

**ROTHER DISTRICT  
HOUSING NEEDS SURVEY  
FINAL REPORT**

**2005**



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# 1 EXECUTIVE SUMMARY

## 1.1 Housing Needs Survey

1.1.1 Rother District Council formally commissioned David Couttie Associates (DCA) in February 2005 to carry out a District-wide Housing Needs Study. The study formed part of the Pan Sussex Sub-Regional Study conducted with all six East Sussex Councils, one of the first of its kind in the country.

1.1.2 The purpose of the study was to examine the housing requirements needs, aspirations and demands for the communities and household of the District.

### 1.1.3 The overall aims of the project were to:-

- ◆ inform the development of each Council's Housing Strategy and other relevant strategies and plans;
- ◆ provide robust information to support Housing and Planning policies;
- ◆ assist in the provision of data in relation to the number, type and location of affordable new homes required over the next three years and beyond;
- ◆ inform the decisions concerning future housing provision in relation to household aspirations;
- ◆ provide data in relation to the number of dwellings requiring adaptation or extension;
- ◆ support the Council's contribution to County-wide and Regional joint strategic planning;
- ◆ contribute to the evidence base for development plans and in particular, to assist policy formulation in respect of the delivery of affordable housing through the planning system.

### 1.1.4 In this summary you will find the main findings from a study undertaken through:-

- ◆ A postal questionnaire to 4,950 households in 6 sub-areas;
- ◆ A housing market survey utilising the Land Registry and Halifax databases and an internet/telephone survey of estate agents on the cost of access level property and on the supply and cost of private rented housing;
- ◆ Secondary data analysis drawing upon HIP and Housing Register data on the flow of social stock and need, 2001 Census, household and population projections and other national research;
- ◆ Face to face interviews with older people, young people, Black and Minority Ethnic (BME) households, Gypsy and Traveller households and people with learning disabilities on a sub-regional basis across all 6 Districts of East Sussex. Each group were interviewed using a dedicated questionnaire.

**KEY FINDINGS OF THE SURVEY**

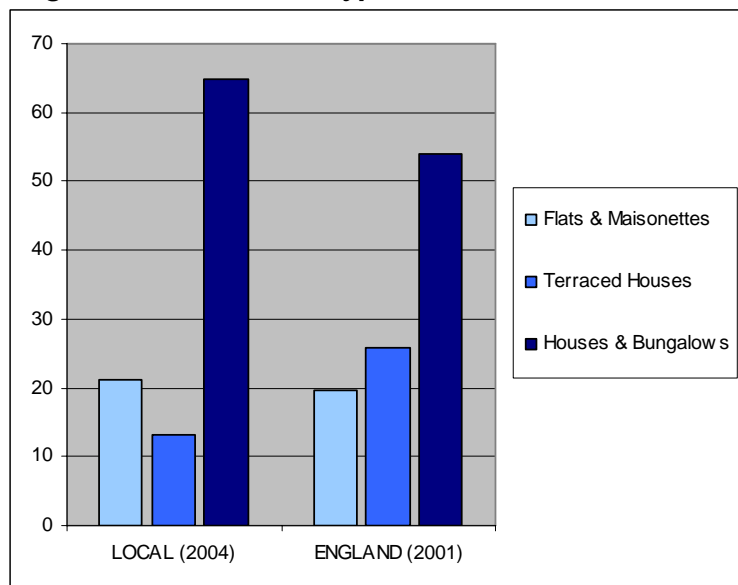
- ◆ 91% of households live in accommodation suitable for their needs. Satisfaction varies from 97% in the owner occupied (no mortgage) sector to 76% in the Private rented sector;
- ◆ The average prices of flats and terraced houses have increased by 82% and 79% in the last 3 years and are £127,267 and £174,884 respectively. Affordability is a major issue, particularly for new forming households;
- ◆ 76% cannot afford private rental and home ownership is beyond the reach of 83% of concealed households. Only 5% of concealed households earn over £27,300 pa, the national average;
- ◆ The social stock is now 11.3%, much lower than the national average of 19.3% and provides 337 re-let units each year. 38.5% of existing stock re-lets are sheltered flats and bungalows and the net level of units available for general households is around 230 units per annum.
- ◆ Annually 593 affordable housing units are needed, 256 more than existing re-let supply;
- ◆ There is a requirement to develop a more balanced housing stock in both sectors with a need for more flats and terraced houses, particularly in the private sector;
- ◆ The retired population will increase by 35.5% by 2021. There is an inextricable link between ageing and disability. 70% of those with a support need are over 60, and over half (52%) have a walking difficulty.

**1.2 The Housing Stock**

1.2.1 Figure 1-1 shows the characteristics of the District stock in 2005, compared to the national average level at the 2001 Census in each category.

1.2.2 Locally, the proportion of houses and bungalows (64.8%) is much higher than the national average of 54%. The supply of terraced properties is 13.3%, much lower than the national average of 26%, and flats / maisonettes at 21.5%, just above the national average of 20%.

**Figure 1-1 House Types Local: National**



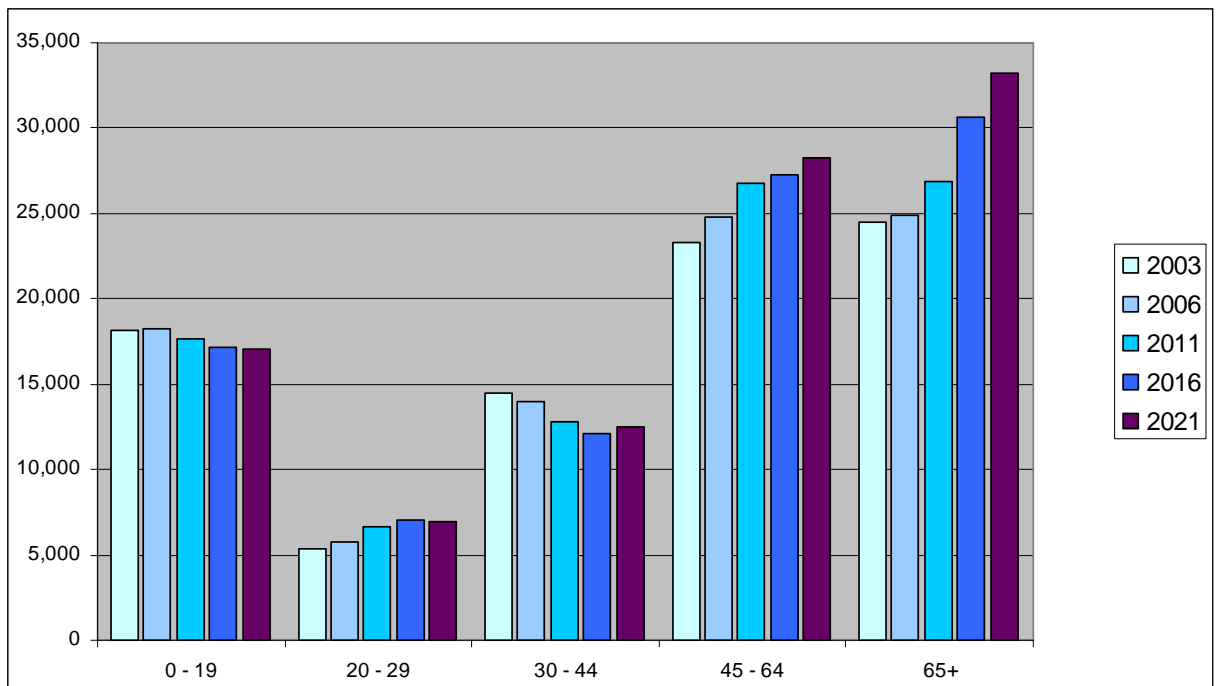
**1.3 The District Population – Future Projections**

1.3.1 An important feature in measuring housing needs is to forecast what is likely to happen over the next decade or so in order that provision for new housing can be planned. Population change in an area results from a number of factors - numbers of births and deaths, how the population is ageing, and the migration of people into and out of the area. The number of households rises and falls over time in response to these and is also affected by changes in the pattern of marriages and divorces and the general economic climate.

**1.3.2 What about the future?**

- 1.3.3 The population estimates are based on East Sussex County Council projections (2003). The 2001 Census data has been taken into consideration in the production of these projections.
- 1.3.4 The 2003 based projections indicate that the population will increase by approximately 12,100 people, 14.1% over the 18 years to 2021, rising to 98,000 by 2016, increasing at an average annual rate of approximately 0.8%.
- 1.3.5 The 0-19 age range shows a decrease overall (1,000; 5.5%). The largest fall occurs between 2006 and 2011 (600; 3.3%).
- 1.3.6 The 20-29 age range comprises new households forming and will have implications for future affordable housing need both in the short and longer term. Overall this age group shows a rise (1,500; 27.8%), with the most significant increase seen between 2006 and 2011 (800; 13.8%) followed by a slight fall between 2016 and 2021 (100; 1.4%).
- 1.3.7 The 30-44 age group, the main economically active group shows a decrease overall (2,000; 13.8%). The largest decrease occurs between 2006 and 2011 (1,200; 8.6%).
- 1.3.8 There is a growth of the population in the 45-64 age group. Over the forecast period there is an increase of 5,000 people (21.5%) A steady rise is seen throughout the forecast period, with an increase of 2,000 people between 2006 and 2011.
- 1.3.9 The most significant feature here is the growth of the population in the over 65 age group with an increase of 8,700 people (35.5%) over the forecast period. Numbers rise throughout the forecast period, with a large rise of 6,300 occurring in the current decade to 2011.
- 1.3.10 Numbers in the 80+ age group increase by 26%, 2,100 more people by 2021. Given the resource demands often associated with elderly people, these are significant figures.

**Figure 1-2 Population Change Age Band Forecast**



## **1.4 The Housing Market**

1.4.1 The housing market is the context against which all the housing needs of the area are set. In particular, house price information is the basis on which the “affordability” of housing is measured for low-income households. In essence, we are seeking to establish who cannot afford to enter into the market. This data is then related to the problems faced by the “concealed households” in the area, i.e. households living with friends and relatives unable to gain access to the housing market.

### **1.4.2 National and Regional Context**

1.4.3 UK house price inflation for the year ending 31<sup>st</sup> December 2004 was recorded by Halifax Index at 15.1% and the Land Registry at 11.7%. House price inflation in the fourth quarter of 2004 slowed in most regions with an overall increase of 0.1%, well below the 2.7% gain in the third quarter of 2004.

1.4.4 House prices in the South East Region show a small fall, decreasing by 1.6% during the fourth quarter of 2004. The annual rate of house price inflation recorded in the Halifax Index for the South East Region at 31<sup>st</sup> December 2004 was 7.2%, well below the UK average of 15.1%.

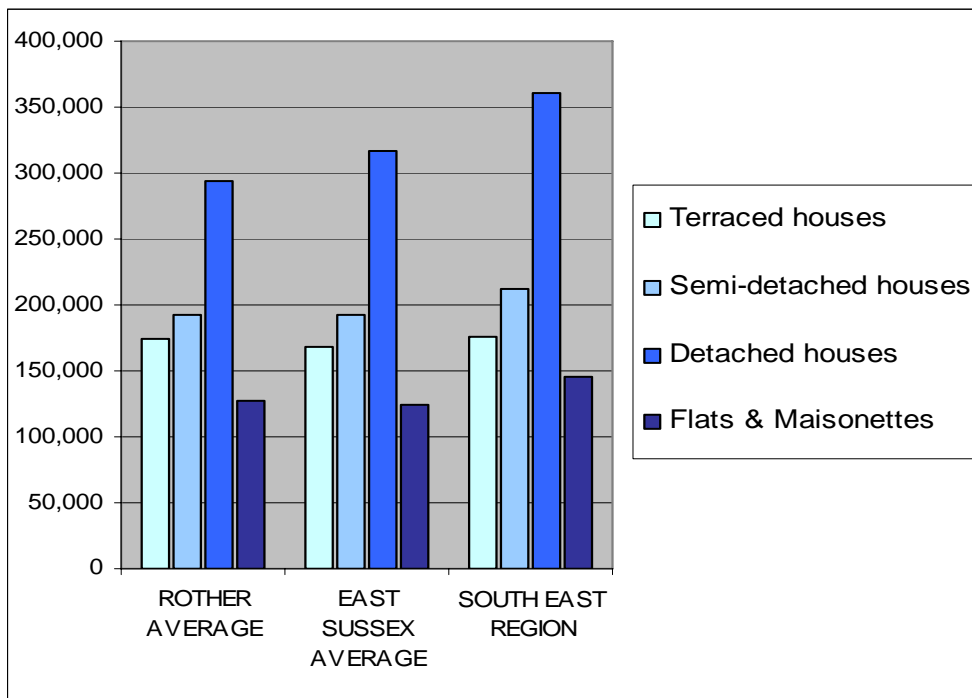
## **1.5 The Rother District Housing Market**

1.5.1 The evaluation of the market in Rother District is based on specially prepared information taken directly from the Land Registry database for the year to 31<sup>st</sup> December 2004, an analysis of local estate agency sales looking at entry level properties and from the Halifax as the largest mortgage lender, analysing lending in the region.

1.5.2 The Land Registry recorded the average price for all dwellings in the District at £209,134. The average semi-detached dwelling was sold for £193,140, a similar level to the East Sussex average of £192,550. The graph shows that house prices in the District are comparatively similar to the average for East Sussex. The average prices of flats and terraced house have increased by 82% and 79% respectively in the last 3 years.

1.5.3 An income of £25,100 is required to buy a one bedroom flat in Bexhill. A two bedroom flat requires an income of £36,900 in Battle and Battle Rural and potentially up to £56,200 in Ticehurst Rural, although there is a very small stock for this type in the area. Terraced properties require an income of £37,600 in Bexhill and £48,500 in Battle and Battle Rural.

1.5.4 We assess flats/maisonettes to be the main entry level for first time buyers in view of their lower cost and high volume of sales. 83% have inadequate income to be able to buy and 76% cannot afford to rent privately. Additionally the private rented sector is small and is not the housing preference of the majority of households. Even where this is the case lack of supply may cause some households to have to leave the District to meet their requirements.

**Figure 1-3 2004 Average House Prices**

## 1.6 Key Findings from the Household Survey

- 1.6.1 The fieldwork for the study took place in Rother in March 2005 and provides a detailed picture of the current and future housing needs and preferences in the District. The study consisted of a postal questionnaire to 4,950 households within 6 sub-areas. 1,753 responses were achieved, providing statistical confidence at 95%  $\pm$  1.91% confidence interval. 4.5% of all households in the District participated in the survey.
- 1.6.2 The “implied” numbers are our assessment of the total numbers after applying a sub area weighting factor to represent the total population. Below we present in summary form, the key findings from the survey with a particular emphasis on the needs of concealed households.

## 1.7 Adequacy of the Existing Stock

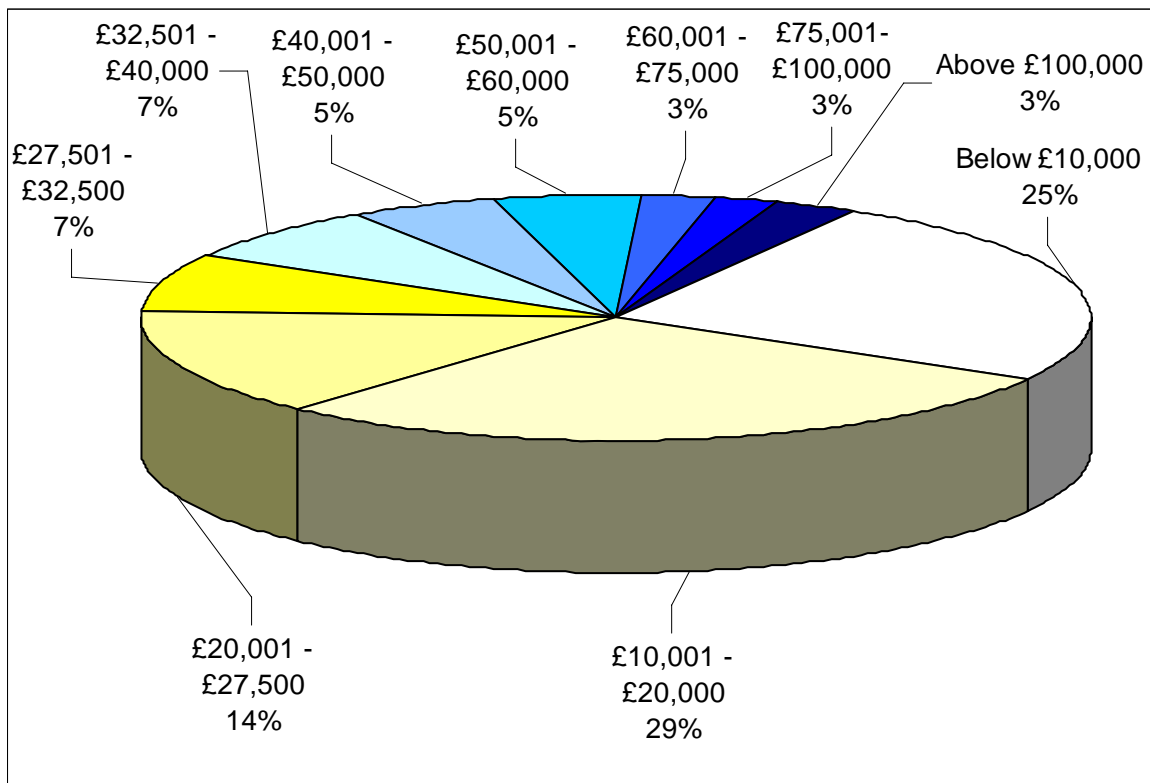
- 1.7.1 The vast majority of households have access to all the basic amenities and the perception of most residents is that their homes are well maintained and not in need of improvement.
- 1.7.2 Some 90.8% of households indicated that their accommodation is adequate for their needs. 9.2% (3,560 implied) indicated that it is inadequate. The largest single issue for those reporting an inadequacy which could be resolved in-situ (without moving) was that the dwelling needed improvement / repairs (87.4%). Of those requiring a move 67.7% (2,082 implied) indicated that the dwelling was too small.
- 1.7.3 Based on a calculation of occupants to bedroom numbers, under-occupation affects approximately 16.9% of all households and over-occupation affects 1.2%.



## 1.8 Costs of Present Housing and Household Income

- 1.8.1 A total of 18.8% paid less than £60 p.w.; 30.5% paid less than £70 p.w. and 50.6% paid less than £80. Of owner-occupiers, with a mortgage 68.1% pay less than £250 per month. Around 3.3% of owner-occupier households pay in excess of £1,250 per month. The level of payment was well spread across the bands up to £1,000 per month.
- 1.8.2 25.0% of households have incomes below £10,000, below the corresponding UK figure (28%). 32.4% of households in the District have incomes above £27,500, well above the UK average (27%).

**Figure 1-4 Average Income of Existing Households**



- 1.8.3 33.9% of households were in receipt of financial support (6,275 implied), of whom 34.3% (4,523 implied) were in receipt of Housing Benefit or 50.2% of renters in the sample.

## 1.9 Moving Households

- 1.9.1 2,790 existing households and 1,523 new households will be moving within Rother District in the next three years.
- 1.9.2 2,794 existing and new forming households anticipate moving away from the District. In the case of existing households moving, the single most common reason given by existing households moving outside the District was to move to a better area (46.6%). In the case of concealed households moving, choices were more focused on employment (65.7%), lack of affordable housing (19.0%) and better education facilities (12.6%).

## 1.10 Support Issues

- 1.10.1 20.7% of households in the District contain somebody with a support need (8,024 households implied), of which 16.4% had two members affected. 33.5% of all household members were over 60, 36.2% over 75.
- 1.10.2 The largest group (4,007 implied) affected by a named support need were those with a walking difficulty, representing 52.3% of those with a support need.
- 1.10.3 Around 7.6% of these households contained someone who was a wheelchair user, suggesting around 585 in Rother District as a whole. 23.0% of wheelchair user's households live in a property with suitable adaptation.
- 1.10.4 Of household members with support needs, some 14.7% (468 implied) felt they needed care or support which is not currently provided.
- 1.10.5 11.7% of all dwellings (4,544 implied) have been adapted to meet the needs of a disabled person. In terms of the nature of adaptations, 54.3% have handrails / grabrails, 46.1% have ground floor toilet adaptations, and 42.4% have adaptations to the access to the property.

