



# **Additional homes survey 2018/19:**

# **Measuring our progress against the Welsh Government Pact**



**March 2020**



## Background

CHC has historically commissioned research on housing associations' performance to Beaufort & the Welsh Economy Research Unit (WERU). This research has included data that allows us to monitor the sector's progress against the commitments made in the 2016 Housing Supply Pact between CHC, Welsh Government and the WLGA. In relevance to this report, the housing association sector's key commitment was to aim to deliver 13,500 additional units of affordable housing in this Assembly term, contributing to the overall target of 20,000 affordable homes.

The following report presents findings from CHC's own research for additional homes provided by housing associations in the financial year 2018/19, and draws comparisons with Beaufort and WERU's findings from previous years. A review of the Pact period to date follows, as well as a brief note on local authorities' contribution to the sector's overall target.

Further details about the Pact can be found [here](#).

## Methodology

'Survey 1 – Additional Homes' was distributed and returned by 32 CHC housing association members taken from WERU's previous records of return (see Appendix 1 for details). Data was inputted from each individual housing association according to the relevant local authority area.

### 1.1. Table 1: Additional homes provided in the financial year 2018/19

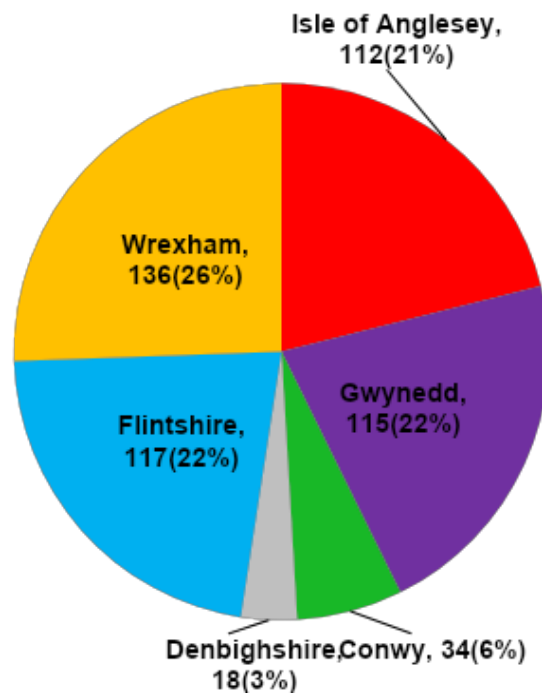
	<b>Additional homes provided in the financial year 2018/19</b>
Completions	1,743
Renovations	141
Acquired through S106	383
Acquired through other means	316
<b>Total</b>	<b>2,583</b>



A total of 2,583 additional homes were provided by housing associations in the financial year 2018/19. This comprises completed builds, renovations and homes acquired through S106 and by other means.

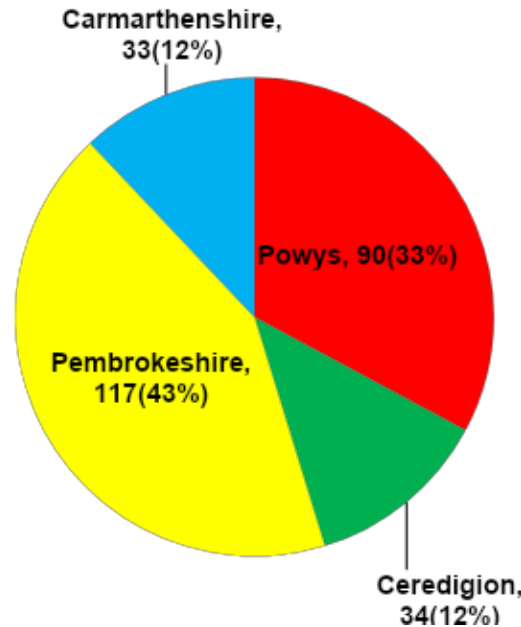
A full breakdown of the number of units by local authority area (including the percentage split) is as follows:

### Additional homes provided by HAs in 2018/19: North Wales

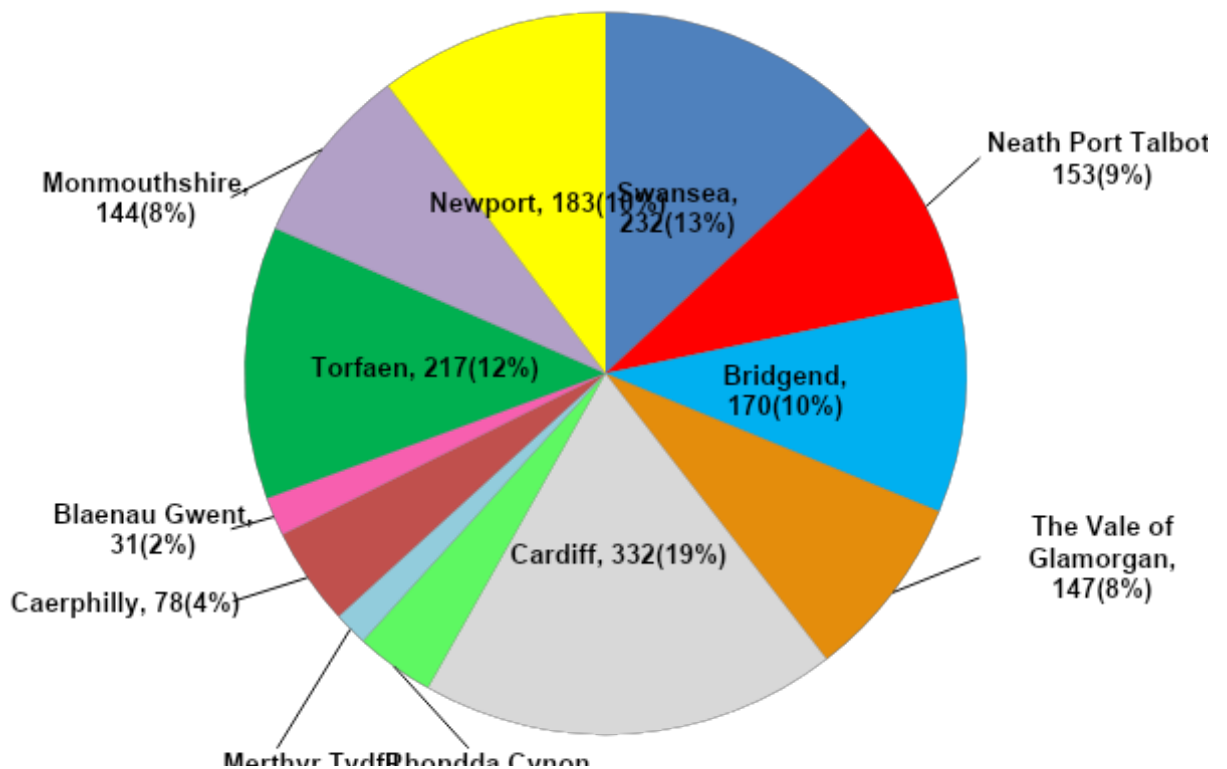




## Additional homes provided by HAs in 2018/19: Mid & W. Wales



## Additional homes provided by HAs in 2018/19: South Wales





As expected, the majority of developments have occurred in the most populous regions across Wales, with the highest number of additional homes provided in Cardiff (332 units, with a 19% share of the South Wales distribution).

In addition to these figures, a total of 2,888 homes were in development by housing associations (but not completed) in the financial year 2018/19 and are included in the projections for the next financial year 2019/20.

