

New Deal for Communities

The National Evaluation

Research Reports

Understanding Housing Market Change in NDC Areas

Research Report 61

The Neighbourhood Renewal Unit within the Office of the Deputy Prime Minister is currently sponsoring the 2002-2005 national evaluation of New Deal for Communities. This evaluation is being undertaken by a consortium of organisations co-ordinated by the Centre for Regional Economic and Social Research at Sheffield Hallam University. The views expressed in this report do not necessarily reflect those of the NRU/ODPM.

Those wishing to know more about the evaluation should consult the evaluation's web site in the first instance
<http://ndcevaluation.adc.shu.ac.uk/ndcevaluation/h>



*Sheffield
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Understanding Housing Market Change in NDC Areas

Research Report 61

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Executive Summary

This report from the Housing and Physical Environment Team of the NDC National Evaluation examines housing market change in NDC areas with particular attention focusing on identifying drivers of change. As such, it represents the third in a trilogy of reports produced by the team on the key theme of low demand and housing market change.

The emergence of the twin problems of 'low demand' in the North and Midlands of the country and affordability, in many parts of the country, but primarily the South-east, has increasingly focused attention on the workings of housing markets, and housing market change in particular.

The research comprised three key stages: a review of house-price change in NDC areas; a telephone survey of a representative sample of Partnerships; and four in-depth case studies: Aston, Sheffield, Tower Hamlets and Oldham.

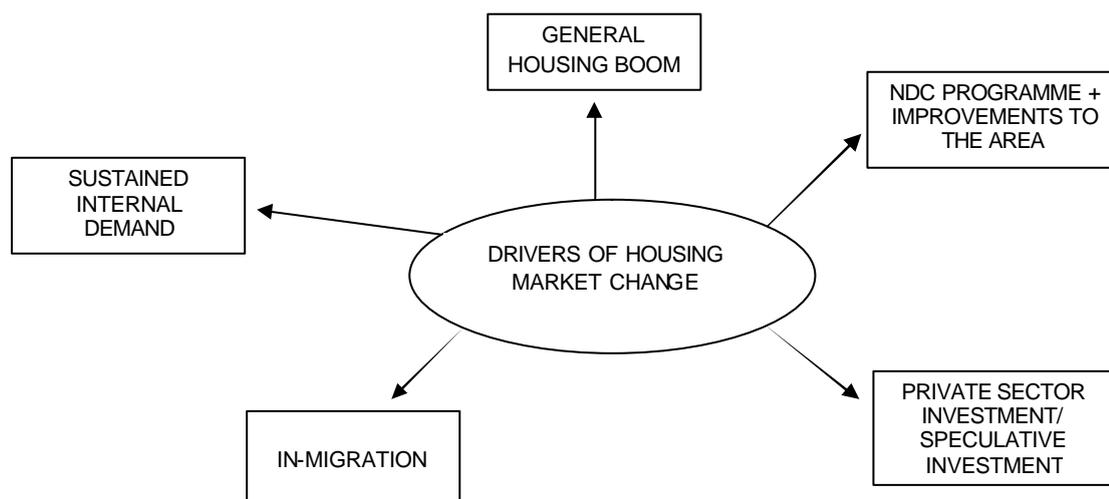
House-price data supplied by the Land Registry revealed that house-prices in all but two NDC areas grew between 2001 and 2003.

However, the 'performance' of NDC areas relative to the broader housing market within which they are located varies. 23 NDC areas 'out-performed' their respective wider local authority area, with Newcastle NDC enjoying the highest relative growth rate: 115%.

Relatively few NDC officers were fully aware of house-price changes in their area. Very few of the NDCs surveyed reported having put in place specific systems to monitor housing market change. Over half of NDC officers from the 21 Partnerships who took part in this study reported that they relied on 'gut instinct' or anecdotal evidence, often provided by other agencies, to compile a picture of the local housing market.

The housing markets of a number of NDCs appear to be highly segmented.

The study team identified a number of key drivers of housing market change in NDC areas. These are highlighted in the figure below:



Just over half - eleven - of the 21 NDC partnerships who participated in the study, including the four case study areas, thought that the NDC programme and general improvements to the area were a significant driving force behind housing market change. However, some respondents were concerned that the NDC programme in isolation could do relatively little to affect housing

market change. Most respondents felt that demolition programmes were having a positive impact on housing market change.

Respondents in each of the 21 Partnerships surveyed believed that one of the principal contributory factors driving local housing market change in the area was the 'general housing boom' that the UK had experienced in the last five years. Respondents from twelve NDC areas reported that the location of their area made it ideally placed to benefit from any general rise in the market. Locational advantages identified by respondents included being close to the city centre, 'good' schools, and major employers, and good transport links.

Respondents in 14 NDC areas reported that investment by private landlords and 'speculative' investment was driving housing market change in their areas. Investment took two principal forms: landlord's up-grading of their existing properties in NDC areas; and the purchase of new properties by landlords and investors, often for 'speculative' investment reasons.

Local private landlords were reported to be the main speculative investors, although in some areas larger national companies were also buying-up properties, and the purchasing of property by 'ordinary members of the public' was a feature in all markets. Speculative investors appeared to be attracted to NDC areas for two inter-linked reasons: the promise of relatively high and stable rental incomes; and sustained and rapid high-price growth. In a number of Partnerships, significant 'buy-to-let' investment appeared to have had a significant impact on the local housing market. Speculative investment was perceived by many respondents as having a negative impact on the housing markets it happened in. For example, it was perceived as driving up the cost of regeneration and making the renewal process more problematic.

A number of respondents felt that the desire of core communities within their areas to 'stay-put' was helping to sustain demand for the area, thereby boosting the local housing market. Respondents in all four case studies could identify 'committed' communities within their areas that were helping to sustain the local area and housing market. In three of our case study areas - Aston, Sheffield, Tower Hamlets - ethnic minority groups were identified as displaying a particularly strong commitment to their local area. Although several reasons were offered by respondents in these areas to explain the 'commitment' of BME groups two re-occurred: the desire of many ethnic minority groups to remain close to their families; and linked to this, the existence of excellent support, network and faith structures in these areas.

However, it should be noted that the immobility of some NDC residents should not necessarily be taken as a reflection of their commitment to their area: a number of respondents observed that many were anxious to leave their areas but were unable to do so, mainly because they could not afford to purchase a home in more expensive neighbouring markets. As such, they were effectively 'trapped' within areas. However, rising house prices provides 'trapped' residents with an opportunity to sell their homes.

A number of NDC officers reported that the increased movement of households into their area was contributing positively to local housing demand and housing market growth. According to respondents, incomers were attracted by a bundle of factors including the relatively low house-prices in many NDC areas and positive change in NDC areas, and on the back of this, the prospects of equity growth.

The study team identified a number of key lessons for NDC Partnerships, policy makers and practitioners: These included:

- A number of NDCs, many of whom have set themselves the goal of increasing house-prices within their areas, have enjoyed rapid house-price growth in recent years. However, if this trend is not accompanied by a similar growth in household income levels, this may create affordability problems in some areas as would-be local home-owners become

effectively 'priced-out' of the local housing market. NDC Partnerships and local agencies therefore need to think imaginatively about how they might prevent this from happening.

