

# Strategic Housing Market Assessments for Yorkshire & the Humber

Final report:  
Ryedale  
housing market area

June 2008

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# 1. Introduction

- 1.1 This document is a Strategic Housing Market Assessment (SHMA) for the Ryedale housing market area (HMA). It has been produced in accordance with Government guidance for the production of SHMAs.<sup>1</sup>
- 1.2 This SHMA forms part of a suite of SHMAs for the Yorkshire and the Humber Region. Yorkshire and the Humber are seeking to develop a framework of SHMAs across the region which can provide comprehensive and consistent regional coverage.
- 1.3 Phase One of this study identified a need across some parts of the region for additional work to provide fit for purpose SHMAs corresponding to strategic housing markets. This work is recognised as building on the existing local studies.
- 1.4 This is not a local level SHMA but one of a suite of comparative regional reports which support a strategic overview for the region. This report does not replace the need for a local SHMA. An integral element of this strategic approach is the consideration of connections with a wider reference area and an analysis that looks beyond the boundaries of each district.
- 1.5 Key to this suite of reports is the need for comparability and consistency across the region to support a strategic overview. This report does not include primary data similar to that which might be collected as part of a more local assessment. In order to provide the comparators required across the region consistency has been the primary driver of the data assembled to inform this profile. It is recognised that more detailed local studies may have additional information which is either more recent, or finer grained, and can be used to further inform the

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<sup>1</sup> Communities and Local Government (2007) Strategic Housing Market Assessments: Practice Guidance. August 2007.

understanding of the current and future operation of housing markets within this HMA.

- 1.6 For the purposes of this assessment, the Ryedale HMA is taken to be coterminous with Ryedale district. A justification for this is provided In Chapter 2. The research has also identified a wider reference area encompassing Scarborough and York. Where possible comparator data for this reference area is included as well as for the Ryedale HMA.

## 2. Summary of findings

- Ryedale is a largely rural HMA including market towns, villages and deep rural areas.
- Ryedale is a net exporter of labour with strong commuting links to adjacent housing markets.
- Population has shown steady growth driven by sustained levels of in migration to Ryedale.
- There is a large and increasing proportion of older people over 65 and a relatively low proportion of children and young people.
- A significant proportion of employees working within Ryedale are in occupations associated with relatively low wage levels and overall wage levels for residents are lower than regional and national averages.
- Over 40% of the stock comprises detached homes and a low proportion of terraced properties and flats.
- Overall demand is high with low vacancy levels and high house prices which have risen faster than the regional average.
- Affordability has worsened with a lower quartile ratio at over 10.0 by 2006.
- The population is projected to increase with older age groups showing the most significant increase. The growth in the over 65 age group is projected to be greater than the overall population increase.
- The number of households is also projected to grow and by a higher number than the net house building target for Ryedale set out in RSS.
- Internal migration is the primary driver of the projected population change.

- Although numbers remain small the proportional impact of international migration from EU accession countries is significant.
- There is a projected increase in one person households to be 37% of all households by 2029.
- An income of £30,000 to £35,000 per year would be needed for a first time buyer to purchase a terraced home within the Ryedale HMA. In contrast, for 2007 the average annual pay for full time employees residing in Ryedale was £18,679<sup>2</sup>
- The Ryedale Housing Needs Assessment identifies a need for 292 affordable homes a year.
- The number of affordable homes delivered via grant funding is well below the affordable homes requirement indicating a need to provide a significant proportion of new affordable homes via the private sector.
- There is a relatively small BME population
- The proportion of families is lower than for the region as a whole but there is a higher proportion of households with non-dependant children.
- There has been a significant increase in those eligible for Disability Living Allowance.
- There is a significant and growing older population. This may indicate a future need for specialist accommodation. Combined with a decline in the working age population and difficulty accessing the housing market for those in lower paid personal care occupations there may impact on the delivery of services to support older people, whether within their existing homes or in specialist accommodation.
- The housing market in Ryedale can be characterised by extreme high demand, a feature reflected in its position as the third most expensive district in the region (after Harrogate and Hambleton).

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<sup>2</sup> Office for National Statistics. Annual survey of hours and earnings. 2007

- Employment in the district tends to be less well-paid and this creates a real problem for local people seeking to find affordable housing. This scenario makes measures to secure and maximise the provision of affordable housing crucial.

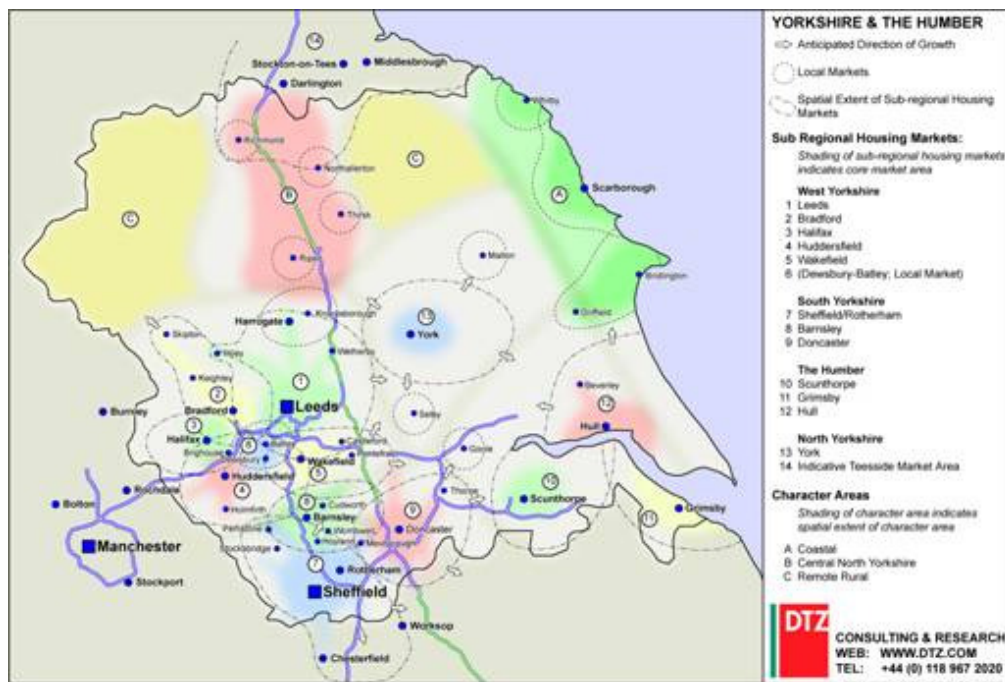
The availability of social rented stock in the district is limited by its historical size and by the lack of turnover, itself a reflection of high prices.

### 3. Context

#### Rationale for the boundary

3.1 Research undertaken by DTZ Consulting<sup>3</sup> (shown Figure 3.1 below) suggests that Ryedale falls across parts of the Central North Yorkshire and the Remote Rural special character areas. A local market is identified for Malton.

Figure 3.1. Indicative Housing Market Areas and Character Areas



Source: DTZ

<sup>3</sup> DTZ 2007 Mapping Housing Markets in the Yorkshire and the Humber Region..

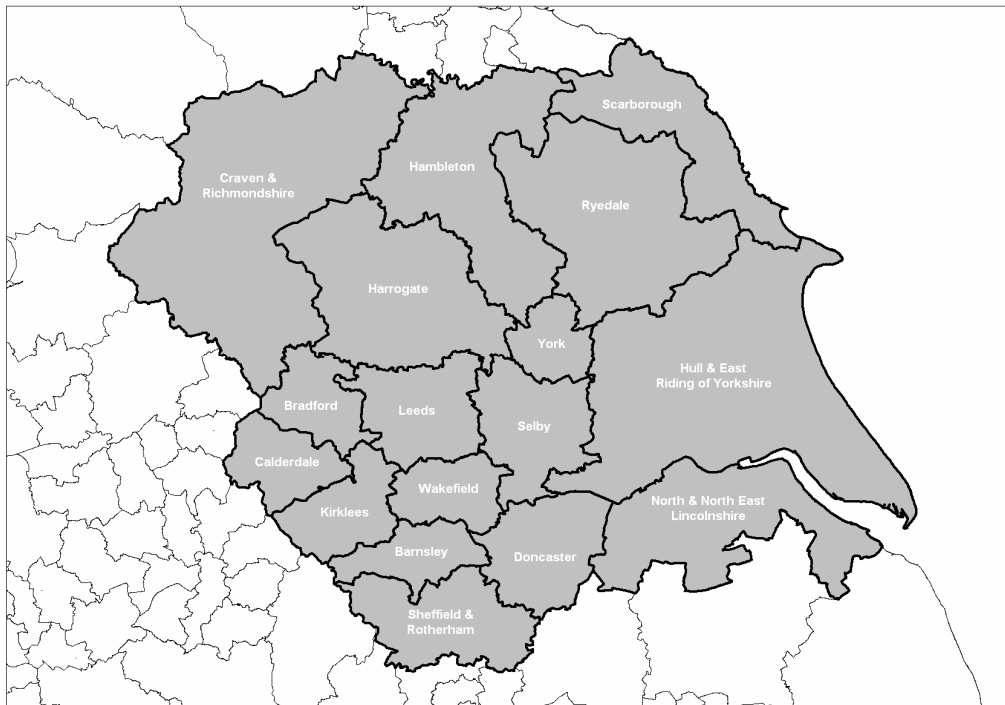
- 3.2 This work did not provide a practical basis for housing market assessments because it did not set precise boundaries for the assessments. Further work was therefore carried out by ECOTEC and Sheffield University using travel to work and migration data to refine the DTZ analysis.<sup>4</sup>
- 3.3 There are some links with adjacent areas, most notably York but these are minimal compared with some other HMAs in the region. The further validation and testing of HMA boundaries<sup>5</sup> that we have conducted confirms the relevance and practical applicability of the chosen boundary.
- 3.4 Following official guidance, and taking into account travel to work and migration patterns, the research defined HMAs by aligning them with whole local authorities or groups of local authorities (Figure 3.2). In North Yorkshire this led to the definition of seven HMAs, made up as follows:
- York
  - Hambleton
  - Selby
  - Ryedale
  - Harrogate
  - Craven and Richmondshire
  - Scarborough

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<sup>4</sup> See our Stage 1 report to Yorkshire and Humber Assembly.

<sup>5</sup> ECOTEC et al ..... stage one report to YHRA

**Figure 3.2. Yorkshire and the Humber: housing market area boundaries**

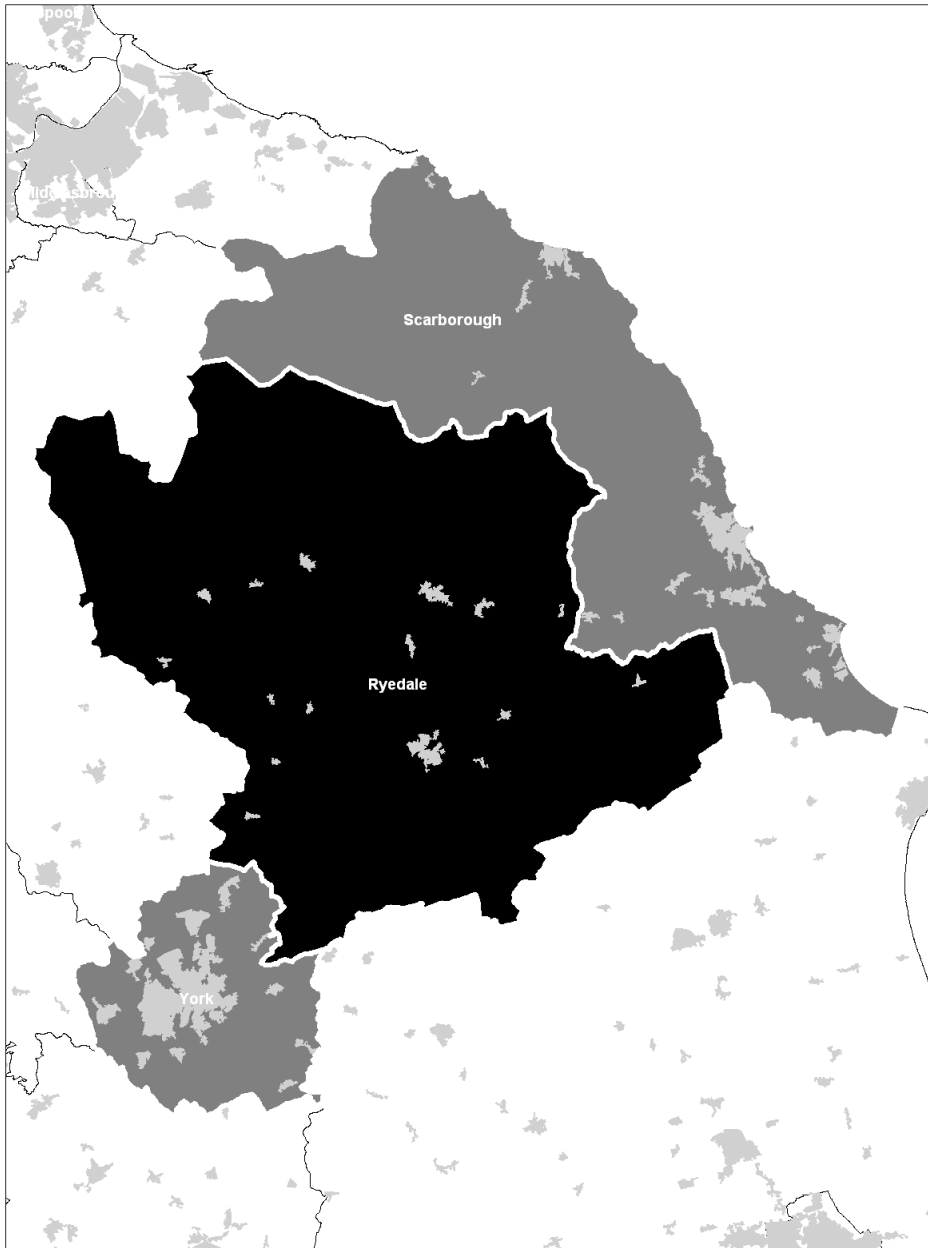


### **Connections with other areas**

3.5 Although the boundaries of the Ryedale HMA coincide with the district boundary, it is recognised that there are some important links with adjacent areas. These are examined in this assessment and must be taken into account in the subsequent development of LDF and housing policies.

