Inner East Zone Profile

2022 – 2023

Bristol City Council, Strategy & Enabling Team

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Summary:

For the Inner East key affordable housing priorities from a Housing Strategy and Enabling perspective are:

- Development of larger family sized properties (3+ bedrooms)
- Accessible & adaptable properties

The Inner East zone is made up of three inner city wards, two of which are the most densely populated wards in Bristol. Most of the new affordable housing supply and existing City Council stock in these wards is 1 and 2-bed flats/maisonettes. Whilst these smaller properties are continuously in high demand, there is an acute shortage of homes that are suitable for larger families (3+ bed homes) in the area which is exacerbating the demand for these homes across the city as households on the register can bid on homes in any part of Bristol. The lack of space in these urban areas means that it is increasingly difficult to provide suitable housing for larger families in the zone and so alternative property types to the traditional house for families (i.e. duplex or maisonette style properties) * may need to be considered.

Accessible housing is also in high demand in this area. The figures seem comparatively low to the overall demand for affordable housing but there is a shortage in supply and existing stock which means that people in need of this type of accommodation have far less options than households without a need.

The above is based on the assessment of the information detailed in this zone profile. Key factors that have been considered in determining the priorities for the zone are as follows:

- Across the Inner East lower quartile prices have more than doubled since 2012 (130% increase).
- It is estimated that by 2035 Central East Bristol** will need 607 properties for older people and 140 dwellings with extra care facilities[1].
- There is a total of 3,634 Bristol City Council homes within Inner East which makes up 13.5% of Bristol's overall stock. 79% of these are flats (including maisonettes and studios) and 21% are houses (includes bungalows).
- The majority of the Council's existing stock in the Inner East is 2 bed properties (53%) followed by 1-beds (31%). 3+ bed homes make-up 13% of the council stock in the zone***.
- Bristol's Inner East there is a high demand for affordable housing, with 2,969 households with live housing register applications as of April 2022. This is the second highest number of applications in a zone. The highest demand is for 1-bed properties followed by 2 beds however, the turnover of these properties is far greater, and the wait time is significantly shorter for this size of properties compared 3+ bed homes.
- 163 households on the housing register in this zone have been assessed as either being a full-time wheelchair user or requiring an accessible and adaptable feature in the home. This is 15% of total households in need of accessible and adaptable housing on the housing register.
- Active Sites (those that have started on site or about to) are forecast to deliver 1,435 affordable homes in Bristol between **2022/23 and 2024/25**[1]. In the Inner East zone there are 81 affordable homes that have been started, 99% of these are flats (including two 3-bed maisonettes). There is one 2-bed house in construction.

**These will need to be well designed though i.e. with their own entrance, useable outdoor space.*

***These figures are for the whole of Bristol's Central East area and not solely the requirement within Ashley, Easton and Lawrence Hill.*

****As well as Council stock in the zone there is affordable housing owned and managed by partner Registered Providers but we do not have the data needed to assess this housing provision.*

1. Introduction

This area profile is comprised of data relating to three wards. These are:

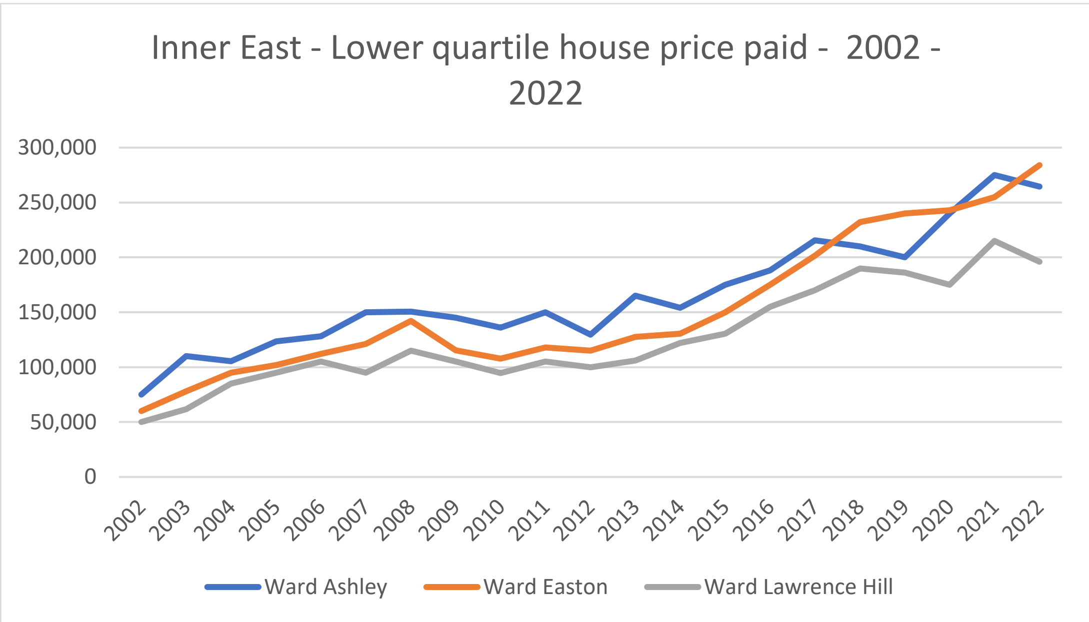
- Ashley
- Easton
- Lawrence Hill

Detailed ward profiles can also be accessed on the Bristol City Council website here.

Mid-2020 population estimates for Wards show that the Inner East wards have larger than the Bristol average (13,702) population sizes.[1] Lawrence Hill and Ashley wards are the third and fifth largest wards in Bristol respectively.

2. Private Sale House Prices

As of March 2022, the lower quartile price paid in Bristol is £258,879 which is substantially higher than the lower quartile price paid for England and Wales of £175,000. Of the three wards in the Inner East, Easton has the highest values with a lower quartile house price paid of £284,000 (March 2022). Lawrence Hill has the lowest lower quartile price paid in Bristol of £196,000 (March 2022). Across the Inner East lower quartile prices have more than doubled since 2012 (130% increase). The below chart highlights the steady increase in house prices for the area since 2002-2022.[2]



[1] Population estimates Mid – 2020 by Five Year Age Band and Sex (by Ward) – accessed October 2022

[2] Lower quartile price paid by ward, England and Wales, year ending Dec 1995 to year ending Mar 2022 Taken from: Lower quartile house prices for administrative geographies: HPSSA dataset 15 - Office for National Statistics (ons.gov.uk) – accessed October 2022

3. Older persons housing

The Inner East's population of over 55's (14.5%) is lower than the Bristol's overall over 55 population (21.9%).[3]

It is estimated that by 2035 Central East Bristol* will need 607 properties for older people and 140 dwellings with extra care facilities[4]. This requirement is broken down in the table below:

	Properties needed for rent	Properties needed for sale
Housing for older people	547	60
Housing with care	126	14

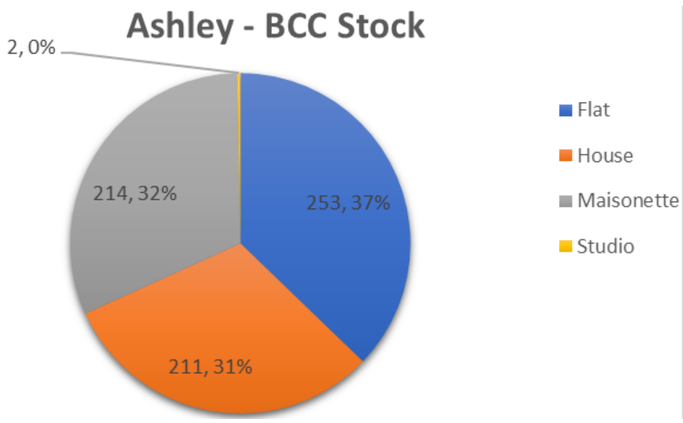
*These figures are for the whole of Bristol's Central East area and not solely the requirement within Ashley, Easton and Lawrence Hill.