- The diversity of many housing NDC markets presents Partnerships with a number of problems, not least how to develop a cohesive market strategy for the area as a whole.
- Partnerships need to think carefully about how (if it all) they can manage 'speculative' investment. They should be aware of the negative impacts it can have on the local housing market. They should also be aware that at any time speculative investors may choose to disinvest from the housing market: this may have a significant deflationary affect on house prices.
- Future housing market growth in NDC areas will be very much dependent on the ability of Partnership's to attract new residents. Thus, the marketing strategies they employ will be of vital importance in achieving this, and an important weapon in counter-acting commonly held negative views about NDC areas.
- Partnerships need to put in place systems to track and monitor market change in their areas. If they lack the time and resources to undertake the comprehensive approach to housing market analysis outlined in the recent ODPM publication, Housing Market Assessment Manual (ODPM, 2004), they should focus on tracking key headline indicators such as house-prices, turnover, and void rates. The study team identified a number of useful data sources and analytical frameworks to help Partnerships do this.
- Partnerships in Housing Market Renewal areas should work closely with Pathfinders, although in most of the Partnerships we visited this already appeared to be the case.

Introduction

This report from the Housing and Physical Environment Team of the NDC National Evaluation examines housing market change in NDC areas with particular attention focusing on identifying drivers of change. As such, it represents the third in a trilogy of reports produced by the team on the key theme of low demand and housing market change.

In year one of the National Evaluation attention focused on NDCs' strategies for low demand and a research report was produced on the issue entitled, *Research Report 19: A Review of NDC Strategies for Tackling Low Demand and Unpopular Housing* (Cole et al, 2003). In year two, attention turned to the involvement of respondents in responses to low demand, and the key findings to emerge from this study were presented in the research report, *Research Report 40: The Involvement of NDC Residents in the Formulation of Strategies to Tackle Low Demand and Unpopular Housing* (Cole et al, 2004). A copy of both reports can be obtained from the following website: <http://ndcevaluation.adc.shu.ac.uk/ndcevaluation/Reports.asp>.

The report is divided into four sections. The first provides a brief policy context to the study and highlights the research approach. The second assesses the 'performance' of NDC housing markets with particular attention focusing on house-price change. The third section, which constitutes the main body of the report, identifies the key drivers of change in NDC housing markets. The final section identifies a number of key messages for Partnerships and policy makers to emerge from the research. Interspersed throughout the report in boxed format is more information about the four case study Partnerships examined in detail as part of the research.

1. Policy Context and Research Approach

1.1. Policy Context

The emergence of the twin problems of 'low demand' in the North and Midlands of the country and affordability, in many parts of the country, but primarily the South-east, has increasingly focused attention on the workings of housing markets, and housing market change in particular.

In recent years, the phenomenon of 'low demand' for housing has become a serious and widespread problem in England, particularly in the North and Midlands. The problem, which manifests itself in a number of ways including high stock turnover, empty properties, abandonment, and low and declining house prices, has affected all tenures (Murie *et al*, 1998; Bramley *et al*, 2000; Bramley and Pawson, 2002) and has undermined the social, economic and physical fabric of many neighbourhoods (Cole *et al*, 2000a; Cole *et al*, 2000b).

While the problem of unpopular or difficult-to-let housing is not a new one (Bramley and Pawson, 2002), it is the magnitude of the problem in this country that has warranted the creation of a new epithet. As the *Sustainable Communities: Building for the Future* Report notes (ODPM, 2003, p24): "Around one million homes are affected by low demand, spread across over 120 local authorities in the North and Midlands."

In the South of England, and especially in London, housing shortage and high house prices have created an 'affordability' problem in the region. This has resulted in many residents being unable to afford to home-ownership. Relatively low paid public sector workers such as teachers, nurses, police officers and fire fighters have been particularly hard hit by this phenomenon (GLA Economics, 2003).

With the recent rapid growth of house prices in the North and Midlands in the last two years, which in many areas has outstripped the growth experienced in the South, it is perhaps worth noting that housing shortage, and the affordability problems that often accompany it, are problems that are not confined solely to the South. A recently published Government commissioned review of housing supply in England, the 'Barker Review' (Barker, 2004), recognised that affordability was a problem that affected many parts of the UK including the 'Golden Triangle' area in the Yorkshire and Humber region, where a partnership has been established between key local housing agencies to create more affordable housing.

The government has introduced a number of initiatives to tackle the problems of affordability and housing market failure. Its strategy for tackling both problems was outlined in the report, *Sustainable Communities: Building for the Future* (ODPM, 2003). The plan sought to build on earlier attempts to tackle the two problems and to offer a much needed 'step-change' in the Government's approach to the problems:

"We have achieved a great deal, but building on our achievements alone is not enough. We need a step change in our approach. A step change is essential to the tackle the challenges of a rapidly changing population, the needs of the economy, serious housing shortages in the London and the South East and the impact of housing abandonment in places in the North and Midlands." (ODPM, 2003, p.3)

The report outlined plans to tackle the problem of low demand in the North and Midlands through the Housing Market Renewal Fund (HMRF) programme, although Government re-affirmed its commitment to other initiatives that it hoped would indirectly tackle the problem

through the improvement of the quality of the social housing stock: ALMOs, PFI and the Decent Homes standard.

Like some of the initiatives announced in the *Sustainable Communities* plan, the HMRP programme had already been launched by the government before the report was published - in this case in April 2002. Recognising that a strategic approach was needed to tackling the problem of low demand, the programme was set-up with the purpose of regenerating the housing markets of nine sub-regional housing markets in the North and North Midlands. The report notes that each of these areas - Birmingham and Sandwell; East Lancashire; Humberside; Manchester and Salford; Merseyside; Newcastle and Gateshead; North Staffordshire; Oldham and Rochdale; and South Yorkshire - which in all cover about half of the stock affected by low demand (ODPM, 2003), were to receive £500 million in funding over a ten year period.

The early progress of the Market Renewal programme has been reviewed by Cole and Nevin (2004). The authors highlight the key issues to emerge from the early stages of the programme, and make a number of recommendations about the future of the programme.

In the *Sustainable Communities* report the Government for the first time recognised that in some areas local housing markets had failed to such a degree that stock demolition and reduction represented the only viable course of action, in line with its desire to adopt a 'step-change' approach to the regional housing problems it faced:

"Pathfinder strategic plans will entail radical and sustained action to replace obsolete housing with modern sustainable accommodation, through demolition and new building or refurbishment. This will mean a better mix of homes, and sometimes fewer homes." (ODPM 2003, p.24)

Turning now to the Government's plans to tackle affordability, the *Sustainable Communities* plan defined the key challenge for the South as follows:

'To accommodate the economic success of London and the wider South East and ensure that the international competitiveness of the region is sustained, for the benefit of the region, and the whole country.' (ODPM, 2003, p.41)

The plan, thus, reinforces the government's view of the South as the strategically crucial economic 'engine room' of England.

The existing Regional Planning Guidance for the South¹, *RPG9* (DETR, 2001), provides for the construction of 62,000 new homes per annum between 2001 and 2006. However, the recent rate of new housing construction has been inadequate to meet these targets (ODPM, 2003). In light of this, the *Sustainable Communities* plan proposed a 'step change' in the supply of new housing in the South. Accordingly, the government has designated four *growth areas* (the Thames Gateway; Milton Keynes and the South Midlands; London-Stansted - Cambridge, and Ashford) which it considers, collectively, to have the potential to accommodate an additional 200,000 dwellings to 2016 (ibid).

