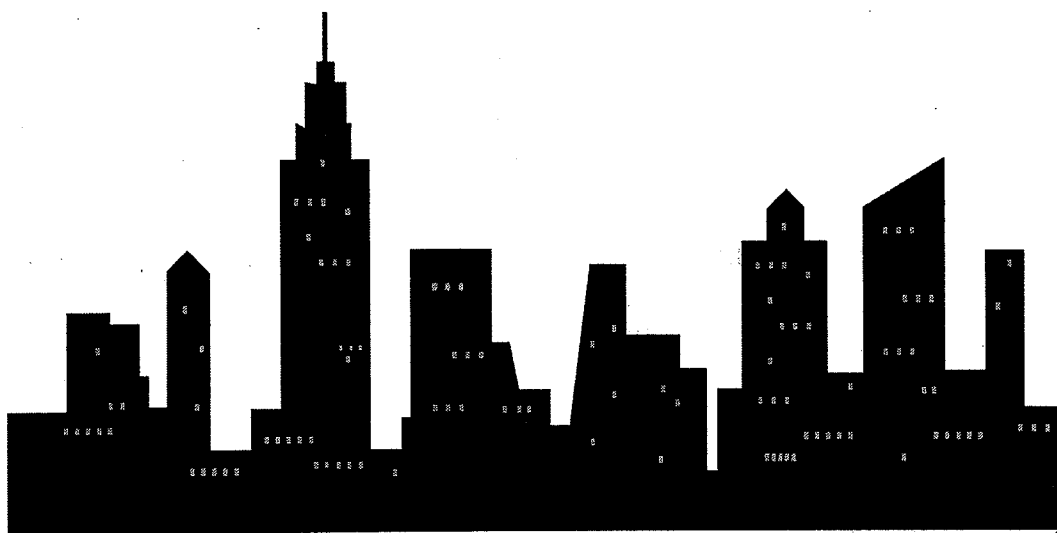


評估房屋需求量
Assessment of Housing Demand
(1997-98 - 2006-07)



房屋需求研究工作小組
Working Group on Housing Demand
一九九七年 十一月
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Assessment of Housing Demand

(1997-98 to 2006-07)

INTRODUCTION

Assessing the demand for housing involves judgement as well as monitoring a moving target. Demand varies according to economic conditions and population fluctuations, as well as policy decisions which may create housing needs (for example, the pace of squatter clearance).

2. For planning purposes, it is necessary to devise a model which will produce the best estimate of future demand at any one time. Such a model is essentially a series of predetermined calculations, which may be applied to the latest assumptions, policies and statistics in order to produce a calculated assessment of demand in the years ahead. As statistics or policies change, the same model can be used to recalculate the demand assessment to take into account the latest situation.

