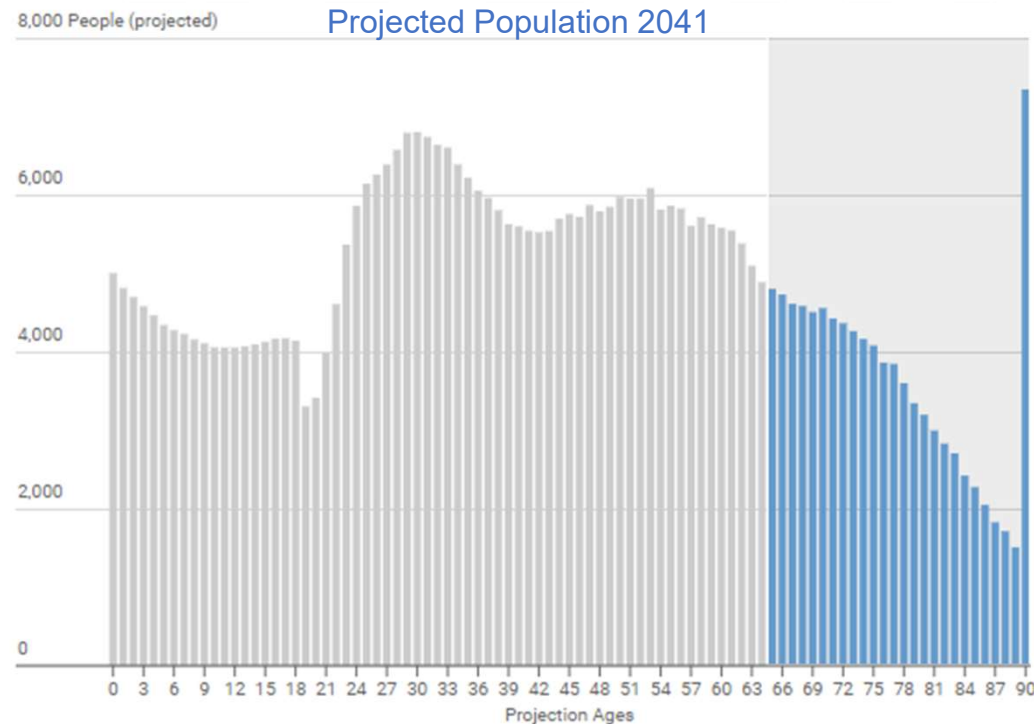
- An ageing population, although below the national average: **18.3%** increase in those aged 65+
- The number of people living alone is expected to increase.
- The number of older people with long-term limiting health conditions and dementia is expected to increase.

Older people

Projected Population 2022



Projected Population 2041



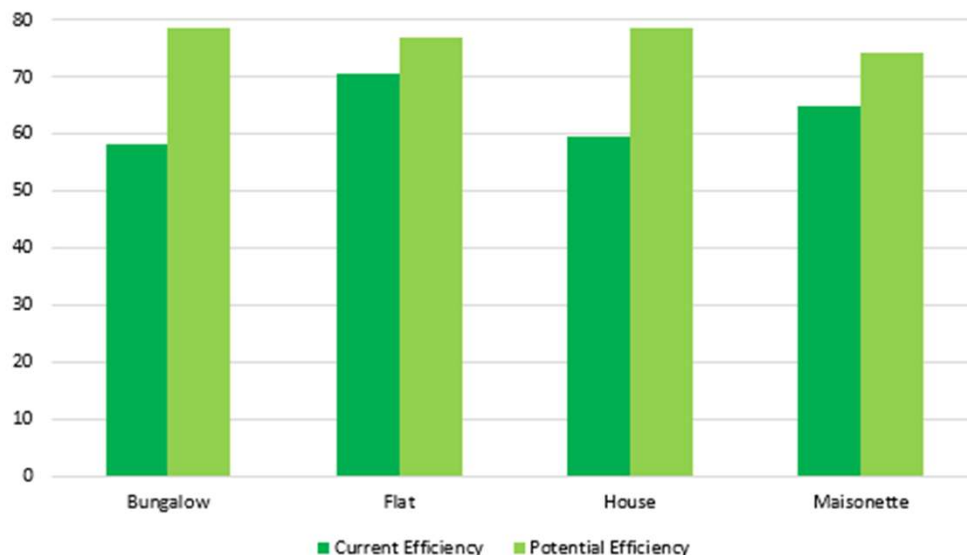
- Projections indicate an increase in people aged over 65 in Barnet by 2041.
- Population of those aged 0-17 projected to decrease by 11.6% by 2041.
- Population of those aged 18-64 projected to increase by 5.7% by 2041.
- Population of those aged 65+ projected to increase by 56% by 2041.

