

# Socio-Economic Impact of the Housing Association and Community Mutual Sector 2017/18



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## EXECUTIVE SUMMARY

This report for Community Housing Cymru (CHC) estimates the economic impact of the CHC membership, in terms of gross value added impact, and direct and indirect Full Time Equivalent (FTE) jobs. It also provides a time series from 2008/09 to 2017/18.

Housing Associations (HAs) refer to Community Mutual organisations, Large Scale Voluntary Transfers (LSVTs) and Traditional Housing Associations.

CHC represents over 70 not-for-profit housing associations and community mutuals in Wales. These vary in terms of the number of homes managed, the range of services provided and their geographical coverage. In 2017/2018 28 housing associations had an active development programme. Each year, CHC members report the number of new homes provided and Table E1 includes the information for 2017/2018.

**Table E1 Additional homes provided by CHC membership 2009 - 2018**

	Additional homes
2009	2142
2010	2286
2011	2033
2012	1973
2013	1862
2014	1850
2015	1923
2016	2322
2017	2533
2018	1876

The 1,876 additional homes provided in 2017-18 is a decrease on the two previous years. However, members report that they expect 3,045 additional homes to be made available in 2018/19 and this puts housing associations on target to achieve the sector's 12,500 additional homes targeted over a five year period as part of the housing pact signed between Welsh Government, WLGA and CHC.

As well as reporting additional homes, the survey questionnaires also report sources of income. Those responding to the survey indicate that of the total sector income of approximately £1.2bn, housing associations receive approximately £122m from Welsh Government as social housing grant. In addition, housing associations receive approximately £60m in other grants, of which 92% comes from Welsh Government and 8% from other sources. The balance of Housing Associations' income is from sources such as rents, sales, borrowing as well as other activities such as service charges etc. The relationship between the money received from Welsh Government compared to other sources can be expressed as for every £1 received from Welsh Government, the housing associations bring £5.69.

### Economic Impact Assessment 2017/18

In 2017/18 Welsh Housing Associations (HAs) spent an estimated £1,212m (including operational expenditure, staffing costs, construction spend and maintenance/ major works). Table E2 reports the share of this expenditure *retained* in Wales.

**Table E2 Estimated Gross Spending of Welsh HAs in Wales by category 2017/18**

	Net expenditure taking place in Wales £m	Category expenditure as a % of all Welsh HA expenditure
Direct labour costs (inc. temp staff etc.)	358.6	35.2%
Construction	263.5	25.8%
Maintenance & repair	217.4	21.3%
Finance & business services (inc. insurance)	34.6	3.4%
Other	43.5	4.3%
Land acquisition	56.8	5.6%
Community regeneration	22.7	2.2%
Transport etc.	7.6	0.7%
Rent & rates	4.3	0.4%
Energy / water etc.	1.9	0.2%
Training	3.7	0.4%
Consumables	2.1	0.2%
Tenant participation/engagement	2.1	0.2%
Hotels etc.	0.7	0.1%
Total	1,019.5	100.0%

The estimated extra jobs and gross value added linked to CHC member activity are shown in Table E3.

**Table E3 Estimated Economic Impacts of the Housing Associations of Wales on the Welsh Economy 2017/18**

	Direct Impact: HA Sector Output & Employment	Indirect (supplier effect and induced income effect)	Total Impact
Output £m	1,212	1,051	2,263
Gross Value Added (GVA) £m	359	528	886
Employment Full Time Equivalent (FTEs)	9,138	14,013	23,151

*\*To provide an estimate of the direct GVA impact, total wage spend of Welsh HAs was used. This total should be treated as indicative only.*

*\*\*The direct employment estimate is calculated from HAs employees and agency staff.*

HAs in Wales supported a total output of £2,263m in 2017/18, gross value added of around £886m, and an estimated 23,151 FTE jobs in Wales. For every one full time person employed by a HA, one and a half other jobs are supported elsewhere in the economy.

CHC membership organisations spent £23m on community regeneration in 2017/18, in addition to expenditure on brownfield and greenfield construction, training and repairs/maintenance – a total of the £442m overall – see Table E4.