3.6 Phase One of this research identified a 'reference area' for each of the HMAs based on the strongest connections with adjacent areas. This reference area for Ryedale includes Scarborough and York as well as Ryedale itself. This reference area is shown in Figure 3.3.

**Figure 3.3. Ryedale HMA and associated districts**



Data source: Ordnance Survey.

3.7 An examination of travel to work to key employment centres within the region illustrates the connection with York which is strong from the South Western part of the HMA and some connection with Scarborough from the south eastern corner of the HMA. These districts are highlighted above in Figure 3.3. These travel to work patterns are illustrated in Figures 3.4 and 3.5. While our

analysis focused on the key employment centres in the region local stakeholders report travel to work in East Riding is a factor from parts of the HMA.

**Figure 3.4. Travel to work in the York employment centre**

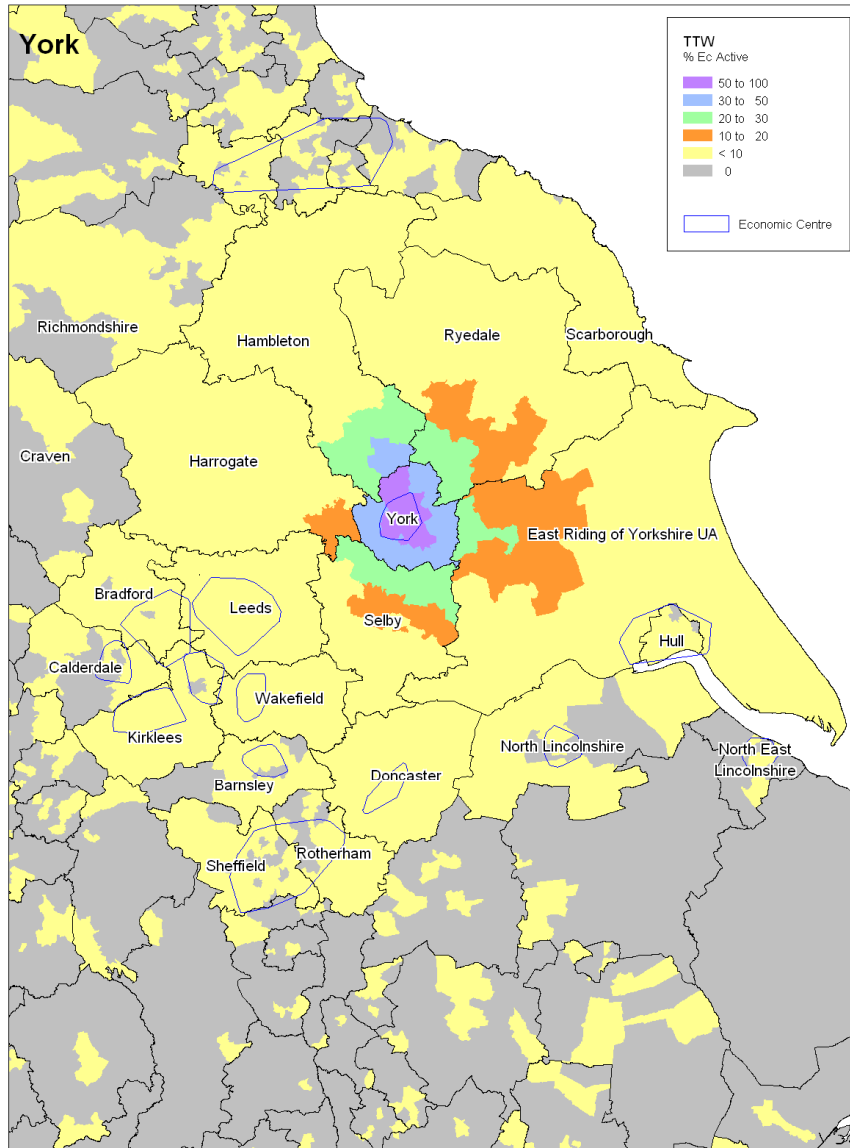
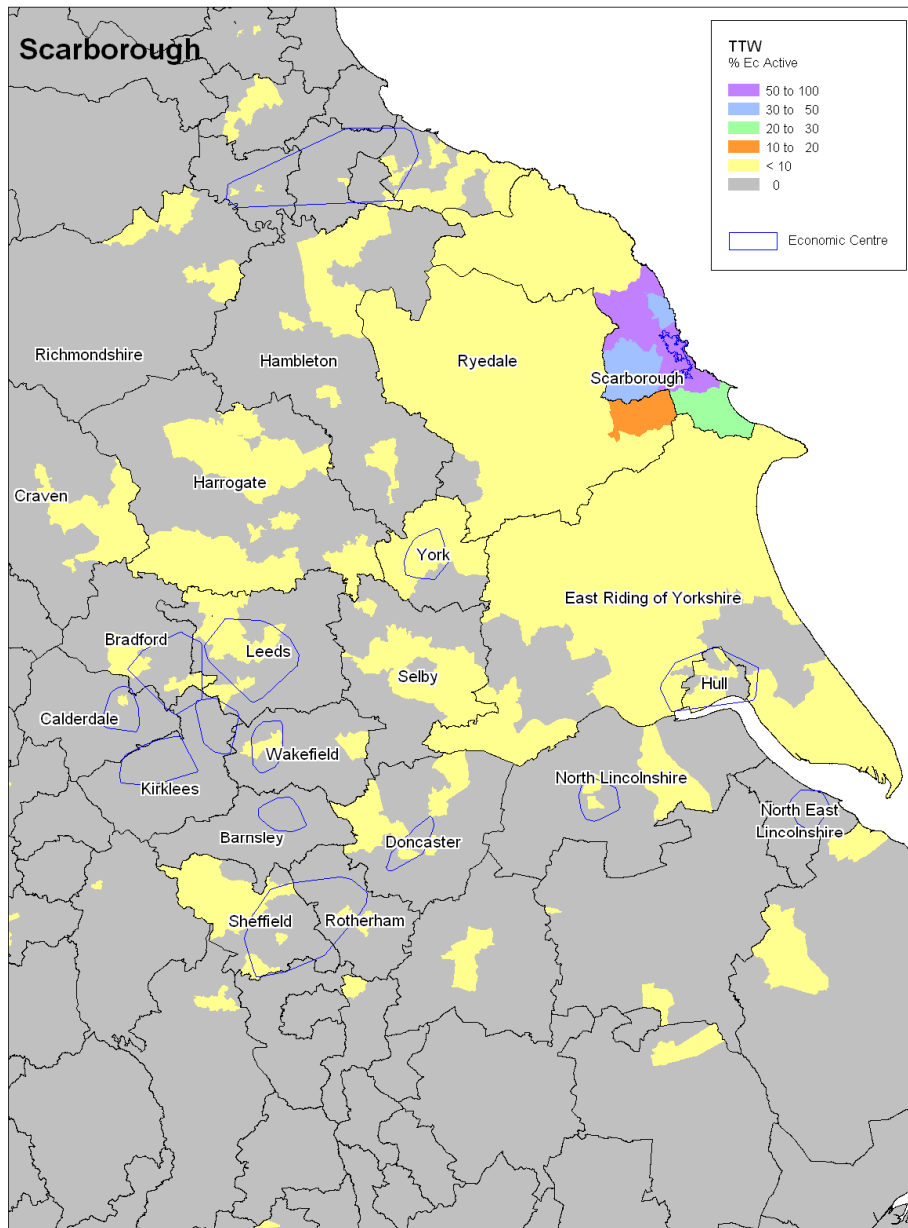


Figure 3.5. Travel to work in Scarborough



## **4. The current market**

- 4.1 Ryedale is a largely rural HMA between York and the North Yorkshire coastal district of Scarborough . The North York Moors form the northern border of the District and the Yorkshire Wolds the southern limit. As well as villages and deep rural areas Ryedale includes the market towns of Malton, Pickering, Kirkbymoorside and Helmsley. Many of the towns, villages and hamlets are identified as areas of considerable environmental character and architectural or historic interest. This quality is reflected in the designation of the North York Moors National Park and the Howardian Hills Area of Outstanding Natural Beauty. Each of the market towns has a conservation area at its heart.
- 4.2 The Ryedale LDF will not cover the area of the District that is located within the boundary of the North York Moors National Park. This will be covered by the North York Moors local plan and LDF, produced by the North York Moors National Park Authority.
- 4.3 Ryedale District is very sparsely populated relative to the rest of England and its rurality has implications around access to services with 57% of the population living in villages, hamlets and isolated dwellings. Rates of crime are relatively low and the census identified a population that was generally older, healthier and living in larger accommodation than the English average.

### **Population**

- 4.4 Table 4.1 shows past trends in the overall population and number of households in the Ryedale HMA, drawing on ONS and DCLG estimates. The population of Ryedale has experienced a fairly steady increase since 1981, notwithstanding some slight falls in 1982 and 1985. The most recent projections indicate a likely rise in population of some 7,200 persons between 2007 and 2029. The

implications of such population growth for the future housing market are discussed in Chapter 5.

**Table 4.1 Population and households in Ryedale HMA, 1981-2007**

Year	Mid-year population	% increase on previous year	Mid-year households	% increase on previous year	Average household size
1981	43,700	-	16,000	-	2.73
1982	43,500	-0.46	16,000	0.00	2.72
1983	43,800	0.69	16,000	0.00	2.74
1984	44,000	0.46	17,000	6.25	2.59
1985	43,400	-1.36	17,000	0.00	2.55
1986	43,500	0.23	17,000	0.00	2.56
1987	43,600	0.23	17,000	0.00	2.56
1988	43,900	0.69	18,000	5.88	2.44
1989	44,300	0.91	18,000	0.00	2.46
1990	45,200	2.03	18,000	0.00	2.51
1991	46,200	2.21	19,000	5.56	2.43
1992	46,800	1.30	19,000	0.00	2.46
1993	47,400	1.28	19,000	0.00	2.49
1994	48,400	2.11	20,000	5.26	2.42
1995	48,800	0.83	20,000	0.00	2.44
1996	49,200	0.82	20,000	0.00	2.46
1997	49,300	0.20	21,000	5.00	2.35
1998	49,700	0.81	21,000	0.00	2.37
1999	50,100	0.80	21,000	0.00	2.39
2000	50,300	0.40	21,000	0.00	2.40
2001	50,900	1.19	21,000	0.00	2.42
2002	51,000	0.20	22,000	4.76	2.32
2003	51,600	1.18	22,000	0.00	2.35
2004	52,300	1.36	22,000	0.00	2.38
2005	52,700	0.76	NA	NA	NA
2006	52,900	0.38	NA	NA	NA

Sources: ONS mid-year population estimates, DCLG household estimates. NA Data not yet available

4.5 The average household size in the HMA has fallen from 2.73 persons in 1981 to 2.38 persons in 2004 with the number of households consistently increasing at a slightly higher rate than the overall population across the period.

4.6 Table 4.2 shows the breakdown of population change in the Ryedale HMA, showing the respective contribution of

natural change (births and deaths) and migration over the period from 1991 to 2006. The rate of growth through in migration has been the driver of population increases – with sustained levels of in migration throughout the period. Natural population has a negative impact on population numbers throughout the period.

**Table 4.2 Components of population change**

Year	Natural change	Net Migration	Total change
1991	-100	700	600
1992	-200	800	600
1993	-100	1,100	1,000
1994	-100	400	400
1995	-100	600	400
1996	-100	200	100
1997	-100	600	400
1998	-100	500	400
1999	-200	400	200
2000	-100	700	600
2001	-200	300	100
2002	-200	800	600
2003	-200	800	700
2004	-100	600	500
2005	-100	300	200

Source: ONS

- 4.7 Table 4.3 shows migration by occupational type. This shows (in line with other areas without higher education establishments) that there are high net outflows of students compared to other occupational types.
- 4.8 Managerial and professional groups generally tend to be over represented among those moving between housing markets. The data for Ryedale shows net in migration from this group particularly from those in the higher managerial and professional groups. This may reflect a housing market that is increasingly accommodating those in the more highly paid occupations who are willing and able to commute to employment centres outside Ryedale.



**Table 4.3 Migration by occupational type**

	Did not move or moved within LA	Moved in from within UK	Moved out to within UK	Net moves in from UK	Net moves as % of non-movers/movers within LA
Higher managerial and professional	1517	119	75	44	2.9
Lower managerial and professional	2698	148	121	27	1.0
Intermediate	696	42	43	-1	-0.1
Small employers and own account workers	3081	64	49	15	0.5
Lower supervisory and technical	1515	51	35	16	1.1
Semi-routine	1786	56	49	7	0.4
Routine	1649	36	31	5	0.3
Never worked or long-term unemployed	184	10	6	4	2.2
Full-time students	31	6	22	-16	-51.6
Total	13157	532	431	101	-43.4

Source: 2001 Census. Note: the table excludes moves to and from areas outside the UK

4.9 Table 4.4 shows the age breakdown of the population of Ryedale in 2001 and the projected composition in 2007. This shows, in line with the regional picture, a fall in the proportion of children under 15, and a fall in the proportion of 30 to 44 year olds. There is little forecast change in the 15-29 age band (compared to an increase in the region). There is a higher proportion of the population in the 45 to 64 age group than the region and this age band has experienced an increase. The over 65 age group is larger than for the region and has experienced a greater increase in the Ryedale HMA. Overall the population of Ryedale has a lower proportion of children and young people than the region and a higher proportion of people in the older age bands.