## 1.11 Concealed Households

- 1.11.1 Concealed households are people who could not afford to be in the housing market and are living within another household. We found that around 3.9% of households contained one or more households seeking independent accommodation giving a total of 1,523 cases over the next three years to 2008. Over 94.6% are the adult children of existing residents.
- 1.11.2 In the concealed households group:-
- ◆ 60.6% of the people in these concealed households are between 20 and 29 years of age and 29.1% are over 30;
  - ◆ 559 (36.7%) of households are being formed with a partner living in a separate household elsewhere in the District;
  - ◆ Only 11.6% of concealed households moving within the next year were registered on a housing waiting list, 76.0% being on the Rother District Council List.
- 1.11.3 Their needs and preferences for specific house types were:-

Type	Need %	Preference %	Current Stock %
Flat	59.0	27.8	21.5
Terraced	27.9	35.8	13.3
Semi-detached	5.3	20.2	18.0

Size	Need %	Preference %	Current Stock %
One bed	43.6	8.7	11.0
Two bed	54.3	80.6	34.4
Three bed	2.1	10.7	35.9

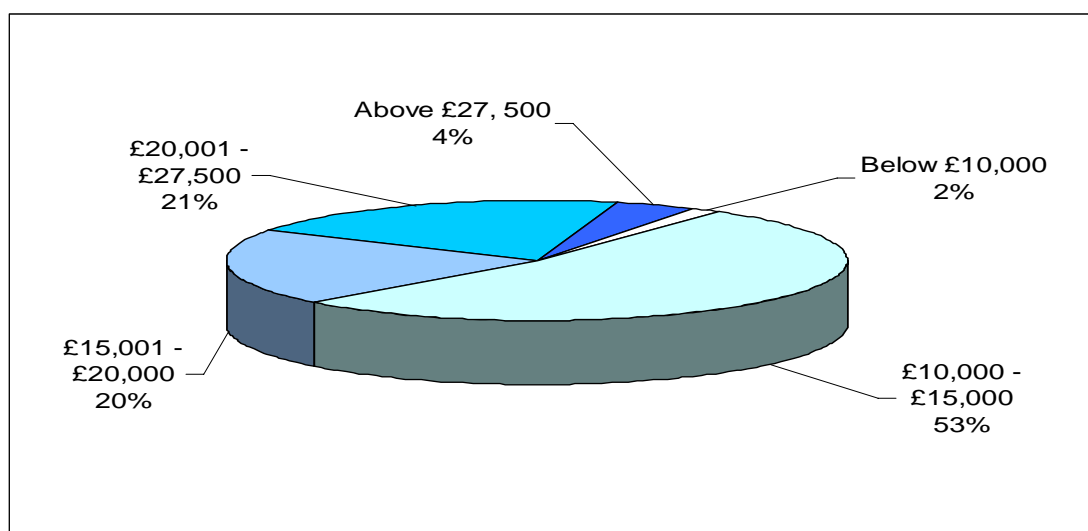
- ◆ Important differences exist between the levels of preference expressed for property types and their stock supply levels, especially the higher preference for flats than are present in the existing stock;
- ◆ 73.7% (1,122 implied) of the concealed households preferred owner occupation, 9.6% (146 implied) want HA rented and 14.1% (215 implied) prefer private rented.

## 1.12 Concealed Households' Housing Costs and Incomes

1.12.1 Key factors relating to immediately forming households' ability to meet housing costs are that:-

- ◆ 34.9% of those wishing to rent could afford a weekly rent of no more than £60 and a further 29.4% no more than £80;
- ◆ 51.7% wanting to buy could not afford a mortgage of more than £400 per month;
- ◆ 53.2% have household incomes below £15,000 per annum, 21.0% earn between £15,001 - £20,000 and a further 21.6% between £20,001 and £27,500, giving a total of 95.8% with an income below £27,500.

**Figure 1-5 Average Income of Concealed Households**



## 1.13 Affordability and Access to Market Housing

1.13.1 The data indicates strongly that there is an affordability problem arising from the relationship between local incomes and the realistic supply of the cheapest stock available.

1.13.2 The following table shows the annual household income needed to buy in the lowest and highest priced areas in the District, based on a 95% mortgage availability and a 3-times gross income to lending ratio, the Good Practice Guidance recommended level.

**Table 1-1 Annual Household Income Required to Buy**

Area	Income Thresholds (£)		
	1 bed Flat	2 bed Flat	2 bed Terrace
Bexhill	25,100	38,800	37,600
Battle & Battle Rural	32,400	36,900	48,500
Rye & Rye Rural	37,200	41,800	47,500
Ticehurst Rural	31,700*	56,200*	42,700*

- 1.13.3 Although the average price of terraced properties according to the Land Registry survey is £174,884, entry levels for 2-bed property start at £118,650 in Bexhill, rising to £153,300 in Battle / Battle Rural.
- 1.13.4 The survey findings indicate that income levels of around 83% of the new households who formed in the past 2 years are below the level necessary to be able to buy and 76% to rent in the local market. These income levels are higher than those of concealed households about to form this year, but are those used in the Assessment Model calculations.

## 1.14 Housing Stock Balance Analysis

- 1.14.1 The nature and turnover of the existing housing stock is vitally important in meeting current and future housing demand in all tenures. The information gained from a separate detailed stock flow analysis will be of major benefit to the development of site development briefs for the delivery of both private sector and affordable sectors, balancing housing markets and in longer-term business planning.

## 1.15 House Type Preferences / Supply

- 1.15.1 Table 1-2 reflects the differing levels of existing supply against demand from new households and the impact in actual sales levels created by stock availability and turnover.
- 1.15.2 New household's preference and need for flats at 27.8% and 59.0% respectively are much higher than the stock level of 21.5% reflecting the impact of changing household formation and preferences and lower price levels. Sales of flats/maisonettes are higher because they are most available the stock type with lowest prices.
- 1.15.3 New forming households show a higher level of preference for terraced houses at 35.8% than the stock supply of 13.3%.

**Table 1-2 Dwelling Type Demand / Stock Supply / Market Sales**

	Demand		Census 2001 Stock Supply % *	Sales
	New Household Need %	New Household Preference %		All Buyers %
Terraced	27.9	35.8	13.3	17.1
Flats	59.0	27.8	21.5	27.8

\* © Crown Copyright (Census)

- 1.15.4 Small units, flats and terraced houses are 34.8% of existing stock compared to the national average level of 45%. All site briefs and regeneration projects should promote the house types, which are under represented in the stock compared to national average levels in line with the principles in the PPG3 issued in March 2000 and future household formation demand.

## 1.16 Affordable Housing Need Summary

- 1.16.1 The following summary is our assessment of the broad balance of affordable unit delivery between rental and subsidised low cost or "intermediate" market housing by unit need numbers and percentages. These are summarised in Table 1-3 below.
- 1.16.2 The annual level of outstanding affordable need of 256 units, after allowing for current re-let supply is clearly not economically deliverable or sustainable, bearing in mind past new supply levels averaging 59 units each year. Despite the evidence of the scale of need from existing and concealed households, there are wider issues to consider when setting targets for delivery of affordable housing from new developments. Primarily there is a need to build viable, sustainable developments.

- 1.16.3 The District Local Plan Deposit (November 2003) highlights the residual requirement for the 2006 to 2011 period, is 837 units, 167 each year. The scale of annual affordable housing need is 256 units, 153% of supply still to be negotiated. This is clearly not viable and a judgement has to be made to determine target levels.
- 1.16.4 Essentially planning should be providing for balanced communities, which acknowledge the need for social compatibility if the problems of housing in the past are not to be repeated. Our significant experience of affordable subsidised housing in mixed developments leads us to support the current target of 40% of new units negotiated from the total of all suitable sites. This proportion includes both affordable housing for rent (25%) and “intermediate” housing (15%) to meet the needs of low income households, key workers and those on average incomes unable to purchase. These households could afford shared ownership or shared equity at 70% of market price based on the income distribution.
- 1.16.5 In view of the scale of need, period to 2011, subsidised affordable units should be negotiated on all suitable sites. The Council should set a ‘target’ for each site taking into account existing supply, survey demand and other regeneration, planning, sustainability and economic factors. Subsidy can be provided by free or discounted land, grant or discount.
- 1.16.6 The increases in house prices over the last four years have excluded many of ‘first-time buyers’ from the owner occupied market. We believe therefore that the proportion of affordable housing provided on new sites should encompass more subsidised low cost market housing than would have been the case four years ago when it was a more marginal element of affordable need.
- 1.16.7 The ratio below is recommended only in terms of the total delivery and will need to be assessed for individual sites to take account of the existing flow of re-lets from the rental stock. The summary of total affordable need and supply in Table 1-3 is derived from the Assessment Model in Section 11.2.

**Table 1-3 Affordable Need Summary**

Total Annual Need	593	
Existing Stock Re-lets	<u>337</u>	
Additional Net New Units Needed	<u>256</u>	
<hr/>		
New Rental	160	62.5% (25%)
Shared Ownership / Shared Equity	96	37.5% (15%)
Discounted Market Rent		
<b>Total</b>	<b><u>256</u></b>	<b><u>100% (40%)</u></b>

- 1.16.8 In addition to the scale of affordable housing to meet general household’s requirements, there are specific needs which should also be addressed. These are highlighted in the following paragraphs.

## **1.17 Sheltered Housing**

- 1.17.1 In total, the data suggests a combined requirement for 787 units of sheltered accommodation to 2008:-
- ◆ 159 units of HA sheltered housing and 131 units of private sheltered housing, 290 in total, to meet existing households needs;
  - ◆ 247 affordable sheltered and 250 private sheltered units, 497 in total to meet the needs of in-migrating parents / relatives.
- 1.17.2 Of the total requirement of 787 units, 406 are in the affordable sector and 381 in the private market.
- 1.17.3 Some of this requirement will be addressed by flow of the existing sheltered stock which was 105 units in 2005, but acceptability of existing stock to meet today's standards will need to be assessed in calculating the scale of new delivery.
- 1.17.4 The significantly higher level of elderly accommodation for people moving into the District is common to other DCA surveys. Generally the forecast is being made by their children who assist in the moving process. Conversely the indigenous older population prefer to continue in the area/surroundings they know and within their own home as long as possible.

## **1.18 Supported Housing**

- 1.18.1 The Survey identified a need over the next three years for:-
- ◆ 132 units of independent accommodation with visiting support worker;
  - ◆ 139 units of residential / nursing homes;
  - ◆ 86 units of independent accommodation with live-in carer.

## **1.19 Recommendations**

### **1.19.1 Housing and Planning Strategies**

- ◆ Provide a mix of house types in both market and social sectors but mainly flats and terraced houses to meet the needs of new and existing households for smaller units to provide a balanced housing market.
- ◆ Develop an older persons delivery strategy to address the current and future growth in elderly and frail elderly households across all tenures, and their related care and support needs to:-
  - assess and prioritise the need for support services and adaptation required to keep people in their own home;
  - re-assess existing sheltered stock in meeting today's housing standards and preferences;
  - assess the need for 'extra care' accommodation for the growing frail elderly population.

- ◆ Continue to negotiate with prospective developers towards achieving subsidised affordable homes from the all suitable sites coming forward for planning consent over the period of the Local Plan. Each site will need to be assessed individually, targets being subject to wider planning, economic viability, regeneration and sustainability considerations and will require a flexible approach to specific site negotiation.
- ◆ The rises in lower quartile house prices of around 80% over the last 3 years, significantly in excess of inflation is resulting in greater difficulty in entering the housing market. If the Local Plan was to be reviewed now we believe the overall affordable housing target should be 40% of the total of all suitable sites negotiated.
- ◆ Within this target the major requirement is for rented housing and we recommend a balance of around 25% for rent and 15%, as “intermediate” housing provided it is delivered at a cost below the cheapest entry level costs in the general market and would be available on a similar basis to subsequent purchasers.
- ◆ Both the affordable housing target and the tenure balance within it may vary on a site by site basis.

#### **1.19.2 Disabled Households**

- ◆ Continue to promote disabled adaptations in order to improve the ratio of suitably adapted properties for disabled people;
- ◆ Develop a register of adapted property and disabled people needing adapted accommodation in order to facilitate better matching;
- ◆ Consider adopting Lifetime Homes standards for new housing.

## **2 SURVEY METHODOLOGY**

### **2.1 Purpose, Aims and Objectives**

2.1.1 Rother District Council, formally commissioned DCA in February 2005 to carry out a District-wide Housing Needs Study, as part of the Pan Sussex Sub-Regional Study conducted with all six East Sussex Councils, one of the first of its kind in the Country.

2.1.2 The purpose of the study was to examine the housing requirements (needs, aspirations and demands) for the communities and households of Rother District.

2.1.3 The aims and objectives were to:-

- ◆ inform the development of each Council's Housing Strategy and other relevant strategies and plans;
- ◆ provide robust information to support Housing and Planning policies;
- ◆ assist in the provision of data in relation to the number, type and location of affordable new homes required over the next three years and beyond;
- ◆ inform the decisions concerning future housing provision in relation to household aspirations;
- ◆ provide data in relation to the number of dwellings requiring adaptation or extension;
- ◆ support the Council's contribution to County-wide and Regional joint strategic planning;
- ◆ contribute to the evidence base for development plans and in particular, to assist policy formulation in respect of the delivery of affordable housing through the planning system.

2.1.4 The Final Report will provide the information to:-

- ◆ support future housing strategy to meet the criteria set out by the ODPM in its Good Practice Guidance and HIP Guidance and to prioritise investment decisions;
- ◆ co-ordinate housing and community care strategies;
- ◆ inform the Council's affordable housing policies in the Unitary Development Plan and assist in target setting for site development briefs and for negotiation in accordance with Circular 6/98, PPG3 and emerging Guidance.

### **2.2 Promotion**

2.2.1 A comprehensive promotion campaign was agreed with the Council to create awareness of the survey, and its importance to the Council. Councillors in the District were contacted to inform them of the survey and enlist their assistance in publicising the survey and maximising the response rate.

2.2.2 Posters were prepared for display in public places in wards throughout the District and a press release was issued to publicise the postal survey, both on the weekend of the survey being received and the final weekend for responses.



## 2.3 Methodology

2.3.1 The study consisted of the following elements:-

- i. A postal questionnaire to 4,950 households in 6 sub-areas;
- ii. A housing market survey utilising the Land Registry and Halifax databases and an internet/telephone survey of estate agents on the cost of access level property and on the supply and cost of private rented housing;
- iii. Secondary data analysis drawing upon HIP and Housing Register data on the flow of social stock and need, 2001 Census, household and population projections and other national research;
- iv. Face to face interviews with older people, young people, Black and Minority Ethnic (BME) households, and people with learning disabilities on a sub-regional basis across all 6 Districts of East Sussex. Each group were interviewed using a dedicated questionnaire.

2.3.2 The questionnaire was designed in consultation with officers of Rother District Council and based upon tried and tested questionnaires used in previous comparable assessments.

2.3.3 In our view, a large-scale postal survey is the most cost-effective means of identifying the general needs, aspirations and intentions of the population at ward level. Nearly all the housing needs studies undertaken by DCA have utilised postal questionnaire surveys as one means of primary data collection.

2.3.4 The questionnaire was in three parts. Part One sought information about the existing housing situation including:-

- ◆ house type and number of bedrooms;
- ◆ adequacy of current housing to meet the households needs;
- ◆ property repair and improvement requirements;
- ◆ forms of heating and energy efficiency facilities;
- ◆ housing costs and income;
- ◆ employment and travel to work;
- ◆ support and adaptation needs;
- ◆ household composition by gender, age and ethnicity.

2.3.5 Part Two of the questionnaire collected information on the existing household's moving intentions and Part Three collected information on the moving intentions of new forming or concealed households. Questions in these two sections included:-

- ◆ when people expect to move;
- ◆ who is forming new households;
- ◆ how much they can afford;
- ◆ preferred tenure, type, size and location of the housing they require;
- ◆ support requirements.

2.3.6 The Postal questionnaires are provided as an Appendix to this report.

## 2.4 Sampling

- 2.4.1 Sample size depends on two key factors: the degree of accuracy we require for the sample and the extent to which there is variation in the population with regard to key characteristics. The most important points to note about these issues are:-
- ◆ beyond a certain sample size, there is no benefit in a bigger sample in terms of accuracy;
  - ◆ the size of the population is largely irrelevant for the accuracy of the sample. It is the absolute size of the sample that is important.
- 2.4.2 Our Survey is structured to achieve a 95% confidence rate and that our results reflect the population. Using simple random sampling, the confidence interval with a sample size of 1,580 households is in the region of 2% at District level.
- 2.4.3 This means, for example, that if 53% of respondents in a survey do not have central heating then we can be 95% confident that 53% of households plus or minus 2% do not have central heating (i.e. 51% - 55%).
- 2.4.4 The postal sample was stratified into 6 sub-areas and selected by random probability from the Council Tax Register.
- 2.4.5 The sample was 12.7% of resident households, determined to ensure statistical validity within each area. As we see in 2.6.4, based on a 6 sub-area structure and a high response rate, a finer level of  $\pm 1.91\%$  was achieved in this survey.
- 2.4.6 The main issue is whether non-respondents are different in some crucial way to responders (e.g. low education, older etc.). However, increasing the sample size does not necessarily alleviate this problem if some groups of people systematically do not respond. We check for bias and re-weight where necessary by comparing known characteristics in the population with our findings, particularly by tenure, household type and house type.

## 2.5 Sub-Regional Interview Survey Fieldwork

- 2.5.1 Over the period 20<sup>th</sup> February to 19<sup>th</sup> March 2005, interviews were conducted across all six Districts with four groups of households. Each group were interviewed to a specifically created questionnaire to address their particular needs. 60 interviews were undertaken with each of 3 interview groups, elderly, young and black and minority ethnic (BME) households.
- 2.5.2 Elderly households were interviewed to a quota set by tenure, single / couple and age and young households by age and gender and these were achieved in each case.
- 2.5.3 The BME interviews were carried out on a free find basis amongst a cross section of nationalities living in each area. Brighton & Hove provided some contact details and some of them were used.
- 2.5.4 Households containing a person with learning disabilities were identified to 146 addresses across the Sub-Region and interviews undertaken by pre-arranged appointments. The response rate averaged 78.7% over the sub-region ranging from 54.1% in Brighton & Hove to 94.7% in Lewes.
- 2.5.5 All interviews were carried out within the MRS Code of Conduct.

## 2.6 Postal Survey Process and Response

- 2.6.1 The sample survey of 4,950 questionnaires was dispatched for delivery on the 1<sup>st</sup> March 2005. The return deadline was 22<sup>nd</sup> March 2005 allowing respondents a period of around twenty two days including three weekends for completion and return. The response rate was analysed on a daily basis and following a week of returns. A final sample total of 4,950 questionnaires across the District.
- 2.6.2 The survey achieved a final postal response rate of 35.4% with 4,950 questionnaires returned almost three times the 1,250 level recommended in the ODPM Guidance providing a robust sample for analysis.
- 2.6.3 The highest response level was achieved in Ticehurst Rural with 38.2%. All sub-areas achieved over 20%.
- 2.6.4 All sub-areas reached response levels based on household numbers are adequate to ensure statistical validity at a confidence level of 95%. The confidence interval ranged from  $\pm 4.51\%$  to  $\pm 4.82\%$  at sub-area level and was  $\pm 1.91\%$  at District level.
- 2.6.5 4.5% of all resident households in Rother will have taken part in the survey. The response rate analysis by sub-area is detailed in Table 2-1 below.

**Table 2-1 Response Rate by Sub-Area**

Sample Area	Households	Postal Sample	Postal Responses	Postal Response Rate %	Confidence Interval +/- %
Bexhill	19,361	825	276	33.5	4.82
Battle	2,703	825	297	36.0	4.64
Battle Rural	1,961	825	280	33.9	4.78
Rye	4,665	825	307	37.2	4.57
Rye Rural	6,753	825	278	33.7	4.80
Ticehurst Rural	3,391	825	315	38.2	4.51
<b>Total</b>	<b>38,834</b>	<b>4,950</b>	<b>1,753</b>	<b>35.4</b>	<b>1.91</b>

## 2.7 Survey Weighting

- 2.7.1 We check the data file against the 2001 Census tenure data and the Council's Housing Strategy Statistical Appendix for bias and re-weight the data where necessary. A copy of the weighting carried out in this survey is provided with the Survey data Tables.
- 2.7.2 Given the nature of the random sample of households within agreed sub-areas embodied in the postal and interview survey, we would expect tenure type to provide the main validation of the representativeness of the sample.
- 2.7.3 The data set out on household population and tenure at Table 2-2 is based on the Council Tax number of resident households. Private sector tenure has been re-weighted to be in line with the 2001 Census data, with allowance for four further years development. The social housing stock has been re-weighted to the number of units in the HIP Statistical Appendix at March 2004.
- 2.7.4 The overall data set is therefore representative of the District population and is the basis for the calculation of all the subsequent tables i.e. all responses are given the weight appropriate to the actual tenure balance in Rother District.

**Table 2-2 Tenure of Present Households**

Question 1

Tenure	2005 Survey %	Survey Group %	N <sup>os</sup> implied	Local Area Census 2001 *
HA rented	11.3	11.3	4,380	8.7
Council rented	0.0	0.0	0	1.8
Private rented	9.6	11.9	3,747	8.0
Tied to employment / other	2.3		878	3.5
Owner occupier - mortgage	31.4	76.8	12,182	32.2
Owner occupier - outright	44.9		17,464	45.3
Shared ownership	0.5		183	0.5
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>38,834</b>	<b>100.0</b>

\* © Crown Copyright (Census)

- 2.7.5 The tenure levels in the District have remained largely unchanged since 2001. The percentage of owner-occupiers has increased slightly from 77.5% to 76.3% while level of social rented accommodation increased from 10.5% to 11.3%.
- 2.7.6 The private rented sector accounts for 9.6% of households. This group includes those renting from a private landlord, from a relative or from an employer. At the Census 2001, 828 households, 61.6% of the total of 1,344 lived rent free and households in this sector are not therefore homogenous.