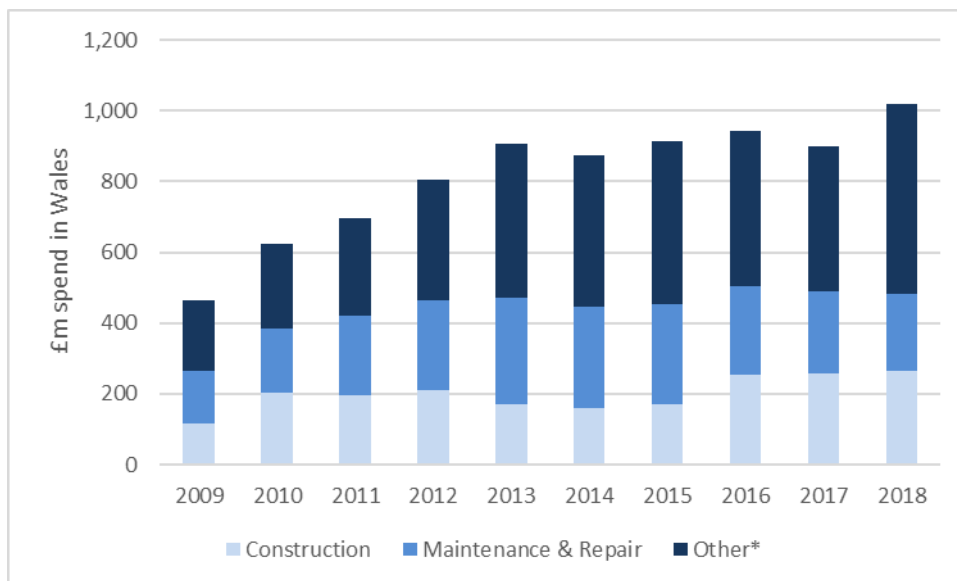
**Table E4 Estimated Regeneration Spend (excluding staff costs) 2017/18**

	2018 £m
Care and health	1.7
Employment support and apprenticeships	1.2
Digital inclusion	0.4
Social enterprise development	0.6
Financial inclusion	1.8
Energy projects	6.3
Empty homes	5.9
Assisting victims	1.2
Other	3.6
<i>Sub-total</i>	22.7
Brownfield construction	181.8
Greenfield construction associated with regeneration	19.7
Training	3.7
Repair and maintenance	217.4
<b>Total</b>	<b>445.3</b>

Figure E1 and Tables E5 and E6 show various measures over a 10 year period. Figures prior to 2018 (2009-2017) have been adjusted so that they are expressed in 2018 values. These “constant” prices are appropriate to enable a more accurate comparison of monetary values, effectively removing any differences which are merely the result of inflation.

The value of spending on local goods and services over the 10-year period is shown in Figure E1. Welsh HAs have spent around £4.4bn in the Welsh economy on housing properties (either on constructing new builds or on maintenance/repair) over the 10-year period.

**Figure E1 Welsh HA spending in Wales 2009 – 2018 (constant prices 2018 pounds)**



\*Other selling sectors in Wales and wages/salaries

A summary of *total* impacts of Welsh HA activity over the last 10-year period appears at Table E5, and the regeneration impacts in E6.

**Table E5 Estimated TOTAL (Direct + Indirect) Economic Impact of the Housing Associations of Wales on the Welsh Economy 2009-2018** (constant prices 2018 pounds)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Output £m	1,162	1,551	1,719	1,962	2,125	2,064	2,160	2,036	1,992	2,263
Gross Value Added (GVA) £m	387	483	540	621	699	697	718	778	739	886
Employment: Full Time Equivalents (FTEs)	14,762	15,940	17,361	20,508	21,686	21,676	22,635	23,429	22,458	23,151

**Table E6 Estimated Regeneration Spend in Wales (excluding staff costs) 2009-2018, £m**  
(constant prices 2018 pounds)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	10- year total
Brownfield construction	114	199	184	205	187	188	203	198	210	182	1,868
Greenfield construction associated with regeneration	18	23	21	18	9	8	9	13	12	20	151
Repair & maintenance	166	220	267	310	323	310	315	288	233	217	2,650
Training budgets	2	3	4	6	8	7	7	4	3	4	50
Community Regeneration projects & other expenditure	3	4	6	6	30	30	22	32	21	23	178
<b>Total</b>	303	449	483	545	558	544	556	536	478	445	4,898

# MAIN REPORT

## 1. The Economic Impact of Housing Associations in Wales

### 1.1 Background

An estimation of the economic impact of housing association spending in Wales in 2017/18 is set out in this chapter. We define the economic terms used in the estimation process. We then explain the methodology for estimating the economic impact of housing association sector activity to the economy of Wales.

The reported results for the Welsh economy cover: gross spending by category; gross spending in Wales by category; and “knock-on” (multiplier) effects of housing association-related spending in terms of total spending, gross value added and employment supported by housing association spend in Wales.

This report is part of a series of reports and follows on from estimates of economic impact provided by the Welsh Economy Research Unit (WERU) 2008-2015, and the estimate of economic impact provided by Beaufort/HECL in 2016 and 2017. All care has been taken to ensure continuity with previous work but the reader should be aware that there is the potential for methodology differences between the estimates produced here and the estimates for previous years. This study (as with the 2015/16 and 2016/17 editions) has not had access to the Input Output model used by WERU in previous editions of this work. Discussion with WERU has confirmed that the relationships between direct and indirect impacts established in 2015 relationships remain current and therefore these coefficients are used to provide the estimates of direct and indirect impacts arising from the activities of the Housing Associations in Wales.