## 1.2. Table 2: Additional homes provided for Rent and Low Cost Home Ownership (LCHO) in the financial year 2018/19

Region	Rented	LCHO	Total
North Wales	498	34	532
Mid & W. Wales	266	8	274
South Wales	1,371	128	1,499
<b>Wales</b>	<b>2,135</b>	<b>170</b>	<b>2,305</b>



### 1.3. Table 3: Additional Homes provided in the financial year 2018/2019 with and without Government Grant funding

Local Authority Area	With Government Grant (SHG & HFG)	Without Government Grant
Anglesey	42	0
Gwynedd	87	28
Conwy	33	1
Denbighshire	8	2
Flintshire	44	0
Wrexham	26	0
Powys	47	43
Ceredigion	34	0
Pembrokeshire	99	18
Carmarthenshire	33	0
Swansea	213	19
Neath Port Talbot	138	15
Bridgend	118	1
Vale of Glamorgan	27	83
Cardiff	153	155
Rhondda	83	10
Merthyr Tydfil	15	30
Caerphilly	55	1
Blaenau Gwent	31	0
Torfaen	87	34
Monmouthshire	56	63
Newport	140	43
<b>Wales</b>	<b>1,569</b>	<b>546</b>



## 2. Approximate percentage split between homes built on greenfield and brownfield sites in the financial year 2018/2019.

Housing associations have prioritised the regeneration of previously used land by using brownfield sites to develop an average of 77% of the units they provided in 2018/19.

## 3. Additional Homes projected to be made available in the financial year 2019/2020

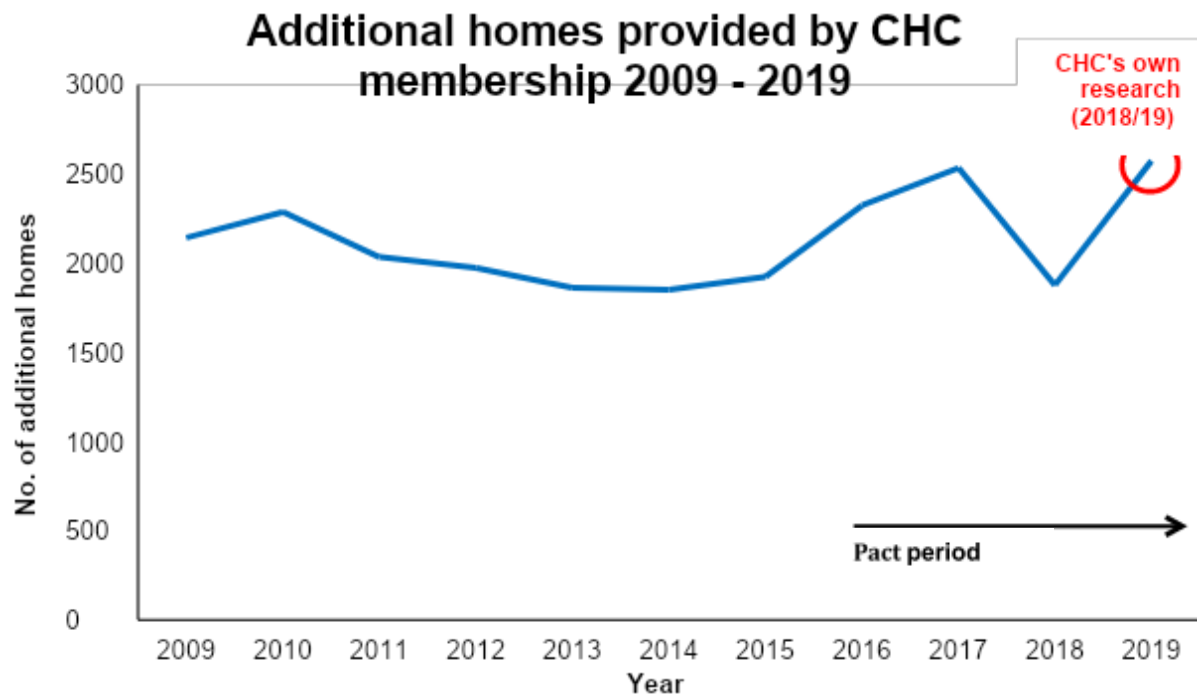
Looking ahead, 3,189 additional homes are projected to be made available by housing associations in the next financial year.