## 2.8 Definitions

- 2.8.1 The Housing Needs Study has been undertaken in line with the ODPM research Local Housing Needs Assessment: A Guide to Good Practice in assessing people's preferences as well as their needs and the SEERA Good Practice Guidance published in January 2004.
- 2.8.2 DCA work to a definition of housing requirements that encompasses demand, need and preferences. Households that can enter the general market without intervention of any sort can be defined as demand, whereas those households that are unable to enter the general market without some form of intervention can be defined as having a housing need. Our methodology enables us to identify this distinction by asking for both a household's characteristics in terms of size, current property condition and income and a household's views on suitability of current housing and preferences for moving or modification.
- 2.8.3 Affordability in our view is defined by the relationship between local incomes and the local general housing market. Our definition of affordable housing is as follows:-

*“Affordable housing is that provided with subsidy, both for rent and low cost market housing, for people who are unable to resolve their housing requirements in the local private sector housing market because of the relationship between housing costs and incomes. This definition covers housing for social rent, shared ownership, low cost home ownership and sub-market rent.”*

- 2.8.4 The issue of affordability is central to our approach. Within the project, we capture a range of data on actual incomes and costs of housing and the likely level of incomes and the accessible costs of housing for moving or newly forming households. We also examine secondary data on incomes, house prices and rent levels. Thus a reliable indicator of affordability is derived that leads towards the identification of real options for meeting housing need.

## **2.9 Survey Household Data**

- 2.9.1 It should be noted that the “numbers implied” column inserted in some of the tables is our assessment of the total numbers to be derived after applying a weighting factor calculated by sample area responses to that sample area household numbers. Where multiple choice is not involved, this will generally equate to the household population of the Local authority as a whole but some individual questions may not be answered by all respondents, giving a marginally lower total.
- 2.9.2 Where multiple choice questions are involved, we have included two percentage columns. The first percentage column relates each heading to the total number of actual responses. Those responses are set out at sub-area level in our accompanying data tables and are the basis of the ‘numbers implied’ column in the report. The second percentage column relates the same numbers to the number of households, which in the case of a multiple choice question is likely to give a total in excess of 100% depending on the level of multiple choice made.
- 2.9.3 All tables included in this report are extracted from the DCA Housing Survey data for the Rother District, unless otherwise indicated. We also provide a comparison for many results throughout this Report to the average of over 150 DCA Surveys nationally.

## **3 THE ROTHER DISTRICT HOUSING MARKET**

### **3.1 Introduction**

3.1.1 Three data searches were commissioned to provide information on house price and sales volumes across the District:-

- ◆ from the Halifax, as the largest mortgage lender, analysing lending in the Region;
- ◆ from the Land Registry, providing data on all sales in the area for the past year;
- ◆ Estate Agency survey to assess entry prices for new households in each sub-area.

3.1.2 The records include house price information by categories of dwellings and information about the volumes of sales of each type of dwelling.

3.1.3 These indices are not absolutely comparable. Land Registry increase levels tend to be lower because they include cash transactions but they are less reliable on a quarterly basis because they only calculate actual transactions and the figures are affected by changes in the mix of properties between the current and previous periods. Halifax data measures a constant mix of properties by type and size which removes the changing mix factor but does not of course include lower price cash transactions.

3.1.4 This information sets the context for the key issue of the affordability of housing in the area, and in particular we can relate the analysis to the problems of low income evaluated through the household postal survey.

### **3.2 National Picture**

3.2.1 House price inflation in the fourth quarter of 2004 slowed in most regions with an overall increase of 0.1%, well below the 2.7% gain in the third quarter of 2004. The overall sound UK economic background and the lowest mortgage rates since the 1950s have boosted housing demand in recent months and this trend should continue throughout the rest of the year.

3.2.2 UK house price inflation for the year ending 31<sup>st</sup> December 2004 was recorded by Halifax Index at 15.1% and the Land Registry at 11.7%.

3.2.3 The Halifax First-Time Buyer Annual Review of 2005 indicates that the average price paid by first-time buyers increased by 16% in 2004 from £112,541 in 2003 to £131,024.

3.2.4 The affordability difficulties confronting first time buyers have significantly reduced the number entering the market. This is reflected in the fact that there were an estimated total of 361,000 first-time buyers in 2004, the lowest annual total since 1981. The numbers of FTB's last year were almost a third lower than at 2002 (532,000).<sup>1</sup>

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<sup>1</sup> Source: Halifax First Time Buyer Annual Review 2005

### 3.3 Regional Picture

**Table 3-1 House Price Inflation**

	Increase over year to 31 <sup>st</sup> December 2004 %	Increase/decrease over quarter to 31 <sup>st</sup> December 2004 %
South East <sup>1</sup>	7.2	-1.6
East Sussex <sup>2</sup>	7.9	2.4

Source <sup>1</sup> - Halifax House Price Index, © Copyright HBOS plc.

Source <sup>2</sup> - Land Registry Data, © Crown Copyright (Land Registry)

- 3.3.1 The annual rate of house price inflation recorded in the Halifax Index for the South East Region at 31<sup>st</sup> December 2004 was 7.2%, well below the UK average of 15.1%.
- 3.3.2 House prices in the South East Region show a small fall, decreasing by 1.6% during the fourth quarter of 2004, the first quarterly decrease since Q2 2003.
- 3.3.3 House prices in East Sussex rose over the last year by 7.9% as calculated by the Land Registry. House prices in Rother rose over the last year by 6.4% as calculated by the Land Registry.

### 3.4 The Housing Market

- 3.4.1 The Regional Market is shown in the Table 3-2 below, which details the prices paid for the main categories of house types for the whole of the South East Region with comparisons against a different source of house price index data.
- 3.4.2 The Halifax data is based on actual sales of mortgaged properties and the information is a real indication of actual prices prevailing in the purchases being made in the South East Region. The Land Registry data incorporates all transactions, at District level.

**Table 3-2 Average South East Region House Prices - All Buyers 2004**

Property Type	SOUTH EAST REGION		EAST SUSSEX
	Land Registry Average Price	Halifax Average Price	Land Registry Average Price
Terraced	175,077	183,026	168,352
Semi-detached	212,143	222,357	192,550
Detached	359,877	398,244	316,024
Bungalows	*	241,060	*
Flats & maisonettes	145,832	148,082	124,561
<b>All properties</b>	<b>222,147</b>	<b>230,191</b>	<b>199,747</b>

Source: Halifax House Price Index, © Copyright HBOS plc.

Land Registry Residential Property Price Report, 4<sup>th</sup> Quarter 2004.

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\* Land Registry figures do not identify bungalows separately.

- 3.4.3 The Halifax data refer to mortgage transactions at the time they are approved rather than when they are completed. Whilst this may cover some cases which may never proceed to completion, it has the important advantage that the price information is more up-to-date as an indicator of price movements and is on a more consistent time-base than completions data (such as the ODPM Index) given the variable time lags between approval and completion.<sup>2</sup> The Land Registry data incorporates all sales transactions in the Region and more specifically in the District.
- 3.4.4 Prices vary between the different data sources and we would expect the Land Registry figures to be lower in all cases given that these figures include non-mortgaged sales.
- 3.4.5 The table below examines average house prices for the District recorded by the Land Registry in December 2004, against house prices at the time the previous housing needs survey in 2000 and the rate of price increase.

**Table 3-3 Average House Prices and Sales - All Buyers 2004**

Property Type	2004 Land Registry Rother District Average Price	Land Registry % of sales in Rother District	2001 Land Registry Average Price	Increase 2001-2004
Terraced	174,884	17.1	97,552	79.3
Semi-detached	193,140	17.9	133,199	45.0
Detached	294,058	37.2	184,377	59.5
Flats & maisonettes	127,267	27.8	70,097	81.6
<b>All properties</b>	<b>209,134</b>	<b>100.0</b>	<b>129,843</b>	<b>62.2</b>

Source: Land Registry Residential Property Price Report, 4<sup>th</sup> Quarter 2004, 4<sup>th</sup> Quarter 2001  
© Crown Copyright (Land Registry)

- 3.4.6 The largest volume of sales in the District were for detached (37.2%) selling at an average price of £294,058. Flats / maisonettes average £127,267 are 27.8% of sales. Semi-detached houses average £193,140 and are 17.9% of sales. Terraced houses account for 17.1% of sales with an average price of £174,884. Flats/maisonettes are assessed to be the main entry level property for first time buyers in view of their higher level of sales and lower prices.
- 3.4.7 Over the last three years the prices of entry level stock, flats/maisonettes have increased by 81.6% and terraced houses have increased by 79.3%.
- 3.4.8 The mix of properties for sale is virtually unchanged since 2001. The sales levels of flats/maisonettes in 2004 27.8% are slightly higher than 2001 levels (26.8%). Sales levels of terraced properties (17.1%) are also similar to 2001 levels (17.0%). Sales levels of detached houses are lower at 37.2% compared to 38.3% in 2001, as shown in table 3-3 above.

<sup>2</sup> Source: [www.hbosplc.com](http://www.hbosplc.com) – Methodology Section



### 3.5 Sub-Area Structure

- 3.5.1 In order to further analyse house prices in the area, the District has been divided into 4 sub-areas and their sample area breakdown is listed below.

**Table 3-4 Sub-Area Breakdown**

Sub-Areas	Parish breakdown
Bexhill	-
Battle and Battle Rural	<i>Battle, Netherfield and Ashburnham, Bodiam, Brightling, Catsfield, Crowhurst, Dallington, Ewhurst, Mountfield, Penhurst, Salehurst, Sedlescombe, Westfield, Whatlington.</i>
Rye and Rye Rural	<i>Beckley, Brede, Comber, East Guildeford, Fairlight, Guestling, Icklesham, Iden, Northiam, Peasmarsh, Pett, Playden, Rye Foreign, Udimore.</i>
Ticehurst Rural	<i>Burwash, Etchingham, Hurst Green, Ticehurst</i>

### 3.6 Entry Sales Levels in the District

- 3.6.1 Entry to the market is clearly dependent on availability, a factor which is particularly critical for low income households who can only enter the market in any numbers where there is an adequate supply of affordable dwellings.
- 3.6.2 First-time buyers as new entrants to the housing market do not purchase houses at average prices as they do not have average incomes. Although average prices are useful for comparisons in general they are not the purchase levels used in assessing the ability of households to enter local markets.
- 3.6.3 In broad terms new purchasers of either flats or terraced properties buy in the lowest quartile of prices i.e. the bottom 25%. We have therefore made the only comparison available from Land Registry data which is at District wide level. In the District this is £131,000, 70.1% lower than the average of £209,134 in Table 3-3.
- 3.6.4 DCA have therefore undertaken a telephone survey of the local estate agents to ascertain the cost of the cheapest units available i.e. the lowest quartile stock costs, both for private rent and for sale in each of the 4 Sub-Areas.

**Table 3-5 Entry Sales Levels in the District – March 2005**

Property Type	Bexhill	Battle & Battle Rural	Rye & Rye Rural	Ticehurst Rural	District-wide
1-Bed Flat	79,125	102,450	117,500	99,950	84,764
2-Bed Flat	122,644	116,633	131,700	177,500	101,558
2-Bed Terraced	118,650	153,300	149,950	134,950	129,133
3-Bed Terraced	141,617	169,950	159,950	170,983	153,760

-nd- no data available, \* low level of data available

Source: DCA House Price Survey March 2005, based on a sample of 262 properties

- 3.6.5 Although the average price of terraced properties according to the Land Registry survey is £174,884, entry sales levels vary across the District with the lowest entry price, for 2-bed terraced property, starting at around £118,650 in Bexhill, rising to £153,300 in Battle and Battle Rural, as can be seen in Table 3-5 above. 3-bed terraced properties start at £141,617 in Bexhill, rising to £170,983 in Ticehurst Rural.
- 3.6.6 According to the table above, entry levels for flats start at £79,125 in Bexhill, rising to £117,500 in Rye & Rye rural, for a 1 bed unit. Entry levels for 2-bed flats average £131,700 in Rye & Rye rural, rising to £177,500 in Ticehurst Rural.

- 3.6.7 The entry sales level for Rye and Rye Rural have been modified to exclude 2-bed flat properties found in the area of Camber. Prices for 2-bed flat properties in Camber were significantly lower than both 1 and 2-bed properties in the remaining areas of Rye and Rye Rural, and led to a significant distortion in the initial data.

### 3.7 Purchase Income Thresholds

- 3.7.1 The cheapest entry levels of the smallest units were assessed to enable threshold income levels to be calculated. These are based on 95% mortgage availability and a 3x gross income lending ratio, the levels recommended in the SEERA 2004 Good Practice Guidance. Table 3-6 below outlines the income ranges needed to enter the market in the main settlements in the District.

**Table 3-6 Purchase Income Thresholds**

Area	Income Thresholds (£)		
	1 bed Flat	2 bed Flat	2 bed Terrace
Bexhill	25,100	38,800	37,600
Battle & Battle Rural	32,400	36,900	48,500
Rye & Rye Rural	37,200	41,800	47,500
Ticehurst Rural	31,700*	56,200*	42,700*

\* Low level of data available

### 3.8 Secondary Research

- 3.8.1 The Joseph Rowntree Foundation published the results of a study undertaken across the Country examining the ability of working households, both existing and new forming, to become homeowners. The study entitled ‘Can Work – Can’t Buy’ conducted by Professor Steve Wilcox uses the Halifax database for House Prices of the lowest quartile prices for 4/5 room dwellings and calculates affordability ratios based on working household incomes from the New Earnings Survey.
- 3.8.2 In 2003 the survey was updated to take account of local prices and increase in incomes at the end of 2003.
- 3.8.3 The Joseph Rowntree Foundation Study “Can Work – Can’t Buy” shows in the 2003 Report that Rother has the 33<sup>rd</sup> highest house price-to-income ratio out of over 350 local authority areas in the country at 5.30 to 1. Access to home ownership is nearly as problematic in the South East region where average ratios are 4.61 to 1. They exceed 5 to 1 in 17 areas including all of East Sussex.
- 3.8.4 The report highlights the key issue, “All ratios should be considered in relation to the ratio of mortgage advance to household gross earned income, which rarely exceeds 3.5 to 1”. This ratio would only apply to professionals and it is more likely that the majority of local households would achieve mortgage ratios below 3.5 to 1 and closer to the average of the Council of Mortgage Lenders for first time buyers in 2004 of 3.03 to 1. The mean percentage loan to first-time buyers was 87% in 2004.
- 3.8.5 Table 3-7 highlights the data and house price to income ratio for Rother District and the South East Region.

**Table 3-7 Purchase Income Thresholds**

Area	Working Households		
	2003 Prices £	Income £	Ratio
Rother	181,155	34,175	5.30
South East Region	183,175	39,734	4.61

Source: Joseph Rowntree Foundation 2003 Update

3.8.6 Additionally the house price to income ratios across the 6 East Sussex authorities range from 5.07 to 5.86. Rother has the fifth highest house price to income ratios across East Sussex at 5.30. The ratios in East Sussex are considerably in excess of the mortgage ratios actually operating of 3:1 as highlighted in 3.8.4 above.

### 3.9 Private Sector Rent Levels

3.9.1 Some of the main private renting agencies operating in the District were approached to access the costs of property at the lower end of the private rented market. From the estate agency sources approached, the prevailing private sector rent levels are set out below. Overall, there was a low level of data available for all 4 sub-areas.

**Table 3-8 Average and Entry Rent Levels in the District February 2005**

Property Type	Bexhill		Battle and Battle Rural		Rye and Rye Rural		Ticehurst Rural		District-wide	
	Average	Entry	Average	Entry	Average	Entry	Average	Entry	Average	Entry
1-Bed Flat	432	<b>375</b>	438	<b>425</b>	450	<b>450</b>	523	<b>445</b>	446	<b>424</b>
2-Bed Flat	502	<b>425</b>	558	<b>550</b>	548	<b>500</b>	595	<b>575</b>	525	<b>513</b>
2-Bed Terraced	575	<b>525</b>	594	<b>575</b>	590	<b>480</b>	-nd-	<b>-nd-</b>	587	<b>527</b>
3-Bed Terraced	-nd-	<b>-nd-</b>	718	<b>650</b>	-nd-	<b>-nd-</b>	-nd-	<b>-nd-</b>	718	<b>650</b>
2-Bed Semi-detached	-nd-	<b>-nd-</b>	642	<b>625</b>	-nd-	<b>-nd-</b>	-nd-	<b>-nd-</b>	642	<b>625</b>
3-Bed Semi-detached	-nd-	<b>-nd-</b>	783	<b>750</b>	-nd-	<b>-nd-</b>	-nd-	<b>-nd-</b>	783	<b>750</b>

-nd- no data available

Source: DCA House Price Survey March 2005, based on a sample of 63 rental properties

N.B. Low level of rental data across all sub-areas

### 3.10 Entry to Private Rent

- 3.10.1 Entry rental costs in the private rented sector vary by location within the District. The private rented sector can be entered at £375 per month in Bexhill, rising to £450 in Rye and Rye rural (see Table 3-8) for a one bedroom flat, the smallest unit. For a 2-bed flat, rents range from £425 p.m in Bexhill, to £575 p.m in Ticehurst.
- 3.10.2 In the case of 2-bed terraced houses, it was found that the entry rent levels range from £480 p.m. in Rye and Rye rural to £575 p.m. in Battle and Battle rural. 3-bed terraced properties can be rented from £650 p.m. in Battle and Battle rural.
- 3.10.3 Semi-detached properties can be rented from £625 (for a 2-bed property) and £750 (for a 3-bed property).
- 3.10.4 The concealed households gave details of how much rent per week they could afford to pay. This data was examined to see if those who had specified their preferred tenure as Private Rent could actually access the market price levels that were identified in the Estate Agents Survey.
- 3.10.5 Concealed households preference for private rented housing are generally quite low. 23.9% could afford to pay between £351 and £430 a month which would allow them entry to the cheapest 1 bed flats. Only 8.6% could afford to pay between £431 and £650 a month which would allow entry to all two bed flats. Additionally, only 8.6% concealed households could afford access the majority of properties across the District. The data indicates around 76% of concealed households in the District are priced out of the private rental market (based on recent movers incomes).
- 3.10.6 There is evidence to suggest that landlords would not accommodate Housing Benefit / Income Support cases; however the decision does rest with the individual landlord concerned.
- 3.10.7 A range of property types are available in the sector as a whole and are found in a variety of locations within the District. The difference in rent level between furnished and unfurnished property is marginal with agents indicating they do charge slightly more for furnished accommodation, although many agencies do not deal with furnished property due to the fire regulations involved.

### 3.11 Rental Income Thresholds

- 3.11.1 The cheapest rental prices of the smallest units in the District were assessed in order to calculate the rental income threshold levels. These are based on rent at 25% of gross income (equivalent to 30% of net income). Table 3-9 below shows the income levels needed to access the private rented market in the District.

**Table 3-9 Rental Income Thresholds**

Area	Income Thresholds (£)		
	1 bed Flat	2 bed Flat	2 bed Terrace
Bexhill	18,000	20,400	25,200
Battle and Battle Rural	20,400	26,400	27,600
Rye and Rye Rural	21,600	24,000	23,000
Ticehurst Rural	21,400	27,600	-nd-

## 3.12 Conclusions

### 3.12.1 House Prices

- ◆ The annual rate of house price inflation recorded in the Halifax Index for the South East Region at 31<sup>st</sup> December 2004 was 7.2%, well below the UK average of 15.1%.
- ◆ The Land Registry data for average price for all dwellings in the District during the year was around £209,134.
- ◆ The largest volume of sales in the District were for detached houses (37.2%) selling at an average price of £294,058. Flats / maisonettes average £127,267 are 27.8% of sales. Semi-detached houses average £193,140 and are 17.9% of sales. Terraced houses account for just 17.1% of sales with an average price of £174,884. Flats/maisonettes are assessed to be the main entry level property for first time buyers in view of their higher level of sales in the District.
- ◆ The average prices of flats and terraced house have increased by 82% and 79% respectively in the last 3 years.
- ◆ The analysis shows that the housing market excludes many families and single person households who are currently seeking access to local housing. This concealed demand requiring affordable housing is mainly in addition to Waiting List numbers. There clearly is an 'affordability' problem in the District for low-income households.

### 3.12.2 Sub-Area Sales Prices / Incomes

- ◆ Prices vary across the District; a 1-bed flat can be purchased at £79,125 in Bexhill, rising to £117,500 in Rye and Rye rural. 2-bed terraced properties can be purchased at £118,650 in Bexhill, rising to £153,300 in Battle and Battle rural.
- ◆ An income of £25,100 is required to buy a one bedroom flat in Bexhill, rising to £37,200 in Rye and Rye rural. A two bedroom flat requires an income of £27,200 in Rye and Rye rural and up to £56,200 in Ticehurst rural. Terraced properties require an income of £37,600 in Bexhill up to £48,500 in Battle and Battle rural.
- ◆ Access to home ownership is beyond the reach of at least 83% of the concealed households identified in the DCA survey based on entry level stock prices in the four sub-areas.
- ◆ Mortgage interest rates this year have been at their lowest levels for over 45 years and people who cannot enter the market under these circumstances may never be able to do so, short of some collapse in the market or a significant change in their income level. Further house price increases above wage inflation in 2005 would make access to market housing more difficult to achieve and would impact on households with marginal incomes most significantly.