The government has made available £610 million (of which the Thames Gateway accounts for £446 million) over three years for land assembly, brownfield site reclamation, establishing new partnership-based delivery mechanisms, developing affordable housing and providing local infrastructure.

¹ RPG9 is issued, jointly, by the Government Offices for the East of England, London and the South East.

1.2. Research Approach

The research comprised three key stages: a review of house-price change in NDC areas; a telephone survey of a representative sample of Partnerships; and four in-depth case studies.

House-price analysis

Drawing on Land Registry house-price data supplied by the SDRC at Oxford University, the study team analysed house-price change in all NDC areas for the period 2001-2003. Analysis was conducted for all property types and the relative 'performance' of markets was assessed by benchmarking house-price growth in Partnerships with a local authority comparator figure.

Telephone survey

A telephone survey of representatives from 21 Partnerships was undertaken. Interviews, which lasted on average for one hour, explored a range of issues including respondents' knowledge of the market, the extent to which it had changed in recent years, and why it had changed. Interviews were conducted with officers from the following Partnerships: Newcastle, Doncaster, Bradford, Hull, Southampton, Sandwell, Tower Hamlets, Leicester, Bristol, Sheffield, Sunderland, Hackney, Liverpool, Lewisham, Manchester, Oldham, Middlesbrough, Norwich, Rochdale, Aston, Knowsley.

Case studies

In-depth case studies of housing market change in four Partnerships were undertaken: Sheffield (Burngreave); Oldham; Tower Hamlets (Ocean); and Aston. Two criteria informed the selection of case studies: first; that the case study sample should provide opportunity to explore the key drivers of market change identified by the telephone survey; and second, that it should be broadly representative of all NDCs (and their housing markets), and include within it a range of different types of Partnerships, including those located in both 'tight' and 'depressed' housing markets.

Case studies comprised two main elements: a review of relevant documentary evidence; and interviews with key local actors, including representatives from the NDC Partnerships, local housing providers, Housing Market Renewal Pathfinders, estate agents, developers, and community representatives (in all 40 interviews were conducted). In one case study (Oldham) a resident focus group was also held which sought to unpick respondents' perception of housing market change.

The data gleaned from this study has been subject to robust qualitative data analysis. Given the sensitive nature of many of the issues addressed in the report, many of the quotes presented within it have been anonymised in order to protect the anonymity of respondents. This means on occasions that the analysis lacks specificity.

2. NDC Housing Markets

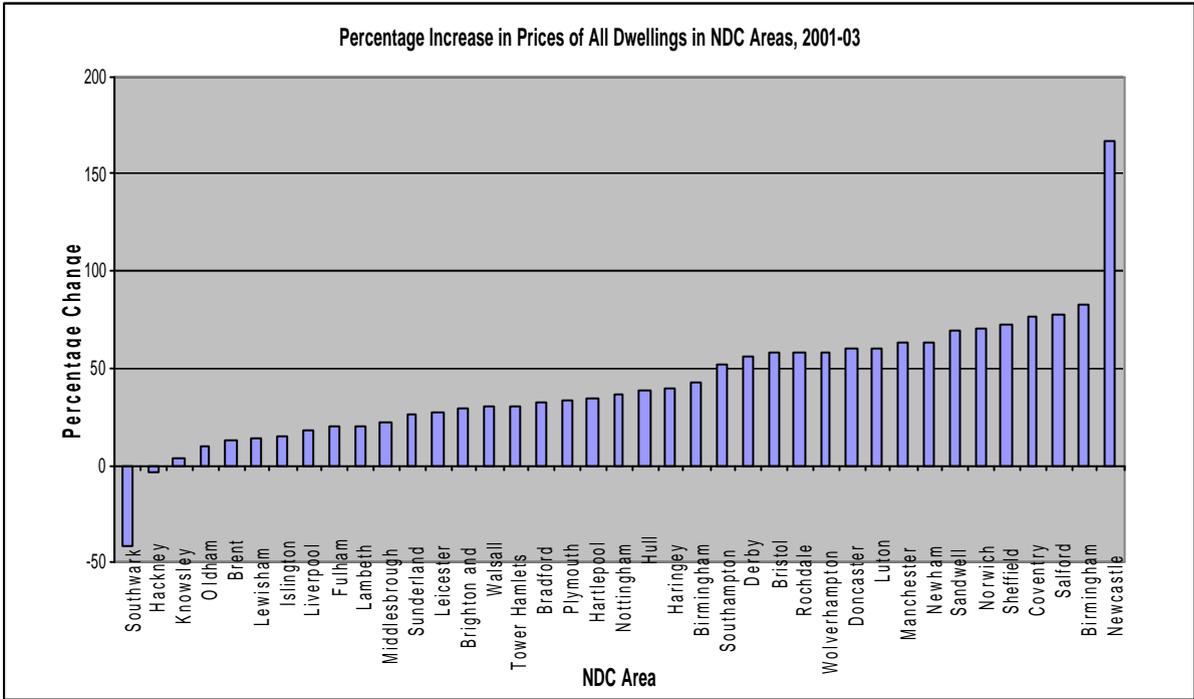
2.1. Introduction

This section highlights some of the key characteristics of NDC housing markets. It begins by examining the relative ‘performance’ of NDC markets with reference to house-price data supplied by the Land Registry. It then explores the extent to which officers from NDC partnerships were aware of house price change in their areas and concludes by noting that the housing markets of many NDC areas are highly segmented.

2.2. House price change in NDC areas

House-price data supplied by the Land Registry was analysed for the time-period 2001-2003. As Figure 1 reveals, all but two NDC areas - Southwark and Hackney, both of which, like a number of other Partnerships have relatively little private sector housing and therefore few property sales - have enjoyed house-price growth since 2001:

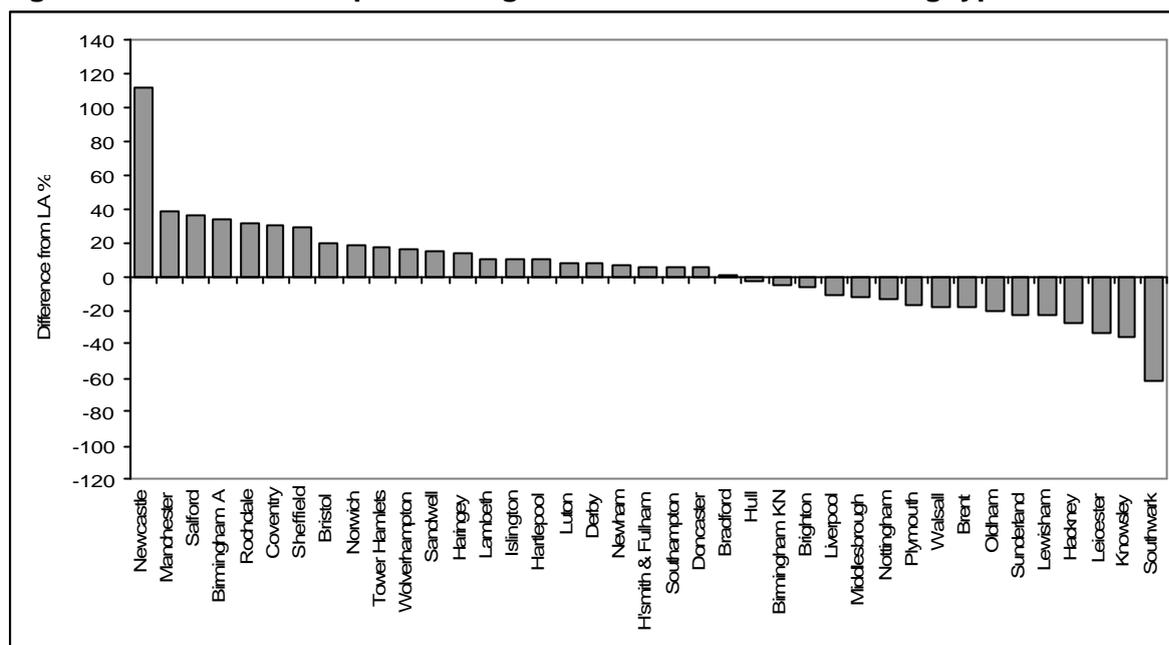
Figure 1: Absolute house-price change in NDC areas for all dwelling types: 2001 - 2003