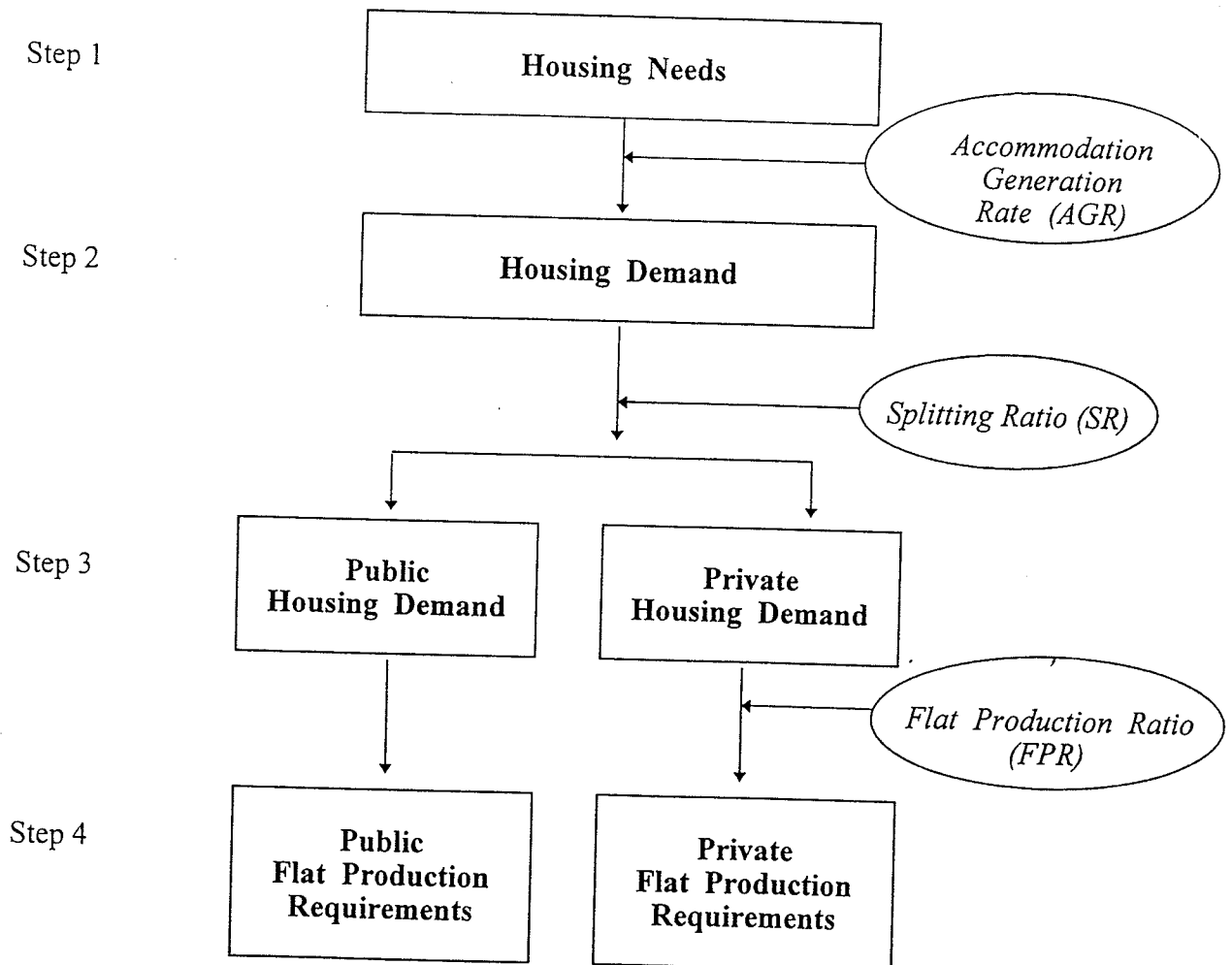
3. In July 1994, an inter-departmental Working Group on Housing Demand¹ was commissioned to produce a model which would allow refined and transparent assessments of housing demand to be made. The Working Group presented its initial findings to the Secretary for Housing in November 1995. A report summarising the methodology and results of the projection for housing over the period from 1995-96 to 2005-06 was also issued. Currently the model has been re-run and rolled forward to cover the period 1997-98 to 2006-07 in the light of new projections and views expressed during the public consultation exercise.

¹ The inter-departmental Working Group includes representatives of the Housing Bureau, Financial Services Bureau, Housing Department, Census & Statistics Department, Planning Department, Rating and Valuation Department, and the Hong Kong Housing Society.

THE MODEL

4. The model operates in four consequential steps to project the flat production requirements for public and private sectors². The structure of the model is illustrated in the chart below.

Model Structure



² The projections are based upon a large body of statistics, including the results of the 1996 Population By-census and the 1996 General Household Survey, as well as those of the Survey of Housing Aspirations of Households conducted in 1996-97 to collect statistics for the model. Other statistics such as immigration statistics and housing statistics are also used.

5. The first step of the model is to project the housing needs arising essentially from such events as Marriages, Divorces and Legal Entrants from Mainland (collectively known as New Housing Needs) and the housing needs generated as a result of the Redevelopment of Public and Private Housing and Clearance of Temporary Housing Areas, Cottage Area and Squatter Areas (collectively known as Generated Housing Needs). Housing need is defined as the number of existing or potential households³ in need of 'adequate housing' i.e. self-contained living quarters⁴ made of permanent materials. A list of components of housing need is at **Annex 1**.

6. For one reason or another, not all households with housing needs intend to acquire separate accommodation. The second step, therefore, is to convert the housing needs of individual components into 'housing demand' by applying a factor known as the Accommodation Generation Rate (AGR). Housing demand is defined as the number of existing and potential households with housing needs who intend to seek separate accommodation. The list of AGRs for different components of housing need is at **Annex II**.