**Table 4.4 Age structure of the population 2001 and 2007**

Age Group	Ryedale		Yorkshire and the Humber	
	2001	2007	2001	2007
0 - 14	17.2	15.9	19.1	17.6
15 - 29	14.0	14.2	18.8	20.2
30 - 44	20.2	18.4	22.0	20.7
45 - 64	28.2	30.0	23.9	25.2
65 +	20.4	21.4	16.1	16.2
Total	100.0	100.0	100.0	100.0

Source: 2001 Census, ONS sub-national population projections

## **Households**

4.10 There are approximately 22,500 households in Ryedale (2006 figures), and an increase of around 1,000, or 4.7 per cent, since 2001.

4.11 Table 4.5 shows the changing composition of households in 2001 together with the projected composition in 2006. During this period, the number of 'couple' households has increased slightly (with a fall in the proportion of married couples compensated by an increase in the number of cohabiting couples). However the proportion of 'couple' households has fallen due to greater increase amongst other household types. The numbers of lone parent, multi-person and one person households have also all increased both in absolute terms and as a proportion of the overall population. The composition of households in 2007 showed a higher proportion of couple households than the region, and a lower proportion of all other household types.

**Table 4.5 Household composition 2001 and 2006**

Household type	Number of households		Proportion of households in HMA (%)		% Change 2001-2006	Proportion of households in Yorkshire & the Humber 2006 (%)
	2001	2006	2001	2006		
Married Couple	12000	11900	55.8	52.9	-0.8	44.7
Cohabiting Couple	1800	2000	8.4	8.9	11.1	10.5
Lone Parent	900	1000	4.2	4.4	11.1	7.8
Other Multi-Person	1100	1200	5.1	5.3	9.1	6.1
One Person	5800	6400	27.0	28.4	10.3	30.8
All Households	21500	22500	100.0	100.0	4.7	100.0

Source, 2001 Census, ONS sub-national population projections. Columns may not add to 100% due to rounding.

## **Economic Profile**

4.12 In 2001 Ryedale was a net exporter of labour. Of employees who were working in Ryedale 74.2% also lived within the district. However there was some in commuting, most notably from Scarborough and York. (Table 4.6)

**Table 4.6. Number of employees working in Ryedale by district of residence, 2001**

District of residence	Number of employees working in Ryedale
Ryedale	18716
Scarborough	2061
York	1703
East Riding of Yorkshire	971
Hambleton	473
Redcar and Cleveland	275
Selby	204
Harrogate	132
Leeds	108
Hull	60
All employees in Ryedale	25234

Note: only the first ten districts shown. Data source: Census 2001.

4.13 Some 77% of the working age population was economically active (Table 4.7), a slightly lower proportion than in the region as a whole. The male activity rate (85%) is significantly higher than the female rate (68%). The male rate is higher than for the region or Great Britain. The proportion of people in employment who were self employed was higher than for the region or Great Britain. Unemployment was lower compared to the regional average.

**Table 4.7 Economically active population 2006**

People of working age population (2006)	Ryedale (persons)	Proportion of working age population (%)		
		Ryedale	Yorkshire & The Humber	Great Britain
All People Economically Active	21,900	77.0	77.8	78.4

In Employment	20,900	73.4	73.4	74.1
Employees	16,500	57.9	64.9	64.3
Self Employed	3,800	13.3	8.2	9.4
Unemployed	1,000	3.5	4.4	4.3
<i>Males</i>				
Economically Active	12,900	84.8	82.9	83.2
In Employment	11,800	77.6	77.7	78.4
Employees	8,700	57.2	65.2	64.5
Self Employed	2,900	19.1	12.1	13.5
Unemployed			5.2	4.8
<i>Females</i>				
Economically Active	9,000	68.1	72.4	73.3
In Employment	9,000	67.7	68.9	69.6
Employees	7,800	58.6	64.5	64.1
Self Employed	900	6.8	4.0	5.0
Unemployed			3.5	3.7

Source: NOMIS, derived from ONS annual population survey. \*numbers are for those of working age, % are for those of working age (16-59/64);

4.14 Table 4.8 shows employment by occupation in 2006. The Ryedale HMA has a lower representation than the region of employees in professional and managerial jobs (27.2% of employees in Ryedale compared to 37.5% in the region). Those in skilled trades represent a relatively high proportion of employees compared to the region and the UK. The HMA also has relatively high levels of employees working in personal service occupations. There are also high employment levels for those engaged in routine or elementary occupations – associated with agricultural employment.

4.15 In housing market terms this profile indicates a significant proportion of employees within the HMA working in occupations associated with some of the lowest wage levels and hence have significant difficulty in accessing market housing within Ryedale.

**Table 4.8 Employment by occupation 2006**

Standard Occupational Classification (SOC)	Ryedale (No.)	Ryedale (%)	Yorkshire and The Humber (%)	Great Britain (%)
<b>SOC groups 1 - 3</b>	<b>6,400</b>	<b>27.2</b>	<b>37.5</b>	<b>42.3</b>
1 Managers and senior	2,800	11.9	13.2	15.0
2 Professional occupations	1,700	7.3	11.4	13.0
3 Associate professional & technical	1,900	8.0	12.8	14.3
<b>SOC groups 4-5</b>	<b>6,100</b>	<b>25.5</b>	<b>23.3</b>	<b>23.0</b>
4 Administrative & Secretarial	2,400	10.1	11.4	12.1
5 Skilled trades occupations	3,700	15.4	11.9	10.9
<b>SOC groups 6-7</b>	<b>3,700</b>	<b>15.9</b>	<b>16.6</b>	<b>15.7</b>
6 Personal service	2,500	10.7	8.4	8.0
7 Sales and customer service	1,200	5.2	8.2	7.7
<b>SOC groups 8-9</b>	<b>7,200</b>	<b>30.1</b>	<b>22.4</b>	<b>18.7</b>
8 Process plant & machine operatives	3,900	16.3	9.3	7.3
9 Elementary occupations	3,300	13.8	13.2	11.4

Source: NOMIS, derived from ONS annual population survey. Notes: Numbers and % are for those of age 16+. Percentages are of all persons in employment

4.16 This occupation structure is not reflected in the qualifications of the workforce. As Table 4.9 indicates, around 29% of the working age population are educated to degree level or higher – compared to 23% for the region. However there are 10% of the working age population with no qualifications, a lower proportion than for the region or Great Britain.

**Table 4.9 Qualifications 2007**

Qualification level	Ryedale (No.)	Ryedale (%)	Yorkshire and The Humber (%)	Great Britain (%)
NVQ4 and above	8,200	28.6	22.7	27.4
NVQ3 and above	13,100	46.1	41.4	45.3
NVQ2 and above	19,100	67.1	60.7	63.8
NVQ1 and above	23,800	83.4	76.3	77.7
Other qualifications	1,900	6.5	8.3	8.5
No qualifications	2,900	10.1	15.3	13.8

Source: NOMIS, derived from ONS annual population survey. Notes: NVQ1 is equivalent to fewer than 5 GCSEs at grades A-C; NVQ2 is equivalent to 5 or more GCSEs at grades A-C; NVQ3 is equivalent to 2 or more A Levels; NVQ4 is equivalent to HND or Degree level. Numbers and % are for those of working age. Percentages are of the total working age population.

## Earnings and incomes

4.17 The previous section highlighted some of the characteristics of the Ryedale labour force. This is an important factor because of the direct effect it has on earnings and incomes, and consequently on the nature of demand for housing (especially the affordable housing requirement).

4.18 Table 4.10 shows earnings for full time-employees in Ryedale in 2007, drawn from the Annual Survey of Hours and Earnings. The median gross weekly pay for full-time employees was £376 per week. This is about £49 per week lower than the regional figure and a full £83 below the Great Britain median of £459. However there is a significant difference between male and female pay in Ryedale with the median gross weekly pay for women (£293) further from the Regional or Great Britain median than the gross weekly pay for male workers living in Ryedale (£464).

**Table 4.10 Earnings – residence based (2007)**

	Median gross earnings, £		
	Ryedale	Yorkshire and The Humber	Great Britain
<i>Gross weekly pay</i>			
Full-time workers	376.3	425.0	459.0
Male full-time workers	464.5	470.0	500.7
Female full-time workers	293.9	355.5	394.8
<i>Hourly pay</i>			
Full-time workers	9.2	10.53	11.50
Male full-time workers	10.5	11.15	12.17
Female full-time workers	7.9	9.49	10.48

Source: ONS Annual Survey of Hours and Earnings. Note - median earnings in pounds for full-time employees living in the area

## **The current housing stock**

4.19 The housing stock in Ryedale comprises a significantly higher proportion of detached properties compared to the region (Table 4.11). Detached properties – of which there are around 9,400 – form the majority with a proportion (41.1%) almost double that of the region. There is a proportionally lower stock of all other property types. In particular terraced housing (around 4,400) and flats (around 1,600). This indicates a market which has a lower proportion of the types of property attainable to first time buyers, and those on average wages in the HMA.

**Table 4.11 Property type profile**

<b>Property Type</b>	<b>Ryedale (No.)</b>	<b>Ryedale (%)</b>	<b>Yorkshire &amp; Humber (%)</b>
All Occupied Household Spaces	22,765	100	100.0
In an Unshared Dwelling	22,752	99.9	99.7
House or Bungalow: Detached	9,360	41.1	20.2
House or Bungalow: Semi-detached	7,330	32.2	37.5
House or Bungalow: Terraced	4,373	19.2	29.1
Flat, Maisonette or Apartment	1,593	7.0	12.7
Caravan or Other Mobile or Temporary Structure	96	0.4	0.2
In a Shared Dwelling	13	0.1	0.3

Source: 2001 Census

- 4.20 Under-occupancy was an issue in the 2001 Census for the North Yorkshire sub-region was and in particular the more rural areas of Ryedale, where under-occupancy was highlighted as a severe issue. In 2005, Ryedale and Richmondshire had the lowest gas coverage, closely followed by the rural districts of Hambleton and Selby. In many case in Ryedale there are inconsistencies of very high and low gas coverage sitting cheek by jowl with each other.
- 4.21 SAP ratings provide an indication of the energy efficiency of homes. They take the form of an index of the annual cost of heating a dwelling to achieve a standard heating regime where 1 is the most inefficient and 100 is highly efficient. It is dependent on both heat loss from the dwelling and the performance of the heating system
- 4.22 Where the SAP rating of a property is below 30, around 30% of households are in fuel poverty, whilst fuel poverty is almost eliminated in houses which are energy efficient. Generally socially rented housing tends to be energy efficient and this has improved in recent years due to the government's decent homes policy targeting these houses as part of their fuel poverty strategy. The private rented

sector tends to include some of the worst housing conditions.

- 4.23 SAP ratings are not currently available for Ryedale, for the sub-region the levels were above the England average of 51.8 (2004)<sup>6</sup> Tenure
- 4.24 Owner occupation is the dominant tenure in Ryedale and, with around 69% of households owning or buying their own home, this represents a greater share than the regional average (just under 68%) (Table 4.12). There were 2,700 households who rented from a social landlord in 2001, representing 13% of households – significantly below the regional average of 21%.
- 4.25 Levels of private renting in Ryedale (14.0%) are significantly higher than the regional average of 9.1%. There is also a higher proportion of households living rent free (4.2%) compared to the region (2.3%) This may represent tied accommodation associated with agricultural employment and substantial Estate land ownership in Ryedale.

**Table 4.12 Tenure profile**

Tenure of household	Ryedale (No.)	Ryedale (%)	Yorkshire & Humber %
Owned	14,842	69.2	67.6
Social Rented	2,700	12.6	21.0
Private rented	3,000	14.0	9.1
Living rent free	909	4.2	2.3
Total	21,451	100	100

Source: 2001 Census.

### **Vacant dwellings**

- 4.26 Levels of vacant dwellings are a key indicator of the strength of the housing market. Vacancy data is always difficult to interpret, as there are frequent variations which are difficult to account for except by changes in the way

<sup>6</sup> DCLG English House Condition Survey 2004. Annual Report 2006

that data is collected. Table 4.13 shows the number of vacant dwellings in the Ryedale stock by broad tenure group.

**Table 4.13 Vacant dwellings 2003-2006**

Year ending April	Proportion of properties vacant (%)				Proportion of Private Sector properties vacant for more than 6 months (%)
	Social Rented	Other Public Sector	Private Sector	All housing	
2003	0.78	7.50	2.24	2.07	0.95
2004	0.49	7.50	2.36	2.14	1.36
2005	0.43	7.50	2.27	2.06	1.32
2006	0.54	10.00	2.38	2.18	1.39

Source: HSSA

4.27 The overall vacancy rate is low and although it has fluctuated, has remained below 3% since 2003. Vacancies in the social rented stock of well under 1% reflect the particularly high demand for this stock. Markets need a degree of frictional vacancies to operate effectively and the low vacancy rates, particularly in the social rented sector indicate an extremely tight market.

4.28 Data for vacancies is not readily available below local authority level, but ONS has recently published data on vacancy levels for Census wards which gives an indication of variations. Table 4.14 shows the results. This confirms a picture of low vacancy rates across all areas of the Ryedale HMA.