### 3.12.3 Private Rental Costs / Incomes

- ◆ Similar cost variation applies in the private rented sector across the District. Based on rent at 25%, the gross income needed to rent a one bed flat ranges from £18,800 per annum to £21,600 per annum. The cost of renting a 2-bed flat would need an income of £20,400 rising to £27,600. A terraced house requires an income of between £23,000 and £27,600.
- ◆ The private rented sector makes only a limited contribution to access to affordable housing providing access to housing for only 24% of concealed households.

## 4 CURRENT HOUSING IN ROTHER

### 4.1 The Existing Stock

4.1.1 Table 4-1 below indicates the type of accommodation occupied by existing households responding to the question.

**Table 4-1 Type of Accommodation**

Question 2

Type	2004 Survey%	Survey Group %	N <sup>os</sup> implied	Local Area Census 2001
Semi-detached house	18.0	67.7	6,995	64.8
Detached house	26.7		10,378	
Bungalow	23.0		8,947	
Terraced	11.1	11.1	4,298	13.3
Flat / maisonette	20.1	21.1	7,803	21.5
Bedsit / studio / room only	1.0		373	
Caravan / mobile home	0.1	0.1	26	0.4
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>38,820</b>	<b>100.0</b>

4.1.2 The data shows some difference in the dwelling type structure as compared with the 2001 Census data, with a somewhat lower proportion of terraced houses and flats / maisonettes and a higher proportion of detached and semi-detached houses and bungalows but some bungalows will be categorised in the Census as terraced houses. The implications of the change in dwelling type structure over time may be significant in the light of future demand for flats in the District. Our analysis of concealed households in Section 6 of this report found 59.0% of expressed need to be for flats / maisonettes.

**Table 4-2 Form of Tenure by Property Type (%)**

Question 2 by Q.1

Type	Owner occupier with mortgage	Owner occupier no mortgage	Private rented	HA rented	Shared ownership*	Tied to employment / other*	Total
Semi-detached	42.3	26.9	7.1	19.8	0.7	3.2	<b>100.0</b>
Detached	39.6	53.7	2.5	0.0	0.4	3.8	<b>100.0</b>
Terraced	43.2	31.5	8.8	13.4	1.0	2.1	<b>100.0</b>
Bungalow	26.9	61.7	5.4	5.9	0.1	0.0	<b>100.0</b>
Flat / maisonette	10.8	39.8	27.2	19.6	0.5	2.1	<b>100.0</b>
Bedsit / studio / room only	0.0	2.1	3.0	94.9	0.0	0.0	<b>100.0</b>
Caravan / mobile home	44.6	55.4	0.0	0.0	0.0	0.0	<b>100.0</b>

(\* Low volume of data).

- 4.1.3 A cross-tabulation relating form of tenure to property type indicated that 48.9% of flat / maisonette accommodation was in the rented sector, 40.1% of which was in the social rented sector. In terms of new demand, our analysis of concealed households in the District found 46.7% of demand for flats / maisonettes was in the rented sector, of which 33.8% was in the social rented sector.
- 4.1.4 61.7% of bungalow accommodation was in the owner-occupied no mortgage sector, perhaps reflecting the older age of respondents in that sector.
- 4.1.5 Respondents were asked how long they had lived at their present address. On the basis of a 98.5% response, 43.9% had lived in the same home for over 10 years.

**Table 4-3 Time at Present Address**

Question 3

Date	%	N <sup>os</sup> implied
Less than 1 year	6.6	2,496
1 -2 years	7.8	2,991
2 - 10 years	41.7	15,953
Over 10 years	43.9	16,794
<b>Total</b>	<b>100.0</b>	<b>38,234</b>

- 4.1.6 Respondents were asked to indicate the number of bedrooms in their current home.

**Table 4-4 Number of Bedrooms**

Question 5

Bedrooms	%	N <sup>os</sup> implied
Bedsit	1.4	538
One	9.6	3,735
Two	34.4	13,312
Three	35.9	13,930
Four	14.5	5,604
Five or more	4.2	1,619
<b>Total</b>	<b>100.0</b>	<b>38,738</b>

- 4.1.7 The average across the stock in the District was 2.7 bedrooms, just below the average level found in recent DCA surveys (around 2.8). The breakdown of size by number of bedrooms in percentage terms as between the ownership and rental sectors was accessed by cross-tabulation with the following results:-

**Table 4-5 Number of Bedrooms by Tenure**

Question 5 by Q1

Tenure	Bedsit	One	Two	Three	Four	Five+	Total
Properties owned	0.0	3.2	33.3	39.8	18.2	5.5	<b>100.0</b>
Properties rented	5.8	30.5	38.2	22.9	2.6	0.0	<b>100.0</b>
HA rented only	9.4	26.0	41.9	22.7	0.0	0.0	<b>100.0</b>

- 4.1.8 As might be expected, 96.7% of four (or more) bedroom properties were in the owner occupied sector. 76.3% of bedsit / one bedroom properties were in the rented sector.

**Table 4-6 Access to Basic Facilities**  
Question 6

H/IF	All tenures %	Owner occupier with mortgage	Owner occupier no mortgage	Private rented	HA rented	Shared ownership*	Tied to employment / Other*
CH-F	83.0	84.5	84.7	74.1	82.7	78.5	67.1
CH-P	9.3	8.9	10.5	7.5	7.2	12.7	10.1
HWTJ	73.8	73.6	81.2	49.3	64.6	97.1	70.5
DG-F	70.8	70.3	76.0	37.7	80.6	91.6	56.1
DG-P	15.5	17.3	15.7	23.9	4.8	6.9	4.3
LI	68.5	77.7	74.0	26.9	56.5	74.6	58.5
WPI	50.4	55.6	60.4	18.0	24.8	75.6	34.4
CWI	30.6	33.6	33.9	4.8	34.0	39.2	6.7
DP	19.6	20.8	21.0	9.5	18.8	33.8	17.0

(\* Low volume of data).

Heating / Insulation facilities:-

CH-F (central heating -full), CH-P (central heating -partial), HWTJ (hot water tank jacket), DG-F (double glazing -full), DG-P (double glazing -partial), LI (loft insulation), WPI (water pipes insulated), CWI (cavity wall insulation), DP (draught proofing).

- 4.1.9 Households with some form of central heating at 92.3% were just above the national average in the 2001 Census (91.5%).
- 4.1.10 In the case of HA rented accommodation alone, 89.9% had some form of central heating, a little below the all tenure average. The HA rented sector performed relatively poorly in relation to the level of loft insulation, water pipe insulation and (to a lesser degree) hot water tank jackets but full double glazing was high at 80.6%.
- 4.1.11 Another significant pattern to emerge from the cross tenure analysis was that private rented accommodation had a far lower level of access to all of the nominated facilities than the all tenure average. Full central heating was available in only 74.1% of properties; full double glazing in only 37.7% with generally low levels of insulation.

## 4.2 Adequacy of Present Dwelling / Improvement Required

- 4.2.1 Respondents were asked if their current accommodation was adequate for their needs. 90.8% indicated that their accommodation was adequate; 9.2% (3,560 implied) that it was inadequate. A level in the region of 89% has been a typical result in recent DCA surveys. The Guidance test of inadequacy causing a housing need is based on those households in this situation actually moving to another dwelling, totalling 1,882 households in the District.
- 4.2.2 From a cross-tabulation some discrepancy in satisfaction by tenure was evident but this was fairly consistent with the results of other recent DCA surveys. The satisfaction level for HA rented accommodation (83.8%) was above the average emerging for social rented accommodation from recent DCA surveys (around 82%). Satisfaction in the private rented sector (75.9%) was well below the all tenure average as might be expected from the comment at 4.1.11 above.



**Table 4-7 Adequacy by Tenure**

Question 8a by Q.1

Tenure	% adequate
Owner occupied with mortgage	90.7
Owner occupied no mortgage	96.5
Private rented	75.9
HA rented	83.8
Shared ownership*	64.7
Tied to employment / other*	80.0

(\* Low volume of data).

- 4.2.3 Responses on the reason for inadequacy were invited on two bases - 'in-house' solutions (improvements/repairs or cost of heating) and other solutions. Respondents could reply in both categories on a multiple-choice basis.
- 4.2.4 59.3% (2,110 implied) of the group indicated an 'in-house' solution. The results in response to a multiple choice question are shown in Table 4-8 below. 87.4% of these households selected need for repair or improvement.

**Table 4-8 Reason For Inadequacy of Present Accommodation Where an "In House" Solution May Be Possible**

Reasons	% responses	% households	N <sup>os</sup> implied (all choices)
Needs repairs / improvement	61.3	87.4	1,844
Too costly to heat	38.7	55.1	1,162
<b>Total</b>	<b>100.0</b>		<b>3,006</b>

**Table 4-9 Reason for Inadequacy of Present Accommodation Likely to Require a Move**

Reasons	% responses	% households	N <sup>os</sup> implied (all choices)
Too small	51.4	67.7	2,082
Housing affecting health	14.7	19.4	596
Rent / mortgage too expensive	14.5	19.1	586
Tenancy insecure	12.0	15.8	486
Too large	7.4	9.8	302
<b>Total</b>	<b>100.0</b>		<b>4,052</b>

- 4.2.5 86.4% (3,075 implied) of the group indicated a solution requiring a move. The largest single issue was that the home was too small, referred to by 67.7% of households indicating a solution likely to require a move, and implying 2,082 cases in the District as a whole.
- 4.2.6 We have tested in paragraph 4.2.7 whether households are actually overcrowded by the national bedroom standard and there are 463 households in the situation.

- 4.2.7 This suggests that around 1,619 households may well be expecting additional children or perhaps have an elderly parent coming to live with them which would make their house too small in their view but equally it could be a desire for more space in general. Even though some of them could become overcrowded we have eliminated these from our calculations of those needing to move for this reason, in the Assessment Model, leaving a net figure of 811 households who need to move.
- 4.2.8 We set out in the next few paragraphs some inadequacy issues relating to those in specific respondent groups indicating inadequacy.

**Table 4-10 Repair Needed / Tenure**

Question 8bi / Question 1

	% of all households in sample	% households with a repair need	N <sup>os</sup> implied
Owner occupier with mortgage	31.4	39.4	727
Owner no mortgage	45.0	18.3	338
Private rented	9.6	24.4	450
HA rented	11.3	9.8	180
Shared ownership	0.4	2.2	41
Tied to employment / other	2.3	5.9	108
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>1,844</b>

- 4.2.9 In terms of tenure, repair need was disproportionately low among owner occupiers without a mortgage (as is usually found in our surveys). The proportion of private rented households having a repair need was relatively high.

**Table 4-11 Repair / Household Income**

Question 8bi / Question 16c

Income	% of all households in sample	% households with a repair need	N <sup>os</sup> implied
Below £10,000	25.0	39.6	593
£10,000 - £20,000	28.4	20.2	303
£20,001 - £27,500	14.2	11.4	171
£27,501 - £32,000	7.4	8.7	130
£32,501 - £40,000	7.4	8.6	129
£40,001 - £50,000	5.2	4.4	66
£30,001 - £60,000	4.8	2.1	32
£60,001 - £75,000	2.7	0.7	10
£75,001 - £100,000	2.2	1.4	21
Above £100,000	2.7	2.9	43
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>1,498</b>

- 4.2.10 We found some correlation between incomes and repair in that those with annual incomes under £10,000 appear to have disproportionately high repair need but the result for the £10,000 to £20,000 band in particular presented a somewhat different case with a relatively low repair need pro-rata to the sample.

**Table 4-12 Repair / Age Groups (Based on Age of Head of Household)**  
Question 8bi / Question 14d

Age Groups	% of all households in sample	% households with a repair need	N <sup>os</sup> implied
20 - 29	2.8	13.9	251
30 - 44	14.3	24.0	432
45 - 59	26.8	21.7	390
60 - 74	31.0	33.2	599
75+	25.1	7.2	130
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>1,802</b>

- 4.2.11 Repair need was disproportionately found among households where the head of household was aged 20 – 44. Repairs were apparently not a significant problem for those above 75 years of age.
- 4.2.12 11.0% of households with a disability felt their home was inadequate (compared to 9.2% among all households). Of respondents with a disability, 88.6% of those saying their home was inadequate also said they had a repair need, compared to 87.4% of all respondents. The nature of the disability for those with a repair need is shown in Table 4-13 below on the basis of a multiple choice question.

**Table 4-13 Disabled Households / Repair Needs**  
Question 8bi / Question 10c

Disability	% of all households (in sample of 7,663)	% households with a repair need (in sample of 530)	N <sup>os</sup> implied
Wheelchair user	7.6	1.6	9
Walking difficulty	52.3	55.9	296
Learning difficulty	6.0	3.8	20
Mental health problem	11.0	6.1	33
Visual / hearing impairment	22.1	7.3	39
Asthmatic / respiratory problems	21.7	45.6	242
Other physical disability	14.7	14.4	76
Limiting long term illness	32.3	50.5	268
<b>Total</b>			<b>983</b>

- 4.2.13 The results produced a sharp contrast between those with walking difficulty, those with asthmatic / respiratory problems and those with a limiting long-term illness whose repair need was disproportionately high and those with visual / hearing impairment (in particular) and wheelchair users whose repair need was disproportionately low.

**Table 4-14 Rent / Mortgage too Expensive / Income**

Question 8bii / Question 16c

Income	% of all households in sample	% households rent / mortgage too expensive	N <sup>os</sup> implied
Below £10,000	25.0	38.3	191
£10,000 - £20,000	28.4	32.3	162
£20,001 - £27,500	14.2	7.7	39
£27,501 - £32,500	7.4	6.7	33
£32,501 - £40,000	7.4	0.0	0
£40,001 - £50,000	5.2	13.1	66
£50,001 - £60,000	4.8	0.0	0
£60,001 - £75,000	2.7	1.9	10
£75,001 - £100,000	2.2	0.0	0
Above £100,000	2.7	0.0	0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>501</b>

- 4.2.14 We found some correlation between income and cost of rent / mortgage. Those in the under £10,000 annual income band indicated a relatively high level of difficulty with the cost of rent / mortgage even though this band is likely to benefit from Housing Benefit support and in other DCA surveys has not indicated a problem at the same level as those in the £10,000 - £20,000 income band. The relatively high level of difficulty in the £40,001 - £50,000 band must presumably reflect particular mortgage commitments.
- 4.2.15 Arguably, the main finding from the basic question on adequacy is the high degree of satisfaction expressed but some caveat has to be drawn in relation to the degree to which respondents maybe reluctant to describe their accommodation as unsuitable.
- 4.2.16 5,985 implied households responded to a question on whether their property will require any of a range of nominated repairs / improvement within the next 3 years. On average each respondent to a multiple choice question offered around 2.1 choices.

**Table 4-15 Repair Required in the Next 3 Years**

Question 8c

Repair	% responses	% households	N <sup>os</sup> implied
Window repairs	23.4	48.5	2,904
Improved heating	18.4	38.1	2,281
Additional security	16.0	33.0	1,978
Insulation	15.2	31.4	1,878
Roof repairs	11.7	24.2	1,451
Re-wiring	9.6	19.8	1,184
Damp proofing	5.7	11.8	705
<b>Total</b>	<b>100.0</b>		<b>12,381</b>

- 4.2.17 Window repairs (48.5%) was the main single choice as is usually found in our surveys but choices were generally quite well spread over most of the other nominated categories.

**Table 4-16 Repair Required by Tenure**

Question 8c

	Owner occupier with mortgage	Owner occupier no mortgage	Private rented	HA rented	Shared ownership*	Tied to employment / other*
Additional security	45.0	23.2	24.7	48.1	0.0	0.0
Improved heating	48.6	26.1	31.5	35.4	80.5	94.0
Re-wiring	22.8	17.6	26.9	11.5	19.5	0.0
Damp proofing	12.7	7.1	15.5	16.0	0.0	0.0
Roof repairs	27.3	31.0	14.1	19.5	5.2	35.9
Window repairs	55.6	47.2	61.5	22.4	0.0	41.9
Insulation	29.6	39.7	35.8	17.4	75.2	0.0

- 4.2.18 Overall, requirement in the HA rented sector was lower than the all tenure average in 5 of the 7 nominated categories being particularly low in relation to window repairs, re-wiring and insulation. However, the requirement for additional security was well above the all tenure average.
- 4.2.19 In the private rented sector a higher work requirement was identified in 4 of the 7 nominated categories with a particular emphasis on window repairs but generally the requirements in the sector were closer to the all tenure average than is often found in DCA surveys.

### 4.3 Household Composition and Household Profile

- 4.3.1 Large amounts of data were collected about the structure of the households and we have constructed a summary table to show the basic pattern of household types. It is based on the categories used by the ONS to construct their 'Social Trends' statistical series but is not exactly similar due to the manner in which the different data sets are collected and not directly comparable.

**Table 4-17 Family Composition**

Question 14c&d

Family Composition	%	Group %	Local Area Census 2001
1 adult over 60	23.8	40.8	33.0
1 adult under 60	12.3		
1 adult + other	4.7		
Couple no child	38.9	56.9	60.2
Couple with children	10.1		
Couple + others	7.9		
Single parent	2.3	2.3	6.8
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

- 4.3.2 Our survey results indicated a higher proportion of single adult households and a lower proportion of couple and single parent households than the 2001 Census. The latter appear to be under-represented with a corresponding over-representation of single adult households.

**Table 4-18 Population Age Groups**

Question 14d

Age Group	Sample %	Local Area Census 2001
0 - 10	7.7	17.0
11 - 15	4.6	
16 - 19	3.6	4.0
20 - 29	5.3	6.9
30 - 44	13.1	17.2
45 - 59	23.3	20.0
60 - 74	25.5	19.4
75+	16.9	15.5
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

- 4.3.3 Table 4-18 shows the ages of all household members in the sample. Our figures show some deviation from the 2001 Census data. There was a greater concentration of persons in our data in the 45+ age bands as compared with the 2001 Census with a lower concentration in the sub 45 age bands. This may be linked to the over-representation of single adult households referred to at 4.3.2 above.

**Table 4-19 Number in Household**

Question 14g

Number in Household	%	N <sup>os</sup> implied
One	34.9	13,485
Two	44.2	17,084
Three	9.3	3,586
Four	8.3	3,216
Five	2.5	971
Six	0.6	249
Seven	0.2	69
<b>Total</b>	<b>100.0</b>	<b>38,660</b>

(No household above 7 persons)

- 4.3.4 The profile emerging from our survey equated to 2.02 persons per household on average – well below the UK average of 2.40 (as endorsed by 2001 Census data) and below the District 2001 Census figure of 2.17.

**Table 4-20 Numbers in Household by Tenure**

Question 14a by Q.1

Tenure	N <sup>os</sup> in household
Owner occupier with mortgage	2.50
Owner occupier no mortgage	1.79
Private rented	1.75
HA rented	1.87
Shared ownership*	1.87
Tied to employment / other	1.78

(\* Low volume of data).

- 4.3.5 The owner occupied with mortgage sector would be expected to have a relatively high proportion of families. The HA rented sector figure was lower than the average for that sector in our survey experience, with a higher level of single person households (54.6%) than found on average in recent surveys (around 44%). 89.7% of the owner-occupier no mortgage households contained no more than two persons, reflecting the higher average age in this form of tenure and the fact that children will in the main have left home. 21.7% of the owner-occupier with mortgage households were single person households, above the average in recent DCA surveys (around 15%).
- 4.3.6 We offer below a broad assessment of ‘under-occupation’ and ‘over-occupation’ based on a detailed analysis of the family composition data. We established the number of bedrooms required in each household allowing for age and gender of occupants. In the case of over-occupation any dwelling without sufficient bedrooms to meet that requirement has been categorised as over-occupied. In the case of under-occupation, any dwelling with two or more ‘spare’ bedrooms above requirement has been categorised as under-occupied.
- 4.3.7 Our overall over-occupation level of around 460 households (1.2%) was below the average UK level indicated by the Survey of English Housing 2001/2 (3%). We have no comparable data against which to measure our overall under-occupation figure of 16.9% but it was slightly above that found in recent DCA surveys (around 16%).
- 4.3.8 The assessment of under / over occupation by tenure revealed some disparity between tenure types as indicated at Table 4-21 below.

**Table 4-21 Under / Over Occupation by Tenure**

Question 14a by Q.5 &amp; Q.1

Tenure	% under occupied	% over occupied
Owner occupied with mortgage	17.7	1.6
Owner occupied no mortgage	22.1	0.1
Private rented	1.0	4.2
HA rented	1.1	3.4
Shared ownership*	25.0	0.0
Tied to employment / other*	16.6	0.0

(\* Low volume of data).

- 4.3.9 The HA rented over-occupation level was above the all tenure average in our data at 3.4%.
- 4.3.10 Under occupation within the owner occupied no mortgage sector (22.1%), which will include a higher proportion of elderly households, was not unduly high in our experience. 26% has been around the average in recent DCA surveys. HA rented under-occupation was low at only 1.1% as recorded in our data in contrast to the all-tenure average and the owner occupied forms of tenure set out in Table 4-21.