Stock Condition and Empty Homes



Stock condition

Current and potential energy efficiency by property type



- 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.

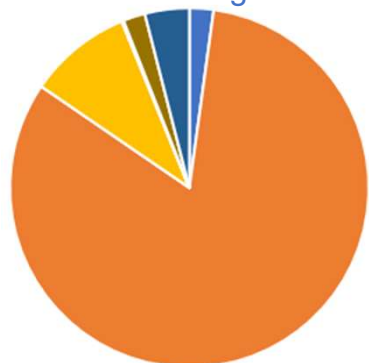
Domestic property energy efficiency rating

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%

- 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

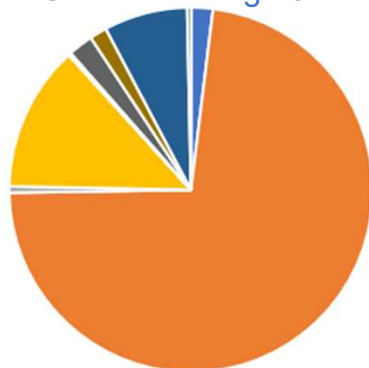
Central heating 2011



- No central heating
- Mains gas only
- Tank or bottled gas only
- Electric only
- Oil only
- Wood only
- Solid fuel only
- Renewable energy only
- District or communal heat networks only
- Other central heating only

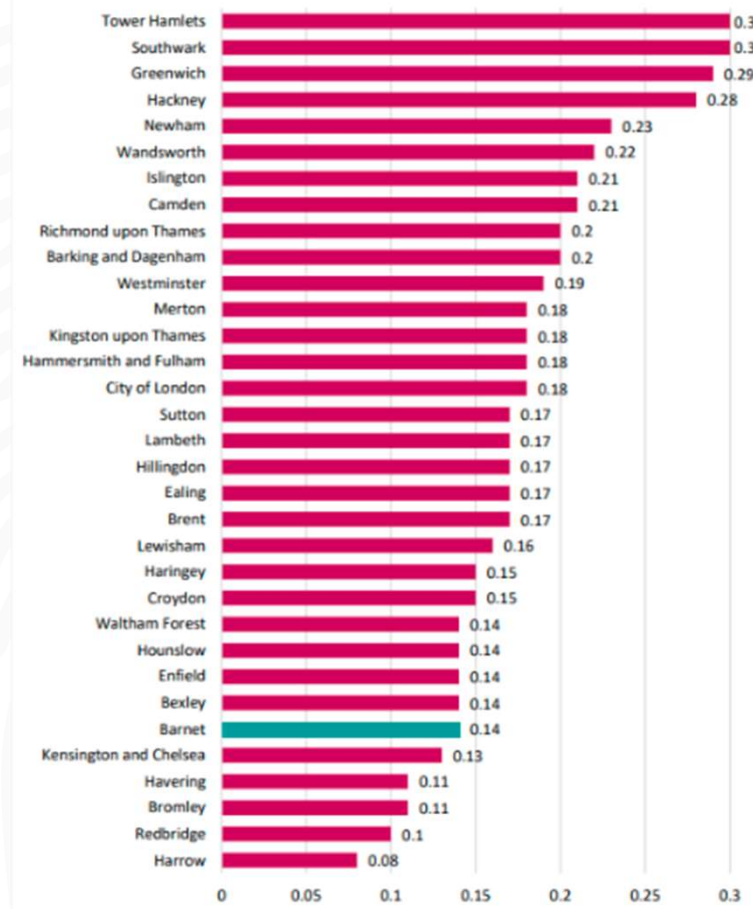
- Most households rely on gas central heating (**72.8%**), although this had reduced by 9% compared to 2011.
- The 2021 Census captured more information about central heating types – including separating mains and tank/bottled gas, separating wood and solid fuel, and adding district/communal heating 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)