7. The third step is to split the housing demand of individual components between public and private housing by applying a Splitting Ratio (SR), based on such parameters as household income, eligibility rules for public housing and housing preferences. The list of SRs for the different components of housing demand is at **Annex III**

³ A household consists of a group of persons who live together under the same roof and make common provision for essentials of living. These persons need not be related, though in most cases they are.

⁴ Living quarters with tapped water supply, toilet and kitchen facilities.

8. The final step is to establish the flat production requirements on the basis of the projected housing demand for each sector. In the public sector, a household with housing demand requires an additional flat. The flat production requirement is therefore assumed to be equal to the level of housing demand. In the private sector, however, it is necessary to make an allowance, on top of the level of the projected housing demand, for flats which are vacant, used as second homes or for other purposes.⁵

RESULTS

9. For the ten-year period from 1997-98 to 2006-07, the total flat production requirement is projected to be 799,300 flats, comprising 456,300 public housing flats and 343,000 private housing flats. On average, the yearly production requirement for both public and private housing is 79,900⁶ flats.

Flat Production Requirements

1997-98 - 2006-07	Public	Private	Total
Total	456,300	343,000	799,300
Annual	45,600	34,300	79,900
		Say	80,000

⁵ Based on past trends, this allowance is assumed to be 6%.

⁶ Taking into account these demand projections, the Government's long-term target is to provide not less than 85,000 new flats annually, beginning from 1999-2000 onwards, to meet the needs of the community. This represents a "safety" margin of 5,000 flats of the current forecast of housing demand during the period.

FUTURE REVIEW

10. The above projections require regular review and adjustment in the light of changing circumstances such as updated statistics and new Government policies related to housing. The Model will be re-run on an annual basis to provide new sets of projections.

Components of Housing Need

New Housing Needs

- Marriages (First marriages and Re-marriages)
- Divorces
- Legal Entrants from Mainland
- Expatriates
- Splitting of Existing Households
- Inadequately-housed Households

Generated Housing Needs

- Redevelopment of Public Rental Estates (Comprehensive Redevelopment Programme)
- Clearance of Temporary Housing Areas (THAs) / Cottage Areas (CAs) / Squatters
- Emergency / Natural Disasters and Compassionate Cases
- Redevelopment of Private Flats

Adjustments ⁽¹⁾

- Net Outflow of Hong Kong Residents
- Dissolution of Households
- Transfers of Adequately-housed Households between Public and Private Sectors
- Double-counting

⁽¹⁾ The projection of housing needs is calculated on a gross basis. Adjustments are therefore required to arrive at the net figures for the overall housing needs : -

- (a) to take account of events which reduce housing needs. These events are essentially the Net Outflow of Hong Kong Residents, and the Dissolution of Households (most commonly due to death or re-marriage);
- (b) to take account of transfers between public and private sector housing by households which are already adequately-housed; and
- (c) to remove the effect of Double-counting. The various components of need are not mutually exclusive. For example, upon redevelopment of public rental estates, an existing household may intend to split, giving rise to housing needs under both categories of need (i.e. new and generated).

Accommodation Generation Rates (AGRs) for Components of Housing Need

Category / Component	AGR
New Housing Demand	
• First Marriages	82
• Re-marriages	25
• Divorces	30
• Legal Entrants from Mainland	100
• Expatriates	100
• Splitting of Existing Households	100
• Inadequately-housed Households	100
Generated Housing Demand	
• Redevelopment of Public Rental Estates (Comprehensive Redevelopment Programme (CRP))	100
• Clearance of THAs / CAs	100
• Clearance of Squatters	100
• Emergency / Natural Disasters and Compassionate Cases	100
• Redevelopment of Private Flats	100
Adjustment of Housing Demand	
• Net Outflow of Hong Kong Residents	93
• Dissolution of Households	100
• Intersectoral Transfers of Adequately-housed Households	100
• Double-counting	
Household Splitting in CRP	100
Households Splitting in the Clearance of THAs/CAs	100
Legal Entrants from Mainland	100