## 4. Comparability to previous years

**Table 4: The number of additional homes provided by CHC member HAs between financial years 2008/9 and 2017/18 (based on Beaufort & WERU's figures), including additional affordable homes provided in 2019 (based on CHC's own data in red):**

Year	Additional homes
2008/9	2,142
2009/10	2,286
2010/11	2,033
2011/12	1,973
2012/13	1,862
2013/14	1,850
2014/15	1,923
2015/16	2,322
2016/17	2,533
2017/18	1,876
<b>2018/19</b>	<b>2,583</b>





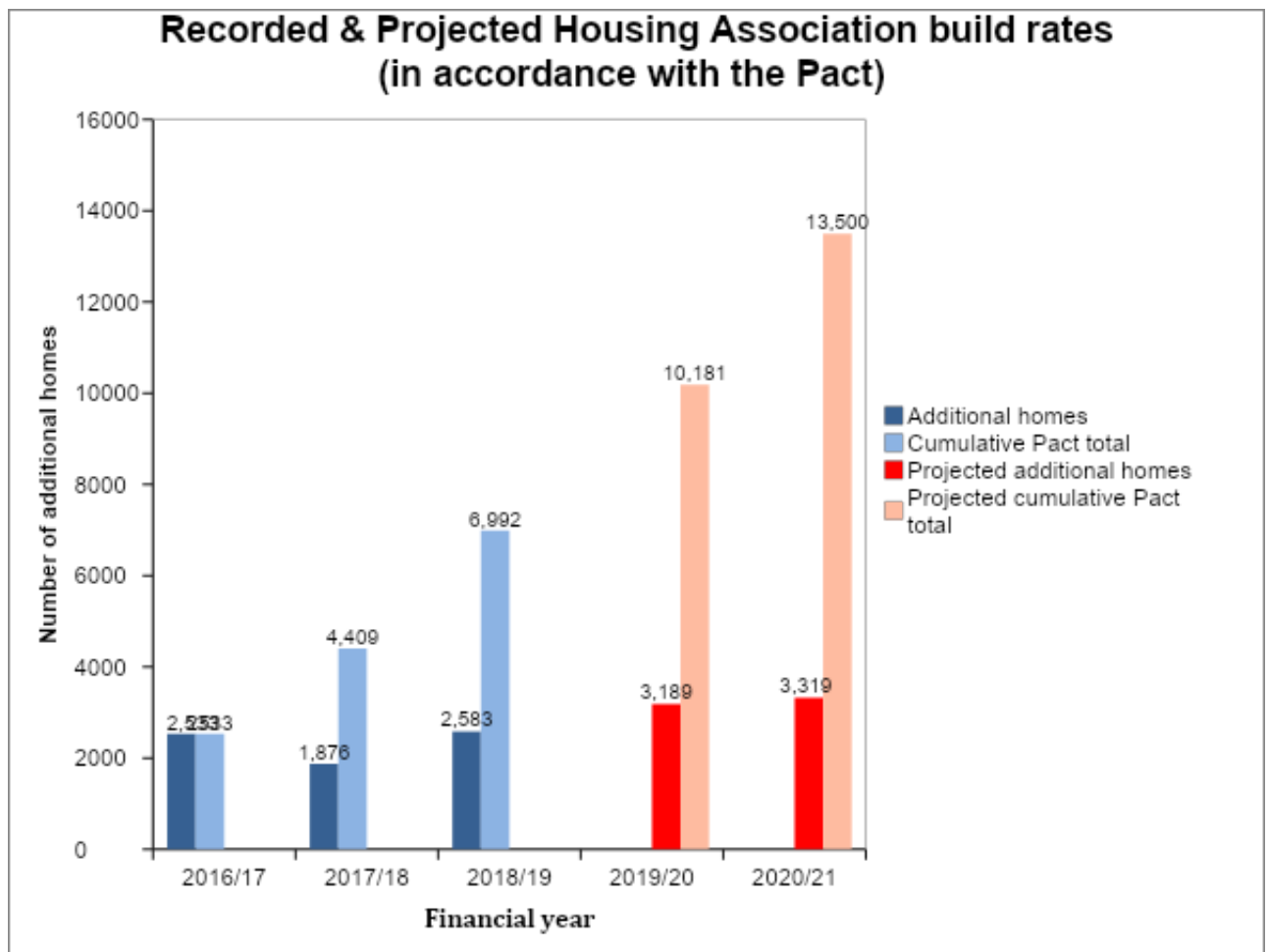
It is reassuring to see an increase in the number of additional homes provided in 2018/19 in comparison to 2017/18, with an increase of 707 homes from housing associations in Wales. This is the highest annual total since 2008 and is narrowly above the 2016/17 total of 2,533 homes. In spite of the 2017/18 decline, there has been a gradual linear increase in the number of additional homes provided by housing associations in Wales since 2009.