**Table 4.14 Vacancy rates by Census ward 2005**

Ward	Vacant dwellings		Long term vacant dwellings	
	Number	% of all dwellings	Number	% of all dwellings
Amotherby	18	2.2	6	0.7
Ampleforth	20	2.8	9	1.3
Cropton	7	1	3	0.4
Dales	22	2.9	13	1.7
Derwent	28	1.9	9	0.6
Helmsley	39	2.5	13	0.8
Hovingham	16	2	5	0.6
Kirkbymoorside	38	2.3	10	0.6
Malton	46	1.9	14	0.6
Norton East	19	1.2	5	0.3
Norton West	36	2.4	12	0.8
Pickering East	30	1.9	5	0.3
Pickering West	29	1.8	5	0.3
Rillington	13	1.6	1	0.1
Ryedale South West	13	1.9	4	0.6
Sherburn	14	1.7	5	0.6
Sheriff Hutton	11	1.5	4	0.5
Sinnington	14	1.8	4	0.5
Thornton Dale	26	1.7	5	0.3
Wolds	17	2.4	7	1
Ryedale	456	2	139	0.6

Source: ONS. Note: 'long term' refers to vacancies of 6 months or longer.

### **New dwelling supply**

4.29 Table 4.15 shows levels of new dwelling provision in Ryedale since 1998. The period shows an average of 97 completions a year with 95 of these private sector completions. The only RSL completions were in 1999/00 and 2002/03.

4.30 The table also shows an average annual provision of new affordable housing of around 16 units, nearly all of these being provided by social landlords. Compared to the overall level of demand and anticipated future demand and need set out in the subsequent sections this level is clearly insufficient to meet the need for affordable homes in the Ryedale HMA.

**Table 4.15 Dwelling completions**

Year	Completions				Affordable Units	
	Private Sector	Registered Social Landlords	Local Authority	All	LA/RSL	Private
1998/99	113	0	0	113	21	0
1999/00	102	13	0	115	24	0
2000/01	72	0	0	72	7	0
2001/02	61	0	0	61	14	0
2002/03	138	8	0	146	27	0
2003/04	109	0	0	109	21	0
2004/05	70	0	0	70	3	2
2005/06	79	0	0	79	11	1
2006/07	107	0	0	107	14	1
Average	95	2	0	97	16	0

Source: DCLG, HSSA returns

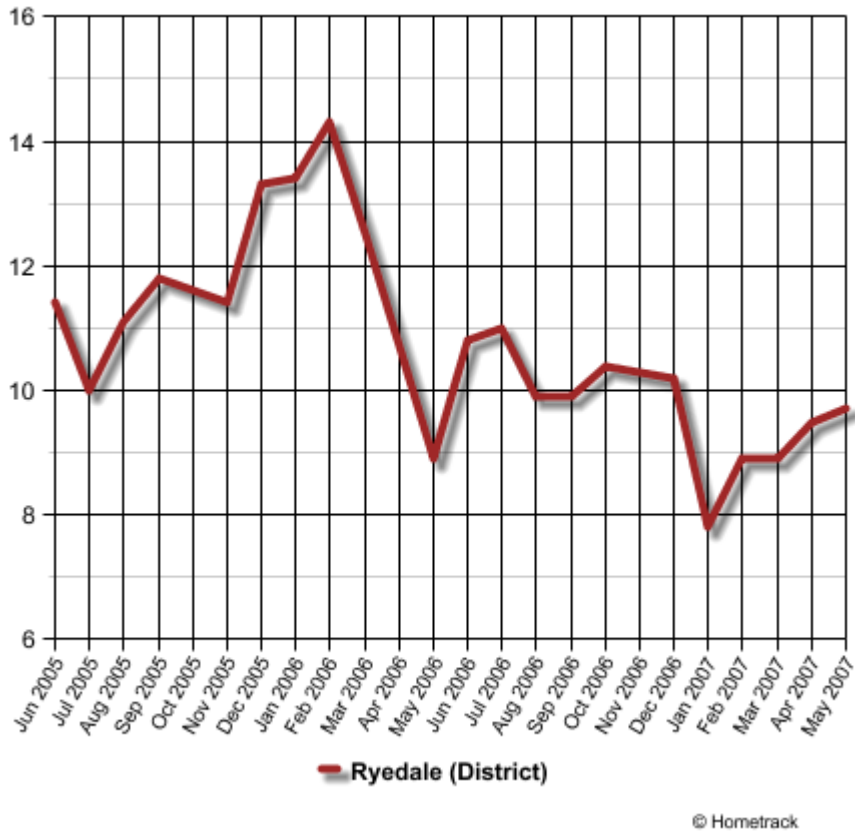
### Property sales and market prices

4.31 Residential property takes on average just under ten weeks to sell (as at May 2007).<sup>7</sup> The trend is shown in Figure 4.1 which shows some fluctuation in sale times. Despite a peak of over 14 weeks in February 2006 the overall trend has been of a reduction in the average time to sell a property.

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<sup>7</sup> Source: Hometrack.

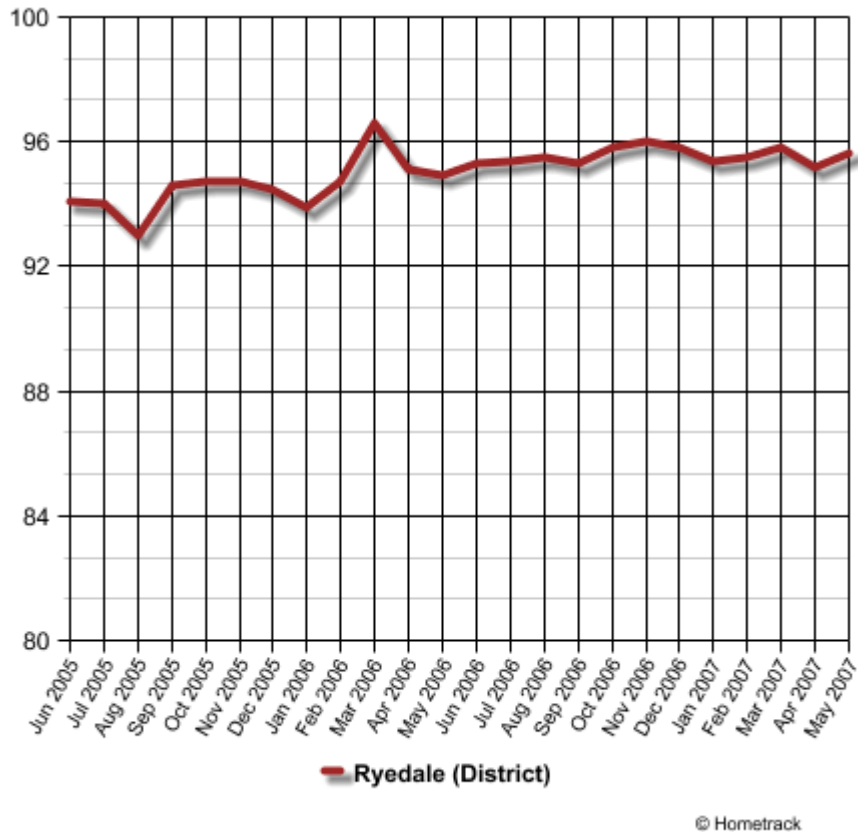
Figure 4.1 Average Time to Sell (weeks)



Source: Hometrack

4.32 An alternative measure of the strength of the local housing market is the average sale price to asking price ratio. At May 2007, this stood at just under 96% and whilst seasonal fluctuations can be discerned, the overall trend has been for an increase in this ratio, indicating the continued strength of the market.

Figure 4.2. Sale to Asking Price Ratio

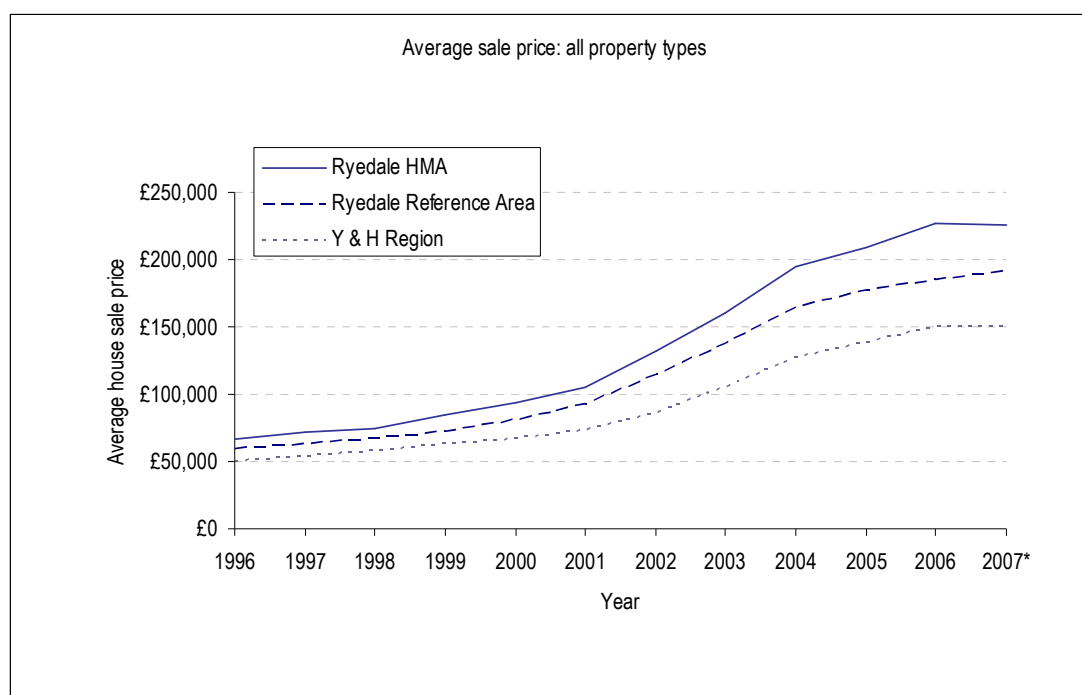


Source: Hometrack

4.33 The average sale price for properties in Ryedale continues to rise. However the substantial increases since 2001 have levelled off somewhat since 2006 (Figure 4.3). Prices are higher, and have risen faster than those for the wider reference area (which encompasses Ryedale, Scarborough and York) and for the region.

4.34 Ryedale is part of a high value North Yorkshire area as well as adjacent to other high value markets such as Hambleton and the rural East Riding. These markets are all higher than the average for the region. This means that not it is extremely difficult for those on lower or average incomes to meet their property aspirations in the market. This is compounded by the fact that within the Ryedale HMA there are no adjacent areas where lower house priced homes can be easily accessed.

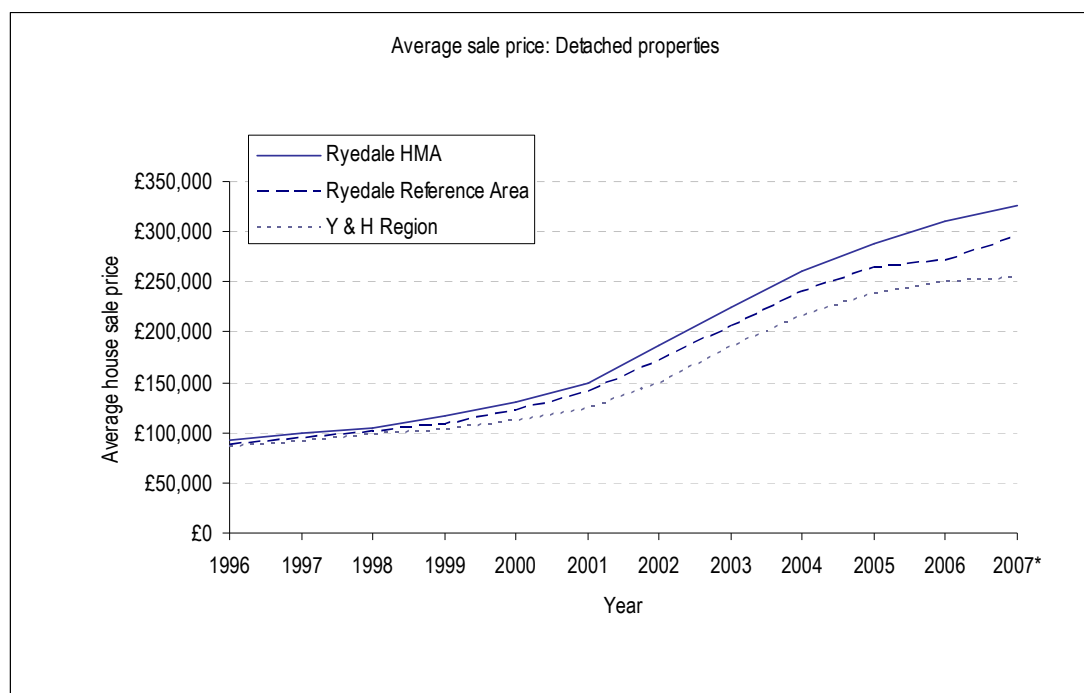
**Figure 4.3. Average sale price for all residential property sales 1996-2007\***



Note: \*2007 data are for Quarter 1 only and are provisional. Source: HMLR.

4.35 The average sale price of a residential property in the Ryedale HMA stands at just over £225,000 (Figure 4.3). Prices in the wider reference area are around £25,000 lower on average, but still commanding an average price of around £200,000, which is consistently higher than the regional average.