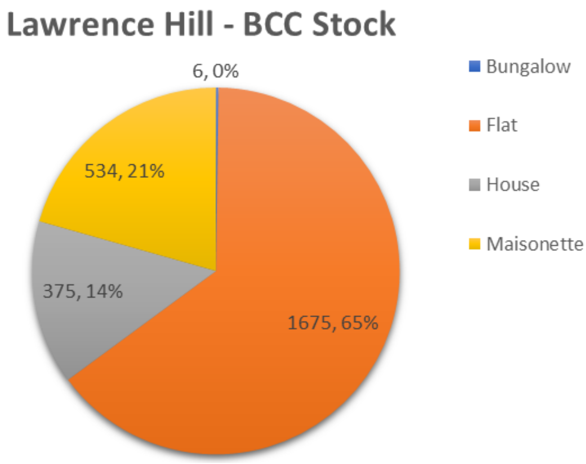
This information in the table above has been taken from the Housing LIN report "Support with commissioning the Better Lives at Home programme for Bristol City Council" April 2020 (updated November 2020). The report considered the housing need of older people for social/affordable rent and private for sale options. The report proposes that any growth in need for Housing for Older People and Housing with Care is estimated to be split 50%/50% between social rent and private for sale tenure in the North, 90%/10% in the East and 70%/30% in the South of the city.

4. Bristol City Council Data – Inner East

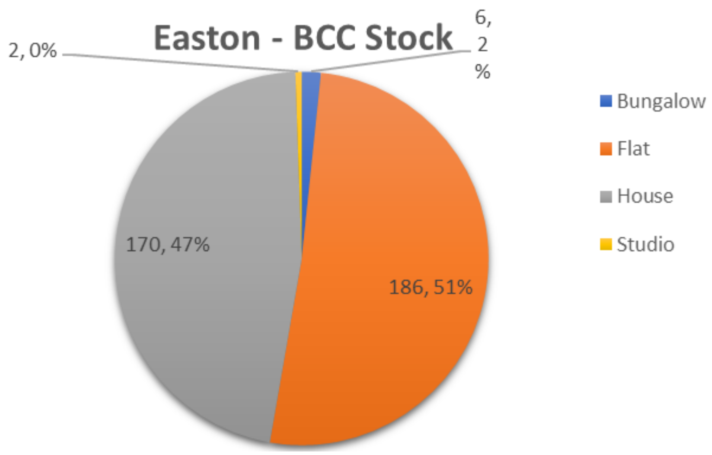
4.1 BCC Council Housing Stock

There is a total of 3,634 BCC units within Inner East which makes up 13.5% of Bristol's overall stock, including 680 in the ward of Ashley, 364 in Easton and 2,590 in Lawrence Hill. Graphs indicating the number of houses and flats can be found below. Most of the homes within Lawrence Hill are flats (65%), with a relative shortage in houses.





[3] [Population estimates Mid – 2020 by Five Year Age Band and Sex (by Ward)] – accessed October 2022
*This data has not been broken down into ward level. The numbers are for the entirety of the North of Bristol.
[4]Housing LIN report "Support with commissioning the Better Lives at Home programme for Bristol City Council" April 2020 updated November 2020



4.2 BCC Housing Register - Applications

Across Bristol's Inner East there is a high demand for social housing, with 2,969 households with live applications as of April 2022. The caveat to this information is that applicants are required to input their current address as opposed to their desired location which means it's possible that a proportion may desire to be housed elsewhere in Bristol. This should be considered when reviewing area profiles. The highest demand is for is for one- and two-bedroom properties, which reflects a city-wide trend.