**Table 4-22 Employment Status of Head of Household**

Question 14e

Status	%	N <sup>os</sup> implied
Wholly retired	51.7	19,117
Full-time employee (30+ hours)	19.2	7,124
Self-employed	9.5	3,506
Part-time employee (up to 30 hours)	9.2	3,394
Looking after the home	6.2	2,304
Permanently sick / disabled	2.1	758
Unemployed / available for work	1.7	616
On Government Training Scheme	0.3	108
In full-time education	0.1	18
<b>Total</b>	<b>100.0</b>	<b>36,945</b>

- 4.3.11 95.1% of Heads of Households responded to the question on employment. 37.9% of Heads of Household indicated that they were in employment, as compared with the 60% average identified for Heads of Household in the Survey of English Housing 2001/2. 51.7% were retired – well above the average in our survey experience. 1.7% indicated that they were unemployed and available for work, compatible with the results in our recent survey experience in which the average has been between 1-2%.

**Table 4-23 Occupation Type of Head of Household**

Question 14f

Occupation	%	N <sup>os</sup> implied
Professional	41.5	6,673
Managerial / Technical	19.3	3,111
Skilled, manual	8.8	1,410
Skilled, non manual	5.8	935
Unskilled	5.5	881
Partially skilled	5.5	878
Other	13.6	2,180
<b>Total</b>	<b>100.0</b>	<b>16,068</b>

- 4.3.12 In the case of occupation type 41.4% of the sample responded, higher than the proportion indicating that they were in employment in Table 4-22 above (37.9%). 41.5% of respondents described themselves as professional.



**Table 4-24 Workplace of Head of Household**

Question 14h

Workplace	%	N <sup>os</sup> implied
Within Rother District	40.2	5,788
Hastings	16.7	2,399
Work from home	7.7	1,107
Eastbourne	7.2	1,034
London	4.7	682
Elsewhere in Kent	4.7	676
Elsewhere in South East	4.5	647
Wealden	4.0	577
Elsewhere in UK	3.7	539
Elsewhere in Sussex	3.6	514
Tunbridge Wells	2.0	290
Ashford	0.6	89
Lewes	0.2	30
Brighton & Hove	0.1	19
Abroad	0.1	10
<b>Total</b>	<b>100.0</b>	<b>14,401</b>

4.3.13 40.2% of heads of household worked within Rother District; 16.7% in Hastings.

4.3.14 In the case of ethnic origin the breakdown at Table 4-25 below refers only to 'Self' which we take in the main to be the Head of Household. 98.0% respondents answered the ethnic origin question.

**Table 4-25 Ethnic Origin of Households**

Question 14b

Ethnic Origin	%	N <sup>os</sup> implied	Local Area Census 2001
British	96.2	36,659	95.4
Other White	1.8	689	2.0
White & Asian	0.7	286	0.2
Irish	0.6	226	0.7
Indian	0.2	67	0.2
Chinese	0.1	42	0.2
Caribbean	0.1	21	0.1
Bangladeshi	0.1	21	0.1
Pakistani	0.1	21	0.0
Other mixed	0.0*	10	0.2
White & Black Caribbean	0.0*	9	0.1
White & Black African	0.0	0	0.1
Other Asian background	0.0	0	0.1
African	0.0	0	0.1
Other	0.1	22	0.5
<b>Total</b>	<b>100.0</b>	<b>38,073</b>	<b>100.0</b>

(\* No data for other Black background and Gypsy / Traveller)

- 4.3.15 A further question in this section related to access to cars. 20.5% had no car, based on a response rate of 94.6%.

**Table 4-26**      **Number of Cars in Household**

Question 15

	<b>%</b>	<b>N<sup>os</sup> implied</b>
One	48.5	17,801
Two	24.3	8,922
Three or more	6.7	2,468
None	20.5	7,539
<b>Total</b>	<b>100.0</b>	<b>36,730</b>

#### 4.4 Costs of Present Housing and Income

- 4.4.1 The next group of tables relate to the cost of accommodation and household incomes, beginning with a question on weekly rent paid which was answered by 21.0% of households (8,167 implied) i.e. 90.7% of those households indicating a rented tenure.

**Table 4-27**      **Weekly Rent Paid for Present Accommodation**

Question 16a

<b>Weekly rent</b>	<b>%</b>	<b>Cum %</b>
Below £60 pw / £260 pm	18.8	18.8
£60 - £70 pw / £260 - £300 pm	11.7	30.5
£71 - £80 pw / £301 - £350 pm	20.1	50.6
£81 - £100 pw / £351 - £430 pm	28.0	78.6
£101 - £150 pw / £431 - £650 pm	13.5	92.1
£151 - £200 pw / £651 - £865 pm	6.0	98.1
£201 - £250 pw / £866 - £1,080 pm	1.2	99.3
£251 - £300 pw / £1,081 - £1,300 pm	0.4	99.7
Above £300 pw / £1,300 pm	0.3	100.0

- 4.4.2 The table indicates that 18.8% of renters in the sample paid less than £60 per week; 50.6% less than £80 per week. 48.6% of those renting were in the social rented sector.

- 4.4.3 From cross-tabulation the percentage breakdown of rent levels for the two main rental tenures was as follows:-

**Table 4-28 Rent Level / Tenure**

Question 16a by Q.1

Weekly rent	Private rented	HA rented
Below £60 pw / £260 pm	15.6	16.1
£60 - £70 pw / £260 - £300 pm	1.7	21.0
£71 - £80 pw / £301 - £350 pm	8.8	32.7
£81 - £100 pw / £351 - £430 pm	37.9	24.8
£101 - £150 pw / £431 - £650 pm	23.8	5.4
£151 - £200 pw / £651 - £865 pm	11.0	0.0
£201 - £250 pw / £866 - £1,080 pm	0.7	0.0
£251 - £300 pw / £1,081 - £1,300 pm	0.3	0.0
Above £300 pw / £1,300 pm	0.2	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

- 4.4.4 64.0% of private sector rents appeared to be relevant to households on lower incomes (i.e. under £100 per week). 37.1% of HA rents were below £70 per week.
- 4.4.5 The next table shows that, of the 70.6% (27,409 implied) responding to this question as homeowners in the sample (92.5% of owner occupiers), 62.0% had no mortgage and a further 16.3% paid less than £450 per month.

**Table 4-29 Monthly Mortgage Paid for Present Accommodation**

Question 16b

Monthly mortgage	%	Cum %
Nil	62.0	62.0
Below £250	6.1	68.1
£250 - £350	5.4	73.5
£351 - £450	4.8	78.3
£451 - £600	7.3	85.6
£601 - £750	4.1	89.7
£751 - £1,000	4.7	94.4
£1,001 - £1,250	2.3	96.7
Above £1,250	3.3	100.0

- 4.4.6 The next question probed for information about household income, the results are set out in Table 4-30.

**Table 4-30 Gross Annual Income of Households**

Question 16c

Annual income	%	Cum %	UK 2002 - 2003 *
Below £10,000	25.0	25.0	21.6
£10,000 - £20,000	28.4	53.4	42.3
£20,001 - £27,500	14.2	67.6	
£27,501 - £32,500	7.4	75.0	36.1
£32,501 - £40,000	7.4	82.4	
£40,001 - £50,000	5.2	87.6	
£50,001 - £60,000	4.8	92.4	
£60,001 - £75,000	2.7	95.1	
£75,001 - £100,000	2.2	97.3	
Above £100,000	2.7	100.0	

(\* Source: DWP Family Resources Survey 2002-2003).

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- 4.4.7 The response rate to the income question was 77.2% and should give a good picture of the income levels in the District. The table shows 25.0% of households had incomes below £10,000, above the corresponding UK figure (21.6%). The total proportion in the District earning below the approximate national average household income of £27,300 per annum was 67.5%, above the average for the UK as a whole (63.6%). 32.4% of the households in the District on the basis of the survey data had incomes above £27,500 per annum, below the UK average (36.1%).
- 4.4.8 Cross-tabulation produced the following split of income levels by tenure for the four main tenure types.

**Table 4-31 Annual Income by Tenure**

Question 16c by Q.1

Tenure	Below £10k	£10k - £20k	£20k - £27.5k	£27.5k - £32.5k	£32.5k - £40k	£40k - £50k	£50k - £60k	£60k - £75k	£75k - £100k	Above £100k	Total
Owner occupier–mortgage	9.6	16.1	17.2	10.4	13.4	9.8	8.0	5.9	4.3	5.3	100.0
Owner occupier–outright	27.6	35.2	14.6	6.6	4.2	3.5	3.7	1.2	1.6	1.8	100.0
Private rented	46.9	32.3	9.8	4.2	2.7	1.9	0.6	1.6	0.0	0.0	100.0
HA rented	50.8	30.9	4.7	4.0	6.2	0.3	3.1	0.0	0.0	0.0	100.0

- 4.4.9 The profiles were largely as would be expected as between owner-occupiers and renters, especially bearing in mind that a significant proportion of owner-occupiers without mortgage would be people with limited pension income. HA rented sector incomes were concentrated (81.7%) below £20,000 per annum. Private rented sector incomes were only slightly higher than HA rented sector incomes and 79.2% were still below £20,000 per annum.
- 4.4.10 Our findings are also broadly consistent with the findings of the Family Spending Review 2000/01. The review found the average gross income of owners without a mortgage to be £21,944 compared to £36,712 for those with a mortgage. Lowest incomes were found among local authority tenants (£12,168) and housing association tenants (£13,468). 54.8% of households with incomes in the lowest income group (up to £5,564 per year) were social housing tenants; 24.4% were outright owners.

4.4.11 33.9% of households were in receipt of financial support (13,170 implied), above the average found in recent DCA surveys (around 26%). The results from those responding to a multiple-choice question are set out in Table 4-32 below. On average, each respondent indicated 1.5 forms of financial support.

**Table 4-32 Financial Support**  
Question 16d

	Responses %	Households %	N <sup>os</sup> implied
Housing Benefit	23.0	34.3	4,523
Pension Credits	21.0	31.3	4,125
Disability Allowance	17.1	25.5	3,356
Income Support	12.4	18.4	2,429
Working Family Tax Credit	8.9	13.3	1,748
Job Seekers Allowance	2.2	3.2	422
Other	15.4	22.9	3,022
<b>Total</b>	<b>100.0</b>		<b>19,625</b>

4.4.12 34.3% of households responding were in receipt of Housing Benefit (4,523 implied) or 50.2% of renters in the sample.

## 4.5 Development

4.5.1 We asked respondents what types of housing, if any, they felt were needed in Rother. The responses from 93.9% of the sample (36,479 implied) to a multiple choice question are set out in Table 4-33 below, with each respondent making 2.7 choices on average.

**Table 4-33 Types of Housing Needed in Rother**  
Question 38

	Responses %	Households %	N <sup>os</sup> implied
Affordable housing for local people	22.4	60.9	22,231
Housing for young people	16.1	43.7	15,941
Housing for families	11.9	32.2	11,758
Environmentally friendly housing	11.3	30.6	11,182
Housing for key workers	10.7	29.1	10,606
Housing for older people	10.3	28.0	10,226
Housing for disabled people	8.0	21.9	7,975
No more housing required	5.2	14.2	5,165
No opinion	4.1	11.1	4,066
<b>Total</b>	<b>100.0</b>		<b>99,150</b>

4.5.2 As usual in our surveys where a development question has been posed, the highest proportion opted for affordable housing for local people with 60.9% making it one of their choices but 43.7% chose housing for young people. Only 5.2% of all responses indicated that no more housing was required.

4.5.3 82.7% of the sample (32,124 implied) answered a further question on the type of tenure required in any new homes provided in the District. 68.3% of households responding indicated a requirement for a mix of sale, rent and shared ownership but respondents have in some cases treated the question as multiple choice. 22.6% made new housing for rent one of their specific priorities (7,257 cases implied).

## 5 MIGRATION

### 5.1 In Migration to Rother

5.1.1 This section looks at the patterns of migration for the Rother area. In the first part of the section we asked the 5,853 implied households (15.1% of the sample) who had moved in the last 2 years where they had moved from. 56.5% had previously lived within Rother District.

**Table 5-1 Location of Previous Dwelling**

Question 4a

Location	%	N <sup>os</sup> implied
Within Rother District	56.5	3,305
Hastings	8.7	509
London	8.7	508
Elsewhere in UK	5.5	321
Elsewhere in Kent	4.9	289
Eastbourne	4.5	266
Elsewhere in South East	4.2	245
Wealden	3.7	215
Elsewhere in Sussex	1.4	83
Brighton & Hove	0.7	42
Tunbridge Wells	0.4	26
Ashford	0.4	23
Lewes	0.2	11
Abroad	0.2	10
<b>Total</b>	<b>100.0</b>	<b>5,853</b>

5.1.2 Those who had moved within the last 2 years were then asked what the most important reason was for moving home. 5,564 implied households responded to the question, 95.1% of the group indicating a move.

**Table 5-2 Reason for the Moving Within Last 2 Years**

Question 4c

Reason	%	N <sup>os</sup> implied
Needed more space	29.5	1,639
Retirement	14.8	822
Needed less space	12.9	721
Relationship / family breakdown	10.6	589
Health reasons	9.1	505
Move to a cheaper home	7.8	432
To be near relative	6.1	342
Closer / easier to commute to work	3.7	204
New job	2.2	125
Wanted to buy	1.7	96
Education	1.1	60
Wanted own home	0.5	29
<b>Total</b>	<b>100.0</b>	<b>5,564</b>

- 5.1.3 The need for more space (29.5%) was the single most common reason given for moving; retirement the second most common (14.8%).
- 5.1.4 85.6% of the group indicating a move (5,011 implied) answered a further question on whether the move was to a first home. 92.9% indicated that it was not their first home.

## 5.2 Out-Migration from Rother

- 5.2.1 Out-migration is expected to account for 39.9% of all moves for both existing and concealed households over the next 3 years (2,794 moves implied). Out-migration will account for 39.6% (1,829 implied) of all intended moves for existing households and 40.5% (965 implied) in the case of concealed households over the next 3 years. The needs of those respondents wishing to move outside of the District have been excluded from the needs assessment model in Section 11 of the report.
- 5.2.2 Those moving out of the District were asked where they were thinking of moving to. In this case 1,829 implied existing households, all of those intending to move out of the District and 917 implied concealed households, 95.0% of those intending to move out of the District responded to the question.

**Table 5-3 Location of Move for those Moving Outside Rother District**  
Question 17c

Location	Existing households		Concealed households	
	%	N <sup>os</sup> implied	%	N <sup>os</sup> implied
Elsewhere in UK	33.8	617	46.2	424
Eastbourne	17.1	312	7.3	67
Elsewhere in South East	15.5	283	24.0	220
Abroad	10.6	193	1.6	15
Elsewhere in Kent	10.5	192	1.6	14
Elsewhere in Sussex	7.3	134	1.6	14
Wealden	4.3	79	1.1	10
Ashford	3.5	64	0.9	8
Tunbridge Wells	3.4	62	2.1	19
Hastings	2.8	51	13.0	119
London	1.6	28	5.8	53
<b>Total</b>		<b>2,015</b>		<b>963</b>

(No data for Lewes & Brighton and Hove)

- 5.2.3 In the case of both existing and concealed households, the main single interest was elsewhere in the UK i.e. outside the South East, with 33.8% of existing households moving and 46.2% of concealed households moving giving that location.
- 5.2.4 For concealed households moving the proportion thinking of moving elsewhere in the South East was higher than for existing households with less interest in moving abroad. Of the specific locations offered existing households moving favoured Eastbourne; concealed households moving favoured Hastings.
- 5.2.5 Those moving out of the District were also asked their reasons for moving away. 1,394 implied existing households, 76.2% of those intending to move out of the District and 926 implied concealed households, 96.0% of those intending to move outside the District, responded to a multiple choice question, offering around 1.5 choices in the case of existing households moving; 1.1 choices in the case of concealed household moving.

**Table 5-4 Reason for Moving Out of Rother District**

Question 17d

	Existing Households		Concealed households	
	% households	N <sup>os</sup> implied	% households	N <sup>os</sup> implied
Better area	46.6	649	3.4	32
Employment / access to work	32.3	450	65.7	609
Safety / fear of crime	28.3	395	1.0	9
Retirement	25.1	350	8.3	77
Lack of affordable housing	12.0	168	19.0	176
Better education facilities	4.8	67	12.6	117
<b>Total</b>		<b>2,079</b>		<b>1,020</b>

5.2.6 The single most common reason given by existing households moving outside the District was better area (46.6%). 25.1% gave retirement as a reason. In the case of concealed households moving, choices were more focused on employment reasons (65.7%), lack of affordable housing (19.0%) and better education facilities (12.6%) as might be expected from a group likely to have a younger profile.

### 5.3 Migration Summary

**Table 5-5 Existing Households**

Migration Areas	Rother	Hastings	Tunbridge Wells	Ashford	Wealden	Brighton & Hove	Lewes
Moving in to Rother from	266	509	26	23	215	42	11
Moving out of Rother to	312	51	62	64	79	0	0
Net Migration	- 46	+ 458	- 36	- 41	+ 136	+ 42	+ 11

Reasons	Retirement	Employment	Education
In to Rother	822	125	60
Out of Rother	350	450	67
<b>Net Impact</b>	<b>+ 472</b>	<b>- 325</b>	<b>- 7</b>

5.3.1 There is a net level of out-migration relating to employment of 325 existing households and 609 concealed households resulting in an overall net out-negative relating to employment of 934.



## 6 FUTURE HOUSING REQUIREMENTS

### 6.1 Moving Households Within Rother

- 6.1.1 Moving intentions were tested in several sections of the questionnaire with an emphasis on future plans to move within the District for existing households and also a more focused study on concealed households who represent pent up demand for housing.
- 6.1.2 Respondents were asked to say whether they or any members of the household were currently seeking to move or will do so in the next three years. We found that 16.7% of all households responding (6,484 implied) planned a move. A further 4.6% (1,799 implied) indicated that they wished to move but were unable to do so.
- 6.1.3 The majority (78.7%) was not intending to move in this time scale, whether able to do so or not. The scale of movement implied, at an average of around 5.6% per annum, was higher than that found in other recent surveys carried out by DCA in which an average figure of around 4.8% has emerged (but the figure relates to periods of 3 or 5 years). This proportion would rise to 7.1% if all those wishing to move in the period were able to do so.
- 6.1.4 Those indicating a wish to move but an inability to do so offered the following reasons for not being able to move. Respondents offered around 1.4 choices on average. However, the number of implied households responding was 2,215, not 1,799 as indicated by the basic responses on moving referred to at 6.1.2 above. We assume that some households experiencing a difficulty in moving in the shorter term also answered this question even though they expected to move some time in the next three years.
- 6.1.5 It would seem clear from Table 6-1 below that affordability was the most important factor with 41.8% indicating an inability to afford to buy a home; 38.3% a lack of affordable housing.

**Table 6-1**            **Reasons Preventing a Move**  
Question 17e

	% responses	% households	N <sup>os</sup> implied
Unable to afford to buy a home	29.6	41.8	925
Lack of affordable housing	27.1	38.3	848
Unable to afford moving costs	14.4	20.4	451
Family reasons	5.3	7.5	166
Location of employment	3.6	5.1	112
Local education choices	0.8	1.2	26
Other	19.2	27.0	599
<b>Total</b>	<b>100.0</b>		<b>3,127</b>

## 6.2 Housing Needs of Existing Households Moving Within Rother

6.2.1 The percentages in all tables in this section (except cross tabulations) have been applied to the control total of 2,790 implied existing household moving within the District, corresponding to the total number of households responding to question 17b asking about the nature of the move.

6.2.2 The first table in this section looks at the current tenure of existing households moving within the District. 76.3% of the group were owners. Only 6.2% were social rented sector households as compared with around 12% on average for the social sector in recent DCA surveys, implying a 3.9% turnover on social housing stock (excluding death and eviction).

**Table 6-2 Current Tenure of Existing Households Moving Within Rother**  
Question 17b by Q.1

Tenure	% of moving households	N <sup>os</sup> implied
Owner occupier with a mortgage	37.4	1,043
Owner occupier no mortgage	38.9	1,087
Private rented	15.1	421
HA rented	6.2	172
Tied to employment / other	2.4	67
<b>Total</b>	<b>100.0</b>	<b>2,790</b>

-Low volume of data

-No data for shared ownership.

**Table 6-3 When is the Accommodation Required**  
Question 18

Time accommodation required	%	N <sup>os</sup> implied
Within 1 year	46.2	1,289
Between 1 - 2 years	28.2	787
Between 2 - 3 years	25.6	714
<b>Total</b>	<b>100.0</b>	<b>2,790</b>

6.2.3 The table shows that 46.2% of potential movers sought to do so within one year.

**Table 6-4 Type of Accommodation Required**  
Question 19

Type	%	N <sup>os</sup> implied
Detached	24.6	686
Bungalow	24.3	678
Semi-detached	23.4	653
Flat / maisonette	10.7	299
Supported housing	10.1	282
Terraced	6.9	192
<b>Total</b>	<b>100.0</b>	<b>2,790</b>

(No data for bedsit / studio / room only and caravan / mobile home)

- 6.2.4 Table 6-4 indicates that only 24.6% of these respondents felt that they required detached houses – below the average for this group found in recent DCA surveys (around 32%). Interest in flats / maisonettes at 10.7% was above that found in recent DCA surveys even though interest in flats from existing households moving has typically only been around 8%. Interest in supported housing (10.1%) was relatively high in our experience.

