

2009 HOUSE CONDITION SURVEY – PRELIMINARY FINDINGS

1.0 Introduction

The 2009 House Condition Survey employed an electronic approach to data collection using tablet computers. The application of this new technology has been successful and preliminary results for the 2009 HCS are presented in this paper – nearly six months earlier than for previous surveys.

2.0 Survey Objectives

2.1 The Objectives of the 2009 House Condition Survey were as follows:

- To provide a comprehensive picture of the dwelling stock and its condition in 2009 on the basis of the new council areas proposed under RPA;
- To facilitate a comparative analysis of housing conditions in Northern Ireland with other parts of the UK;
- To examine the association between dwelling conditions and the social and economic circumstances of households;
- To examine changes in the condition of the stock over time in terms of key Government measures: Decent Homes and the Housing Health and Safety Rating Standard;
- To examine the role of renovations including those funded by home improvement grants in improving housing conditions;
- To provide a reliable assessment of the energy efficiency of the stock and the level of Fuel Poverty in Northern Ireland on a comparable basis with the rest of the UK.

The objectives have remained broadly consistent with those in 2001, 2004 and 2006.

3.0 The Survey Methodology

3.1 The methodology employed for the 2009 HCS was broadly the same as in 2001 and in 2006, with the exception of the use of a full electronic form on a tablet p.c. (Motion 5) with built in field validation and uploading of data via a website to a database.

3.2 The E-Survey Form

The E-Survey form broadly remains the same as previous paper surveys and comprised five main sections of questions covering:

- The physical attributes of each dwelling (internal and external)
- The physical aspects of flats and common areas
- Demographic, social economic and attitudinal information on households
- The front and back plot of the dwelling, the local neighbourhood and area
- The Housing Health and Safety Rating System.

The information gathered in the physical section allows measurement of repairs costs, the Fitness Standard, The Decent Homes Standard, Fuel Poverty, SAP and the Housing Health and Safety Rating System.

Information from the social survey will be cross referenced, providing an indication of the types of households living in dwellings which are in the poorest condition and most likely to fail The Decent Homes Standard, The HHSRS or in those designated as fuel poor.

3.3 The Sample

The 2009 HCS was based on a stratified random disproportionate sample of 3,000 dwellings comprising two main elements.

- A fresh sample of 1500 properties from across Northern Ireland extracted by NISRA which uses the Land and Property Services database as its source.

- A resample of 1500 properties drawn from the 2006 HCS database. This allows a longitudinal analysis of properties and provides an indication of flows in and out of unfitness, disrepair, energy efficiency and tenure change. It includes all dwellings which were deemed unfit or defective in 2006.

The process of weighting and grossing ensures that the final figures reflect the actual housing stock.

4.0 Preliminary Findings

The following section draws out some of the more important preliminary findings of the 2009 House Condition Survey in relation to the stock as a whole and dwelling unfitness.

Findings in relation to disrepair, Housing Health and Safety Rating, Decent Homes, SAP, and Fuel Poverty will emerge over the next 9 months as BRE carries out its modelling work in relation to these issues.

4.1 Northern Ireland's Dwelling Stock and Tenure

In 2009 Northern Ireland's total dwelling stock was approximately 740,000, a net increase of 35,000 (11,700 per annum) since 2006. This represents a slightly higher rate of growth than for the decade as a whole and reflects the high number of dwelling completions in 2006 and 2007 at the height of the housing boom. In 2001 there were 647,500 dwellings, a net increase of approximately 92,500 dwellings in nine years (10,300 per annum).

Table 1 provides the key tenure related information:

	2006 (%)		2009 (%)		inc vacants	
Owner occupied	468,800	66.5	461,800	62.4	480,400	64.9
Private Rented & Other	80,800	11.5	124,600	16.8	142,000	19.2
Housing Executive	93,400	13.3	85,650	11.6	90,800	12.3
Housing Association	21,500	3.1	24,550	3.3	26,700	3.6
Vacant	40,400	5.7	43,400	5.9		
Total	705,000	100	740,000	100	740,000	100

Table 1: Northern Ireland's Dwelling Stock by Tenure

It shows the following:

- A slight reduction in the owner-occupied sector of approximately 7,000 dwellings. As a proportion of the total stock the figure has decreased by four percentage points (from 66% to 62%).
- The continued rapid increase in the number and proportion of private rented sector dwellings. In 2001 there were 49,400 (7.6%) privately rented dwellings in Northern Ireland. By 2006 this had risen to 80,800 (11.5%). From 2006 to 2009 the number rapidly increased to 124,600 (16.8% of the total stock) an increase of 43,800 (14,600 per annum). Indeed if vacant properties whose previous tenure was private rented, are included, the figure rises to 142,000 (19.2%).
- The number of tenanted social dwellings fell from 133,900 (20.7%) in 2001 to 114,900 (16.4%) in 2006 and to 110,200 (14.9%) in 2009.
- The total number of vacant properties increased by approximately 3000 between 2006 and 2009 and the vacancy rate has risen a little from 5.7 per cent to 5.9 per cent. The rate in 2001 was 4.9 per cent. A high vacancy rate is particularly evident in the private rented sector where 17,500 properties (12.3%) are vacant.

4.2 Dwelling Age

	2006 (%)		2009 (%)	
Pre 1919	109,500	15.5	106,500	14.4
1919-44	74,000	10.5	78,200	10.6
1945-64	142,700	20.2	125,100	16.9
1965-80	169,200	24.1	181,800	24.6
1981-90	79,900	11.3	86,300	11.7
Post 1990	129,700	18.4	162,100	21.9

Table 2: Northern Ireland's Dwelling Stock by Age

Table 2 confirms the following:

- The continuing decline of the pre-1919 stock from 116,400 (18.0%) in 2001 to 109,500 (15.5%) in 2006 to 106,500 (14.4%). There is a disproportionately high percentage of these older dwellings in the private rented sector (19.9% of all dwellings in this sector were built before 1919 compared to 14.1% for the owner-occupied sector). More than one-third (35.7%) of all vacant properties were also built before 1919.