### 1.2 Sources of economic impact

The outputs from a number of economic sectors are purchased by housing associations. The majority of spending takes place on staff wages, construction of new housing, and maintenance and repair of existing housing units. In addition to these, purchases are made of such items as financial services, IT equipment, energy supplies and training of staff.

We begin our estimation process by identifying the proportion of total housing association spending that is on imported goods and services, and then consider how far the remaining (import adjusted) total spending by housing associations supports gross value added and employment in the Welsh economy.

### 1.3 Measures and types of economic impact

The magnitude and nature of economic activity associated with Welsh housing associations can be quantified in a number of ways. These are highlighted in Table 1.1.



**Table 1.1 Measures of Economic activity**

Measure	Description
Spending	Expenditure on goods and services that is associated with housing associations
Gross Value Added (GVA)	The total of all revenues, from final sales and (net) subsidies, which are incomes into organisations/ businesses. Those incomes are then used to cover expenses (wages, salaries), savings (any surplus, depreciation), and taxes.
Employment	The number of jobs that are supported in Wales as a result of the spending of housing associations. These are reported as Full Time Equivalents (FTEs), a measure that involves converting any part-time jobs into comparable full-time jobs (e.g. typically around 2 part-time jobs equal one full-time).

In order to quantitatively assess the main economic impacts of housing associations in Wales an economic impact model of the Welsh economy is utilised. This produces estimates in terms of:

1. **Direct Welsh Spending, GVA and Employment Impacts** - This measure captures the gross spending, gross value added and employment supported directly through the spending of housing associations in Wales.
2. **Indirect (Supplier) Welsh Spending, GVA and Employment Impacts** -This measure accounts for supply chain impacts in Wales associated with the direct effects above. For example, as a housing association spends money on Welsh goods and services, the suppliers of these also have to purchase goods and services in Wales to meet these demands. Therefore, indirect spending, GVA and employment are supported in the Welsh economy.
3. **Induced (Income) Welsh Spending, GVA and Employment Impacts** -This is an estimate of the impact arising from additional wage spending on goods and services elsewhere in the economy.

## 1.4 The Economic Impact Methodology

The methodology follows that used on an annual basis since 2008 initially by the Welsh Economy Research Unit of Cardiff Business School and then by Beaufort Research/Houston Economic Consulting in similar work for Community Housing Cymru.

Housing associations in Wales were sent a questionnaire survey (see Appendix 1) asking them to estimate their spending broken down by major categories. A total of 32 of the largest housing associations responded. This compares to 33 in 2016/17 and 35 in 2015/2016, although note that there were two mergers in 2016/17 – Gwalia and Seren group to form Pobl and Tai Cantref merging with Wales and West, meaning two returns were received from these housing associations rather than four. The data was collated and used to calculate the direct effects of housing association spending in Wales, presenting an aggregate breakdown of purchases from other sectors of the economy.

A control total for spending was derived from the “2017 Financial Statements of Welsh Housing Associations” produced by Community Housing Cymru. Here, operational spend (staff costs etc.), construction/upgrading spend (being estimated from the change in housing properties at cost year on year) were examined. Note that reporting standards have changed since the previous edition of this work, which means that some year-on-year changes may result from the way figures are compiled, as well as any annual variations.

The control total was calculated at £1,212m of direct gross spend by the Welsh HA sector, which is an increase (15%) on the total in the previous year, although part of this increase (estimated at 2 percentage points) is due to the revised accounting standards. Using the completed questionnaires to allocate this total by spending category Table 1.2 outlines the gross spending estimate by Welsh housing associations for 2017/18<sup>1</sup>. The principal elements of direct expenditure were direct labour costs (£366m, or 30% of spend), construction (£293m or 24% of spend) and maintenance, repair and upgrading (£274m, or 23% of all sector spend).

**Table 1.2 Estimated Gross Spending of Welsh HAs by category 2017/18**

Category	£m	% of all Welsh HA spend
Direct labour costs (inc. temp staff etc.)	366.2	30.2%
Construction	293.3	24.2%
Maintenance & repair	274.2	22.6%
Finance & business services (inc. insurance)	99.9	8.2%
Other	51.1	4.2%
Land acquisition	57.7	4.8%
Community regeneration	23.2	1.9%
Transport etc.	16.9	1.4%
Rent & rates	10.1	0.8%
Energy / water etc.	5.7	0.5%
Training	5.4	0.4%
Consumables	3.7	0.3%
Tenant participation/engagement	2.3	0.2%
Hotels etc.	2.3	0.2%
Total	1,212.0	100%

*"Other" includes items such as "depreciation of stock" and "other estate costs/management charges".*

Incorporated into the estimated gross total spending figure for Welsh housing associations of £1,212m are elements of spending on goods and services that 'leak' outside the Welsh economy (i.e. imports from outside the region). Information supplied from the questionnaires on spending in Wales was used to adjust this total to account for these leakages.