Central heating 2021



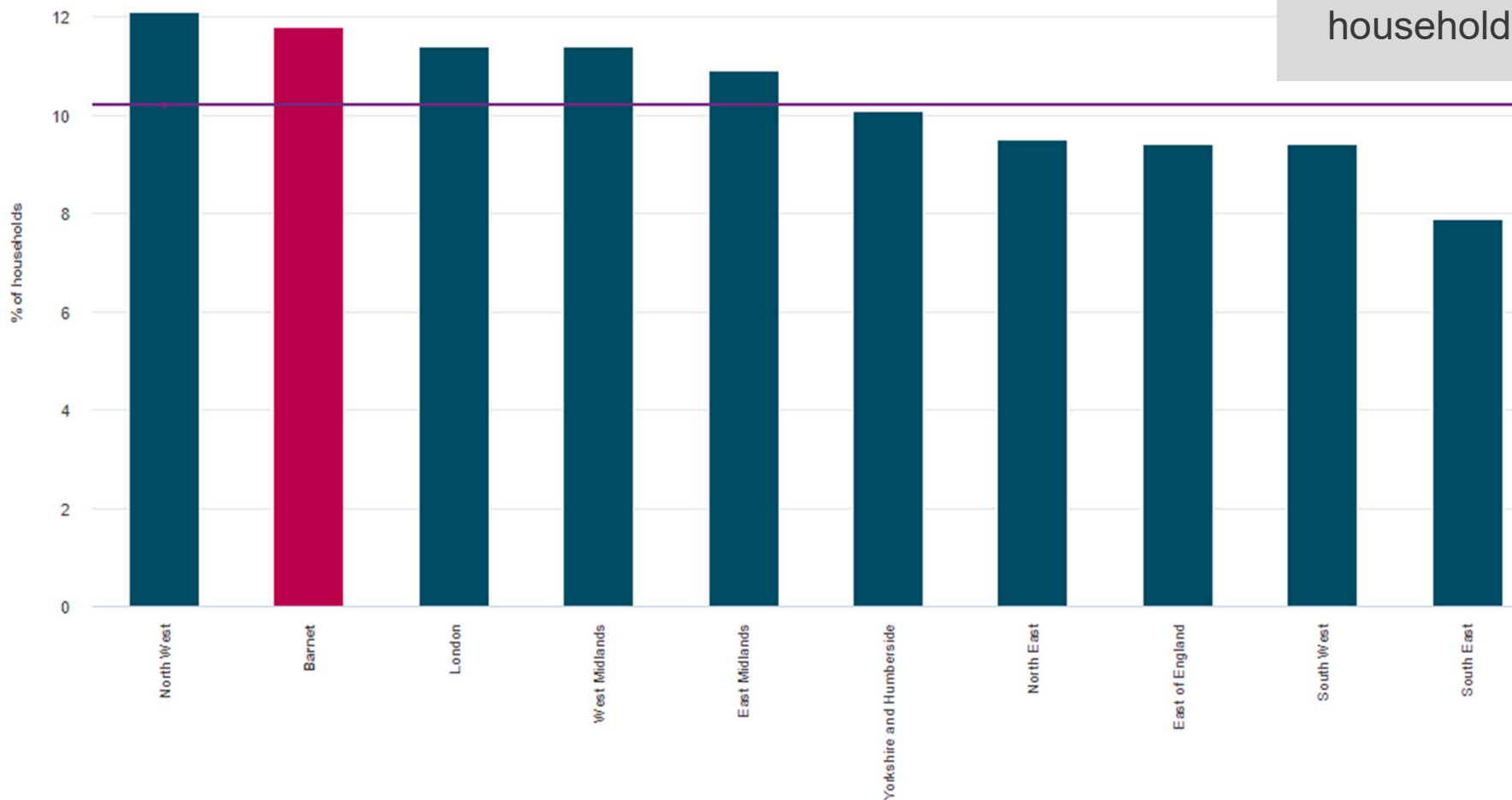
- Barnet ranked **24th** out of 33 London boroughs for the percentage of households that used renewable energy for central heating in 2021.
- Barnet had the **18th** highest percentage (0.34%) of households with two or more types of central heating including renewable energy.