**Table 6-5**      **Number of Bedrooms Required**

Question 20

Bedrooms	%	N <sup>os</sup> implied
One	13.1	366
Two	35.3	985
Three	37.0	1,032
Four	14.2	396
Five or more	0.4	11
<b>Total</b>	<b>100.0</b>	<b>2,790</b>

- 6.2.5 72.3% of existing household moving respondents indicated that they required two or three bedroom accommodation. The requirement for one bedroom accommodation (13.1%) was above that found in other recent surveys carried out by DCA in which 8% has been around the average, reflecting to some degree relatively high level of interest in supported housing referred to at 6.2.4 above.

- 6.2.6 We ran a cross-tabulation relating type of property required to size required in terms of bedrooms with the following results.

**Table 6-6**      **Type Required by Size Required**

Question 19 by Q20

Type	One bed		Two bed		Three bed		Four beds		Five + bed		Total
	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	N <sup>os</sup>
Semi-detached	0.0	0	38.3	252	54.9	362	6.8	45	0.0	0	<b>659</b>
Detached	0.0	0	9.7	65	37.8	254	51.0	343	1.5	10	<b>672</b>
Terraced*	0.0	0	82.5	160	17.5	34	0.0	0	0.0	0	<b>194</b>
Flat / maisonette*	27.1	81	49.8	149	23.1	69	0.0	0	0.0	0	<b>299</b>
Bungalow	4.8	33	48.1	329	45.9	314	1.2	8	0.0	0	<b>684</b>
Supported housing*	89.4	252	10.6	30	0.0	0	0.0	0	0.0	0	<b>282</b>
<b>Total</b>		<b>366</b>		<b>985</b>		<b>1,033</b>		<b>396</b>		<b>10</b>	<b>2,790</b>

(\* low volume of data)

- 6.2.7 48.1% of bungalow demand was for 2-bed accommodation; 45.9% for 3-bed accommodation. 52.5% of detached demand favoured 4+ bed accommodation; 37.8% 3-bed accommodation. 54.9% of semi-detached demand was for 3-bed accommodation; 38.3% for 2-bed accommodation.

- 6.2.8 Existing moving households were next asked if they were looking to rent or buy. The results are set out in Table 6-7.

**Table 6-7 Preferred Tenure**

Question 21

Tenure	%	N <sup>os</sup> implied
Owner occupation	80.9	2,257
HA rented	15.6	435
Private rented	2.9	81
HA shared ownership	0.6	17
<b>Total</b>	<b>100.0</b>	<b>2,790</b>

(No data for tied to employment)

- 6.2.9 80.9% (2,257 implied) saw owner occupation as their preference – above the average found in recent DCA surveys (around 73%). 15.6% of the group indicated a preference for social rented accommodation – below the level found for social rented accommodation in recent DCA surveys (20%). The number of households expressing a demand for social rented accommodation (435 implied) was higher than the number of social rented tenants indicating an intention to move in Table 6-2 above (172 implied), suggesting a turnover of 9.9% on the social housing stock (excluding death and eviction).
- 6.2.10 Of those preferring HA rented housing, 35.4% were currently HA tenants; 34.9% were moving from private rented accommodation.
- 6.2.11 We ran a cross-tabulation to compare type of property required with type of tenure preferred with the following results.

**Table 6-8 Type Required by Preferred Tenure**

Question 19 by Q21

Type	Owner occupation		Private rented		HA rented		HA shared ownership		Total
	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	N <sup>os</sup>
Semi-detached	89.1	585	0.0	0	8.5	56	2.4	16	<b>657</b>
Detached	94.3	664	1.7	12	4.0	28	0.0	0	<b>704</b>
Terraced*	100.0	197	0.0	0	0.0	0	0.0	0	<b>197</b>
Flat / maisonette*	61.0	186	0.0	0	39.0	119	0.0	0	<b>305</b>
Bungalow	81.7	531	0.0	0	18.3	119	0.0	0	<b>650</b>
Supported housing*	37.2	103	24.5	68	38.3	106	0.0	0	<b>277</b>
<b>Total</b>		<b>2,266</b>		<b>80</b>		<b>428</b>		<b>16</b>	<b>2,790</b>

(\*Low volume of data).

- 6.2.12 Demand in the HA rented sector was fairly evenly split between flats / maisonettes, bungalows and supported housing. 29.3% of owner-occupation demand was for detached houses; 25.8% for semi-detached houses; 23.4% for bungalows.
- 6.2.13 100.0% of demand for terraced houses; 94.3% of demand for detached houses; 89.1% of demand for semi-detached houses and 81.7% of demand for bungalows was for owner-occupation. 39.0% of demand for flats / maisonettes was for HA rented accommodation.

- 6.2.14 92.3% of existing households moving (2,574 implied) responded to a question asking whether, if they needed to move to a different house, they could afford a home of a suitable size in the District. 69.8% indicated that they could afford such a move.
- 6.2.15 11.6% of existing moving households (323 implied) were registered on a housing waiting list, 88.9% indicating registration on the Rother District Council list. 21.3% indicated registration on a housing association list.
- 6.2.16 Existing households moving were asked where accommodation was required. Up to two choices were invited but on average only 1.3 choices each were offered.

**Table 6-9 Where Accommodation is Required**

Question 25

Location	All existing moving households			Those seeking Council rented accommodation
	% responses	% households	N <sup>os</sup> implied (all choices)	N <sup>os</sup> implied (all choices)
Bexhill	41.4	54.2	1,358	206
In existing village	19.9	26.1	654	48
Battle	19.8	25.9	649	87
In another village	11.7	15.3	384	70
Rye	7.2	9.4	235	77
<b>Total</b>	<b>100.0</b>		<b>3,280</b>	<b>488</b>

- 6.2.17 Bexhill was the most favoured location with 54.2% making it one of their choices. 85.2% of all demand for Bexhill came from households currently living in that area, representing 89.6% of existing households moving currently living in Bexhill.
- 6.2.18 We ran a separate cross tabulation looking at the locations required by those seeking HA rented accommodation who also made 1.3 choices on average. Demand among those seeking HA rented accommodation was also focused to a large degree on Bexhill.
- 6.2.19 The final question in this section asked respondents why they preferred a particular location. The average number of choices was 2.2. As with other DCA surveys, the reasons were quite widely spread. Employment / closer to work, chosen by 43.4% as one of their reasons, was the main single choice with familiarity with the area ('always lived here') marginally the second most common choice at 42.5%.

**Table 6-10 Reason for Preferred Location**

Question 26

Reason	% responses	% households	N <sup>os</sup> implied (all choices)
Employment / closer to work	19.3	43.4	1,008
Always lived here	18.9	42.5	985
Better area	13.5	30.3	704
Nearer / better shopping / leisure facilities	11.4	25.6	593
Nearer / better schools / colleges	9.3	21.0	488
Near family / carer	9.2	20.6	478
Safety / fear of crime	7.8	17.5	407
Better public transport	5.4	12.2	283
Greater availability of cheaper housing	5.2	11.7	272
<b>Total</b>	<b>100.0</b>		<b>5,218</b>

### 6.3 Housing Needs of Concealed Households Moving Within Rother

- 6.3.1 In this section we look in detail at those people living in an existing household but described as a 'concealed' household which we take as a proxy for the extent of 'concealment' of housing need within the District because these households represent a pent up and unmet demand for housing.
- 6.3.2 The questionnaire allowed for up to 2 concealed households to be identified within each existing household. We identified 1,417 households with one concealed household (as per Q17b on the nature of move) and 106 with a second concealed household (based on the average responses in the detailed data tables), giving a total of 1,523 concealed households in the District.
- 6.3.3 The tables below show both the findings for all concealed household planning to move within the next 3 years (1,523 households) and the findings for those moving within the next 12 months (666 households).
- 6.3.4 The vast majority (94.6%) of the total of concealed households consisted of people described as children of the household as set out in Table 6-11 below. The level of relationship breakdown at 1.7% is lower than normal (4%).

**Table 6-11 Persons Looking to Form Concealed Households**  
Question 27

Persons forming household	%	N <sup>os</sup> implied
Children 16 +	94.6	1,441
Partner / Spouse	1.7	26
Lodger	1.4	21
Friend	0.7	11
Other relative	1.2	18
Parent / Grandparent	0.4	6
<b>Total</b>	<b>100.0</b>	<b>1,523</b>

(No data for friend)

**Table 6-12 Age Structure of Concealed Households**  
Question 28c

Age	%	N <sup>os</sup> implied
16 - 19	10.3	201
20 - 29	60.6	1,180
30 - 44	16.1	313
45 - 59	7.9	154
60 - 74	0.3	5
75 +	4.8	93
<b>Total</b>	<b>100.0</b>	<b>1,946</b>

6.3.5 The age question refers to individual adult household members. Table 6-12 above suggests only 10.3% of concealment related to the 16 - 19 age group but 70.9% related to all those under 30 years of age.

**Table 6-13 Number of Children**

Question 28d

Children	%	N <sup>os</sup> implied
One	7.5	114
Two	0.7	11
None	91.8	1,398
<b>Total</b>	<b>100.0</b>	<b>1,523</b>

(No data for child due)

6.3.6 The survey found that children (under the age of 16) were involved in only 8.2% of cases (125 implied).

6.3.7 We asked if the household was being formed as a single person or with a partner. 36.7% of the group (559 implied) indicated formation with a partner. Of those, 43.2% indicated that their partner lived within their existing household; 40.9% elsewhere in the District; 15.9% outside the District.

**Table 6-14 Time of Move**

Question 30

When required	%	N <sup>os</sup> implied
Within 1 year	43.7	666
Between 1 - 2 years	27.6	420
Between 2 - 3 years	28.7	437
<b>Total</b>	<b>100.0</b>	<b>1,523</b>

**6.3.8 New Household Formation**

6.3.9 The Good Practice Guidance recommends that the scale of annual new household formation is calculated as an average of the first two years numbers identified in the survey. Table 6-14 above shows that the average in District would be 543.

6.3.10 Guidance also requires that double counting is avoided and the following numbers, relating to two person formation with a partner living elsewhere in the District and those already on the Housing Register, are removed.

**Table 6-15 Double Counting Removal**

9. New household formation (gross p.a.)	543
10. MINUS - Two person formation (15.0%) x 0.5	<u>41</u>
	502
11. MINUS - Households registered on waiting list (10.8%)	<u>54</u>
<b>Total</b>	<b>448</b>

6.3.11 The net level of households is that considered to form each year and used in the Assessment Model at Section 11.

- 6.3.12 43.7% (666 implied) of the all those in the concealed household moving group required accommodation within one year as compared with 46.2% in the case of existing households moving.

**Table 6-16 Tenure Needed**

Question 29a

Tenure	All concealed households moving		Concealed households moving within one year	
	%	N <sup>OS</sup> implied	%	N <sup>OS</sup> implied
Owner occupation	38.7	589	24.4	162
Private rented	31.7	483	28.4	189
HA rented	17.3	264	23.1	154
HA shared ownership	12.3	187	24.1	161
<b>Total</b>	<b>100.0</b>	<b>1,523</b>	<b>100.0</b>	<b>666</b>

(No data for 'tied to employment')

- 6.3.13 A relatively low proportion (38.7%) of all concealed households moving opted for owner occupation as compared with results in other recent DCA surveys. Interest in private rented accommodation was high at 31.7%. Those moving within a year had a slightly different profile in that a lower proportion (24.4%) opted for owner occupation and a higher proportion opted for HA rented and shared ownership accommodation. However, it should be stressed that the data relating to concealed households was limited throughout this section of the report.

**Table 6-17 Tenure Preferred**

Question 29b

Tenure	All concealed households moving		Concealed households moving within one year	
	%	N <sup>OS</sup> implied	%	N <sup>OS</sup> implied
Owner occupation	73.7	1,122	57.4	382
Private rented	14.1	215	26.3	175
HA rented	9.6	146	11.9	79
HA shared ownership	2.6	40	4.4	30
<b>Total</b>	<b>100.0</b>	<b>1,523</b>	<b>100.0</b>	<b>666</b>

(No data for 'tied to employment')

- 6.3.14 In the case of tenure preference, the choices of all concealed households moving were more aspirational i.e. favouring owner occupation over the other forms of tenure. Concealed households moving within one year again indicated a lower level of preference for owner occupation than for all concealed households moving with a higher proportion of interest in private rented accommodation in particular.



**Table 6-18 Type of Accommodation Needed**

Question 31a

Type	All concealed households moving		Concealed households moving within one year	
	%	N <sup>os</sup> implied	%	N <sup>os</sup> implied
Flat / maisonette	59.0	898	65.1	434
Terraced	27.9	425	23.3	155
Semi-detached	5.3	81	6.4	43
Bedsit / studio / room only	3.9	59	0.0	0
Detached	2.1	32	3.5	23
Bungalow	1.1	17	0.0	0
Supported housing	0.7	11	1.7	11
<b>Total</b>	<b>100.0</b>	<b>1,523</b>	<b>100.0</b>	<b>666</b>

*(No data for caravan / mobile home)*

- 6.3.15 The results from the survey showed a different profile from existing households moving, as might be expected for a generally younger group. This is consistent with our other recent surveys. 59.0% of all concealed households required flats / maisonettes. A level in the region of 40-50% has been common in our surveys. The profile of those moving within 1 year showed a slightly higher level of need for flats / maisonettes rather than terraced houses.

**Table 6-19 Type of Accommodation Preferred**

Question 31b

Type	All concealed households moving		Concealed households moving within one year	
	%	N <sup>os</sup> implied	%	N <sup>os</sup> implied
Terraced	35.8	545	33.8	225
Flats / maisonette	27.8	423	23.2	155
Semi-detached	20.2	308	31.6	210
Detached	10.3	157	9.7	65
Bungalow	3.3	50	0.0	0
Bedsit / studio / room only	1.8	28	0.0	0
Supported housing	0.8	12	1.7	11
<b>Total</b>	<b>100.0</b>	<b>1,523</b>	<b>100.0</b>	<b>666</b>

*(No data for caravan / mobile home)*

- 6.3.16 The more aspirational view usually reflected amongst all concealed households moving on preference for type (i.e. more houses; fewer flats) can be seen in Table 6-19. The position in relation to those moving within 1 year showed even more of a shift away from flats with only 23.2% saying they would prefer a flat compared to 65.1% expressing a need.

**Table 6-20 Number of Bedrooms Needed**

Question 32a

Bedrooms	All concealed households moving		All concealed households moving within one year	
	%	N <sup>OS</sup> implied	%	N <sup>OS</sup> implied
One	43.6	664	37.8	252
Two	54.3	827	60.5	403
Three	2.1	32	1.7	11
<b>Total</b>	<b>100.0</b>	<b>1,523</b>	<b>100.0</b>	<b>666</b>

*(No data for four or more bedrooms)*

- 6.3.17 Broadly in line with the proportion of flats / maisonettes in Table 6-18 above, 43.6% of all new household need was for one bedroom. The profile for those moving within a year indicated a lower proportion of one bedroom accommodation required even though a higher need for flats / maisonettes was evidenced in Table 6-18.

**Table 6-21 Number of Bedrooms Preferred**

Question 32b

Bedrooms	All concealed households moving		All concealed households moving within one year	
	%	N <sup>OS</sup> implied	%	N <sup>OS</sup> implied
One	8.7	132	3.4	23
Two	80.6	1,228	85.5	569
Three	10.7	163	11.1	74
<b>Total</b>	<b>100.0</b>	<b>1,523</b>	<b>100.0</b>	<b>666</b>

*(No data for four or more bedrooms)*

- 6.3.18 The results for all concealed households moving reflected the interest in house types referred to at 6.3.16 above in that preference for 2-bed and 3-bed properties was much higher as compared with need at Table 6-20. The results for concealed households moving within one year showed a somewhat higher level of interest in two-bedroom accommodation in line with the greater shift in interest from flats / maisonettes to house types referred to at 6.3.16 above.

6.3.19 We ran two cross-tabulations for all concealed households moving on need only relating the type of property required to size and tenure required.

**Table 6-22 Type Needed by Size Needed**

Question 31a by Q32a

Type	1-bed		2-bed		3-bed		Total
	%	N <sup>OS</sup>	%	N <sup>OS</sup>	%	N <sup>OS</sup>	N <sup>OS</sup>
Semi-detached	15.3	11	62.5	45	22.2	16	<b>72</b>
Detached	0.0	0	100.0	33	0.0	0	<b>33</b>
Terraced	29.8	127	67.6	288	2.6	11	<b>426</b>
Flat / maisonette	51.3	464	48.7	440	0.0	0	<b>904</b>
Bedsit / studio / room only	56.7	34	43.3	26	0.0	0	<b>60</b>
Bungalow	0.0	0	64.7	11	35.3	6	<b>17</b>
Supported housing	100.0	11	0.0	0	0.0	0	11
<b>Total</b>		<b>647</b>		<b>843</b>		<b>33</b>	<b>1,523</b>

6.3.20 As might be expected, 51.3% of flatted accommodation demand was for 1-bed property; 48.7% for two-bed property. 67.6% of terraced demand was for 2-bed property; 29.8% for 1-bed property.

**Table 6-23 Type Needed by Tenure Needed**

Question 31a by Q29a

Type	Owner Occupation		Private Rented		HA rented		HA shared ownership		Total
	%	N <sup>OS</sup>	%	N <sup>OS</sup>	%	N <sup>OS</sup>	%	N <sup>OS</sup>	N <sup>OS</sup>
Semi-detached	51.9	41	48.1	38	0.0	0	0.0	0	<b>79</b>
Detached	71.9	23	28.1	9	0.0	0	0.0	0	<b>32</b>
Terraced	56.9	242	13.9	59	26.6	113	2.6	11	<b>425</b>
Flat / maisonette	32.7	294	30.9	278	15.8	142	20.6	185	<b>899</b>
Bedsit / studio / room only	0.0	0	81.7	49	18.3	11	0.0	0	<b>60</b>
Bungalow	100.0	17	0.0	0	0.0	0	0.0	0	<b>17</b>
Supported housing	0.0	0	0.0	0	100.0	11	0.0	0	11
<b>Total</b>		<b>617</b>		<b>433</b>		<b>277</b>		<b>196</b>	<b>1,523</b>

6.3.21 47.6% of interest in owner occupied accommodation was for flats / maisonettes; 39.2% for terraced houses. 64.2% of interest in private rented accommodation; 51.3% of interest in HA rented accommodation and 94.3% of interest in HA shared ownership was for flats / maisonettes.

- 6.3.22 56.9% of interest in terraced houses and 32.7% of interest in flats / maisonettes was for owner occupied accommodation. 30.9% of interest in flats / maisonettes was in the private rented sector; 20.6% in the HA shared ownership sector and 15.8% in the HA rented sector.
- 6.3.23 11.6% of all concealed households moving (176 implied) were registered on a housing waiting list, 76.0% being on the Rother District Council list. The proportion fell to 10.8% (72 implied) among concealed households moving within one year, all being on the Rother District Council list.
- 6.3.24 Concealed households were asked the same questions on location as existing households moving. Respondents gave around 1.2 choices on average in the case of both all concealed households and concealed households moving within one year, based on response rates of 88.4% and 85.3% respectively.

**Table 6-24 Choice of Location**  
Question 33

Location	All concealed households moving			Concealed households moving within one year		
	% responses	% households	N <sup>os</sup> implied	% responses	% households	N <sup>os</sup> implied
Bexhill	47.0	54.2	730	56.4	66.2	376
In existing village	19.9	22.9	309	16.3	19.2	109
Battle	14.3	16.6	223	14.2	16.7	95
Rye	12.7	14.7	198	8.7	10.2	58
In another village	6.1	7.1	95	4.4	5.1	29
<b>Total</b>	<b>100.0</b>		<b>1,555</b>	<b>100.0</b>		<b>667</b>

- 6.3.25 Clearly the most popular choice for all those moving was Bexhill (54.2%). Interest for those moving within one year was broadly similar but with even more emphasis on Bexhill.

**Table 6-25 Reason for Preferred Location**  
Question 35

Reason	All concealed households moving			Concealed households moving within 1 year		
	% responses	% households	N <sup>os</sup> implied (all choices)	% responses	% households	N <sup>os</sup> implied (all choices)
Always lived here	28.7	61.9	980	30.7	67.5	383
Employment / closer to work	22.3	48.2	763	18.1	39.9	226
Better area	18.0	38.8	615	11.4	25.0	142
Nearer / better shopping / leisure facilities	9.8	21.3	337	13.7	30.2	171
Safety / fear of crime	7.8	16.8	266	12.7	28.0	159
Greater availability of cheaper housing	4.7	10.1	160	0.0	0.0	0
Nearer / better schools / colleges	4.3	9.3	147	5.2	11.5	65
Better public transport	3.7	8.1	128	8.2	18.2	103
Greater availability of smaller homes	0.7	1.5	24	0.0	0.0	0
<b>Total</b>	<b>100.0</b>		<b>3,420</b>	<b>100.0</b>		<b>1,249</b>

6.3.26 The most popular reason given by all concealed households moving was familiarity with the area ('always lived here') with 61.9% making it one of their choices. Employment issues (48.2%) and better area (38.8%) were also significant reasons. Those moving within one year showed less interest in employment issues, better area and greater availability of cheaper housing and focussed more on safety / fear of crime, public transport and shopping / leisure.