Based on the 2017/18 WERU survey returns, members reported that they expected 3,045 additional homes to be made available in 2018/19. This estimate falls slightly short of the actual 2018/19 figures.



## 5. Review of the Pact period (2016/17 – 2018/19)

### Housing associations



These findings show that housing associations have provided 6,992 additional affordable homes in the three years of the Pact period since 2016.

Despite the decline in build rates in 2017/18, 2018/19 had the highest additional units of affordable housing during the Pact period to date.

A projected 3,189 additional homes in 2019/20 will bring the cumulative Pact total to 10,181 additional homes provided by housing associations. With this in mind, in order for the 13,500 target to be achieved, housing associations will need to work towards providing a total of 3,319 additional homes in the 2020/21 financial year.



Based on the current figures and future estimates, housing associations appear to be on track to achieve the objective of 13,500 additional affordable homes as part of the sector's overall 20,000 target by 2021.

### Local authorities

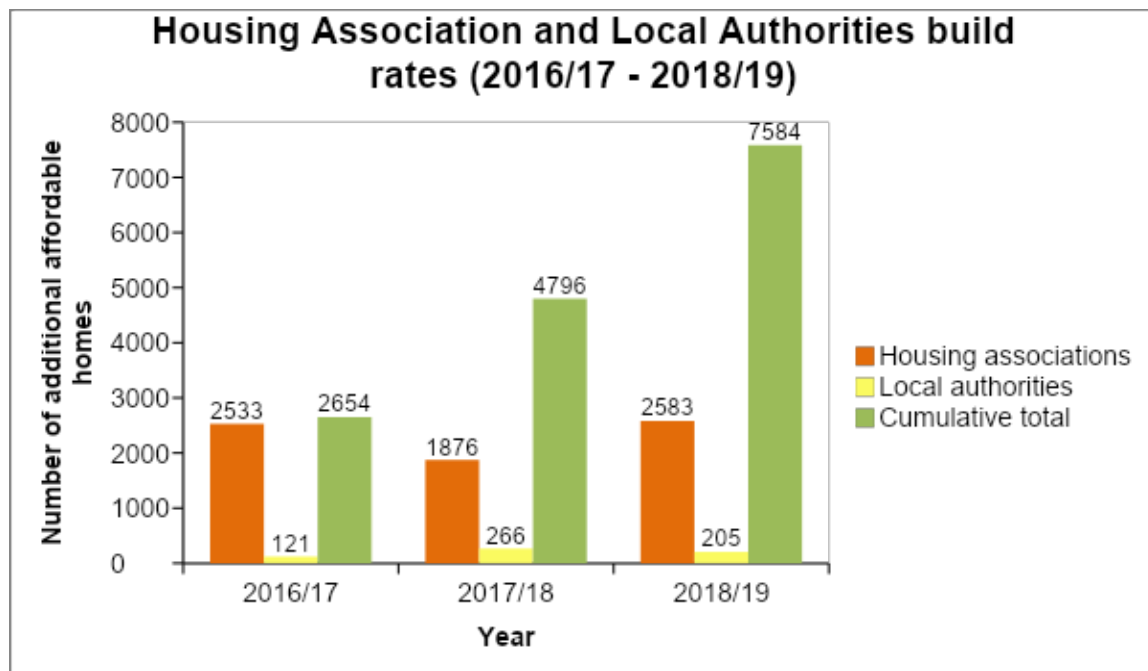
Year	Additional homes
2016/17	121
2017/18	266
2018/19	205
<b>Total</b>	<b>592</b>

Local authorities have provided a total of 592 additional affordable homes alongside housing associations during the Pact period to date.<sup>1</sup> The majority of additional affordable homes were provided in 2017/18 (266 homes) – in contrast to housing associations in which this year was their lowest rate of builds (1,876) during this period.