% of households with renewable energy for central heating



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 (affordable housing)

- **2,086** new homes delivered on regeneration schemes between 2018 and 2020
- **2,133** new homes to be delivered on regeneration sites, of which **244** will be for social rent or London Affordable Rent, **546** will be for affordable rent, and **768** will be affordable homes for purchase
- Barnet Homes is also developing a programme of new homes on behalf of the council.

Regeneration sites (affordable housing)	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total
Dollis Valley	4	89	7							100
Granville Road		46								46
West Hendon	78	72	34	96						280
Grahame Park		209			403	225	72		366	1,257
Total	82	416	105	160	505	225	72		566	1,701

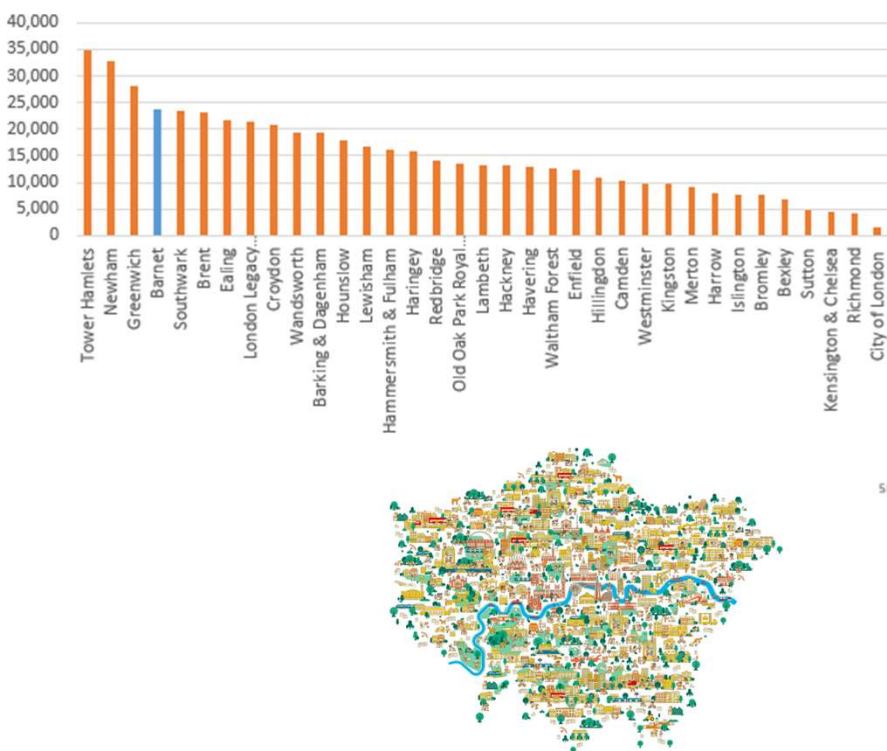
Barnet Homes	2023	2024	2025	2026	Type
Stag House	51				Extra Care
Cheshire House		75			Extra Care
Upper Lower Fosters			142		Shared ownership
Broadfields			28		London Affordable Rent (LAR)
The Grange			16		LAR
Little Strand		35			LAR
Coppetts		15			LAR
Moxon Street and Whitings			56		Shared ownership and Affordable Rent
Potential future programmes				50	Affordable Rent
Total	51	125	242	50	

Delivery of new homes (all regeneration properties)