The adjusted breakdown by category is shown in Table 1.3 illustrating the direct gross spending of Welsh housing associations in the Welsh economy. Different proportions of expenditure remain in Wales between the categories of spend, with 90% of construction spend and 79% of maintenance and repair spend remaining in Wales. Overall, 84% of the housing association spend is in Wales, which is the same proportion as 2017. Further elements of spending that do not generate positive economic impacts on the Welsh economy were also removed - these leakages include expenditures on such items as rent losses/ bad debts and depreciation of stock in the "Other" category.

<sup>1</sup> Part of this process includes grouping some of the 'other' expenditure back into specific categories where it is appropriate to do so. This follows the broad approach in previous editions of this work.

**Table 1.3 Estimated Gross Spending of Welsh HAs in Wales by category 2017/18**

	Net expenditure taking place in Wales £m	% of gross expenditure taking place in Wales	Category expenditure as a % of all Welsh HA expenditure
Direct labour costs (inc. temp staff etc.)	358.6	97.9%	35.2%
Construction	263.5	89.9%	25.8%
Maintenance & repair	217.4	79.3%	21.3%
Finance & business services (inc. insurance)	34.6	34.7%	3.4%
Other	43.5	85.1%	4.3%
Land acquisition	56.8	98.3%	5.6%
Community regeneration	22.7	97.7%	2.2%
Transport etc.	7.6	45.0%	0.7%
Rent & rates	4.3	42.7%	0.4%
Energy / water etc.	1.9	32.6%	0.2%
Training	3.7	69.4%	0.4%
Consumables	2.1	57.5%	0.2%
Tenant participation/engagement	2.1	90.9%	0.2%
Hotels etc.	0.7	28.7%	0.1%
Total	1,019.5	84.1%	100.0%

Prior to the economic modelling to estimate the indirect impacts of housing association spending in Wales, a number of other adjustments were carried out<sup>2</sup>. This results in an estimate for net expenditure in Wales.

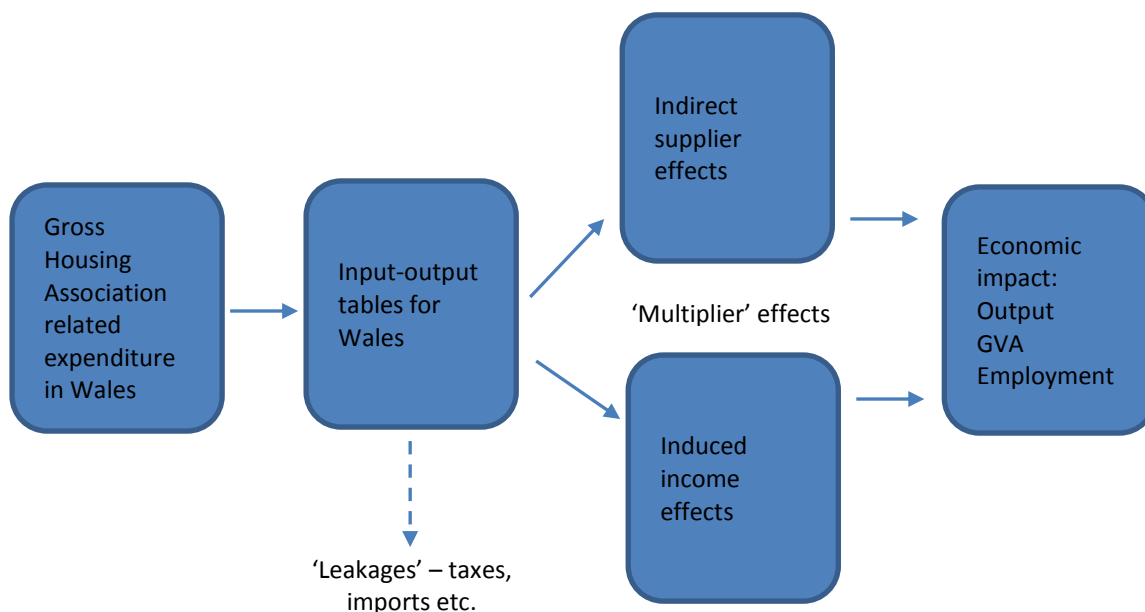
## 1.5 Estimation of the Indirect Supplier and Induced-Income Effects

In order to estimate the multiplier effects of housing association expenditure at the national level an economic modelling framework of the Welsh economy is needed. Previous editions of this study have used the Wales Input-Output Framework to estimate these flow-on effects, known as the indirect and induced-income effects. This is based on a financial account of trading between different parts of the economy over the period of one year. The tables illustrate trade between industries within the economy, external trade through imports and exports, and consumer and government spending. The Input-Output framework then enables the effect of any spending or activity to be traced through the various supply chains, ultimately estimating indirect and induced-income effects.