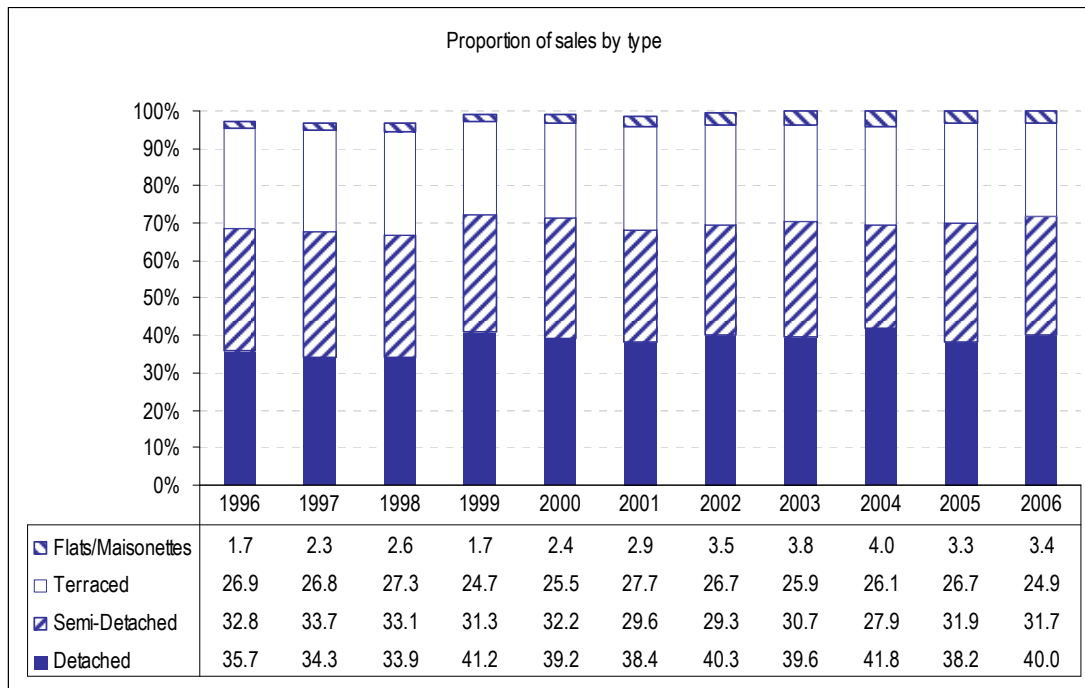
**Figure 4.4. Average sale price for detached houses 1996-2007\***



Note: \*2007 data are for Quarter 1 only and are provisional. Source: HMLR.

- 4.36 Figure 4.4 shows how prices for detached dwellings in Ryedale are more closely aligned with those in the wider reference area. This suggests that location is less of a factor for detached dwellings, where the property itself commands the premium.
- 4.37 Sales of detached homes make up the highest proportion of sales in the HMA comprising circa 40% of the sales market. There has been an increase in the proportion of detached sales from 1996 to 2006.
- 4.38 Flatted properties have accounted for a small but increasing proportion of residential property transactions to 2004 (Figure 4.5). Although flats as a proportion of the overall housing stock, has fallen slightly since 2004, the absolute sales of flats has doubled between 1996 and 2006.

**Figure 4.5. Proportion of sales by type**



Note: Columns do not always add to 100% because of sales of unknown type. Source data: HMLR.

### **Affordability**

- 4.39 In line with the national housing market, prices have risen substantially and affordability significantly worsened throughout the HMA, as it has in much of the region. The lower quartile affordability ratio has almost doubled from 5.3 to 10.0 between 1997 and 2006. This has been driven by house price increases in the order of 205% over the decade, compared to a 61% increase in lower quartile wages.
- 4.40 Lack of affordability is not a new issue for the HMA where even in 1997, the lower quartile affordability ratio was at a level where households would have had difficulty accessing a mortgage.

Table 4.16 Lower Quartile Affordability Ratio  
DCLG Ratio

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Lower Quartile House Price	48,000	49,000	52,375	56,000	64,000	76,875	97,000	128,500	138,000	146,625
Lower Quartile Income	9,108	10,124	11,486	11,915	11,985	12,855	14,969	14,787	13,982	14,707
Ratio	5.27	4.84	4.56	4.70	5.34	5.98	6.48	8.69	9.87	9.97

Source: DCLG

### **Summary of key points – Current Housing Market**

- Ryedale is a net exporter of labour with strong commuting links to adjacent housing markets.
- Population has shown steady growth driven by sustained levels of in migration to Ryedale.
- There is a large and increasing proportion of older people over 65 and a relatively low proportion of children and young people.
- A significant proportion of employees working within Ryedale are in occupations associated with relatively low wage levels. Overall wage levels for residents are lower than the regional and national averages.
- Over 40% of the stock comprises detached homes and a low proportion of terraced properties and flats.
- Overall demand is high with low vacancy levels and high house prices which have risen faster than the region.
- Affordability has significantly worsened with a lower quartile ratio of house prices to average wages of over 10.0 by 2006.

## 5. Future housing market

5.1 This section of the SHMA considers likely future trends in the housing market. Of course the impact that national policy or future macroeconomic conditions might have on the housing market, cannot be accurately predicted. However, an assessment can be made of the likely direction of change of local market economic and demographic drivers.

### Economic drivers

5.2 The North Yorkshire Strategic Economic Assessment (SEA) sets out that the wider North Yorkshire sub-region (including York) has enjoyed sustained economic growth over a long period, as has the UK generally. Over the next ten to fifteen years, the competitive pressures will increase as other major economies seek to increase their competitiveness in the light of increased pressure from the emerging economies of China and India.

5.3 York and North Yorkshire has experienced:

- Strong population and workforce growth;
- A marked increase in employment, both full and part time;
- A high level of business start ups and considerable number of active businesses ;
- Very low unemployment and low levels of multiple deprivation.

5.4 The Strategic Economic Assessment for York and North Yorkshire sets out that this very positive review needs careful interpretation, as below the headlines, there are a number of issues which will have consequences over the coming years. These are:

- A significant part of the increase in employment was from the public sector, and this may not be sustainable in the long run;
- A further major source of growth was from distribution, hotels and restaurants, and whilst welcome, this does not help to address the issue of low earnings;
- Full time jobs account for a smaller proportion of the total than in the region or England as a whole, and the

largest percentage change has been in male part time employment (although in absolute terms, the numbers are still relatively small);

- The growth and representation of banking, finance and insurance remains poor, and this sector is one of the key national drivers of economic growth
- There are considerable differences in performance across the sub region, with York, one of the national Science Cities, seeing faster economic growth than many other parts of the sub region.

5.5 The forecast data suggests that while York and North Yorkshire will continue to be successful, the sub region will experience lower levels of performance compared to national performance, and for some indicators the overall regional performance.

5.6 Therefore this will lead to a widening of the gap between the North Yorkshire sub region and the national position, as well as the other sub regions. This is because the other sub-regions possess a number of strong urban centres, which may perform more strongly than the North Yorkshire sub-region. In summary, the forecast suggests that York and North Yorkshire's time as the top performing sub region in Yorkshire and the Humber may be coming to an end.

### **Demographic drivers**

5.7 The population of the district is expected to grow by 7,200 persons between 2007 and 2029.<sup>8</sup>

5.8 The major part of this growth will be accounted for by the rise in the over-65 age group. Over 7,300 additional persons in this age bracket are projected by 2029 – higher than the overall population growth with falls projected for the 15 to 44 age bands.

5.9 ONS data on migration is reliant on NHS registration data and may not fully capture groups who tend not to register with a doctor, especially younger people. ONS are constrained to ensure that local migration estimates are

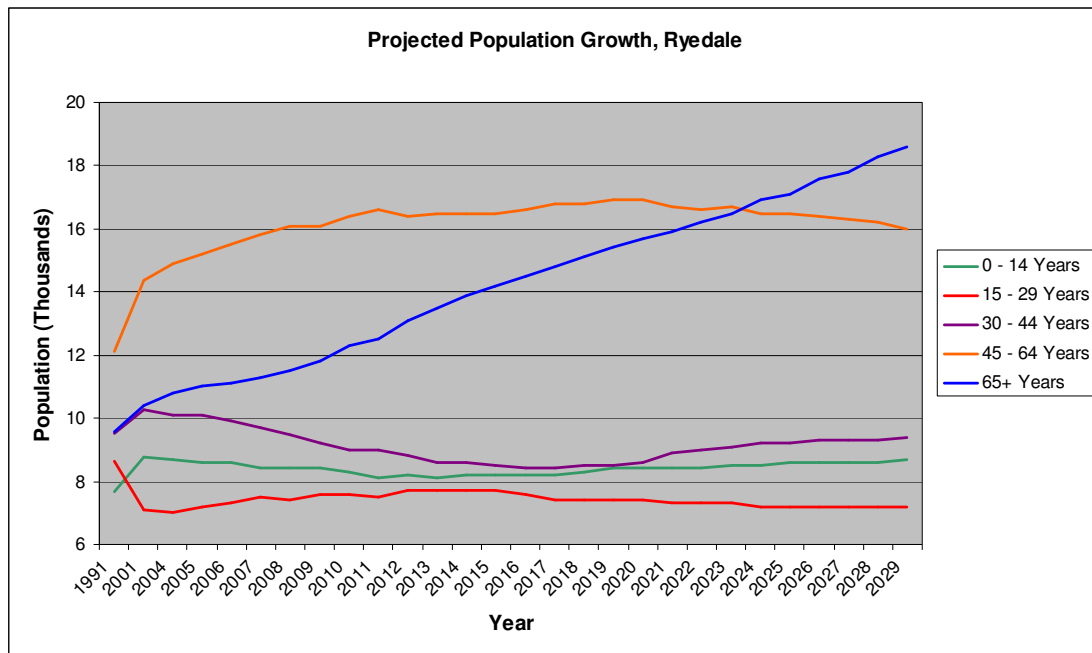
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<sup>8</sup> ONS: 2004 based sub national population projections.

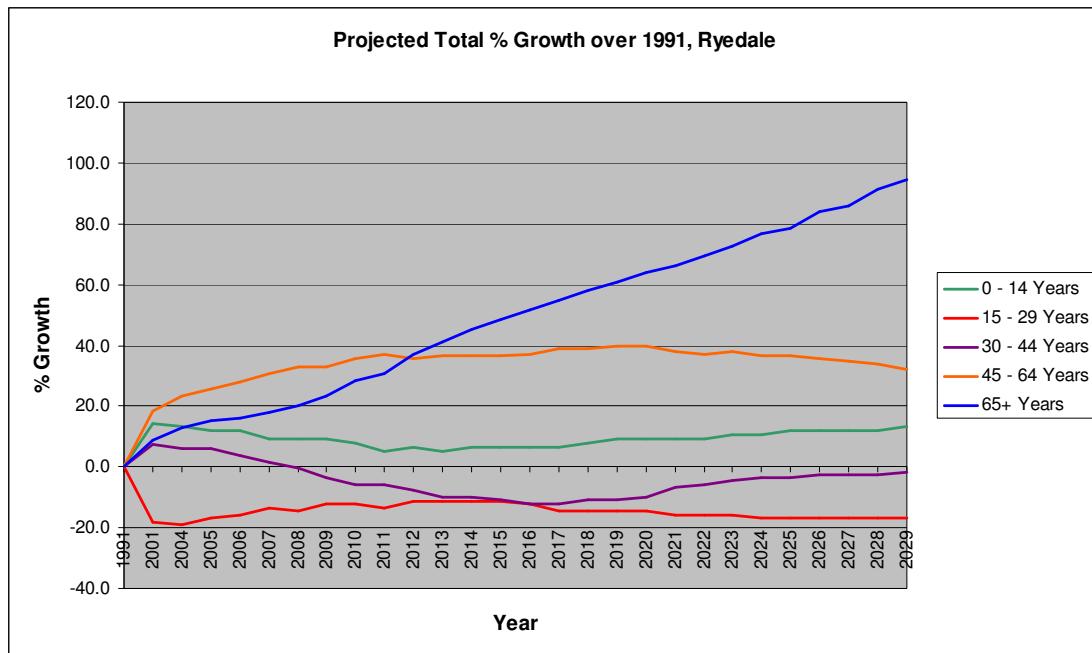
consistent with national totals, but these may not in themselves be accurate.

5.10 There has been a high level of in migration from abroad to the UK in recent years by asylum seekers and refugees, and more recently economic migration from the new EU accession countries such as Poland and Slovakia. While the ONS data reported above does seek to capture migration changes the figures reported above may not fully reflect recent change associated with migration of those groups least likely to register with a doctor. As an example there were 280 national insurance registrations in Ryedale in 2006-07, and 50% of these were from Poland.

**Figure 5.1 Projected population growth by age group**



**Figure 5.2 Projected population growth by age group expressed as percentage change since 1991**



5.11 Population projections are based on demographic and migratory trends that are apparent at the time that the projection is made. In this sense, although they do not take into account future changes in policy, they reflect the operation of current policy and market conditions. If there were to substantially change then the future robustness of projections becomes open to question.

5.12 Furthermore, fluctuations in the number of people occupying households, and its subsequent impact on the housing market, is also subject to variability. For this reason, household projections are even more sensitive to future policy and market changes than population projections. Demand is influenced by the market and, in particular, perceptions of supply, and this should be borne in mind when interpreting household projections.

5.13 Such projections form the principle basis for the assessment of likely future housing requirements in the region. To these projections further information are added on anticipated economic growth.

**Table 5.1. Household projections and RSS net housebuilding targets, 2008–2026.**

Area	2004 based household projections (revised Feb 08)					RSS Targets	
	Annual rate				Total 2008 - 26	Annual rate	Total 2006- 26
	2008- 2011	2011- 2016	2016- 2021	2021- 2026		2008- 2026	
Ryedale HMA	200	200	400	200	4,600	200	3,600
Ryedale Referenc e Area	2,000	2,000	1,800	1,800	34,000	1,610	28,980
Yorkshire & Humber Region	24,000	25,400	22,800	20,800	417,000	22,260	400,680

Sources: CLG; GOYH.