Source: Land Registry and SDRC, Oxford University

A more useful insight into the relative ‘performance’ of NDC markets can be obtained by benchmarking their ‘performance’ to that achieved in the broader local authority area in which they are located. Figure 2 presents the outcome of this exercise.

Figure 2: Relative house-price change in NDC areas for all dwelling types: 2001-2003



Source: Land Registry and SDRC, Oxford University

As Figure 2 illustrates, some 23 NDC areas, 'out-performed' their respective wider local authority area. Newcastle NDC 'out-performed' all the other NDC areas with house price change in the area being 115% greater than its local authority area. All but one of the case study areas - Oldham - 'out-performed' their respective local authority areas: Sheffield by 25%; Tower Hamlets by 20%; and Aston by 40%. In Oldham, house-price growth in 2001-03 was 20% lower than for the local authority as a whole.

Awareness of house price change

Relatively few NDC officers were aware about house-price changes in their area and a number held erroneous views about recent developments. Very few of the NDCs surveyed reported having put in place specific systems to monitor housing market change. Over half of NDC officers from the 21 Partnerships who took part in this study reported that they relied on 'gut instinct' or anecdotal evidence, often provided by other agencies, to compile a picture of the local housing market. As one NDC officer admitted:

"We have no house-price baseline data on which to build projects on - we have very little evidence. In the past we've just acted on local knowledge, word of mouth, but we are planning on doing some research." (NDC Officer, Doncaster)

Those NDCs that did appear to have put in place some mechanisms for tracking market change drew on a number of data sources:

- 2001 Census
- estate agents
- housing management data
- council tax records
- housing benefit records
- auction sales
- Land Registry house-price data

Two Partnerships appeared to have created effective systems for tracking house price change. For example Bradford used a market research company to supply it with house-price data on a quarterly basis. NDC officers from Liverpool track house price change on a quarterly basis and make extensive use of the website, www.upmystreet.com, and publicly available neighbourhood statistics.

2.3. Segmented Markets

Even though the majority of NDCs' surveyed lacked an accurate understanding of the housing market in their area, they were clear that they were operating in diverse markets often containing different sub-markets. The views of two officers were typical of many:

"There are pockets of increasing demand and pockets remaining at lower level. It depends whether you are looking at the area as a whole or whether you are looking at particular streets, because in Burngreave one of the things is that in one street next to another street there is a completely different situation. You will see that one street is very sustainable then on the other side of the road they are completely different." (Local Authority Officer, Sheffield)

"People within each area want to stay in their area. Areas have separate and distinct markets even within each area. People won't even look at a property on the other side of a main road". (Housing Association Officer, Oldham)

In a similar vein, a respondent in Aston noted:

"You can have stock in one place which will be say £70,000 and you can almost cross the road and go round the corner and you're into the £90,000 and £110,000 bracket, and you're thinking: 'This is exactly the same house.' And it's those sort of funny things that are going on here. It's a fascinating little patchwork quilt." (Housing Association Officer, Aston)

Sub-markets were defined in a number of ways including by location, streets and roads, and property type:

"It (Burngreave) has a transitional market. There is a fair amount of churning because of the property types that are there. You would expect that, for example in flats. But I think if you look at the markets for different property types you will see different characteristics, especially if you look at some of the older and larger private owner occupied accommodation, you would see a lot of stable households that have been there for a long time now." (Local Authority Officer, Sheffield)

Oldham NDC

Oldham NDC is located in inner Oldham immediately to the south of the town centre. The area, which falls within the Oldham and Rochdale Housing Market Renewal Pathfinder area, is divided by Ashton Road and comprises two distinct neighbourhoods: Hathershaw and Fitton Hill.

Hathershaw is an area of traditional terraced houses built at the turn of the 20th Century. The majority of properties in this neighbourhood are owner occupied although there is also a significant private rented sector and some social housing. Most of the houses in the neighbourhood have just two bedrooms, with most properties having no front garden. Prior to the NDC programme, the area had become increasingly run-down.

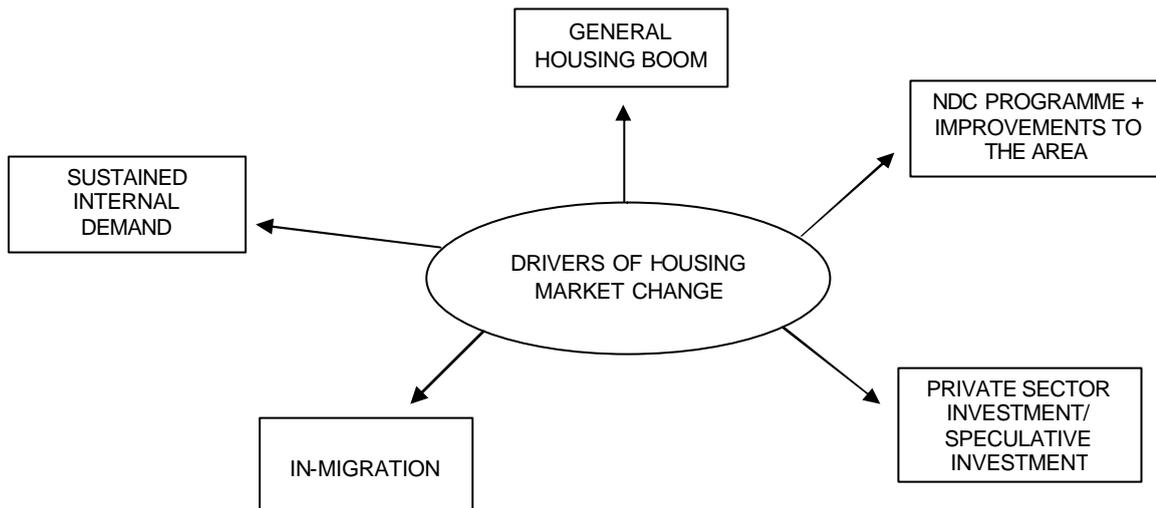
Fitton Hill is a large traditional ex-Council estate built in the 1930s, comprising around 1,400 properties, of which over 400 have been brought under the Right-to-buy initiative. Ownership of the estate transferred to Villages Housing Association in 2004. The housing stock in the neighbourhood comprises predominantly houses but also includes some flats.

3. Drivers of housing market change in NDC Areas

3.1. Introduction

This chapter identifies the key drivers of housing market change in NDC areas identified by participants in the telephone survey and case studies. Figure 3 highlights the key drivers of change identified by respondents.