- The obvious substantial increase in the post-1990 dwelling stock as a result of the new construction (less demolitions, closures and conversions) an increase of 32,400 dwellings 2006-2009 approximately 11,000 per annum.
- The apparent increase in the number of dwellings built between 1919 and 1944 and 1965 and 1990 is the result of minor statistical distortions which result from sample surveys and the difficulties surveyors sometimes have in the field allocating dwellings to relatively narrow age bands.

4.3 Dwelling Location

	2006 (%)		2009 (%)	
Belfast Metro Area	275,400	39.1	270,000	36.5
District/other towns	218,400	31.0	238,400	32.2
Total urban	493,800	70.1	508,500	68.7
Small rural settlements	106,900	15.2	116,500	15.7
Isolated rural	104,300	14.8	115,000	15.5
Total rural	211,200	30.0	231,500	31.3

Table 3: Northern Ireland's dwelling stock by location

The above table highlights a number of trends:

- The slight decline in the number and proportion of dwellings in the Belfast Metropolitan Area between 2006 and 2009.
- The significant growth in the number of dwellings in District and other towns since 2001. The number and proportion in 2001 was 192,700 (29.8%) increasing to 218,400 (31.0%) in 2006 and to 238,400 (32.2%) in 2009.
- The increase in the number of dwellings in smaller rural settlements 2006 to 2009, although the proportions have remained similar at around 15 per cent. The number of dwellings in isolated rural areas decreased between 2001 and 2006 and increased in the three years to 2009. This may reflect the significant increase in the second homes market in Northern Ireland during those years. It may however to a certain extent simply reflect sample error. The proportion of dwellings in isolated rural areas remained fairly similar between 2006 and 2009 (14.8% and 15.5% respectively).

4.4 Dwelling Unfitness

In 2009 there were an estimated 17,500 unfit dwellings in Northern Ireland, representing a headline rate of 2.4 per cent. This compares with an unfitness rate of 4.9 per cent (31,600) in 2001 and 3.4 per cent (24,100) in 2006. This decline in unfitness continues to be accounted for by the high rate of new dwelling

construction, the interest in improving existing homes in the private sector (assisted by grants expenditure), as well as continued investment in social housing in the years 2006 to 2009.

	2006	(%)	2009	(%)
Owner-occupied	7,500	1.6	4,400	0.9
Private rented	2,100	2.6	2,700	2.2
Housing Executive	500	0.5	50	0.1
Housing Association	100	0.4	50	0.2
Vacant	13,900	34.5	10,300	23.5
Total	24,100	3.4	17,500	2.4

Table 4: Northern Ireland's dwelling stock – unfitness by tenure

Since 2001 the unfitness rate has been reduced considerably in the owner-occupied sector from 11,900 (2.8%) to 7,500 (1.6%) to 4,400 (0.9%) in 2009. Between 2001 and 2006 the unfitness rate reduced in the private rented sector from 4,300 (8.7%) to 2,100 (2.6%) and remained broadly similar in 2009 2,700 (2.2%). In the social sector unfitness continues to be minimal.

Unfitness is increasingly associated with vacancy. While a declining proportion of vacant dwellings are now unfit – from 43.9 per cent in 2001 this proportion has declined to 34.5 per cent in 2006 and to 23.5 per cent in 2009 (this is associated with the growing vacancy rate in the new buy-to-let sector). However, the proportion of unfit dwellings which are vacant has risen from 44.4 per cent in 2001 to 57.7 per cent in 2006 and 58.9 per cent in 2009.

As would be expected most unfit dwellings (8,500; 48.4%) were built before 1919. This compares to 60.6 per cent (14,600) in 2006. A further 18.1 per cent of unfit dwellings in 2009 were built between 1919 and 1944, compared to 17.2 per cent in 2006.

A comparison of unfitness figures for the 11 RPA Council Areas shows that the highest levels of unfitness tend to be in Fermanagh and Omagh (6.6%), Mid Ulster (5.1%) and Mid Antrim (4.0%). In Belfast the level of unfitness is highest in South Belfast where an estimated 3.4 per cent of dwellings were unfit in 2009.

5.0 Conclusions

The 2009 House Condition Survey confirms the changing tenure structure of Northern Ireland's housing stock with nearly one in six dwellings now in the private rented sector compared to one in seven in 2006. It also confirms the trend of a higher vacancy rate in the private rented sector, with 12 per cent of this sector lying vacant. In 2006 the proportion was 15 per cent although the numbers have increased between 2006 and 2009 from 13,800 to 17,500.

Headline unfitness reduced from 3.4 per cent to 2.4 per cent, with the highest concentration of unfitness in Fermanagh and Omagh. Unfitness in the private rented sector has remained fairly similar in the years between 2006 and 2009 at approximately 2 per cent but continues to be associated with vacant dwellings in particular.

This paper provides a summary of some of the more important preliminary findings on dwelling stock and unfitness. The new E-form has allowed a faster turn around of these results due mainly to the omission of the time consuming data punching and secondary validation.

Further modelling work by BRE is required to produce key results on disrepair, Housing Health and Safety Rating, Decent Homes, SAP and Fuel Poverty and these will emerge during the summer/autumn months. A final report providing an overall assessment of the key housing indicators will be produced for January 2011.