As noted earlier, this study has not had access to the Input Output model and after discussion with WERU, this study utilises the 2015 relationships between direct and indirect impacts to provide the estimates of direct and indirect impacts arising from the activities of the Housing Associations in Wales. Figure 1.1 provides a summary of the approach used to estimate the economic impacts of housing association spending in Wales.

<sup>2</sup> Direct labour costs are discounted from the total in table 1.3 to remove employer costs, employee tax and National Insurance contributions.

**Figure 1.1 Estimation of Net Economic Impact in Wales**



## 1.6 Indirect Economic Impacts of Housing Association activity in 2017/18

The indirect impact of Welsh housing association spending (supplier effects plus induced-income effects) was estimated to provide £1,051m of additional output in Wales. The amount of real additional worth (local additions to wages and profits) or Gross Value Added accruing to the Welsh economy as a result of housing association spending was estimated at £528m.

In order to service this extra demand, the additional employment required was estimated to be 14,013 Full-Time Equivalents (FTEs). This implies that for every one full time person employed by a HA, one and a half other jobs are supported elsewhere in the economy by housing association activity.

## 1.7 Total Economic Impacts of HA Sector Activity 2017/18

Combining the direct and indirect economic impacts of housing association sector activity gives the total impacts, as shown in Table 1.4. Housing associations in Wales supported an estimated total output of £2,263m in 2017/18, gross value added of around £886m, and an estimated 23,151 FTE jobs in Wales.

**Table 1.4 Estimated Economic Impacts of the Housing Associations of Wales on the Welsh Economy 2017/18**

	Direct Impact: HA Sector Output & Employment	Indirect (supplier effect and induced income effect)	Total Impact
Output £m	1,212	1,051	2,263
Gross Value Added (GVA) £m	359	528	886
Employment Full Time Equivalents (FTEs)	9,138	14,013	23,151

*\*To provide an estimate of the direct GVA impact, total wage spend of Welsh HAs was used. This total should be treated as indicative only. \*\*The direct employment estimate is calculated from HAs employees and agency staff.*

## 2. A 10 Year Time Series

This chapter takes the opportunity to highlight general trends from the year 2009 to 2018. To ensure a fair comparison in the analysis it is necessary to adjust for changes in the price level over the time period covered. HM Treasury *Gross Domestic Product deflators*<sup>3</sup> were used to make these adjustments.

Over a time series “constant” rather than “current” prices are appropriate to enable a more accurate reflection of monetary values. This means that year 2009 to 2017 figures have been inflated upwards so that they are expressed in 2018 pounds, effectively removing any differences which are merely the result of inflation<sup>4</sup>.

The estimated ‘Direct’ total spend of the housing association sector in Wales is shown in Table 2.1 to have increased from £569m in 2009 to £1,212m in 2018. The 2018 figure is an increase from previous years and is higher than the 2015 peak. It is this total spend (or output) figure that is used as the initial building block for the modelling in this study. The housing association sector in Wales is defined here as the organisations covered in the annual Financial Statements.

**Table 2.1 Estimated Direct Economic Impact of the Housing Associations of Wales on the Welsh Economy 2009-2018** (constant prices 2018 pounds)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Output £m	569	794	898	1040	1,113	1,087	1,156	1,090	1,067	1,212
Gross Value Added (GVA) £m	134	163	194	228	273	283	290	315	299	359
Employment: Full Time Equivalents (FTEs)	4,163	4,975	5,584	7,615	8,122	8,528	8,934	9,248	8,864	9,138

A quantity of the spending noted above ‘leaks’ out of the Welsh economy. Therefore, it is important to identify the amount of expenditure on goods and services procured *in Wales* (providing a stimulus to the regional economy, and then generating supplier and income spending effects). Table 2.2 highlights spending by headline category from 2009 to 2018 on Welsh goods and services.