5.14 According to the most recent sub-national household projections<sup>9</sup> the Ryedale HMA can expect an additional 4,600 households in the period 2008–2026. The recommended net housebuilding target for the area, as published in RSS is less than this projection with 3,600 additional homes.

5.15 In the wider reference area for Ryedale there is also a shortfall between planned future housing provision and the expected additional households. This contrasts with the wider reference area, with Scarborough having higher levels of homes recommended in RSS than forecast households but York also having a substantial shortfall.

## **Migration**

5.16 Table 5.2 shows the components of projected population change for Ryedale over the period to 2029. Consequently, as with the population forecasts more generally, the forecasts show a continuation of past trends rather than the impact of policy. Population projections are based on demographic and migratory trends that are

<sup>9</sup> 2004-based Household Projections, revised February 2008 by CLG

apparent at the time that the projection is made.. As above, If they were to substantially change, then the future robustness of projections becomes open to question.

**Table 5.2. Components of projected population change (Thousands)**

Year	Population	Natural Change	Net internal migration	Net international migration	All Migration net
2005	52.7	-0.2	0.4	0.2	0.5
2006	53.0	-0.2	0.4	0.1	0.5
2007	53.3	-0.2	0.4	0.1	0.5
2008	53.6	-0.2	0.3	0.1	0.5
2009	53.9	-0.2	0.3	0.1	0.5
2014	55.6	-0.2	0.4	0.1	0.5
2019	57.4	-0.2	0.5	0.1	0.6
2024	59.4	-0.2	0.5	0.1	0.6
2029	61.0	-0.3	0.4	0.1	0.6

Source: ONS

**Table 5.3 Projected composition of the population**

Year	ALL AGES	0 - 14 Years	15 - 29 Years	30 - 44 Years	45 - 64 Years	65+ Years
1991	47,560	16.2	18.2	20.1	25.4	20.1
2001	50,872	17.2	14.0	20.2	28.2	20.4
2004	51,700	16.8	13.5	19.5	28.8	20.9
2005	52,100	16.5	13.8	19.4	29.2	21.1
2006	52,400	16.4	13.9	18.9	29.6	21.2
2007	52,700	15.9	14.2	18.4	30.0	21.4
2008	53,000	15.8	14.0	17.9	30.4	21.7
2009	53,200	15.8	14.3	17.3	30.3	22.2
2010	53,500	15.5	14.2	16.8	30.7	23.0
2011	53,800	15.1	13.9	16.7	30.9	23.2
2012	54,100	15.2	14.2	16.3	30.3	24.2
2013	54,400	14.9	14.2	15.8	30.3	24.8
2014	54,800	15.0	14.1	15.7	30.1	25.4
2015	55,100	14.9	14.0	15.4	29.9	25.8
2016	55,400	14.8	13.7	15.2	30.0	26.2
2017	55,800	14.7	13.3	15.1	30.1	26.5
2018	56,100	14.8	13.2	15.2	29.9	26.9
2019	56,500	14.9	13.1	15.0	29.9	27.3
2020	56,900	14.8	13.0	15.1	29.7	27.6
2021	57,300	14.7	12.7	15.5	29.1	27.7
2022	57,700	14.6	12.7	15.6	28.8	28.1
2023	58,000	14.7	12.6	15.7	28.8	28.4
2024	58,400	14.6	12.3	15.8	28.3	28.9
2025	58,700	14.7	12.3	15.7	28.1	29.1
2026	59,000	14.6	12.2	15.8	27.8	29.8
2027	59,300	14.5	12.1	15.7	27.5	30.0
2028	59,600	14.4	12.1	15.6	27.2	30.7
2029	59,900	14.5	12.0	15.7	26.7	31.1

Source: ONS

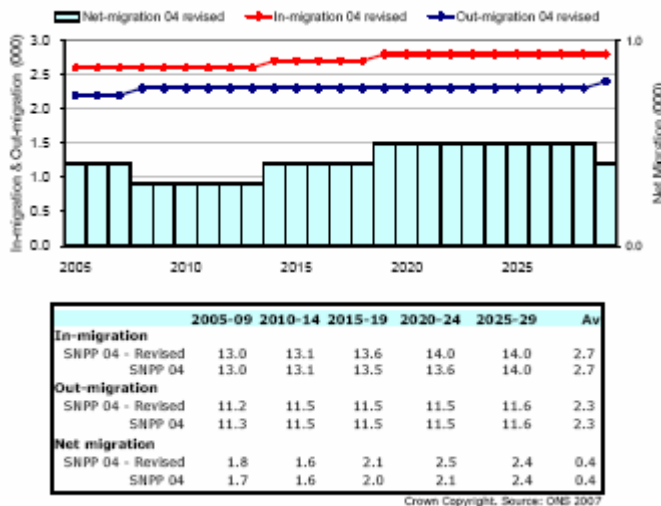
5.17 Internal migration is the predominant driver of projected population change in Ryedale. This applies throughout the period to 2029 with a positive net balance driven primarily by internal migration. International migration assumptions also indicate a small positive net impact each year. There is consistent negative natural change throughout the period - projected to increase in impact by 2029.

5.18 These are set out in the Migration Report<sup>10</sup> and illustrated in Figures 5.4 and 5.5.

<sup>10</sup> Analysis of Migration Trends and Drivers. Edge Analytics. Nov 2007

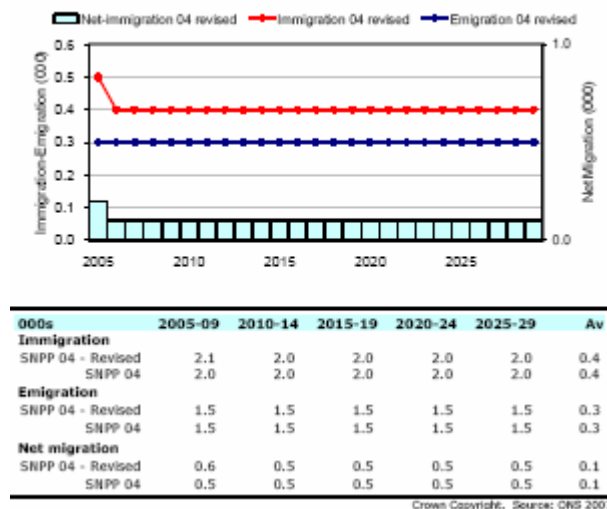
5.19 There is a significant ageing of the population with 31% of people over 65 by 2029 compared to 20% in 1991. While the proportion of children is projected to fall slightly the greatest falls are in the working age population with the 15 to 44 age bands comprising 38% of the population in 1991 and 28% by 2029. This changing demographic will have an impact on the housing market, with less working age households to support an aging population in terms of both supporting and delivering services.

Figure 5.4 ONS Internal migration assumptions



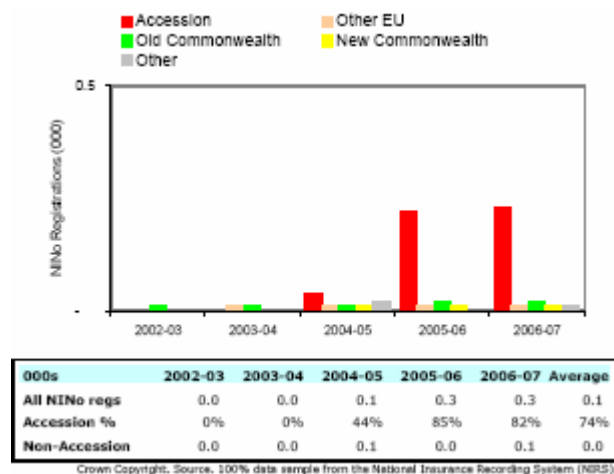
Source: Analysis of Migration Trends and Drivers. Edge Analytics. Nov 2007

Figure 5.5 ONS International migration assumptions



Source: Analysis of Migration Trends and Drivers. Edge Analytics. Nov 2007

Figure 5.6 Immigration based on National Insurance registrations (NINo)



5.20 Ryedale had one of the lowest number of National Insurance (NiNo) registrations in the sub-region (and indeed the region) for 2006 / 07. However of these 280 registrations, 82% were from EU accession countries and 50% were from Poland, representing a higher proportion of registrations from EU accession countries than for the wider sub-region. In the North Yorkshire sub-region 59% of registrations were from EU Accession Counties and 44% from Poland.

5.21 As illustrated in Figure 6.6 Ryedale had not experienced significant levels of international migration prior to 2004. The proportional impact of EU migration from 2004 is therefore a significant one for the HMA.

5.22 Similarly, the wider reference area has witnessed higher levels of NINo registrations from EU accession countries but the proportional impact on international migration levels has been less with 45% of registrations in York and 66% in Scarborough in 2006/07 from EU accession countries.

5.23 This breakdown of immigration, based on NINo data for Ryedale is shown in Figure 5.6.

## Households

5.24 Table 5.4 shows projections of future household numbers for the Ryedale HMA. This shows a 29.1% increase in the number of households over the period to 2029. The most significant change in the composition of households is in the projected increase in the proportion of one-person households, from 27.7% of all households in 2004 to 36.6% of households by 2029. There is a projected fall in the proportion of couples (married and cohabiting) from 62.7% of all households in 2004 to 53.9% in 2029.

5.25 Average household size is projected to decrease from 2.29 in 2004 to 2.05 by 2029.

**Table 5.4 DCLG 2004-based household projections 2004-2029 (Thousands)**

Household types:	2004	2006	2011	2016	2021	2026	2029	Change 2004- 2029	Annual average	% Change
married couple	11.9	11.9	11.9	12	12.1	12.1	12	0.1	0.0	0.8
cohabiting couple	1.9	2	2.4	2.7	3	3.2	3.3	1.4	0.1	73.7
lone parent	1	1	1.1	1.1	1.1	1.2	1.3	0.3	0.0	30.0
other multi-person	1.1	1.2	1.3	1.3	1.4	1.5	1.5	0.4	0.0	36.4
one person	6.1	6.4	7.1	7.9	8.9	9.8	10.4	4.3	0.2	70.5
All households	22	22.5	23.8	25.1	26.5	27.7	28.4	6.4	0.3	29.1
Private household population	50.4	51.1	52.5	54	55.8	57.5	58.3	7.9	0.3	15.7
Average household size	2.289	2.268	2.208	2.153	2.111	2.073	2.052			

Source: DCLG

### **Local investment impacting on future housing markets**

5.26 Investment in York is likely to have a significant impact on the Ryedale housing market. York has seen a steady increase in the number of employee jobs and the most active sectors in the economy continue to be those linked with strong employment growth.

5.27 Substantial employment growth is projected for York with the City setting out plans for growth generating circa 19,000 new jobs to 2021: or just below 1,000 new jobs per year.

## **Summary of key points – Future housing market**

- The population is projected to increase with older age groups showing the most significant increase. The growth in the over 65 age group is projected to be greater than the overall population increase.
- The number of households is also projected to grow and by a higher number than the net housebuilding target for Ryedale set out in the RSS (May 2008).
- Internal migration is the primary driver of the projected population change.
- Although numbers remain small the proportional impact of international migration from EU accession countries is significant.
- There is a projected increase in one person households to be 37% of all households by 2029.

## 6. Housing need

6.1 A Housing Needs Assessment for Ryedale was completed by David Cumberland Housing and Regeneration in late 2007. This included a household survey of need.

### Current and newly arising need

6.2 The Housing Needs Assessment identified an annual shortfall of 292 affordable homes a year. Existing households in housing need (or the backlog need for homes) comprises just over half of this at 186 households.

6.3 There are 113 newly forming households each year who are unable to access the market, 21 households falling into need each year and newly arising need generated by 51 households per year who are in migrants to Ryedale. These are set out in figure 6.1.

**Figure 6.1** Breakdown of households requiring affordable housing

<b>Affordable need from:</b>	<b>Total</b>	<b>% of Need</b>
Existing households in need (backlog)	186	50.1
Newly-forming households	113	30.5
Existing households falling into need	21	5.7
In-migrants requiring affordable accommodation	51	13.7
<b>Gross annual requirement</b>	<b>371</b>	<b>100</b>
Affordable supply	96	
Overall annual shortfall (after adjusting for supply/demand variations)*	292	

Source Ryedale District HNA (Nov 2007)

6.4 The housing needs survey indicated that 67% of households in need had a preference for a social rented home rather than an intermediate product. There was also a strong preference for houses rather than bungalows or flats.

### Supply to meet needs

6.5 The Housing Needs Assessment follows the CLG methodology in calculating levels of affordable housing

supply to offset need. The study sets out a supply of 398 homes per year.

- 6.6 Comparing this to the backlog need and newly arising need each year gives an annual affordable housing requirement of 292 homes per year.
- 6.7 Table 6.1 sets out affordable homes delivered by grant funding from 2004/05.

**Table 6.1 Housing Corporation National Affordable Housing Programme (NAHP) outturn and allocations 2004/5–2007/8**

	Completed		On site	Allocation	
	2004/05	2005/06	2005/06	2006/07	2007/08
Total units for rent	18	12	42	17	40
Total units for sale	0	0	0	15	8

Source: Housing Corporation Regional Investment Statement.