Splitting Ratios (SRs) for Components of Housing Need

Category / Component	SR (PU : PH)
New Housing Demand	
• Marriages	54 : 46
• Divorces	54 : 46
• Legal Entrants from Mainland	71 : 29
• Expatriates	0 : 100
• Splitting of Existing Households	
Unextended Nuclear Family Households	27 : 73
Extended Nuclear Family Households :	
form Young Single-person Households	29 : 71
form Elderly Single-person Households	71 : 29
Two or More Nuclear Family Households	84 : 16
• Inadequately-housed Households	72 : 28
Generated Housing Demand	
• Redevelopment of Public Rental Estates (Comprehensive Redevelopment Programme)	100 : 0
• Clearance of THAs/CAs	100 : 0
• Clearance of Squatters	100 : 0
• Emergency / Natural Disasters and Compassionate Cases	100 : 0
• Redevelopment of Private Flats	72 : 28
Adjustment of Housing Demand	
• Net Outflow of Hong Kong Residents	19 : 81
• Dissolution of Households	
Deaths	31 : 69
Re-marriages	54 : 46
• Intersectoral Transfers of Adequately-housed Households	
Public Sector	0 : 100
Private Sector	100 : 0
• Double-counting	
Household Splitting in CRP	100 : 0
Household Splitting in the Clearance of THAs/CAs	100 : 0
Legal Entrants from Mainland	100 : 0

評估房屋需求量

(1997-98 至 2006-07)

引言

評估房屋需求所涉及的工作，包括對不斷轉變的目標作出判斷和監察。有關需求亦會因經濟狀況、人口變動和政策決定，而可能引起改變（例如清拆寮屋的速度）。

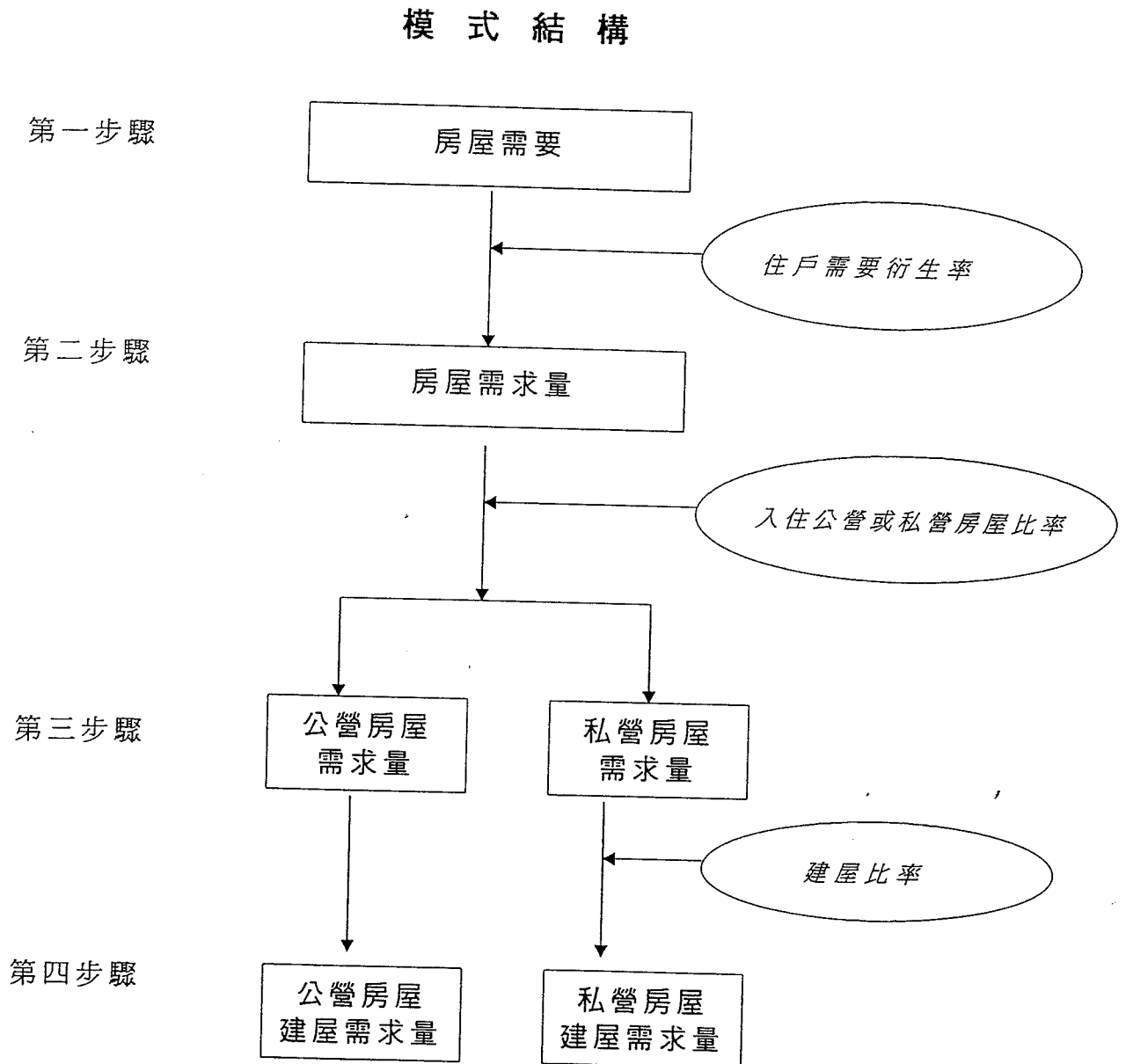
2. 為執行規劃工作，我們必須設計一套模式，可以隨時對未來的房屋需求，作出最準確的估計。這個模式基本上是一系列預先制定的算式，我們可按最新的假設、政策和統計數字，推算未來的房屋需求量。若統計數字或政策有改變，我們亦可以利用同一模式，根據最新的情況，重新進行推算。