**Table 6-26 Maximum Weekly / Monthly Rent of Concealed Households**  
Question 37a

Weekly rent	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Below £50 pw / £215 pm	4.5	4.5	2.2	2.2
£50 - £60 pw / £215 - £260 pm	37.7	42.2	34.9	37.1
£61 - £70 pw / £261 - £300 pm	17.0	59.2	8.7	45.8
£71 - £80 pw / £301 - £350 pm	16.8	76.0	20.7	66.5
£81 - £100 pw / £351 - £430 pm	15.4	91.4	33.5	100.0
£101 - £150 pw / £431 - £650 pm	0.0	91.4	0.0	100.0
£151 - £200 pw / £651 - £865 pm	2.1	93.5	0.0	100.0
Above £200 pw / £865 pm	6.5	100.0	0.0	100.0

- 6.3.27 Responses were received from 65.9% (1,003 implied) of all concealed households moving. Of those, 59.2% could afford a weekly rent of no more than £70; 76.0% no more than £80 (as compared with 50.6% in the existing household profile at Table 4-27). In the case of the movers within 1 year, 66.5% could afford to pay no more than £80 per week based on a 68.9% response (459 implied).

**Table 6-27 Maximum Monthly Mortgage of 'Concealed' Households**  
Question 37b

Monthly mortgage	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Below £250	5.1	5.1	1.6	1.6
£250 - £300	20.7	25.8	18.1	19.7
£301 - £400	47.9	73.7	32.0	51.7
£401 - £500	22.4	96.1	46.5	98.2
£501 - £600	2.1	98.2	1.8	100.0
£601 - £750	1.8	100.0	0.0	100.0

(No mortgage above £750 p.m.)

- 6.3.28 76.7% (1,168 implied) of all concealed households moving responded. For those seeking to buy a dwelling, 73.7% could not or would not pay a mortgage of more than £400 per month. In the case of concealed households moving within one year, 51.7% could not or would not pay a mortgage of more than £400 per month based on a 73.7% response (491 implied). The mortgage bands selected might reflect to some degree perceptions of the actual cost of access to home ownership.
- 6.3.29 79.1% (1,205 implied) of all concealed households responded to a question asking about the level of savings available to meet deposit, stamp duty and legal costs on their new home. 33.6% had less than £1,000 savings; 32.5% £1,000 - £5,000 savings. The proportion among those moving within a year based on a response rate of 77.9% (519 implied) was 45.5% with less than £1,000, 22.0% with £1,000 - £5,000.

**Table 6-28 Savings of 'Concealed' Households**

Question 37c

Savings	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Under £1,000	33.6	33.6	45.5	45.5
£1,000 - £5,000	32.5	66.1	22.0	67.5
£5,001 - £10,000	12.2	78.3	14.2	81.7
£10,001 - £15,000	12.6	90.9	16.6	98.3
Above £15,000	9.1	100.0	1.7	100.0

6.3.30 The concealed households were asked for further information on their financial position via a question on annual income. These findings are presented in Table 6-29 below.

**Table 6-29 Annual Income of Concealed Households**

Question 37d

Annual Income	All concealed households moving			Concealed households moving within one year		
	%	Cum %	N <sup>os</sup> implied	%	Cum %	N <sup>os</sup> implied
Below £10,000	24.7	24.7	376	1.8	1.8	12
£10,000 - £15,000	30.7	55.4	467	51.4	53.2	342
£15,001 - £20,000	16.9	72.3	257	21.0	74.2	140
£20,001 - £27,500	23.1	95.4	352	21.6	95.8	144
£27,501 - £30,000	2.1	97.5	32	4.2	100.0	28
£30,001 - £35,000	0.0	97.5	0	0.0	100.0	0
£35,001 - £40,000	0.0	97.5	0	0.0	100.0	0
£40,001 - £45,000	0.5	98.0	8	0.0	100.0	0
£45,001 - £50,000	0.4	98.4	6	0.0	100.0	0
£50,001 - £60,000	1.1	99.5	17	0.0	100.0	0
Above £60,000	0.5	100.0	8	0.0	100.0	0
<b>Total</b>	<b>100.0</b>		<b>1,523</b>			<b>666</b>

6.3.31 A response was received from 100.0% all concealed household respondents. The proportion of concealed households with annual incomes above the approximate average UK annual household income of £27,300 was 5.2% as compared with around 16% in recent DCA surveys. The proportion in the sub £10,000 per annum category was 24.7% as compared with an average of around 27% in recent DCA surveys.

6.3.32 Concealed households moving within one year indicated a somewhat higher income profile, based on a response of 81.5% (543 implied), compatible with the slightly higher rent and mortgage profiles found at Table 6-26 and Table 6-27 above.

6.3.33 On the basis of a 100.0% response, 5.9% (94 implied) of all concealed households moving would be likely to claim Housing Benefit. Around 15% has been the average in our recent surveys. In the case of concealed households moving within one year, 10.8% (49 implied) would be likely to claim Housing Benefit based on a 82.0% response.

## 7 SUPPORTED AND ADAPTED HOUSING

### 7.1 Needs of Disabled People

- 7.1.1 Issues relating to households with one or more member affected by a disability or long-term illness were addressed through a series of questions. This section draws together the findings from these questions.
- 7.1.2 We found that 20.7% of households in the area did contain somebody with a disability, suggesting 8,024 households in the District were affected in some way.
- 7.1.3 Assessment of the UK average for the percentage of households affected is difficult both because of the impact of multiple disability and the tendency to express statistics in terms of population rather than household population. The Department of Social Security report of 1998 (based on a 1996 / 97 survey) suggested as many as 8.6 million disabled adults in private households - around 14 - 15% of the population.
- 7.1.4 From cross-tabulation we established that the comparative figures for the various tenures were as per Table 7-1 below. The HA rented figure (33.0%) was below the average for the social housing sector found in recent DCA surveys (around 39%). The level for owner occupiers with no mortgage (21.2%) was not unduly high, given the older age profile in this tenure.

**Table 7-1 Incidence of Disability by Tenure**

Question 9 by Question 1

Tenure	%	N <sup>os</sup> implied
Owner occupied with mortgage	15.7	1,913
Owner occupied without mortgage	21.2	3,697
Private rented	25.3	948
HA rented	33.0	1,445
Shared ownership*	5.5	10
Tied to employment / other*	1.3	11

- 7.1.5 In 83.6% of cases only one household member had a disability; in 16.4% two members had a disability. On this basis we identified 9,246 individuals in the District with a disability. However, the age profile and nature of disability data referred to below suggest marginally different totals.
- 7.1.6 The age groups of all disabled household members are shown in Table 7-2 below. 69.7% of all disabled household members were over the age of 60; 12.0% under 45.

**Table 7-2 Age of all Household Members with a Disability**

Question 10b

Age	%	N <sup>os</sup> implied
0 - 15	6.5	594
16 - 24	1.3	121
25 - 44	4.2	390
45 - 59	18.3	1,676
60 - 74	33.5	3,068
75+	36.2	3,314
<b>Total</b>	<b>100.0</b>	<b>9,163</b>



7.1.7 The next table shows the nature of the disability of members of the household. 7,663 implied responses were received to a multiple choice question from the 1<sup>st</sup> household member with a disability and 1,460 implied responses from the 2<sup>nd</sup> member, giving an average of 1.7 and 1.3 choices respectively for each household member.

**Table 7-3 Nature of Disability**  
Question 10c

Disability	1 <sup>st</sup> Member			2 <sup>nd</sup> Member		
	% responses	% households	N <sup>os</sup> implied (all choices)	% responses	% households	N <sup>os</sup> implied (all choices)
Walking difficulty	31.2	52.3	4,007	23.0	29.7	435
Limiting long-term illness	19.2	32.3	2,473	16.2	20.9	305
Visual / hearing impairment	13.2	22.1	1,692	18.8	24.3	355
Asthmatic / respiratory problems	12.9	21.7	1,664	23.1	29.9	436
Other physical disability	8.8	14.7	1,125	8.6	11.1	163
Mental health problem	6.6	11.0	843	3.6	4.6	68
Wheelchair user	4.5	7.6	585	0.4	0.6	8
Learning disability	3.6	6.0	459	6.3	8.1	118
<b>Total</b>	<b>100.0</b>		<b>12,848</b>	<b>100.0</b>		<b>1,888</b>

7.1.8 By far the largest group of people was those with a walking difficulty (52.3%). 7.6% of households contained a member who was a wheelchair user suggesting 585 in the District as a whole.

7.1.9 We ran a cross-tabulation to see if the houses which had been adapted for a wheelchair were indeed the dwellings where people using a wheelchair lived and found this to apply in only 23.0% of cases (211 of the 916 at Table 7-7), suggesting a major mismatch between houses adapted and those where wheelchair users lived. By extension, it would appear that 374 households with a wheelchair user (63.9%) did not live in suitably adapted premises (viz. 585 in Table 7-3 above less 211).

## 7.2 Support Needs

7.2.1 9,217 implied household members responded to the question on need for care or support. 35.1% indicated a need for care or support (3,234 implied).

7.2.2 85.3% of those with a care or support need felt they were getting enough support, the data implying 14.7% (468 implied) with outstanding support needs.

7.2.3 Those with an outstanding care or support need were asked what types of support they needed. Responses were in fact received from 385 respondents, each making an average of 2.4 choices each.

**Table 7-4 Type Of Care / Support Required (All Disabled Household Members)**  
Question 10g

Care / Support	% responses	% households	N <sup>os</sup> implied
Looking after home	32.7	80.0	308
Claiming welfare benefits / managing finances	23.1	56.4	217
Personal care	14.9	36.4	140
Establishing social contacts / activities	12.2	29.9	115
Someone to act for you	9.7	23.6	91
Establishing personal safety / security	5.0	12.2	47
Accessing training / employment	2.4	6.0	23
<b>Total</b>	<b>100.0</b>		<b>941</b>

- 7.2.4 Looking after the home was the most required form of support with 80.0% making it one of their choices. Claiming welfare benefits / managing finances was a significant second choice at 56.4%.
- 7.2.5 A cross tabulation looked at the type of disability affecting those with an outstanding support need. The specific needs of different groups were highlighted in the data. 86.9% of those with a walking difficulty needed help looking after their home. 74.3% of those with a limiting long-term illness needed help with claiming welfare benefits / managing finances. 78.2% of those with mental health problem needed help with personal care. 64.6% of wheelchair users needed help establishing personal safety / security.
- 7.2.6 Those who currently received care and support services were asked who provided their support. In 37.7% of cases (1,019 implied) support was provided by Social Services / Voluntary Body. In the majority of cases (76.3% or 2,061 cases) support was provided by family / friends / neighbours. In 380 cases (11.4%) support was received from both sources.

### 7.3 Adaptations

- 7.3.1 Three questions sought information from all households in the District on the degree to which the home had been built or adapted to meet the needs of disabled persons.

**Table 7-5 Adaptations for the Disabled**

Question 11a

Adaptations	%	N <sup>os</sup> implied
Adapted	11.7	4,544
Not adapted	88.3	34,117
<b>Total</b>	<b>100.0</b>	<b>38,661</b>

- 7.3.2 As can be seen from the table above, 11.7% of properties had been adapted, above the average level found in other recent DCA surveys (around 10%). The split by tenure is set out in the table below.

**Table 7-6 Adaptations by Tenure**

Question 11a by Q1

Tenure	%	N <sup>os</sup> implied
Owner occupied with mortgage	8.3	1,011
Owner occupied no mortgage	11.0	1,914
Private rented	5.4	197
HA rented	29.1	1,275
HA shared ownership*	11.5	21
Tied to employment / other*	14.3	126

7.3.3 Adaptation in the HA rented sector (29.1%) was considerably higher than in the owner occupied sector. Adaptations for owner occupied properties with no mortgage (11.0%) were lower than the average for the District, even though a higher proportion of elderly persons tend to be within that sector.

7.3.4 4,596 implied households actually responded to the question on which adaptations had been provided, suggesting an adaptation level of 11.8% (rather than 11.7% in Table 7-5 above). The following adaptations were identified based on responses to a multiple-choice question, respondents making around 2.3 choices on average.

**Table 7-7 Types of Adaptations Provided**

Question 11b

Adaptations	% responses	% households	N <sup>os</sup> implied (all choices)
Handrails / grabrails	23.6	54.3	2,497
Ground floor toilet	20.0	46.1	2,120
Access to property	18.4	42.4	1,951
Bathroom adaptations	15.8	36.3	1,670
Stairlift / vertical lift	8.7	20.0	918
Wheelchair adaptations	8.7	19.9	916
Extension	0.9	2.2	101
Other	3.9	8.9	410
<b>Total</b>	<b>100.0</b>		<b>10,583</b>

7.3.5 Wheelchair adaptations at 19.9% (916 implied) were above the average level found in recent DCA surveys (around 15%). The data taken in conjunction with 7.1.9 above suggests that many adapted premises are no longer occupied by wheelchair users (705 properties implied). 54.3% had handrails / grabrails fitted, usually the most common type of adaptation in DCA survey experience. 46.1% had ground floor toilet adaptation and 42.4% had improved access to property. Bathroom adaptations also featured strongly at 36.3%.

- 7.3.6 8,135 implied households (marginally higher than the number of households indicating a member with a disability as set out in 7.1.2 above) responded to a further question on what facilities still needed to be provided to ensure that current members of the household can remain in the property now or in the next 3 years. Respondents made around 1.6 choices on average.

**Table 7-8** *Types of Adaptations Needed for Current Member*

Question 12

<b>Adaptations</b>	<b>% responses</b>	<b>% households</b>	<b>N<sup>os</sup> implied (all choices)</b>
Bathroom adaptations	26.0	40.7	3,313
Handrails / grabrails	18.1	28.5	2,314
Stairlift / vertical lift	11.5	18.0	1,465
Access to property	9.7	15.2	1,238
Wheelchair adaptations	8.6	13.4	1,093
Extension	8.0	12.5	1,019
Ground floor toilet	7.7	12.2	989
Other	10.4	16.2	1,322
<b>Total</b>	<b>100.0</b>		<b>12,753</b>

- 7.3.7 Access to property, handrails / grabrails and ground floor toilets featured less prominently when compared to adaptations provided, presumably reflecting levels of work completed as indicated in Table 7-7 above. However, demand for bathroom adaptations (40.7%) remained high, even though significant adaptation work appears to have been carried out. Demand for wheelchair adaptation (13.4% implying 1,093 cases) was only around average in our experience and would not appear to be compatible with the mismatch referred to at 7.1.9 above.

## 7.4 Supported Accommodation

- 7.4.1 Existing households moving were asked if they were interested in supported housing and what type of supported housing they required. The results of this question are set out in Table 7-9 below.

**Table 7-9** *Type of Supported Accommodation Required*

Question 23

<b>Type</b>	<b>%</b>	<b>N<sup>os</sup> implied</b>
HA sheltered housing	21.7	159
Residential / nursing home	19.0	139
Independent accommodation (with external support)	18.0	132
Private sheltered housing	17.9	131
Sheltered housing (with extra care)	11.7	86
Independent accommodation (with live-in carer)	11.7	86
<b>Total</b>	<b>100.0</b>	<b>733</b>

- 7.4.2 Demand for supported accommodation other than sheltered accommodation was limited and fairly well spread across the three nominated categories. The data was too limited to allow meaningful cross-tabulation to respondents with different disabilities or long-term illness.

## 7.5 Housing Needs of Older People

- 7.5.1 Based on a 99.4% response, 5.1% of existing households (1,952 implied) indicated that they had elderly relatives (over 60) who would need to move to the District in the next three years. 2,016 implied households responded to a further multiple-choice question on the type of accommodation required, with respondents making 1.1 choices on average.

**Table 7-10 Accommodation Required by Elderly Relatives in Next 3 Years**  
Question 13b

Adaptations	% responses	% households	N <sup>os</sup> implied (all choices)
Live with respondent (need extension / adaptation)	27.3	30.3	610
Private housing	22.9	25.3	510
Residential care / nursing home	11.9	13.2	265
Private sheltered housing	11.2	12.4	250
HA sheltered housing	11.1	12.3	247
Live with respondent (existing home adequate)	9.5	10.5	211
HA property	6.1	6.8	137
<b>Total</b>	<b>100.0</b>		<b>2,230</b>

- 7.5.2 Demand for this group was predicted by the children of elderly people and, as would be expected, it shows a different pattern to that normally seen among elderly respondents in DCA surveys. In our experience elderly people seek to remain in their own homes and prefer to receive support at home. In contrast, the children of elderly parents tend to predict the need for supported housing. In this case, 12.3% of demand was for HA sheltered housing; 12.4% for private sheltered housing. 13.2% of demand was for residential / nursing home accommodation. 40.8% (821 households implied) indicated that their relative could live with them but in 74.3% of cases (610 implied) the home would need adaptation or extension to accommodate an elderly relative.
- 7.5.3 The sheltered housing needs of elderly people within the District were captured within the question for all movers within the District on supported housing.
- 7.5.4 The combined requirement for sheltered housing in both sectors from existing households living in the District and in-migrating parents / relatives is shown below. (N.B. Sheltered housing with extra care was not split between the affordable and private sectors and has been excluded from Table 7-11 below).

**Table 7-11 Sheltered Housing Demand**

	Private Market	Affordable Sector	All Sectors
Existing Households	131	159	<b>290</b>
In-migrant Households	250	247	<b>497</b>
<b>Total</b>	<b>381</b>	<b>406</b>	<b>787</b>

*N.B. Figures taken from Table 7-9 and Table 7-10.*

- 7.5.5 The higher level of elderly accommodation for people moving into the District is common to other DCA Surveys. As discussed in Section 7.5.2 above generally, the forecast is being made by their children who assist in the moving process. Conversely, the indigenous older population prefer to continue in the area / surroundings they know and within their own home as long as possible.
- 7.5.6 In total, the data suggests a combined requirement for sheltered accommodation from older people currently living in the District (290 households) and those who may in-migrate to be beside their family (497 households) of 787 units, 406 in the affordable sector and 381 in the private sector.
- 7.5.7 Some of this requirement will be addressed by flow of the existing sheltered stock which was 105 units in 2005, but acceptability of existing stock to meet today's standards will need to be assessed in calculating the scale of new delivery.

## 8 KEY WORKER HOUSING ISSUES

### 8.1 Introduction

- 8.1.1 The survey identified whether household members worked in the Public Sector. If the respondent is employed in the Public Sector and specified that they work within Rother District we have identified them as 'Key Workers'.
- 8.1.2 For the purposes of this survey a Key Worker is "any person who directly provides services that are essential for the balanced and sustainable development of the local community and local economy, where recruitment or retention difficulties apply". This includes people who are teachers, nurses, other public sector and public service workers and employees of businesses considered vital to sustaining the economy of an area.
- 8.1.3 In this section we have split the analysis of key workers into two groups: those from existing households and those from concealed households, as we believe these groups are affected by different issues.

### 8.2 Housing Issues of Key Workers from Existing Households

- 8.2.1 Respondents and their spouse / partner were asked to state which area of Public Sector employment they worked, see Table 8-1 below.

**Table 8-1**            *Nature of Employment within Public Sector*  
Question 14g

	%	N <sup>os</sup> implied
Health	51.4	1,089
Education	42.7	906
Social Worker	2.2	46
Police	1.9	41
Occupational Therapist	1.2	26
Fire	0.6	11
<b>Total</b>	<b>100.0</b>	<b>2,119</b>

- 8.2.2 Around 2,119 implied households (5.5% of all households in Rother) gave details of their work in the public sector, with 51.4% (1,089 implied) indicating work in health, 42.7% (906 implied) work in education, and 2.2% (46 implied) work in social work. Numbers working in occupational therapy, police and fire services were far lower than all other areas, 1.9% (41 implied) work in the police services, 1.2% (26 implied) work in occupational therapy, 0.6% (11 implied) work in the fire service.
- 8.2.3 We ran a series of cross tabulations on households who work in the Public Sector, to try and gather information on their tenure preferences and the types of housing they can afford to access.

8.2.4 Firstly we looked at those who have already decided to leave the District. Around 2.2% (47 implied) of the key workers identified in Table 8-1 are existing households leaving the District, 54.1% of whom (144 implied) are leaving due to better education facilities, 37.6% (100 implied) are leaving due to employment reasons, and 10.1% (27 implied) are leaving due to lack of affordable housing to buy.