Figure 3: Perceived drivers of housing market change in NDC areas



3.2. NDC Programme and improvements to the area

Just over half - eleven - of the 21 NDC partnerships who participated in the study, including the four case study areas, thought that the NDC programme and general improvements to area were a significant driving force behind housing market change. A number of respondents highlighted the positive impact the NDC programme was having on the local housing market:

"There's over 100 NDC projects here and there has been a lot of investment in the area. There's something 'extra' in the area as the same type of properties down the road, which are in better condition, are cheaper and less popular. We must be doing something right." (NDC Officer, Newcastle)

"The area has become more popular. Waiting lists now exist for social housing and there is more confidence in the area. Some of this is due to NDC activity and investing in the area." (NDC Officer, Manchester)

"There has been some investment in other areas but not as big as the NDC, and they haven't had as big a house price change as the NDC." (NDC Officer, Rochdale)

"It (Bradford NDC) was an 'area of last resort' but now due to NDC activity people say it's a good place to live. Money has been spent on properties and services and the infrastructure is now up to a good standard such as schools and transport. It's now a comfortable area to live in." (NDC Officer, Bradford)

"Two years ago parts of the NDC were very offender friendly. NDC Initiatives have helped reduce crime and domestic burglary. Car and domestic crime have fallen. This has all helped tackle the stigma of the area." (NDC Officer, Oldham)

However, not all respondents shared the same view and felt that other factors were driving market change:

"The NDC hasn't affected the market because the capital work such as environmental improvement and refurbishment of social housing has yet to take off". (NDC Officer, telephone survey)

"There has been house price increases but not due to NDC activity as there has been no housing activity. Housing was not part of the initial scheme, and a result we have been struggling." (NDC Officer, Telephone Survey)

A case study respondent was unclear about the impact of NDC on the local housing market:

"I don't know how exactly public funding can impact on housing markets... I think the role of the NDC regarding housing markets is unclear." (Local Authority Officer)

A number of respondents were concerned that the NDC programme on its own could do relatively little to affect housing market change:

"The NDC Partnership will be able to provide the connections and some of the building blocks for housing market change within the area, but I don't think they can on their own change the market because housing is ridiculously expensive." (Local Authority Officer, case study)

"The NDC (programme) has been able to do little to drive the housing market as we have no funding to do anything drastic." (NDC Officer, case study)

Respondents identified a range of NDC initiatives that were perceived to have had an impact on the local housing market. These included:

- housing improvements
- demolition
- environmental improvements
- measures designed to tackle crime and the fear of crime

Housing Improvements

NDC led housing improvement initiatives were perceived to be contributing to housing market change in eight NDC areas: Leicester, Bristol, Sunderland, Oldham, Newcastle, Middlesbrough, Bradford and Sheffield. Partnerships employed a range of initiatives, some of which are highlighted in Figure 4.

Figure 4: Housing improvement initiatives in NDC areas

Property improvements

Bristol NDC has made improvement grants of up to £10,000 available to vulnerable owners who cannot afford to maintain their properties.

Bradford NDC is investing £7 million in property improvements in the private sector, which comprises mainly external works including stone cleaning, and improving boundary walls and gates. The initiative will be completed in 2007.

Sheffield NDC is funding a Face Lift scheme which focuses on the improvement of the external fabric of properties. The scheme has improved a significant number of properties on the main thoroughfare in the area.

Improving housing management in the private rented sector

Sunderland NDC has developed an initiative which seeks to educate private landlords on property maintenance and how to work with tenants better.

Newcastle NDC's private rented project seeks to educate landlords and tenants about maintenance and better management, and has encouraged landlords to improve their properties.

Bradford NDC is working with private landlords and owner occupiers on a range of health and safety issues.

A number of partnerships reported that they had adopted a partnership approach to housing improvement. Examples of partnership working include:

- **Bristol NDC** is working with Bristol City Council to re-designate some high rise flats to 'key worker' housing
- **Middlesbrough NDC** has helped bring key local agencies together to help attract new development
- **Sheffield NDC** is working closely with Transform South Yorkshire Housing Market Renewal pathfinder to secure the future of the Burngreave area

Demolition Programmes

Respondents from nine NDC Partnerships reported that demolition programmes in their areas or surrounding areas, whether completed, on-going or planned, were having an impact on housing market change. Demolition programmes in NDC areas have generally taken place in small discrete areas, with poor or obsolete housing stock and/ or little or no demand.

In some cases NDC Partnerships, including Sheffield and Tower Hamlets, have been directly involved in demolition programmes. Tower Hamlets NDC is involved in on-going plans with the London Borough of Tower Hamlets to improve housing in the area through stock transfer with a vote scheduled for Spring 2005. In Sheffield, the financial support provided by the NDC Partnership has accelerated a clearance programme in the area.

Most respondents felt that demolition had had a positive impact on housing market change:

"The market has changed due to clearance and taking out abandoned properties. This has increased confidence in the market. Developers are interested in the area."

This should have a knock-on affect in surrounding areas." (NDC Officer, Middlesbrough)

"I think the (Burngreave housing) market is also reasonably strong now whereas a few years ago it was an 'area of last resort' and there were lots of empty properties. But I think since they demolished Woodside at the top that's certainly strengthened demand for social housing, so at the moment we don't have letting problems at all, and we have quite a lot of demand." (Housing Association Officer, Sheffield)

"Overall, there has been an increase in demand at the moment in the area. That's affected by a number of things. It's affected by the number of demolitions that have been going on within the council stock as a whole, not necessarily just areas like Burngreave, so more people are having to go to Burngreave because there isn't other accommodation elsewhere within the city." (Sheffield City Council Officer, Sheffield)

"Social housing in the area has been quite considerably reduced through demolition and as a result there is far more demand for rented housing, social housing. It's helped us quite a lot with the voids we've had in the area." (Housing Association Officer, Sheffield)

However, one respondent, who recognised the *long-term* benefits of demolition, noted that in the *short-term* it could have a detrimental impact on the local housing market:

"Due to clearance a false market has been created as there's a shortage of housing. Investors see potential, prices rise, but this shortage won't last as new development begins on clearance sites." (NDC Officer, Middlesbrough)

Environmental Improvements

NDC led environmental improvement initiatives were perceived to be contributing to housing market change in nine of the Partnerships surveyed: Leicester, Southampton, Aston Birmingham, Oldham, Newcastle, Norwich, Lewisham, Rochdale and Sheffield. These Partnerships undertook a range of initiatives and some of these are highlighted in figure 5.

Figure 5: Environmental improvement initiatives in NDC Areas

Oldham NDC contributes to the 'tidying' up of its area through litter busting campaigns, street cleaning and 'clear-up' squads.
Norwich NDC carries out environmental 'clean ups', for example taking away residents' larger items of rubbish such as sofas and beds.
Rochdale NDC has invested £8 million in environmental improvements, including cleaning-up rear alleys and improving house frontages.
Sheffield NDC has an environmental wardens project.
Aston NDC has undertaken environmental works to tackle rubbish and litter problems in its area.

Crime Related Initiatives in NDC Areas

NDC officers in ten of the 21 Partnerships surveyed reported that NDC led crime related initiatives were having a positive impact on housing demand in the area, thereby precipitating housing market change: Bristol, Sheffield, Aston, Oldham, Newcastle, Middlesbrough, Norwich, Lewisham, Manchester and Rochdale. A range of initiatives had been undertaken and some of these are detailed in Figure 6.