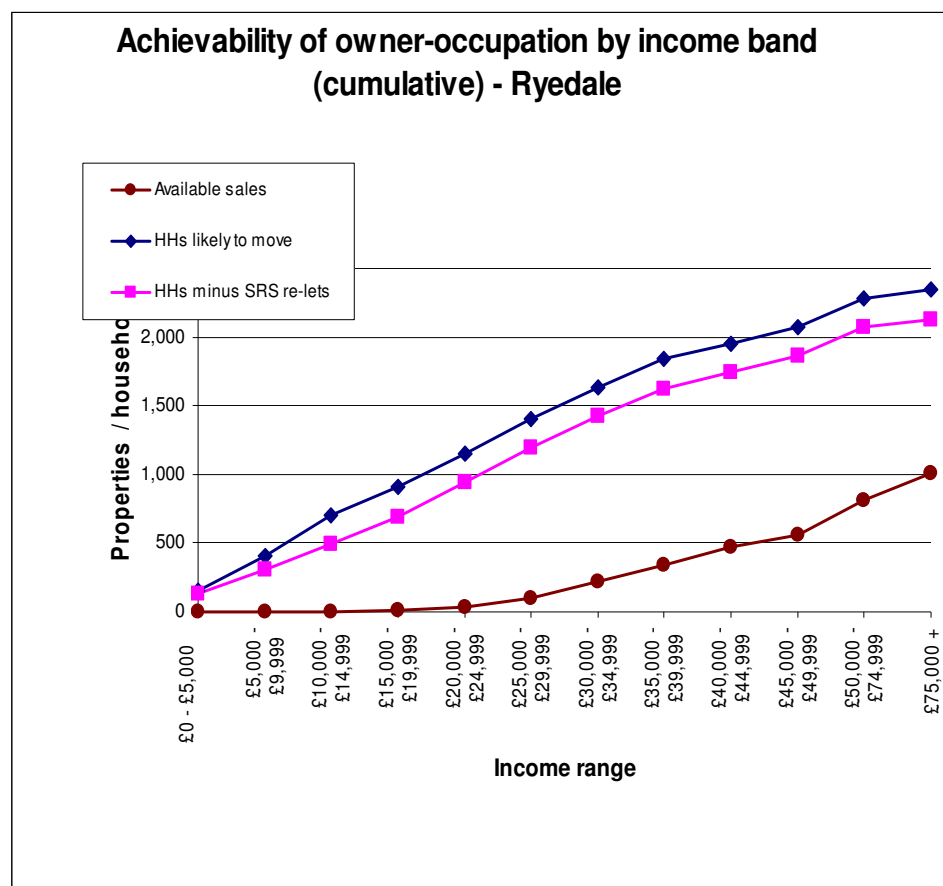
- 6.8 Clearly there is a difference between the number of homes being delivered via the NAHP and the requirement identified by the needs assessment of an annual shortfall of 292 homes. This indicates a need to deliver significant levels of affordable housing from alternative programmes, primarily through S.106 planning obligations.

### **Market housing and affordability**

- 6.9 In order to provide a degree of comparability across the region, we have also prepared a set of estimates of the gap between local house prices and their 'achievability' on the basis of local incomes. This analysis is not intended to replace local estimates and calculations of affordable housing need. It does, however, provide a method of consistent comparison of the potential scale of the affordability gap compared to other HMAs in the region. Figure 6.2 shows that there is a clear gap between the potential demands of households in the HMA and the profile of properties available to them. Cumulatively, this equates to a gap of around 1,112 properties in 2006 – or

more if the capacity of social housing relets to absorb some of this gap is not taken into account.

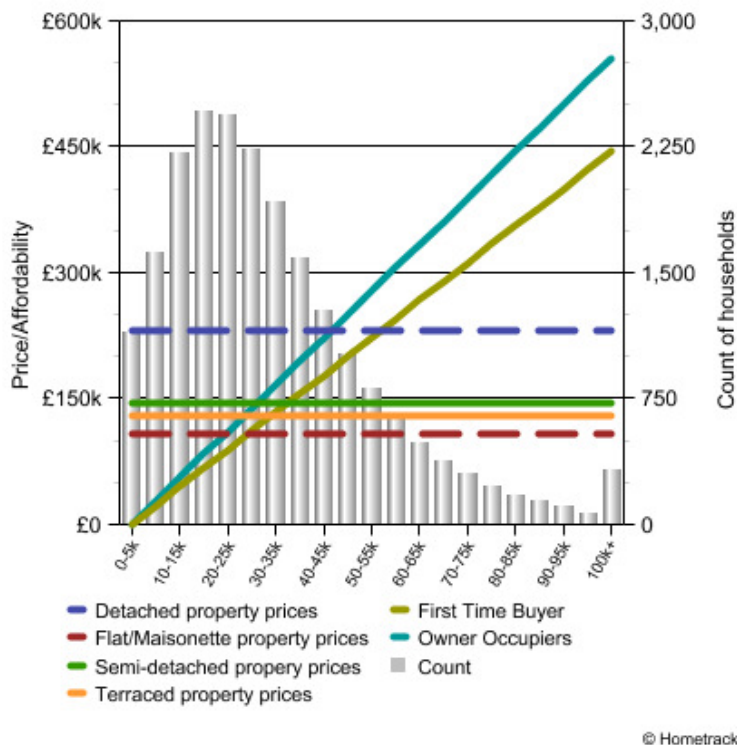
Figure 6.2 Estimates of achievability of owner occupation



Income band	£0 - £5,000	£5,000 - £9,999	£10,000 - £14,999	£15,000 - £19,999	£20,000 - £24,999	£25,000 - £29,999	£30,000 - £34,999	£35,000 - £39,999	£40,000 - £44,999	£45,000 - £49,999	£50,000 - £74,999	£75,000 +
Properties for sale at 4x income	0	0	4	7	27	61	116	126	126	94	255	192
No of households likely to move	153	253	296	204	243	255	232	202	118	115	208	62
No of households minus SRS	128	182	181	204	243	255	232	202	118	115	208	62
Difference	128	182	177	197	216	194	116	76	-8	21	-47	-130
Cumulative difference	128	310	487	684	900	1094	1210	1286	1278	1299	1252	1122
Rank of difference	6	4	5	2	1	3	7	8	10	9	11	12

6.10 Hometrack's model, based on an affordability threshold of 4.0x income, suggests that First Time Buyer households need to be in the £30-35k (gross) income bracket or above to afford the average terraced house, or the £50-55k (gross) income bracket to afford the average detached property (see Figure ). This highlights the premium attracted by detached properties in the HMA – which make up circa 40% of property sales.

Figure 6.3 Affordability by income bands



Source: Hometrack

### Summary of key points – Housing Need

- An income of £30,000 to £35,000 per year would be needed for a first time buyer to purchase a terraced home within the Ryedale HMA.
- The Housing Needs Assessment identifies a need for 292 affordable homes a year.
- The number of affordable homes delivered via grant funding is well below the affordable homes requirement indicating a need to provide the majority of new affordable homes via the private sector.

## **7. Housing Requirements of Specific Household Groups**

7.1 The Practice Guidance sets out a number of reasons as to why it may be appropriate for each Strategic Housing Market Assessment to consider information about the housing requirements of specific household groups, namely:

- The Race and Equality Act requires Government and local authorities to assess the impact of their policies on different ethnic and minority groups, and the 2005 Disabilities legislation requires Government and local authorities to assess the impact of their policies on people with disabilities. Partnerships should ensure that no one group is systematically excluded from the assessment;
- Particular groups and gender types may exert considerable influences within the housing market area that need to be better understood and planned for (e.g. families, older people, key workers, first time buyers);
- Particular groups and gender types may be ill-suited to their dwelling type over the longer term (e.g. families with children and older people living in the private rented sector with insecurity of tenure); and
- Partnerships may wish to obtain evidence about the number of households eligible for intermediate affordable housing.

7.2 The Practice Guidance suggests that these are most relevant for those areas where there may be concerns about the housing requirements of specific groups or good reason to believe that there are needs that significantly differ to the general population.

7.3 The guidance does not set out a step by step approach and suggests that each housing market partnership will need to select appropriate analyses. Given the status of this SHMA as part of a suite of comparative regional reports the approach taken here is to highlight differences in profile from the regional picture for each housing market area. More detailed research may be required to examine particular requirements on a housing market area by housing market area basis, as the issues will differ

regarding family housing or minority ethnic needs for example.

## Families

7.4 The census can provide data on household type. As shown in Table 7.1 there is a lower proportion of households with children than the region as a whole. However there is a slightly higher proportion of couples with adult children at home indicating restricted access to the housing market for young adults.

**Table 7.1 proportion of households with dependent and non-dependent children**

Area	couple or other with dependent child(ren) %	couple with non-dependent child(ren) %	lone parent with dependent children %	lone parent with non dependent child (ren) %
Ryedale	21.82	6.55	3.89	2.61
Yorkshire and Humber	23.34	6.43	6.57	2.87

7.5 Applying the household projections of an additional 4,000 households in Ryedale (2004 to 2021) to the Census 2001 figures for singles, couples and lone parents would indicate that 1,028 of these additional households would be families with children 15 and under.

## Older People

7.6 The Census 2001 data indicates a higher proportion of pensioner households in Ryedale than for the region as a whole. In Ryedale 29.3% of households comprise pensioners only. This compares to 24.4% for the region. Of the total households at the census 16.0% were single pensioner households and 13.3% other pensioner households.

7.7 Population projections indicate that over 7,300 additional people in the over-65 age group are projected by 2029. Applying the household projections to the Census 2001 figures for older people would indicate that of the

additional households 1,172 would be pensioner households.

### **Minority and hard to reach households**

- 7.8 Ryedale has a lower proportion of minority ethnic households than the region as a whole with 99.3% of the population classed as white at the 2001 census compared to 93.5% for the region.
- 7.9 The largest minority ethnic group was those classed as Mixed, although again at 0.3% the proportion of the population classifying themselves as Mixed in 2001 was significantly lower than for the region (0.9%). The next largest proportion was Chinese people who at 0.2% represented the same proportion as for the region. The proportion of Asian people was 0.1% as was the proportion of people classifying themselves as Black.
- 7.10 International migration from EU accession countries, while representing relatively small numbers, has had an impact on the ethnic make up of the population of Ryedale. The 2001 census figures represent less than 900 people who in 2001 did not classify themselves as White British or White Irish. There were just over 500 people classified as White Other and 340 people in non-white ethnic groups. Since 2004 there have been 700 National Insurance registrations with an average of 74% per year from EU Accession Countries.
- 7.11 The Practice Guidance sets out other groups that may be considered hard-to-reach including homeless households, private renters and households in shared accommodation or non-brick and mortar accommodation. The Guidance recommends additional qualitative work to examine in more detail the requirements of these groups, and though not covered here, is something that could be added to this housing market assessment in future.

7.12 These SHMAs do not address the accommodation needs of Gypsies and Travellers however the new RSS (policy H5) does require the completion of Gypsy and Traveller Accommodation Assessments (GTAA). In North Yorkshire a GTAA is currently underway for the County area and is expected to report in the summer.

### **Households with specific needs**

7.13 The Practice Guidance recognises that housing may need to be purpose built, or adapted, to meet the requirements of those with specific needs. The guidance also recognises that it is difficult to estimate the number of people who will need specific adaptations in the home.

7.14 In line with the Guidance for this Strategic Housing Market Assessment we have examined data on the number of people with long-term limiting illness (LLTI) and those eligible for Disability Living Allowance (for care and /or mobility). This helps to identify differences in profile between Housing Market Area, but it is important to remember that not all these households will require adaptations, and conversely there may be other people with disabilities requiring adaptations who are not captured via this data.

7.15 There has been a significant increase in the number of those eligible for Disability Living Allowance in Ryedale and in the number of people who have claimed this benefit for over five years. At May 2007 there were 1,670 people eligible for Disability Living Allowance (this compares to 1,340 in 2002). The rate of increase in the number of eligible people between 2002 and 2007 is 24.6% and the second highest in the region.

7.16 Census data indicates a lower proportion of people in Ryedale with a long-term limiting illness (LLTI) than for the region as a whole with 16.8% of the household population recording a LLTI compared to 19.5% for Yorkshire and Humber. This is in line with the wider reference area

(although levels are higher in Scarborough) with the lowest levels of LLTI in the region recorded in North Yorkshire.

- 7.17 Although the proportion of those with a LLTI at the census is relatively low the figures for DLA indicate that there will be an increasing need for specialist and supported housing within the HMA.

### **Low Cost Market and Intermediate Affordable Housing**

- 7.18 The approach set out in this section gives an indication of households who are unable to access market housing. It is intended as a tool that can be used for comparison across the region. The information set out in section six is specifically not intended to be used to contradict local analysis which may be more detailed and hence, where available, should be given precedence to the figures presented in this SHMA.