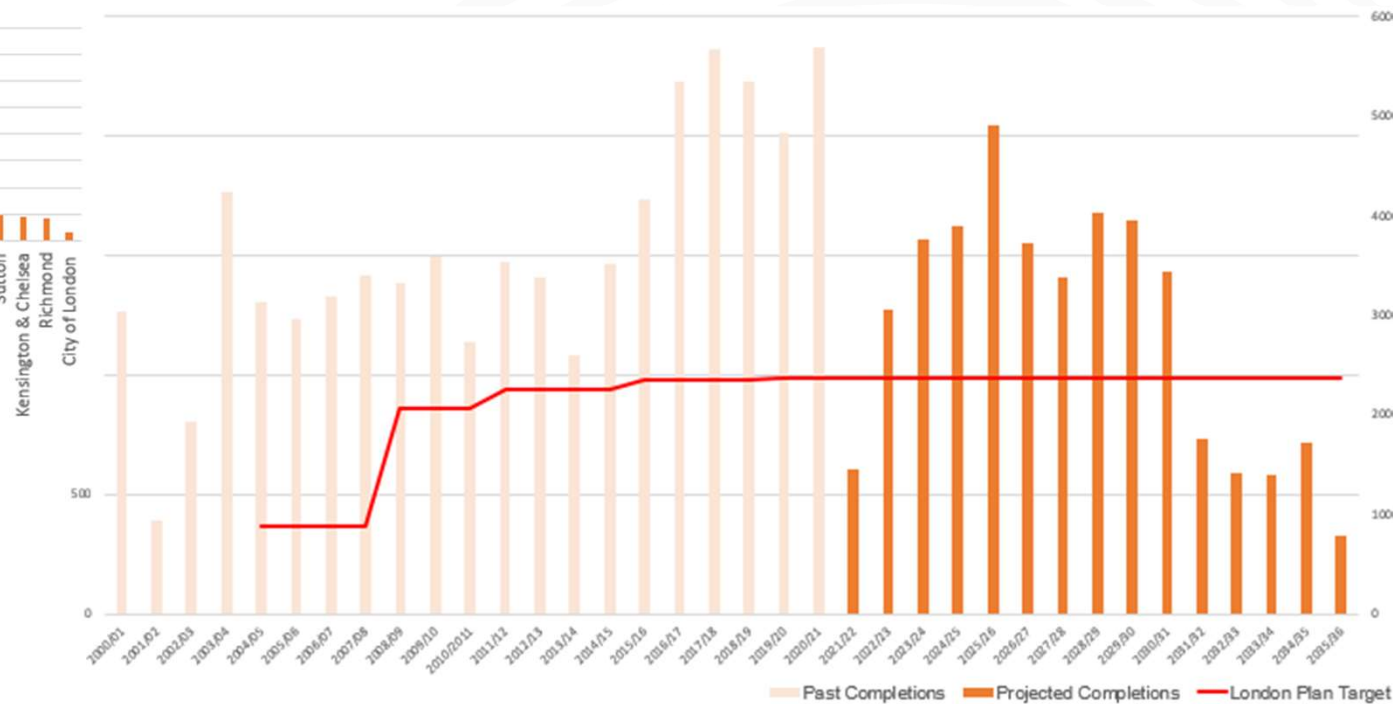
Regeneration sites (all tenure)	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total
Dollis Valley	4	89	71	64						228
Housing type: Market			64	64						128
Housing type: S/O			7							7
Housing type: A/R	4	89								93
Granville Road		132								132
Housing type: Market		86								86
Housing type: S/O		46								46
West Hendon	324	161	115	116						716
Housing type: Market	246	89	81	20						436
Housing type: SO/SE	78	72	34	96						280
Grahame Park		209			150	354	72	106	166	1,057
Housing type: Social/LAR		149							88	237
Housing type: A/R					253				200	453
Housing type: S/O		60				225	72		78	435
Housing type: Market					402	129		106	200	837
Total	328	591	186	180	150	354	72	106	166	2,133

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.