Figure 6: Crime related initiatives in NDC Areas

Bristol NDC has introduced CCTV into a number of high rise blocks which has been welcomed by residents.

Sheffield NDC has funded a new local police unit. A key aspect of officers' work is to tackle anti-social-behaviour. The NDC also runs target hardening and security schemes.

Working with the Greater Manchester Police Force, **Oldham NDC** has employed their own police team, comprising five dedicated officers. The NDC has provided its officers with bicycles, a mobile unit and 4 x 4 vehicle. Greater Manchester police have also put another officer in to the area.

Rochdale NDC has over ten projects relating to crime reduction. Initiatives include target hardening, the instillation of burglar alarms, ASBOs, and extra policing.

Almost all 39 NDC partnerships have funded community/neighbourhood warden schemes, which contribute to reducing the fear of crime and incidence of crime.

Other 'NDC' initiatives

A number of respondents reported that other NDC initiatives in the education, health and employment arenas were also making a positive contribution to housing market change:

"All our work on housing, employment, the environment, crime and supporting local people has helped increase the desirability of the area." (NDC Officer, Norwich)

"You can't just address housing issues without addressing related issues of education, health, crime, environment. It all contributes to making the area an attractive place to live. It's a team effort." (NDC Officer, Bradford)

"As an NDC we are also able to look at the bigger, holistic picture and join things up. It isn't just the housing that needs to be tackled, we are also addressing employment, health, education, crime and so on which will make it a better place to live overall." (NDC Officer, Middlesbrough)

Tower Hamlets (Ocean) NDC

Ocean NDC is a council housing estate located in the Stepney area of the London Borough of Tower Hamlets built in 1930s and 1950s. The area is close to the Docklands and the city and has good transport links. It comprises mainly high and low rise blocks of one and two bed-roomed flats. Much of the area's housing stock has been modernized and all properties have central heating and modern kitchens and bathrooms, although not all blocks have lifts. Since the modernisation programme undertaken in the area early 1990s, the condition of many properties has deteriorated.

The area has a population of around 6,500. Approximately 90% of residents are of Bangladeshi ethnic origin. The area is popular with this population group and has a relatively large waiting list: according to one local authority officer we spoke to, some applicants have been on the area's waiting list for twenty years. The area has around 1,500 leaseholders.

3.3. General Housing Boom

Respondents in each of the 21 Partnerships surveyed believed that one of the principal contributory factors driving local housing market change in the area was the general housing boom' that the UK had experienced in the last five years.

"Prices are rising, many houses are sold within a week. Market performance has increased but it isn't really due to the NDC programme as we have haven't had much NDC housing activity here. I think it's more a reflection of the housing market picture nationally...the nature and function of the housing market has changed here but I don't think it has had anything to do with NDC activity as there has been very little NDC housing activity. I think it's more to do with the housing market change nationally. There has been a particularly dramatic change over the last couple of years with house prices rising." (NDC Officer, telephone survey)

"The national property boom is driving the market." (NDC Officer, telephone survey)

'They (house prices in Hackney NDC) would have gone up anyway because of the general boom'. (NDC Officer, telephone survey)

"Of course the general housing boom has had a big impact on the market (in Rochdale NDC)" (NDC Officer, telephone survey)

Respondents from twelve NDC areas reported that the location of their area made it ideally placed to benefit from any general rise in the market. Locational advantages identified by respondents included being close to the city centre, 'good' schools, and major employers, and good transport links. These 'locational' advantages were a significant 'pull' for many households:

"I think there is a lot of potential to attract people in to the area as it has good traffic routes, it's convenient for schools and close to the city centre." (NDC Officer, Middlesbrough)

"Due to the rail links the area is opened up to London and more people are considering living in the area as work, facilities and entertainment are more accessible and housing is cheaper." (NDC Officer, Lewisham)

"We are getting some incomer's (moving into the area). It's seen as a good value area with good schools and services, and it's next to the city centre. It's an all round good place to live." (NDC Officer, Bradford)

Sheffield (Burngreave) NDC

Sheffield (Burngreave) NDC area lies one and half miles north-east of Sheffield city centre. The area, which is dissected by the busy arterial route, the A6135, has a population of approximately 8,800. The area is located within the Transform South Yorkshire Housing Market Renewal Pathfinder area.

More than a third - 37% - of the local housing stock is owned by Sheffield City Council with 39% of properties being owner occupied. The area also has significant housing association and private rented sectors.

The local authority stock in the area comprises a mixture of flats, maisonettes and larger housing while the housing association stock is primarily made-up of renovated pre-1919 terraces, with associations owning a small number of flats and new build properties. The private housing stock in the area comprises a mix of late Victorian terraces and large terrace villas, many of which have been converted into flats.

Burngreave is an ethnically diverse area with more than half of the local population being a member of a minority ethnic group, and the area houses large Pakistani, Caribbean and African populations. The area is also home to a number of asylum seekers and refugees with 11% of respondents in the MORI household survey 2004 reporting that they had applied (at some point) for asylum in the UK.

3.4. Investment by Private Landlords and 'Speculative' Investment

Respondents in 14 NDC areas reported that investment by private landlords and 'speculative' investment was driving housing market change in their areas. Investment took two principal forms: landlord's up-grading of their existing properties in NDC areas; and the purchase of new properties by landlords and investors, often for 'speculative' investment reasons.

A number of Partnerships reported that the decision of landlords to up-grade their properties in NDC areas was having a positive impact on their areas.

"Private landlords know there is a demand in the NDC area. They see the potential; properties in the area are seen as a good investment and landlords do, in general, improve them." (NDC Officer, Sunderland)

"There has been investment in larger properties, some of which used to be bedsits. They have been modernised by owners and are attracting more affluent students and new graduates. This has helped change the function of the private rented market from an image of bedsit land." (NDC Officer, Liverpool)

"Landlords are doing up properties to a higher standard. They're fetching people in and the people are then looking and thinking: 'Well it's not that bad an area, we can live here.' And then they'll purchase in the area, so that's increasing the property values as well." (Private Landlord, Sheffield)

Speculative investment was identified as a key driver of local housing markets change by respondents in 14 NDC areas: Tower Hamlets, Liverpool, Oldham, Middlesbrough, Manchester, Rochdale, Doncaster, Sheffield, Aston, Bradford, Newcastle, Sunderland and

Hull. It was felt, that in many of these areas, speculative investment had grown over the last two years. Local private landlords were reported to be the main speculative investors, although in some areas larger national companies were also buying-up properties, and the purchasing of property by 'ordinary members of the public' was a feature in all markets. Speculative investors appeared to be attracted to NDC areas for two inter-linked reasons: the promise of relatively high and stable rental incomes *and* sustained and rapid high-price growth.