### **Summary of key points – different market segments and type and size of homes needed**

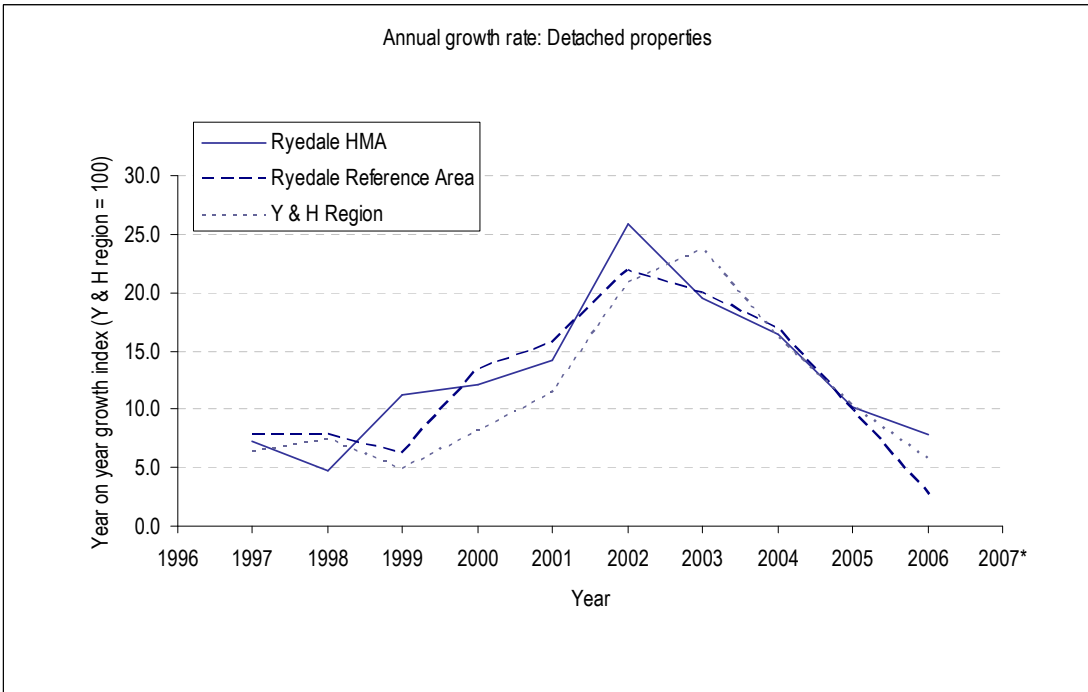
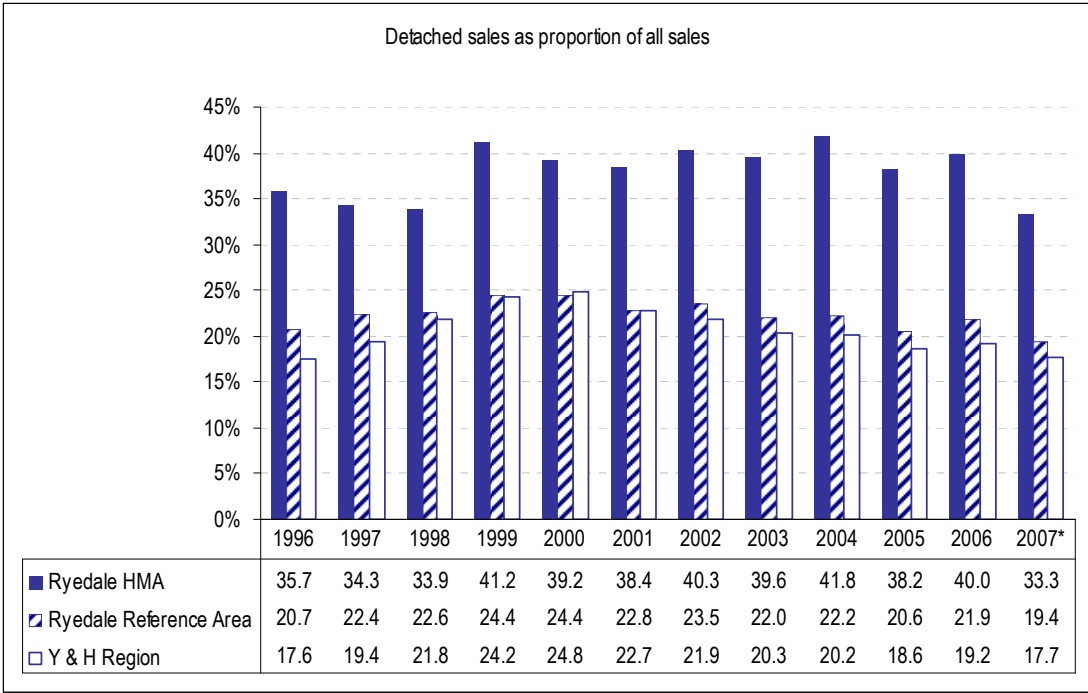
- There is a relatively small BME population
- The proportion of families is lower than for the region as a whole but there are a higher proportion of households with non-dependant children.
- There has been a relatively significant increase in those eligible for Disability Living Allowance.
- There is a significant and growing older population. This may indicate a future need for specialist accommodation. Combined with a decline in the working age population and difficulty accessing the housing market for those in lower paid personal care occupations, there may impact on the delivery of services to support older people, whether within their existing homes or in specialist accommodation.

## 8. Conclusions

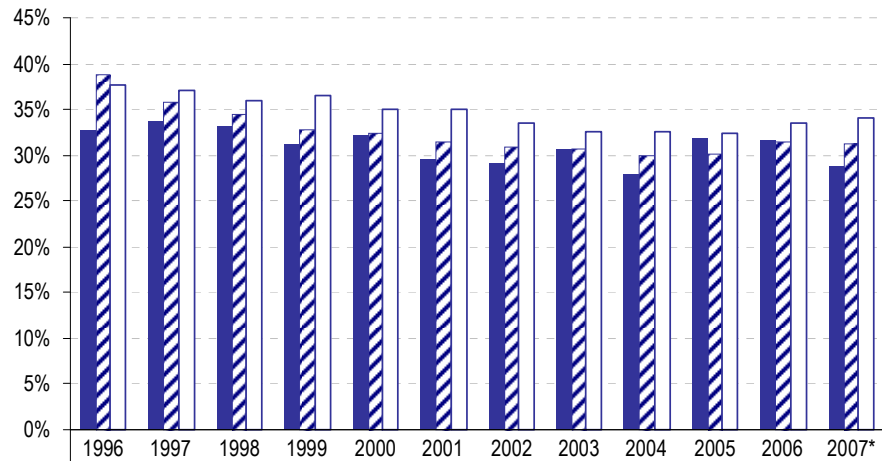
- 8.1 The housing market in Ryedale can be characterised by extreme high demand, a feature reflected in its position as the third most expensive district in the region (after Harrogate and Hambleton).
- 8.2 The availability of social rented stock in the district is limited by its historical size and by the lack of turnover, itself a reflection of high prices.
- 8.3 As in migration from higher income groups continues to place increasing pressure on affordability the current delivery of affordable housing, and the target set out in RSS are significantly below that needed to accommodate need for affordable housing.
- 8.4 Employment within the district tends to be less well-paid and this creates a significant problem for local people seeking to find affordable housing and is compounded by the high house prices mentioned above. This scenario makes measures to secure and maximise the provision of affordable housing crucial.
- 8.5 For the future the ageing of the population will have a significant impact on this SHMA. The growth in older people, combined with a projected fall in the working age population, means there will be pressure on service delivery particularly in remoter rural areas. This will have policy implications for the development and delivery of housing and related services for older people including adaptations, support services and appropriate provision of sheltered or extra care homes.



## **Appendix 1    Additional data tables and charts**

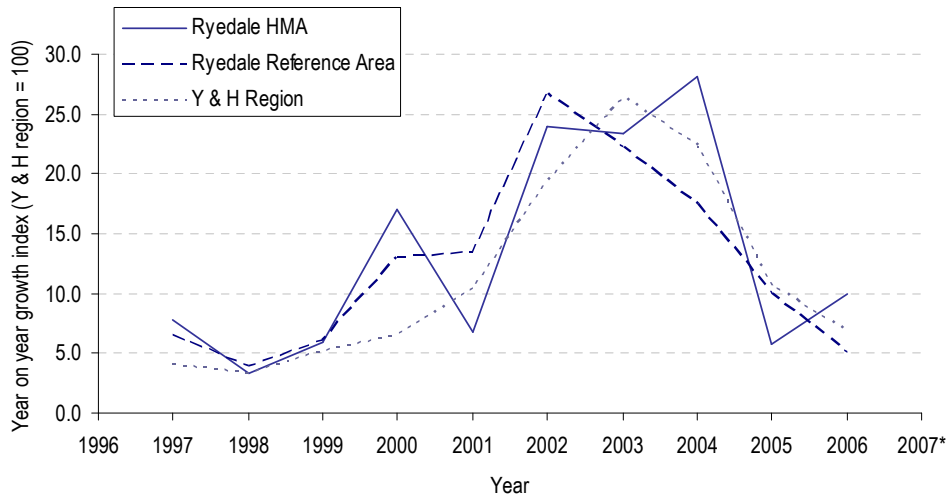


Semi-Detached sales as proportion of all sales

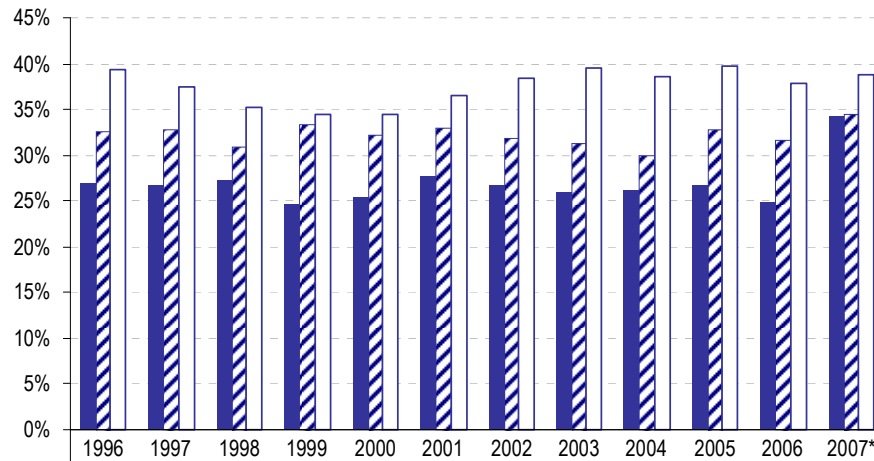


■ Ryedale HMA	32.8	33.7	33.1	31.3	32.2	29.6	29.3	30.7	27.9	31.9	31.7	28.9
▨ Ryedale Reference Area	38.8	35.8	34.4	32.8	32.4	31.4	30.8	30.7	29.9	30.2	31.4	31.3
□ Y & H Region	37.7	37.1	35.9	36.4	35.1	35.0	33.5	32.6	32.7	32.3	33.5	34.1

Annual growth rate: Semi-Detached properties

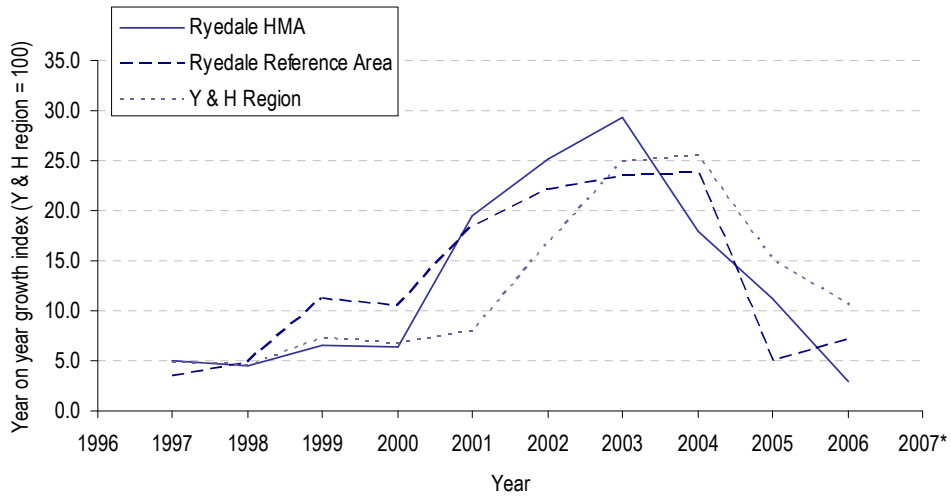


Terraced sales as proportion of all sales

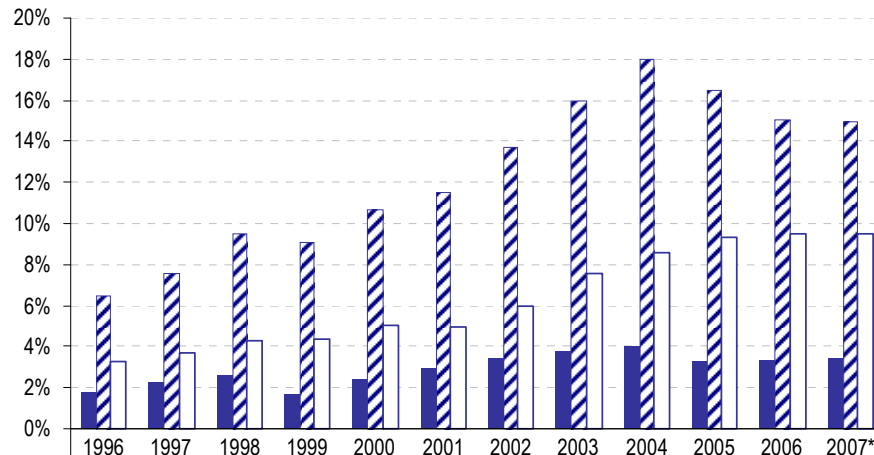


■ Ryedale HMA	26.9	26.8	27.3	24.7	25.5	27.7	26.7	25.9	26.1	26.7	24.9	34.3
▨ Ryedale Reference Area	32.6	32.7	30.8	33.3	32.2	33.0	31.9	31.3	29.9	32.7	31.7	34.4
□ Y & H Region	39.3	37.5	35.1	34.5	34.5	36.6	38.4	39.5	38.6	39.8	37.8	38.8

Annual growth rate: Terraced properties



Flat/Maisonette sales as proportion of all sales



■ Ryedale HMA	1.7	2.3	2.6	1.7	2.4	2.9	3.5	3.8	4.0	3.3	3.4	3.5
▨ Ryedale Reference Area	6.5	7.5	9.5	9.1	10.7	11.5	13.7	16.0	18.0	16.5	15.1	14.9
□ Y & H Region	3.3	3.7	4.3	4.4	5.1	4.9	6.0	7.6	8.6	9.3	9.5	9.5

Annual growth rate: Flats/Maisonettes