The graph below draws together the combined additional affordable housing totals of both housing associations and local authorities, with an overall total of 7,584 additional affordable homes.



## Housing Association and Local Authorities additional affordable housing provision (2016/17 – 2018/19)





## Appendix 1 – Survey 1 Additional Homes survey

The number of additional homes provided in the financial year 2018-2019 - built, renovated and acquired.

### Definitions

*Starts* – A house or flat is counted as started on the date work begins on the laying of the foundation, including 'slabbing' for houses that require it, but not including site preparation. Thus when foundation work commences on a pair of semi-detached houses two houses are counted as started and when work begins on a block of flats all the dwellings in that block are counted as started. The starts of houses in building schemes are usually phased over a period of weeks or even, in very large schemes, months.

*Completions*- A dwelling is defined as completed when a completion notice has been served and when it has become ready for occupation.

Local Authority Area	Built		Renovated	Acquired		Total
	Starts	Completions		S106	Not S106	
Isle of Anglesey						
Gwynedd						
Conwy						
Denbighshire						
Flintshire						
Wrexham						
Powys						
Ceredigion						
Pembrokeshire						
Carmarthenshire						
Swansea						
Neath Port Talbot						
Bridgend						
The Vale of Glamorgan						
Cardiff						



Rhondda Cynon Taf						
Merthyr Tydfil						
Caerphilly						
Blaenau Gwent						
Torfaen						
Monmouthshire						
Newport						
<b>WALES</b>						

**Excludes (Starts).**

**The number of additional homes provided in the financial year 2018-2019 - rented and LCHO.**

Local Authority Area	Rented	LCHO	Total
Isle of Anglesey			
Gwynedd			
Conwy			
Denbighshire			
Flintshire			
Wrexham			
Powys			
Ceredigion			
Pembrokeshire			
Carmarthenshire			
Swansea			
Neath Port Talbot			
Bridgend			
The Vale of Glamorgan			
Cardiff			
Rhondda Cynon Taf			
Merthyr Tydfil			
Caerphilly			
Blaenau Gwent			
Torfaen			



Monmouthshire			
Newport			
<b>WALES</b>			

**Additional Homes provided in the financial year 2018-2019 - with and without grant.**

Local Authority Area	With Government Grant (SHG & HFG)	Without Government Grant	Total
Isle of Anglesey			
Gwynedd			
Conwy			
Denbighshire			
Flintshire			
Wrexham			
Powys			
Ceredigion			
Pembrokeshire			
Carmarthenshire			
Swansea			
Neath Port Talbot			
Bridgend			
The Vale of Glamorgan			
Cardiff			
Rhondda Cynon Taf			
Merthyr Tydfil			
Caerphilly			
Blaenau Gwent			
Torfaen			
Monmouthshire			
Newport			
<b>WALES</b>			



**NOTE: The total figures in Questions 1(a), 1(b) & 1(c) should be the same.**

**Approximate percentage split between homes built on greenfield and brownfield sites in the financial year 2018-2019.**

Percentage of homes built on:	
Greenfield Sites	
Brownfield Sites	

**NOTE: This should add up to 100%**

**Additional Homes projected to be made available in the financial year 2019-2020.**

Local Authority Area	Total
Isle of Anglesey	
Gwynedd	
Conwy	
Denbighshire	
Flintshire	
Wrexham	
Powys	
Ceredigion	
Pembrokeshire	
Carmarthenshire	
Swansea	
Neath Port Talbot	
Bridgend	
The Vale of Glamorgan	
Cardiff	
Rhondda Cynon Taf	
Merthyr Tydfil	
Caerphilly	
Blaenau Gwent	
Torfaen	





Monmouthshire	
Newport	
<b>WALES</b>	

**NOTE: Projections = 'Starts' from question 1a**