**Table 2.2 Estimated Gross Spending (£m) of Welsh HAs in Wales 2009-2018** (constant prices 2018 pounds)

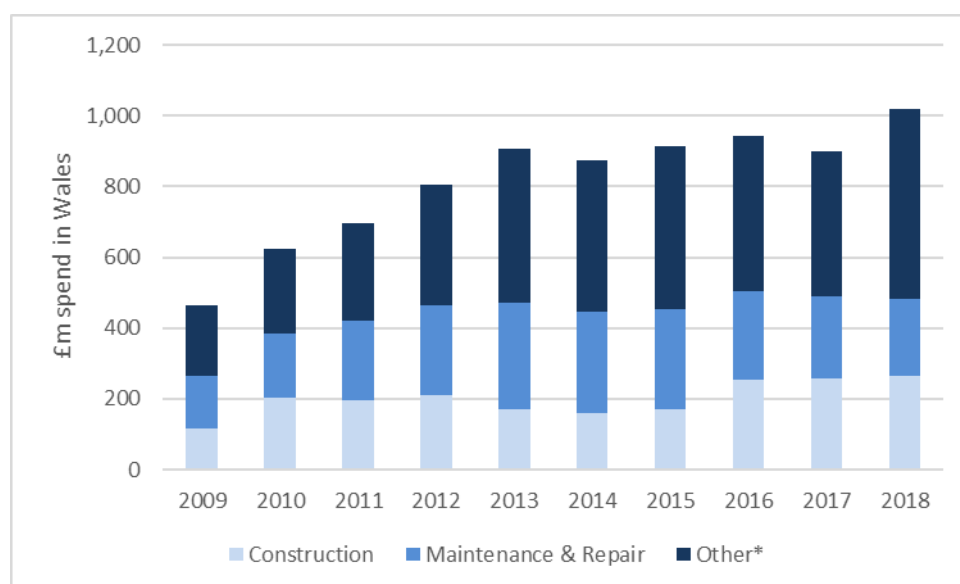
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Construction	116	202	197	210	171	159	169	253	257	264
Maintenance & Repair	149	183	224	253	302	288	283	253	233	217
Other*	199	238	276	342	433	426	460	439	411	539
<b>Total</b>	<b>464</b>	<b>623</b>	<b>697</b>	<b>805</b>	<b>906</b>	<b>874</b>	<b>912</b>	<b>944</b>	<b>901</b>	<b>1,020</b>

\* Other selling sectors in Wales and wages / salaries

<sup>3</sup> <https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-september-2018-quarterly-national-account>

<sup>4</sup> Note that the change in accounting standards between the estimates for 2017 and for 2018 will account for a minority of the changes

**Figure 2.1 CHC Members' spending in Wales 2009 – 2018** (constant prices year 2018 pounds)



\*Other selling sectors in Wales and wages/salaries

The expenditures shown in Table 2.2 create indirect supplier and induced income effects, initially mainly in the in the construction sector, but then flowing throughout the economy.

The indirect impacts of housing association expenditures in Wales are shown in Table 2.3. Indirect output in 2018 has increased from 2017 levels.

**Table 2.3 Estimated Indirect Economic Impact of the Housing Associations of Wales on the Welsh Economy 2009-2018** (constant prices year 2018 pounds)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Output £m	595	760	824	926	1,010	976	1,003	946	925	1,051
Gross Value Added (GVA) £m	254	322	345	394	426	414	427	463	440	528
Employment: Full Time Equivalents (FTEs)	10,599	10,965	11,777	12,894	13,564	13,148	13,701	14,181	13,594	14,013

Combining the headline direct expenditure from Table 2.1 (all spent on communities in Wales but not necessarily provided by Welsh suppliers) with the indirect economic impact from Table 2.3, gives the total economic impacts shown in Table 2.4.

**Table 2.4 Estimated TOTAL (Direct + Indirect) Economic Impact of the Housing Associations of Wales on the Welsh Economy 2009-2018** (constant prices year 2018 pounds)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Output £m	1,162	1,551	1,719	1,962	2,125	2,064	2,160	2,036	1,992	2,263
Gross Value Added (GVA) £m	387	483	540	621	699	697	718	778	739	886
Employment: Full Time Equivalents (FTEs)	14,762	15,940	17,361	20,508	21,686	21,676	22,635	23,429	22,458	23,151

Estimates of regeneration spending by housing associations in Wales are shown in Table 2.5.

**Table 2.5 Estimated Regeneration Spend (excluding staff costs) 2009-2018, £m** (constant prices year 2018 pounds)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	10- year total
Brownfield construction	114	199	184	205	187	188	203	198	210	182	1,868
Greenfield construction associated with regeneration	18	23	21	18	9	8	9	13	12	20	151
Repair & maintenance	166	220	267	310	323	310	315	288	233	217	2,650
Training budgets	2	3	4	6	8	7	7	4	3	4	50
Community Regeneration projects & other expenditure	3	4	6	6	30	30	22	32	21	23	178
<b>Total</b>	303	449	483	545	558	544	556	536	478	445	4,898

Table 2.6 below shows how spending on community regeneration projects was distributed between different activities in 2017/18.