In a number of Partnerships, significant 'buy-to-let' investment appeared to have had a significant impact on the local housing market. This was particularly the case in three of our case studies: Tower Hamlets, Sheffield and Oldham. Buy-to-let markets in these areas were reported to have emerged relatively recently, the views of one respondent being typical:

"I don't think people had latched on to buy to let a few years ago but now they think if I could pick a property up for £15,000 and let it out for £60 a week it's a very good return." (Housing Association Officer, Sheffield)

The recent 'boom' in the UK housing market was seen as the catalyst behind investors' decisions to invest in property to let and the surge in the 'buy-to-let' market has reportedly been fuelled by new investors who normally would not consider investing in property to let:

"People have jumped on the bandwagon (with regard to buy-to-let) and think it's a good idea to have a second income or next egg for them not a full time job." (Auctioneer, Sheffield)

Respondents in a number of Partnerships felt that speculative investors have been attracted to NDC areas by the promise of significant financial returns on the back of regeneration in these areas:

"NDC has drawn a line around an area and said 'we are going to invest 52 million pounds.' Well what that does immediately is make sure that speculators are aware of that and they start buying properties up in the area. We have seen that happen in Burngreave and we've seen it happen in Firvale as well. And it's happened more so in recent months because people know about the housing market renewal funding that is going into the area...It is not just the residential properties that that this is happening to, it's happening to the commercial properties as well...we've drawn a line round the map and investment has gone into the area so people are just clinging on there and investors are buying up properties." (Officer, Transform South Yorkshire, Housing Market Renewal Pathfinder)

As the respondent above noted, the location of many NDCs in housing market renewal areas has made these areas even more attractive to many investors, according to respondents in the nine Partnerships surveyed within a Pathfinders area - Sandwell, Sheffield, Liverpool, Aston, Newcastle, Manchester, Oldham, Rochdale and Hull:

"The HMR Pathfinder has had a ripple effect on house prices. There is a perception that prices will go up." (Housing Provider, Oldham)

"The Housing Market Renewal Pathfinder has actually, without doing anything at all, helped increase the values of properties as the perception is that people are going to make some money on it." (Housing Association Officer, Sheffield)

“They said (some local commentators) that all you need to do to improve the market is declare it a market renewal area. Then you don’t put any money in and that’s just enough to stimulate the market. We think that this has been the case in Burngreave and with the Pathfinder and New Deal programmes.” (Housing Market Renewal Pathfinder officer, Sheffield)

In addition to making money from rental income and equity growth, speculative investors in NDC areas were also looking to profit from the compulsory purchase order process:

“Demand has increased from speculative buyers mainly to cash in on CPOs.” (NDC officer, Middlesbrough)

It was reported by a number of respondents that speculative investors like to ‘get in early’ after the designation of a regeneration area while properties were still relatively ‘cheap.’

Impact of speculative investment on NDC housing markets

Speculative investment was perceived by many respondents as having a negative impact on the housing markets it occurred in. For example, it was perceived as driving up the cost of regeneration and making the renewal process more problematic:

“Speculators are buying in their droves at property auctions mainly to rent properties out and some owner occupiers are buying at auction too...This has had a big knock-on effect on the NDC programme as we can’t afford to purchase properties at auction to clear areas - we always get outbid. And as property values have gone up we can afford less properties so the opportunity for clearance and regeneration of housing becomes increasingly limited.” (NDC Officer, Liverpool)

“Speculative buying has happened more in recent months because people know about the housing market renewal funding and the master planning process...Area based programmes unfortunately can be their own worst enemies in some respects because they draw a boundary and then it becomes more difficult to acquire properties that you want to put forward redevelopment proposals for. That’s what is happening within the NDC area.” (Local Authority Officer, Sheffield)

In a similar vein, two housing associations in Sheffield also highlighted the detrimental impact a ‘tighter’ market and higher house-prices, precipitated in their view, by speculative investment was having on their investment strategies:

“We are looking at re-development in the area. We’ve worked the figures out and of course they’re a lot more now. So in a way we perhaps can’t be as radical as we were going to be. The problem that we’ve had is that we can’t acquire the properties. There’s people hanging on to them thinking they’re going to make a lot more money.” (Housing Association Officer, Sheffield)

“We’ve got a small programme of purchases to improve in the area and we are struggling to buy (properties) because values are making it uneconomic for us to do subsidised housing.” (Housing Association Officer, Sheffield)

A number of respondents felt speculative investment had created ‘artificial’ housing markets in many areas:

“This (speculative investment) has created an artificial market, a speculatively driven market.” (NDC Officer, Liverpool)

"We've seen houses sold for a terrific amount of money for what they are." (Private Landlord, Sheffield)

"Prices have increased considerably and we've got properties where there value is about eighty, ninety, hundred thousand pounds, but no one believes that they're worth that much at all." (Local Authority Officer, Birmingham)

"It falsely improves the price of properties." (Local Authority Officer Sheffield)

Another source of disquiet amongst respondents about speculative investment was the perceived failure of some investors to maintain their properties. This appeared to be a problem in Middlesbrough and in Sheffield:

"There's been a lot more activity as far as landlords buying properties up, even though they've not let them in some cases, they've just left them derelict. I think that's really sad that that's happened really, and now they're hanging onto the properties and wanting to make some more money." (Housing Association Officer, Sheffield)

In Rochdale the NDC has tried to curb the negative consequences of speculative investment by 'managing' information:

"Once you announce a funding programme in an area such as NDC you always get speculative investment, so we decided to manage it and not say where we were going to demolish properties. We managed to kill a lot of the speculative buying as it just hikes up prices. We're careful where we say we were going to demolish. There's a redline and prices can shoot up and then there's fewer properties for people to move into and afford." (NDC Officer, Rochdale)

3.5. Sustained internal housing demand

A number of respondents felt that the desire of 'core' communities within NDC areas to 'stay-put' was helping to sustain demand in many areas, thereby positively contributing to housing market change. Respondents in all four case studies could identify 'committed' communities within their areas that were helping to sustain the local housing market:

"They (committed residents) want to move up the social ladder but without moving out of the area and that's what some landlords realize. There are people wanting to move up their social ladder but not wanting to move out of their community." (Private Landlord, Sheffield)

"People like to stay in the area. Once they move in they want to stay." (Resident, Oldham)

"Very rarely do we get people wanting to move to a different area...generally Oldham communities and markets are very settled." (Housing Association Officer, Oldham)

"Many people want to stay. There is no flood of people wanting to leave and houses sell on to families quite quickly." (NDC Officer, Oldham)

In three of our case study areas - Aston, Sheffield, Tower Hamlets - ethnic minority groups were identified as displaying a particularly strong commitment to their local area. In Sheffield, respondents reported that the local Somali, Pakistani and Caribbean communities exhibited a strong affinity to the area and as such wanted to remain there, while the same was true of local Bangladeshi, Pakistani and Caribbean communities in Aston, reported a number of respondents there.

In Tower Hamlets a number of respondents noted that the local Bangladeshi community, which accounts for around 90% of the local population, was committed to the area. This, according to several respondents was reflected in low household turnover in the neighbourhood and the decision of many households to reject apparently 'better' housing offers in other areas.

Although several reasons were offered by respondents in Aston, Sheffield and Tower Hamlets to explain the commitment of ethnic minority groups to their local area two re-occurred: the desire of many ethnic minority groups to remain close to their families; and linked to this, the existence of excellent support, network and faith structures in these areas.