3. 在一九九四年七月，政府成立了一個跨部門房屋需求工作小組¹，研製了一套模式，並採用了更精確和更具透明度的方法去評估房屋需求。工作小組在一九九五年十一月向房屋司（即現時的房屋局局長）提交了初步的評估結果。一份扼述一九九五—一九六年至二零零五—零六年的房屋需求推算方法和結果的報告亦於同期發出。最近，我們根據最新的推算和長遠房屋策略公眾諮詢期間所收集的意見，重新運算房屋需求模式，而十年評估期亦向前推展，涵蓋一九九七—一九八年至二零零六—零七年這段期間。

¹ 跨部門工作小組成員包括房屋局、財經事務局、房屋署、政府統計處、規劃署、差餉物業估價署以及香港房屋協會的代表。

模式

4. 這套房屋需求模式的運作，可分四個步驟，藉此推算出公營和私營房屋的建屋需求量²。這個模式的結構在下圖說明。



² 推算以大量統計資料為依據，其中包括一九九六年中期人口統計的結果，一九九六年綜合住戶統計調查的結果，以及於一九九六 - 九七年為模式蒐集統計資料而進行的住戶的住屋意願調查的結果。其他所依據的統計資料包括出入境數字和房屋數字等。

5. 模式的第一步驟是推算主要因結婚、離婚及內地新來香港人士所產生的房屋需要（統稱為新的房屋需要），以及由於重建公營與私營房屋和清拆臨時房屋區、平房區與寮屋區而衍生的房屋需要（統稱為衍生的房屋需要）。房屋需要意指需要「合適居所」的現有或可能組成的住戶³。合適居所是指用永久物料建成且有獨立設備的住所⁴。各個房屋需要類別見於附件 I。

6. 由於種種原因，並非全部有房屋需要的住戶都打算物色獨立居所，因此，第二步驟是把各個類別的房屋需要乘以一個「住戶需要衍生率」的系數，從而得出「房屋需求量」。房屋需求量意指有房屋需要而又打算物色獨立居所的現有及可能組成的住戶的數目。有關各個房屋需要類別的「住戶需要衍生率」見於附件 II。

7. 第三步驟是以住戶入息、入住公營房屋資格及住屋意願等參數為依據，把各個類別的房屋需求量乘以一個「入住公營或私營房屋比率」，從而將房屋需求量劃分為公營與私營房屋需求量。有關各個房屋需要類別的「入住公營或私營房屋比率」見於附件 III。

8. 最後的步驟是根據房屋需求量的推算數字，釐定建屋需求量。在公營房屋方面，每有一個有房屋需求的住戶，便須增建一個房屋單位。因此，模式假設公營房屋的建屋需求量與公營房屋需求量相同。不過，在私營房屋方面，除了推算房屋需求量外，還須估計空置、用作第二居所和其他用途的單位數目⁵。