**Table 2.6 Estimated Spending in Wales on Community Regeneration Projects by Type 2018, £m**

	2018 £m
Care and health	1.7
Employment support and apprenticeships	1.2
Digital inclusion	0.4
Social enterprise development	0.6
Financial inclusion	1.8
Energy projects	6.3
Empty homes	5.9
Assisting victims	1.2
Other	3.6
<b>Total</b>	22.7

Housing associations were asked about the number of people assisted in community regeneration projects. Almost 8,300 people received skills development through housing associations and just under 1,700 training and employment opportunities were created. Both these totals are an increase from 2016/17.

**Table 2.7 People supported in community regeneration projects**

	<b>Total people</b>	<b>% tenants</b>
Total number of people who have received employability, training and skills development in 2017/18	8,269	41%
Total number of training and employment opportunities created, including jobs and apprenticeships in 2017/18	1,669	29%

### Changes from 2017 to 2018

There are some changes between 2017 and 2018 that should be noted:

- The overall increase in the change in housing properties (one of the two components used as a ‘control’ for the overall spend by Housing Associations) as recorded in the in the 2017 Financial Statements of Welsh Housing Associations was more than in the previous editions. This has had a knock-on effect through this study and increases the estimates of economic impact compared to previous years.
- At the same time, the operating costs (the other part of the ‘control’ for the overall spend by Housing Associations) as recorded in the in the 2017 Financial Statements of Welsh Housing Associations has decreased, although by less than the increase in the change in housing properties noted above. The net effect is that the overall level of expenditure (and therefore economic impact) is higher than in 2017.
- Compared to previous years the rate of leakage out of the economy in 2018 is the same as in 2017 (84% retained in Wales).
- The three biggest categories of expenditure are labour costs, construction and maintenance. Compared to 2017, expenditure on maintenance was lower but expenditure on construction was higher – and the combined total was less in 2018 than it was in 2017. Labour costs have increased both as a proportion of housing association spend, and as an absolute amount. Taken together, the overall expenditure across these three categories was higher than in 2017. The higher spend on labour has had an impact on the estimates of GVA discussed above.
- The number of people benefitting from skills development has increased in 2018.



### 3. Additional Homes Survey

Information is gathered by CHC each year from its membership for additional homes using 3 returns:

- *Table 3.1:* Number of additional homes by tenure (rented and low cost home ownership LCHO) and local authority area
- *Table 3.2:* Number of additional homes by SHG-HFG/non SHG-HFG and local authority
- *Table 3.3:* Number of additional homes which were built, renovated or acquired

In 2017/18 1,876 additional homes were provided. This is a decrease on previous two years

The results from 2008/9 to 2017/18 are summarised below.

**Table 3.1 Number of additional homes by tenure**

	<b>Rented</b>	<b>LCHO</b>	<b>Total</b>
2008/9	1769	373	2142
2009/10	2123	163	2286
2010/11	1743	290	2033
2011/12	1788	185	1973
2012/13	1714	148	1862
2013/14	1657	193	1850
2014/15	1778	145	1923
2015/16	2149	173	2322
2016/17	2337	196	2533
2017/18	1709	167	1876
<b>Total</b>	<b>18767</b>	<b>2033</b>	<b>20800</b>

**Table 3.2 Number of additional homes by SHG-HFG/non SHG-HFG**

	<b>SHG</b>	<b>Non-SHG</b>	<b>Total</b>
2008/9	1198	944	2142
2009/10	1740	546	2286
2010/11	1820	213	2033
2011/12	1432	541	1973
2012/13	1103	759	1862
2013/14	1383	467	1850
2014/15	1406	517	1923
2015/16	1771	551	2322
2016/17	1788	745	2533
2017/18	1391	485	1876
<b>Total</b>	<b>15032</b>	<b>5768</b>	<b>20800</b>

**Table 3.3 Number of additional homes which were built, renovated or acquired**

	<b>Built</b>	<b>Renovated</b>	<b>Acquired</b>	<b>Total</b>
2008/9	1415	42	685	2142
2009/10	1769	176	341	2286
2010/11	1553	74	406	2033
2011/12	1532	56	385	1973
2012/13	1267	218	377	1862
2013/14	1318	81	451	1850
2014/15	1328	103	492	1923
2015/16	1893	138	291	2322
2016/17	2207	130	196	2533
2017/18	1565	78	233	1876
<b>Total</b>	<b>15847</b>	<b>1096</b>	<b>3857</b>	<b>20800</b>

The information for 2017/18 for each of the above categories broken down by local authority area is found in Appendices 2 to 4 of this report.

In addition, housing associations were also asked about the number of additional homes that had been 'started', defined as when work begins on the laying the foundations including 'slabbing' for houses that require it. A further 1,665 homes had been 'started' according to this definition across all housing associations that reported figures.