No. bedrooms	Ashley	Easton	Lawrence Hill	Total
1	455	379	791	1625
2	155	167	321	643
3	87	88	335	510
4	27	26	101	154
5	10	4	15	29
6	2	1	5	8
Total(s)	736	665	1568	2969

The table below shows the number of households within each band, one to four. Band 1 contains applicants with the highest housing need and Band 4 the lowest.

Banding	Ashley	Easton	Lawrence Hill	Total
1 (Highest Priority)	22	12	38	72
2	123	88	294	505
3	191	163	532	886
4	400	402	704	1506

The Inner East has the second-highest number of households on the housing register out of the eight areas profiled. Two of the wards within Inner East, Ashley, and Lawrence Hill, are the most densely populated wards in Bristol, which partly explains the higher number of housing register applications. In addition to the high population in the area, another reason that we can see higher numbers of applications in the area is because all three wards have been identified as being at risk of being impacted by the Cost of Living crisis due to high levels of deprivation [1].

4.3 BCC Housing Register - Accessible Housing

There is a high demand in Bristol for accessible and adaptable housing. The shortage of accessible and adaptable housing is a concern nationally. English Housing Survey data published in 2020 highlighted that 91% of homes don't provide the main features to be considered 'visitable' for a wide range of people including wheelchair users.[5]

On Bristol's Housing Register 1,919 households have indicated that they have a disability that affects their mobility (this figure does currently include households that currently live outside of Bristol).

For households who currently live in the Inner East on the housing register:

- 14 are fulltime wheelchair users
- 138 require a disabled shower
- 11 have a wheelchair accessible shower/ wet room need

The bedroom needs of these households is detailed down below:

Bedroom Need	**Full time wheelchair user**	**Requires disabled shower**	**Wheelchair accessible shower/ wet room need**
1	7	80	7
2	0	23	2
3	4	21	1
4	3	10	1
5	0	4	0
6	0	0	0
Totals	14	138	11

4.4 BCC Housing Register – Allocations

Data provided by Housing and Landlord Services as of April 2022, showed 193 properties were allocated in the Inner East area between April 2021 and March 2022. This data only includes allocations for properties advertised via HomeChoice Bristol. Of the allocations, 43 were direct matches, and of the remaining 150, 105 properties received over 100 bids. A direct offer/match refers to an offer that has been made directly to a household without the property having been advertised via the HCB system. The property offered will match the households assessed housing needs.

Of particular relevance is the breakdown of bids by unit size – direct matches have been removed:

- Studio: 6 out of 8 received 100+ bids (75%)
- 1-bed: 53 out of 75received 100+ bids (51%)
- 2-bed: 40 out of 28 received 100+ bids (53%)
- 3-bed: 5 out of 6 received 100+ bids (83%)
- 4-bed: 1 out of 1 received 100+ bids (100%)

Between April 2021 and March 2022 there were 22 new build properties allocated in the Inner East area, all of these received 100+ bids when advertised. This data only includes allocations for properties advertised via HomeChoice Bristol.

[5] Habinteg Housing Association accessed November 2022

4.5 BCC Housing Register - Wait times

The time it takes to be allocated a property on Home Choice should also be considered for new developments. Between April 2021 and March 2022, a total of 1,476 properties were allocated across the whole of the city. This is a decrease in allocations of 8% compared from the previous year.

The average wait time for households allocated a property across all bands and all bed sizes was 518 days which an increase to the previous year. It is important to note that this average includes offers made to age restricted accommodation, which will usually have a shorter wait time, and direct offers. There were only 16 4-bedroom properties allocated in this time which had an average wait time of 872 days by comparison there were 588 allocations to one-bedroom properties (across all bands) and on average it took 475 days to be rehoused. Whilst the need is highest in 1- and 2-bedroom data according to number of applicants, the turnover of these properties is far greater and the wait time generally shorter consequently.