"In the Asian community people don't want to move out of Aston because they've got family. They who would rather pay that bit more to stay in the area." (Resident, Aston)

"Burngreave is a very popular area with various ethnic communities because the support network is already there." (Local Authority Officer, Sheffield)

"Well I think they (ethnic minority groups) are coming here because there are services here. I think particularly with Asians they look for areas where there's mosques and there's food shops that provide the type of things that they want. And I think you need to have a viable neighbourhood of people to actually let them services exist. Those services exist here, so I think that is one of things driving change here." (Housing Association Officer, Sheffield)

"Burngreave is a very popular area with various ethnic communities because the support network is already here...People (ethnic minority groups) are actively going to Burngreave because that's where the support networks are." (Housing Market Renewal Officer, Sheffield)

Thus, the 'commitment' of core communities in all the Partnerships we surveyed has undoubtedly helped to sustain the local housing market in these areas. However, it should be noted that the immobility of some NDC residents should not necessarily be taken as a reflection of their commitment to their area: a number of respondents observed that many were anxious to leave their areas but were unable to do so, because they could not afford to purchase a home in more expensive neighbouring markets. As such, they were effectively 'trapped' within their area:

"People who move into the (NDC) area because it is cheaper than other parts of Oldham may find at some point that they need to move on, because most property is here is two bed terraced which is not suitable as families grow. But price differences make it difficult to move out of the area. People get trapped." (NDC Officer, Oldham)

"There's no stepping stone in Sheffield...I mean if you've got a really nice house in this area (Burngreave), a terraced type house, two bedroom, three bedroom, whatever, you're likely to get I would have thought around about between £50,000 and £55,000 for it. You can't buy a three bedroom house at Gleadless for anything less than £70,000, £80,000 or £90,000. So you can't move out. And that's one of the worries of the people that live in this area when they talk about regeneration: that if they come and knock their houses down, they won't get enough (money) for their house to be able to move elsewhere." (Private Landlord, Sheffield)

"I would like to move out of Oldham but cannot afford to move. Although prices in the area are rising, other prices (in neighbouring areas) are moving faster so people are trapped." (NDC Officer, Oldham)

In some areas, relative rising house-prices gave 'trapped' residents the opportunity to sell their homes:

"A lot of owners are jumping on the band wagon. Before the NDC programme houses didn't sell. Now values are going up people have the opportunity to sell and be able to afford to move out." (NDC Officer, Liverpool)

"People have aspirations to move out of such a deprived area and when house prices rise people have the opportunity to leave." (NDC Officer, Doncaster)

Aston NDC

Aston NDC, which is located in the Birmingham/ Sandwell Housing Market Renewal Pathfinder area, lies approximately two miles north of Birmingham city centre. The area is divided by a motorway - the A38M Aston Expressway - and 'Spaghetti Junction' lies on the area's eastern boundary. The area is home to around 17,300 people. Most residents in the area - 82% - are from ethnic minority groups and the area houses significant Bangladeshi, Pakistani and Caribbean communities.

Birmingham City Council owns 29% of properties in the area while housing associations own 15%. Of the remainder of the housing stock, 42% is owner occupied and 15% owned by private landlords. Reflecting the tenure split within the area, the area has a relatively diverse housing stock and comprises a mix of late Victorian terraces, larger terraces, some of which have been converted into flats and bedsits, and a number of high-rise tower blocks. A significant demolition programme has been undertaken in the area with has targeted both social and private sector housing.

3.6. Increased in-migration

A number of NDC officers reported that the increased movement of households into their areas was contributing positively to housing demand and local housing market growth. According to respondents, incomers were attracted by a bundle of factors including positive change in NDC areas, and on the back of this, the prospects of equity growth, and the relatively low house-prices in many NDC areas. The latter had clearly been a key 'pull' factor for in-comers in many areas including Sheffield, a number of respondents noted:

"I still think it (Burngreave) is one of the cheaper areas to buy in so in terms of getting a foothold on the market. That's one reason people are buying here." (Housing Association Officer, Sheffield)

"Some of them (incomers) are buying in the area because of its affordable living and they can afford to live here...£50,000 is a lot of money but its still affordable: that's the key. House prices are going up here but they are still affordable." (Private Landlord, Sheffield)

"There has been a substantial increase in house prices (across the city). As a result people are being priced out of neighbouring areas, for example Crookes, and look to Burngreave." (Auctioneer, Sheffield)

"I think because people were struggling to buy in other areas (of Sheffield) because prices were too high that made people think: 'Well you know, where can I get a cheaper house?' And I think that actually forced people into the area (Burngreave) when perhaps they wouldn't even of considered it before, you know." (Housing Association Officer, Sheffield)

4. Lessons for Policy Makers and Practitioners

A number of key lessons for NDC Partnerships, policy makers and practitioners have emerged from the study:

A number of NDCs, many of whom have set themselves the goal of increasing house-prices within their areas, have enjoyed rapid house-price growth in recent years. However, if this trend is not accompanied by a similar growth in household income levels, this may create affordability problems in some areas as would-be local home-owners become effectively 'priced-out' of the local housing market. NDC Partnerships and local agencies therefore need to think imaginatively about how they might prevent this from happening.

The diversity of many housing NDC markets presents Partnerships with a number of problems, not least how to develop a cohesive market strategy for the area as a whole:

"There are four specific areas (within the NDC)...because of the man made divides. This area I think has a greater affinity than that area for instance and personally I think it's a major issue in terms of being able to develop a cohesive group for the whole of the NDC." (Housing Association Officer, Aston)

Partnerships need to think carefully about how (if it all) they can manage speculative investment. They should be aware of the negative impacts it can have on the local housing market. They should also be aware that at any time speculative investors may choose to disinvest from the housing market: this may have a significant deflationary affect on house prices.

Future housing market growth in NDC areas will be very much dependent on the ability of Partnership's to attract new residents. Thus, the marketing strategies they employ will be of vital importance in achieving this, and an important weapon in counter-acting commonly held negative views about NDC areas. Respondents in three of our case studies believed that there areas suffered from poor reputations.

"There are negative connotations that go with the names of areas like these (Aston NDC), unfairly so, but that's as it is." (Housing Association Officer, Aston)

"I think people are very traditional in Sheffield city wide. They tend to look at a thing that they've known for years like Burngreave and they still have that view of it really and it takes a long time to change that." (Housing Association Officer, Sheffield)

"Properties have been brought up to a better standard, but I think as an area, it (Oldham) still has got a stigma to it. I don't know what the answer is for that." (Housing Association Officer, Oldham)

A useful insight into how to market neighbourhoods and places is provided by the Joseph Rowntree publication, *Challenging images: Housing estates, stigma and regeneration* by Jo Dean and Annette Hastings, a summary of which is available from the following website: <http://www.jrf.org.uk/knowledge/findings/housing/020.asp>.

Linked to the previous point, Partnerships should be careful to ensure that their plans for the areas are attractive to both existing and would-be residents.

Partnerships need to put in place systems to track and monitor market change in their areas. If they lack the time and resources to undertake the comprehensive approach to housing market analysis outlined in the recent ODPM publication, *Housing Market Assessment Manual* (ODPM, 2004), they should focus on tracking key headline indicators

such as house-prices, turnover, and void rates. The study team identified a number of useful data sources and analytical frameworks to help Partnerships do this.

The authors argue that attention should focus on tracking two key parameters - turnover and trends in demand - and they offer a typology of market change which they link to policy responses. A copy of the report - *Interpreting Housing Market Change: the case of Leeds* by Ian Cole, Paul Hickman and Kesia Reeve - is available free of charge from CRESR on 0114 225 3073 or p.g.hickman@shu.ac.uk.

Up to date house-price data can be obtained free of charge from the Land Registry website - <http://www.landreg.gov.uk/> - while upmystreet website - <http://www.upmystreet.com/> - is also a useful source of neighbourhood based data, including house-prices.

Partnerships in Housing Market Renewal areas should work closely with Pathfinders, although in most of the Partnerships we visited this already appeared to be the case.

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