CHC members were also asked to provide estimates of additional homes projected for 2018/19. A total of 3,045 additional homes are expected to be made available next year. This is tabled by local authority area in Appendix 5.

## Appendix 1

### Questionnaire

## Appendix 2

### Additional Homes provided in the financial year 2017-2018 by tenure

LOCAL AUTHORITY AREA	Rented	LCHO	Total
Isle of Anglesey	37	8	45
Gwynedd	31	21	52
Conwy	62	22	84
Denbighshire	70	15	85
Flintshire	108	0	108
Wrexham	18	1	19
Powys	54	12	66
Ceredigion	12	0	12
Pembrokeshire	75	5	80
Carmarthenshire	40	0	40
Swansea	128	2	130
Neath Port Talbot	58	0	58
Bridgend	52	0	52
The Vale of Glamorgan	151	22	173
Cardiff	154	0	154
Rhondda Cynon Taf	208	4	212
Merthyr Tydfil	32	0	32
Caerphilly	44	1	45
Blaenau Gwent	0	0	0
Torfaen	117	15	132
Monmouthshire	88	14	102
Newport	170	25	195
<b>WALES</b>	<b>1709</b>	<b>167</b>	<b>1876</b>

## Appendix 3

### Additional Homes provided in the financial year 2017-2018 with and without grant

LOCAL AUTHORITY AREA	SHG / HFG	Non-SHG/HFG	Total
Isle of Anglesey	21	24	45
Gwynedd	34	18	52
Conwy	66	18	84
Denbighshire	38	47	85
Flintshire	108	0	108
Wrexham	19	0	19
Powys	58	8	66
Ceredigion	12	0	12
Pembrokeshire	75	5	80
Carmarthenshire	40	0	40
Swansea	118	12	130
Neath Port Talbot	24	34	58
Bridgend	30	22	52
The Vale of Glamorgan	31	142	173
Cardiff	154	0	154
Rhondda Cynon Taf	208	4	212
Merthyr Tydfil	32	0	32
Caerphilly	44	1	45
Blaenau Gwent	0	0	0
Torfaen	64	68	132
Monmouthshire	64	38	102
Newport	151	44	195
<b>WALES</b>	<b>1391</b>	<b>485</b>	<b>1876</b>

## Appendix 4

### Additional Homes provided in the financial year 2017-2018 which were built, renovated or acquired

LOCAL AUTHORITY AREA	Built	Renovated	Acquired	Total
Isle of Anglesey	37	0	8	45
Gwynedd	42	0	10	52
Conwy	40	18	26	84
Denbighshire	33	3	49	85
Flintshire	106	2	0	108
Wrexham	14	5	0	19
Powys	62	3	1	66
Ceredigion	2	0	10	12
Pembrokeshire	53	0	27	80
Carmarthenshire	32	0	8	40
Swansea	112	6	12	130
Neath Port Talbot	29	3	26	58
Bridgend	52	0	0	52
The Vale of Glamorgan	144	0	29	173
Cardiff	147	7	0	154
Rhondda Cynon Taf	197	15	0	212
Merthyr Tydfil	23	9	0	32
Caerphilly	44	1	0	45
Blaenau Gwent	0	0	0	0
Torfaen	126	0	6	132
Monmouthshire	90	0	12	102
Newport	180	6	9	195
<b>WALES</b>	<b>1565</b>	<b>78</b>	<b>233</b>	<b>1876</b>

## Appendix 5

### Additional Homes projected to be made available in the financial year 2018-2019

<b>LOCAL AUTHORITY AREA</b>	<b>Total</b>
Isle of Anglesey	97
Gwynedd	134
Conwy	63
Denbighshire	32
Flintshire	126
Wrexham	162
Powys	90
Ceredigion	70
Pembrokeshire	122
Carmarthenshire	29
Swansea	251
Neath Port Talbot	195
Bridgend	153
The Vale of Glamorgan	120
Cardiff	331
Rhondda Cynon Taf	214
Merthyr Tydfil	17
Caerphilly	112
Blaenau Gwent	14
Torfaen	307
Monmouthshire	171
Newport	235
<b>WALES</b>	<b>3045</b>

## Appendix 6

### **Estimate of Welsh Government income versus other**

Those responding to the survey indicate that of the total sector income of approximately £1.2bn, housing associations receive approximately £122m from Welsh Government as social housing grant. In addition, housing associations receive approximately £60m in other grants, of which 92% comes from Welsh Government and 8% from other sources. The balance of Housing Associations' income is from sources such as rents, sales, borrowing as well as other activities such as service charges etc. The relationship between the money received from Welsh Government compared to other sources can be expressed as for every £1 received from Welsh Government, the housing associations bring £5.69.