³ 住戶是由一群同住在一處並一起應付生活基本需要的人組成，而大部分情況下這些人都有親屬關係。

⁴ 有獨立設施如自來水、廁所及廚房設施的住所。

⁵ 根據過往趨勢，模式假設私營房屋建屋需求量應比私營房屋需求量大 6%。

評估結果

9. 在一九九七-九八年至二零零六-零七年的十年期間，推算總建屋需求量为 799 300 個房屋單位，其中公營房屋的建屋需求量为 456 300 個單位，私營房屋則為 343 000 個，而這段期間公營及私營房屋每年的平均建屋需求量为 79 900⁶個單位。

1997-98 至 2006-07	建屋需求		
	公營	私營	總計
總計	456 300	343 000	799 300
每年	45 600	34 300	79 900
		約	80 000

未來的評議工作

10. 上述的房屋需求推算數字需定期評議和調整，以配合不斷轉變的情況，例如新的統計數據及政府的房屋政策。因此，我們會每年重新運算該模式，藉以提供新的推算數據。

⁶ 基於上述預計的房屋需求，政府已定下了長遠目標：由一九九七至二零零零年度開始，每年提供不少於 85,000 個新建單位。這數字包括了每年較預計的房屋需求多出 5,000 個單位的容差量。

房屋需要的類別

新的房屋需要

- 結婚（初婚及再婚）
- 離婚
- 內地新來香港人士
- 外地來香港人士
- 現有住戶分戶
- 沒有合適居所的住戶

衍生的房屋需要

- 重建租住公屋（整體重建計劃）
- 清拆臨屋區／平房區／寮屋
- 緊急事故／天災及體恤困境個案
- 重建私人房屋

調整⁽¹⁾

- 香港居民外流的實數
- 住戶解體
- 有合適居所的住戶在公營房屋與私營房屋之間的遷徙
- 雙重計算

(1) 各類別的房屋需要量是概括推算的數字，須作出以下調整，才可計算到整體房屋需要的實數－

- (a) 香港居民外流以及住戶解體（常見的情況多數是住戶死亡或再婚）都會引致房屋需要減少，故要計及減少了的房屋需要；
- (b) 有合適居所的住戶在公營房屋與私營房屋之間的遷徙也應計及；
- (c) 各個房屋需要類別有可能重疊，故要消除雙重計算的影響。舉例來說，重建租住公屋時，現有住戶可能有意分戶，從而使兩個主要的需要類別（即新的和衍生的房屋需要類別）都計算了由分戶所產生的房屋需要。

住戶需要衍生率

組別／類別	住戶需要衍生率
新的房屋需求	
• 結婚	82
• 再婚	25
• 離婚	30
• 內地新來香港人士	100
• 外地來香港人士	100
• 現有住戶分戶	100
• 沒有合適居所的住戶	100
衍生的房屋需求	
• 重建租住公屋(整體重建計劃)	100
• 清拆臨屋區／平房區	100
• 清拆寮屋	100
• 緊急事故／天災及體恤困境個案	100
• 重建私人房屋	100
房屋需求的調整	
• 香港居民外流的實數	93
• 住戶解體	100
• 有合適居所的住戶在公營房屋與私營房屋之間的遷徙	100
• 雙重計算	
重建租住公屋的住戶分戶	100
清拆臨屋區／平房區的住戶分戶	100
內地新來香港人士	100

各個類別的入住公營或私營房屋比率

組別／類別	比率(公營房屋：私營房屋)
新的房屋需求	
• 結婚	54:46
• 離婚	54:46
• 內地新來香港人士	71:29
• 外地來香港人士	0:100
• 現有住戶分戶	
未擴展的單核心家庭住戶	27:73
擴展的單核心家庭住戶分戶：	
組成單身青年住戶	29:71
組成單身老人住戶	71:29
兩個或以上核心家庭住戶	84:16
• 沒有合適居所的住戶	72:28
衍生的房屋需求	
• 重建租住公屋(整體重建計劃)	100:0
• 清拆臨屋區／平房區	100:0
• 清拆寮屋	100:0
• 緊急事故／天災及體恤困境個案	100:0
• 重建私人房屋	72:28
房屋需求的調整	
• 香港居民外流的實數	19:81
• 住戶解體	
死亡	31:69
再婚	54:46
• 有合適居所的住戶在公營房屋與私營房屋之間的遷徙	
公營房屋	0:100
私營房屋	100:0
• 雙重計算	
重建租住公屋的住戶分戶	100:0
清拆臨屋區／平房區的住戶分戶	100:0
內地新來香港人士	100:0