5. Affordable Housing Delivery

Bristol's Active Sites (those that have started on site or about to) are forecast to deliver 1,435 affordable homes in Bristol between **2022/23 and 2024/25**[6]. This number will increase as further pipeline schemes progress through the planning system and eventually become active sites themselves

In the Inner East zone there are currently 81 affordable homes that have been started, 99% of these are flats (including two 3-bed maisonettes). There is one 2-bed house in construction.

The tenure and bedroom split for Inner East active affordable housing developments is outlined in the tables below. Units being delivered as Move-on Accommodation or for Better Lives At Home (BLAH) are not included in this snapshot.

Area	Affordable Rent	Social Rent	Shared Ownership
Inner East	36	17	28

Area	1 Bed	2 Bed	3 Bed	4 Bed
Inner East	51	28	2	0

6. Conclusion

The Inner East has the second-highest number of households on the housing register out of the eight zones profiled. Two of the wards within Inner East, Ashley, and Lawrence Hill, are the most densely populated wards in Bristol, which partly explains the higher number of housing register applications. There is also a substantial amount of BCC housing stock in the area, predominantly within the Lawrence Hill ward; most stock within the area is flats or maisonettes.

In addition to the high population and levels of BCC stock in the zone, another reason that we can see higher numbers of applications in the area is because all three wards have been identified as being at risk of being impacted by the Cost of Living crisis due to high levels of deprivation [1].

The area follows the city-wide trend of showing 1- and 2-bed need to be the highest demand for the area. However, with 701 households waiting for larger accommodation who reside in Inner East, this is also needed. Due to far lower availability of larger stock in terms of existing supply and new

[6] Data accurate as of August 2022

developments, people in need of larger accommodation are likely to wait far longer than other groups. Developers should therefore aim to factor in an element of larger accommodation to any proposals to meet this need. There is also substantial evidence from the 2021 Local Housing Needs Assessment that there is a strong need for larger homes, for example from Figure 145 see **Appendix 1**[7]. This must be taken into consideration.

The need for adaptable and accessible homes within the zone which presently hosts 15% of those needing accessible accommodation in the city should also be factored in by developers. By building more adaptable and accessible homes, developers will also help provide much needed homes for people with who need them presently as well as future proof housing in the City by enabling citizens to stay in their homes for longer as their needs change.

For further information please contact the Strategy & Enabling team on strategyandenabling@bristol.gov.uk

[7] https://www.westofengland-ca.gov.uk/wp-content/uploads/2021/10/LHNA_Final_Report_Sept_20211.pdf - accessed October 2022

Appendix 1

Local Housing Needs Assessment – Overall need for Market and Affordable Dwellings in Bristol 2020 – 2040 – Figure 145

Figure 145: From Figure 103 - Overall need for Market and Affordable Dwellings in Bristol 2020-40 (including affordable home ownership products) by property size (Source: ORS Housing Model. Note: Figures may not sum due to rounding)

BRISTOL 2020-40		Affordable Housing Need			Total Affordable Housing	Total Market Housing	Total Housing
		Unable to Afford Market Rent		Affordable Home Ownership			
		Social rent	Affordable Rent				
Flat	1 bedroom	2,199	255	3,493	5,947	4,690	10,637
	2+ bedrooms	2,074	499	1,357	3,930	10,209	14,139
House	1-2 bedrooms	1,294	291	2,139	3,723	4,050	7,773
	3 bedrooms	3,675	1,215	1,577	6,468	19,498	25,966
	4 bedrooms	1,185	327	225	1,738	2,752	4,490
	5+ bedrooms	336	93	26	455	46	501
TOTAL HOUSING NEED		**10,764**	**2,679**	**8,818**	**22,261**	**41,244**	**63,505**
Dwellings for Institutional Pop		-	-	-	-	415	415
LHN		**10,764**	**2,679**	**8,818**	**22,261**	**41,659**	**63,920**