**Table 8-2 Annual Household Income of Key Workers**

Question 16c

Income	Health	Education	Social Work	Police	Fire	Occupational Therapists
Below £10,000	31.2	0.0	0.0	0.0	0.0	0.0
£10,001 - £20,000	3.0	11.8	0.0	0.0	0.0	0.0
£20,001 - £27,500	4.2	42.4	50.0	0.0	0.0	49.2
£27,501 - £32,500	26.1	21.7	0.0	0.0	100.0	0.0
£32,501 - £40,000	11.7	1.9	50.0	0.0	0.0	0.0
£40,001 - £50,000	0.0	8.8	0.0	100.0	0.0	0.0
£50,001 - £60,000	4.2	7.5	0.0	0.0	0.0	50.8
£60,001 - £75,000	0.0	3.8	0.0	0.0	0.0	0.0
£75,001 - £100,000	2.1	2.1	0.0	0.0	0.0	0.0
Above £100,000	17.5	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

8.2.5 Of 2,119 existing household key workers, 1,017 gave details of their total household income (i.e. including spouse / partners income), shown in Table 8-2 above. However, caution is advised as data used for key workers other than health and education staff is taken from a small sample.

8.2.6 Access to the owner-occupied market in the District through the cheapest 1-bed flats, requires an income of at least £25,100, we found that the proportions who could not afford to owner occupy in Rother were:-

- ◆ 40.6% of Education staff
- ◆ 37.1% of Health staff
- ◆ 34.0% of Social work staff
- ◆ 33.4% of Occupational Therapists
- ◆ All police and fire staff could afford to owner occupy at £25,100 level.

8.2.7 We ran a series of cross tabulations on key worker households who stated they would be moving within the District, to find information on their tenure and house type preferences. There was no data for police staff.



**Table 8-3 Key Workers House Tenure Preference**

Question 21

Tenure	Health	Education	Social Work	Fire
Owner occupation	29.3	100.0	100.0	100.0
HA rent	70.7	0.0	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

\* Low volume of data

NB - No data for HA Shared ownership, private rent, and tied to employment.

8.2.8 Of those responding to the question on tenure preference, all key worker households working in education, social work and fire services and who are moving within the District prefer owner occupation, as do 29.3% of health workers. 70.7% of health workers moving within the District preferred HA rent.

8.2.9 Table 8-4 shows the type of housing preferred by key workers moving within the District.

**Table 8-4 Key Workers House Type Required**

Question Q14g x Question 19

	Health	Education	Social Work	Fire
Semi-detached	0.0	74.1	100.0	100.0
Detached	29.3	0.0	0.0	0.0
Bungalow	70.7	0.0	0.0	0.0
Terraced	0.0	25.9	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

\* Low volume of data

N.B: No data for other house types

8.2.10 All social work staff and fire staff responding required semi-detached accommodation. 70.7% of health staff that responded required bungalows, 29.3% of health staff required detached accommodation and 25.9% of education staff required terraced accommodation.

**Table 8-5 Number of Bedrooms Required**

Question 14g x Question 20

	Health	Education	Social Work	Fire
Two	70.7	0.0	0.0	0.0
Three	0.0	100.0	100.0	100.0
Four	29.3	0.0	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

8.2.11 Table 8-5 indicates the number of bedrooms required by Key Workers moving within the District. Interest was mainly focused around three bedroomed accommodation, with all of education and social work and fire staff, requiring three bedroomed accommodation. 70.7% of health staff said that they required two bedroom and 29.3% of health staff required four bedrooms.

### 8.3 Housing Issues of Key Workers from Concealed Households

- 8.3.1 The response we received from concealed key workers moving within the District was small. Therefore the data in this section should not be treated as being representative of this group. Neither did we obtain responses from a cross-section of key workers, with no responses from police, social workers and occupational therapists.
- 8.3.2 Respondents were asked to state which area of the public sector they were employed in, see Table 8-6 below for results.

**Table 8-6 Nature of Employment Within Public Sector**

Question 14

	%
Education	65.0
Health	27.0
Fire	8.0
<b>Total</b>	<b>100.0</b>

- 8.3.3 Of the concealed workers responding around 65% (65 implied) work in education, 27% (27 implied) work in health and 8% (8 implied) work in fire services.
- 8.3.4 We asked respondents about their total household annual income, the results are shown in Table 8-7 below. The majority of workers responding stated they earned between £15,001 and £20,000; 46.4%. Almost 46.4% said their incomes were between £20,001 and £27,500. 7.2% had incomes below £10,000. No concealed key worker household earned over £27,500.

**Table 8-7 Annual Household Income of Key Workers**

Question 37d

Income	Key Workers
Below £10,000	7.2
£10,000 - £15,000	0.0
£15,001 - £20,000	46.4
£20,001 - £27,500	46.4
<b>Total</b>	<b>100.0</b>

*N.B. No incomes above £27,500*

- 8.3.5 Looking at the access levels to the owner-occupied market in the District, requiring an income of £25,100, we found that around 85.2% of the concealed key workers could not afford to owner occupy in the Rother District.
- 8.3.6 Concealed key workers were asked if they had any savings to meet a deposit and legal costs in terms of purchasing a property. 71% had under £1,000 saved, 46.4% had between £1,001 and £5,000 saved, 46.4% between £5,001 and £10,001.

- 8.3.7 We ran a series of cross tabulations on key worker households who stated they would be moving within the District, to find information on their tenure and house type preferences.
- 8.3.8 The most popular tenure was owner occupation, mentioned by all of the concealed key workers. There was no demand for Council, HA rent, private rent, HA shared ownership and tied to employment.
- 8.3.9 We asked the concealed key workers what type of accommodation was needed by the new household. 46.4% of workers said they needed a flat / maisonette 46.4% expressed a need for a terraced property and 7.1% for a bedsit / studio/ room only. There was no expressed need for any other type of accommodation.
- 8.3.10 53.6% of concealed key workers stated they needed one bedroomed accommodation and 46.4% said they needed two bedrooms. There was no demand for anything larger than two bedrooms.

## 9 BLACK AND MINORITY ETHNIC NEEDS

### 9.1 Introduction

- 9.1.1 In the case of ethnic origin, the breakdown provided in Table 9-1 below refers to the ethnicity of the household in which the respondent lives. This provides numerical and percentage breakdown of all ethnic groups who responded to the postal survey. The table shows that 36,659 (96.3%) of households ethnic origin was British. The remaining 1,414 (3.7%) household's ethnic origin fall into the other ethnic origin categories.
- 9.1.2 Local Area 2001 Census figures are provided as an illustration however, Census data relates to population not households so the figures are not directly comparable.

**Table 9-1 Ethnic Origin**

	%	N <sup>os</sup> implied	Local Area Census 2001 **
British	96.3	36,659	95.4
Other White	1.8	689	2.0
Irish	0.6	226	0.7
Other mixed	0.0*	10	0.2
Other Asian background	0.0	0	0.1
White & Asian	0.6	286	0.2
Indian	0.2	67	0.2
Chinese	0.1	42	0.2
Caribbean	0.1	21	0.1
White & Black African	0.0	0	0.1
White & Black Caribbean	0.0	9	0.1
African	0.0	0	0.1
Other Black background	0.0	0	0.0*
Pakistani	0.1	21	0.0*
Bangladeshi	0.1	21	0.1
Other	0.1	22	0.5
<b>Total</b>	<b>100.0</b>	<b>38,073</b>	<b>100.0</b>

\* - Nearest decimal place.

\*\* © Crown Copyright (Census)

- 9.1.3 Table 9-2 illustrates the ethnic breakdown of households other than White British within Rother. 70 Black and Minority Ethnic (BME) respondents provide statistical validity of  $\pm 9.56\%$ . This sample represents 1,414 implied households which have been drawn from the survey and analysed separately to give an insight into the specific housing needs of BME households in Rother. The BME responders include categories of 'White Irish' and 'White Other' (in line with the Census definition) which represents 915 (64.7%) of BME implied households across the District. These two categories represent just over half of BME groups in the District with the remaining 499 respondents (35.3%) spread across the remaining mixed or black ethnic groups.
- 9.1.4 The sample included no responses from Gypsy / Travellers households and Census data does not recognize this category. The needs of this group cannot effectively be addressed in a postal survey and a specific questionnaire has been created to identify their needs through a sub-regional series of face to face interviews across all East Sussex Districts. The results are reported separately along with other special household group interviews.

**Table 9-2 Ethnic Origin**

	<b>N<sup>os</sup></b>	<b>%</b>	<b>2001 Census *</b>
White Other	689	48.7	42.7
White & Asian	286	20.2	4.3
White Irish	226	16.0	16.3
Indian	67	4.7	4.3
Chinese	42	3.0	3.6
Other ethnic	22	1.6	10.4
Bangladeshi	21	1.5	2.0
Pakistani	21	1.5	0.4
Black Caribbean	21	1.5	1.5
Other Mixed	10	0.7	4.3
White & Black Caribbean	9	0.6	3.0
White & Black African	0	0.0	1.8
Other Asian	0	0.0	2.8
Black African	0	0.0	2.4
Other Black	0	0.0	0.2
<b>Total</b>	<b>1,414</b>	<b>100.0</b>	<b>100.0</b>

-nd- No Census data for Gypsy/Traveller.

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## 9.2 Current Housing

9.2.1 It should be noted that in all cross-tabulations, data is included only where the respondent has answered each element (question) involved, hence there may be some small discrepancies when compared with the tables relating to a single data source.

**Table 9-3 Property Type by Number of Bedrooms**

Question 2 by Q5

Type	Bedsit		1-bed		2-bed		3-bed		4-bed		5+bed		Total
	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	%	N <sup>os</sup>	N <sup>os</sup>
Semi-detached	0.0	0	2.7	8	12.6	37	81.6	238	0.0	0	3.1	9	<b>292</b>
Detached	0.0	0	0.0	0	1.7	6	21.7	69	56.3	178	20.3	64	<b>317</b>
Terraced	0.0	0	0.0	0	38.3	41	44.9	48	11.2	12	5.6	6	<b>107</b>
Bungalow	0.0	0	0.0	0	14.8	58	70.0	272	15.2	59	0.0	0	<b>389</b>
Flat / maisonette	0.0	0	3.6	11	63.6	194	0.0	0	32.8	100	0.0	0	<b>305</b>
Bedsit / studio / room only	100.0	8	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	<b>8</b>
<b>Total</b>		<b>8</b>		<b>19</b>		<b>336</b>		<b>627</b>		<b>349</b>		<b>79</b>	<b>1,418</b>

*No data for caravan / mobile home.*

9.2.2 The majority of respondents live in bungalows (27.4%), followed by flats / maisonette (21.5%) and detached properties (22.4%). The majority of respondents living in bungalows have 3-bedrooms (69.9%). 63.6% of respondents who live in flats / maisonettes have 2-bedrooms.

**Table 9-4 Access to Basic Facilities**

Question 6

Facilities	N <sup>os</sup>	%	All households
Central heating (full)	1,182	83.6	83.0
Central heating (part)	109	7.7	9.4
Double glazing (full)	939	66.4	70.8
Double glazing (part)	221	15.6	15.5
Cavity wall insulation	313	22.1	30.6
Loft insulation	897	63.4	68.5
Water pipes insulated	834	59.0	50.4
Hot water tank insulated	1,073	75.8	73.8
Draught proofing	253	17.9	19.6

- 9.2.3 Households with central heating at 91.3% (compared with 92.4% for the whole population) was just under the national average in the 2001 Census (91.5%) and also below the average of 94% found in the 2001 English House Condition Survey (EHCS). Full double-glazing at 66.4% (70.8% for the whole population) was slightly below the UK average of 70% (EHCS 2001).
- 9.2.4 91.5% of respondents indicated that their homes were adequate. 115 (8.6%) BME households indicated their home was inadequate. Respondents were asked to indicate the reasons why the accommodation was not suitable. Responses on the reason for inadequacy were invited on two bases - 'in-house' solutions (improvement / repairs or cost of heating) and other solutions. Respondents could reply in both categories on a multiple choice basis. 97.4% of the group indicated an 'in-house' solution (compared to 59.3% in the whole population) of which all BME respondents (87.4% for the whole population) selected need for repairs / improvements as one of their choices; 91.3% selected too costly to heat compared to 55.1% for the whole population.
- 9.2.5 Table 9-5 below sets out the other choices with all respondents opting for solutions likely to require a move. A total of 47 BME households answered the question with 46 responses, giving an average of 1 choice per respondent.

**Table 9-5 Inadequacy of Present Accommodation**  
Question 8bii *(likely to require a move)*

Reasons	N <sup>os</sup>	% (all choices)	All households
Too small	35	76.3	67.7
Rent / mortgage too expensive	0	0.0	19.1
Tenancy insecure	0	0.0	15.8
Housing affecting health	0	0.0	19.4
Too large	11	23.7	9.8
<b>Total</b>	<b>46</b>		

- 9.2.6 The largest single issue for BME households was that the dwelling was too small, with 76.3% stating this compared to 67.7% of the whole population. The remaining reason mentioned by BME households was that the dwelling was too large, mentioned by 23.7% of respondents, higher than the whole population at 9.8%.

### 9.3 Disability / Limiting Long Term Illness

- 9.3.1 Respondents were asked to indicate if any member of the household had a disability or long term limiting illness. 16.1% of the BME sample had a member of their household with a disability or long-term illness, a lower level to that found for the whole population (20.7%). In 96 cases only one person was affected, in 122 cases two members of the household had a disability or long term illness.
- 9.3.2 BME households were asked about the nature of their disability as is shown in 9-6 below. 206 1<sup>st</sup> household members gave 246 responses, making an average of 1.2 choices each. 133 2<sup>nd</sup> household members gave 163 responses, making an average of 1.2 choices each.

**Table 9-6 Nature of Disability / Long Term Illness**

Question 10c

	1 <sup>st</sup> Member		2 <sup>nd</sup> Member	
	N <sup>os</sup>	% (households)	N <sup>os</sup>	% (households)
Limiting long-term illness	40	19.6	19	14.5
Learning disability	19	9.1	8	6.3
Walking difficulty	39	19.1	29	22.1
Other physical disability	8	4.0	19	14.5
Mental health problem	0	0.0	23	17.2
Asthmatic / respiratory problems	115	55.5	65	49.0
Visual / hearing impairment	16	8.0	0	0.0
Wheelchair user	9	4.4	0	0.0
<b>Total</b>	<b>246</b>		<b>163</b>	

- 9.3.3 The majority of respondents (55.5%) had asthmatic / respiratory problems which is slightly higher than the general population where the majority of respondents with a disability were also those with asthmatic / respiratory problems (49.0%). 40 respondents (19.6%) had a limiting long-term illness, 39 respondents had a walking difficulty. 19 respondents (9.1%) had a learning disability. Of the 115 people who had asthmatic / respiratory problem 74.8% were aged 60 years or over.

### 9.4 Annual Income

- 9.4.1 The next question probed for information about household income and the results are set out in Table 9-7.

**Table 9-7 Gross Annual Income of Households**

Question 16c

Annual income	%	Cum %	All households cum %
Below £10,000	10.8	10.8	25.0
£10,000 - £20,000	24.5	35.3	53.4
£20,001 - £27,500	33.4	68.7	67.6
£27,501 - £32,500	3.2	71.9	75.0
£32,501 - £40,000	3.4	75.3	82.4
£40,001 - £50,000	10.0	85.3	87.6
£50,001 - £60,000	2.7	88.0	92.4
£60,001 - £75,000	1.7	89.7	95.1
£75,001 - £100,000	2.5	92.2	97.3
Above £100,000	7.8	100.0	100.0



- 9.4.2 The response rate to the income question was 79.5% (1,124 households). The table shows that 10.8% of households had incomes below £10,000, compared to 25.0% in the whole population, well below the corresponding UK figure (33.0%). 31.3% of BME households, on the basis of the survey data, had incomes above £27,500 compared to 32.4% in the whole population.

## 9.5 Moving

- 9.5.1 Respondents were asked the reasons that prevented them moving and the results are shown in Table 9-8 below. 75.5% of the BME households stated that were unable to buy another home and they were unable to afford to move, both 75.5% respectively each compared to 41.8% and 20.4% respectively in the whole population. Location of employment (24.5%) and both lack of affordable rented housing and local education choices all (22.6%) respectively were also significant reasons for BME households moving, compared to 38.3% and 1.2% respectively in the whole population.

**Table 9-8** *Reasons Preventing a Move*

Question 17e

	N <sup>os</sup>	% households	All H/Holds %
Lack of affordable rented housing	9	22.6	38.3
Unable to buy another home	30	75.5	41.8
Local education choices	9	22.6	1.2
Location of employment	10	24.5	5.1
Unable to afford to move	30	75.5	20.4
Family reasons	0	0.0	7.5
Other	0	0.0	27.0
<b>Total</b>	<b>88</b>		

- 9.5.2 Respondents were also asked to indicate the reasons for moving out of Rother. 136 respondents gave 269 responses making an average of 1.9 choices each. The results are shown in Table 9-9 below.

**Table 9-9** *Reasons for Moving Out of Rother*

Question 17d

	N <sup>os</sup>	% cases (136)	All H/Holds %
Employment / better access to work	67	49.3	43.2
Lack of affordable housing to buy	42	31.1	14.3
Better education facilities	0	0.0	7.2
Retirement	0	0.0	21.5
Better area	72	53.4	28.1
Safety / fear of crime	88	64.8	17.7

- 9.5.3 The most important reason for BME households leaving Rother was safety / fear of crime with 64.8% mentioning this, compared to 17.7% for the whole population. The second most important reason for BME households leaving the District was to move to a better area, mentioned by 53.4% of BME households responding. This was followed by employment / better access to work mentioned by 49.3% of BME respondents, compared to 43.2% of the whole population.

## 9.6 Existing Households Moving

**Table 9-10 Type Required by Number of Bedrooms**

Question 19 by Question 20

	Semi-detached	Detached	Bungalow	Flat / Maisonette	Total
Two	0	0	8	6	14
Three	67	12	50	0	129
Four	0	119	8	0	127
<b>Total</b>	<b>67</b>	<b>131</b>	<b>66</b>	<b>6</b>	<b>270</b>

*NB. No data available for caravan / mobile home, supported housing, terraces, bedsits and one and five bedroomed accommodation.*

- 9.6.1 215 BME existing households indicated they would be moving within the District in the next 3 years, of those 215 households, 269 responses were given regarding questions on type and size of accommodation required. 48.5% indicated they required detached accommodation of whom 90.8% required four bedrooms. 24.8% of moving BME households required bungalows of whom 75.8% required four bedrooms.
- 9.6.2 An assessment was made regarding the type of accommodation required, by preferred tenure. The main preference made by BME households moving was for owner occupation (96.5%; 219 implied) followed by HA rent (3.5%; 8 implied).

**Table 9-11 Type Required by Tenure Preferred**

Question 19 by Question 21

	Semi-detached	Detached	Bungalow	Flat / maisonette	Total
Owner occupation	67	130	16	6	219
HA rent	0	0	8	0	8
<b>Total</b>	<b>67</b>	<b>130</b>	<b>24</b>	<b>6</b>	<b>227</b>

*N.B. No data available for terraced accommodation, bedsit/studio/room only, caravan/mobile home, supported housing, private rent; HA shared ownership and tied to employment.*

- 9.6.3 As Table 9-11 above shows, all of those requiring detached accommodation, semi-detached accommodation and flats / maisonettes preferred owner occupation. Of those requiring bungalows 66.6% preferred owner occupation and 33% preferred HA rent.

## **9.7 New / Concealed Households Moving**

- 9.7.1 42 concealed BME households are forming within Rother over the next three years. Of these 48.6% are forming within a year and 51.4% between 2 to 3 years. In comparison to the general population 47.0% are forming within one year, 24.3% between 1 to 2 years and 28.7% between 2 to 3 years. (Please note overall responses gained from BME households moving were based on a low level of data).
- 9.7.2 BME households were asked how many children would be forming in each new household. 20 BME respondents replied, all stated that no children would be forming in each new household. This is compared to the general population in which 7.5% contained at least one child; 0.7% contained two or more children and 91.8% contained no children.
- 9.7.3 Respondents were asked about the type of accommodation and number of bedrooms they required. Of those responding, 67.7% required terraced accommodation, 16.1% required supported housing, and 16.1% required flats / maisonettes. All of those requiring terraced properties required two bedrooms. All of those needing supported housing and flats / maisonettes required one bedroom.
- 9.7.4 80.8% of demand with regard to tenure was for owner occupation and 19.2% was for HA rent.

## 9.8 Conclusions

- 9.8.1 70 Black and Minority Ethnic (BME) returns, representing 1,414 implied households have been drawn from the Survey and analysed separately to give an insight into the specific housing needs of BME households in Rother. The BME returns include the categories of 'White Irish' and 'White Other' which represent 915 implied households across the District.
- 9.8.2 The majority of BME households who responded to the DCA survey are living in 3 and 4-bedroom accommodation, 44% and 25% respectively. The majority of respondents are living in bungalows (27%), followed by flats/maisonettes (22%).
- 9.8.3 76% of those BME households who said their home was inadequate, cited 'too small' as the reason for inadequacy. This was higher than the 68% found in the whole population.
- 9.8.4 55% of the BME respondents with a disability have asthmatic / respiratory problems, this was slightly higher than that of the whole population (49%). The percentage of respondents with disabilities was generally higher amongst BME respondents – with the exceptions being the category of limiting long term illness at 32% compared to 15% of the whole population.
- 9.8.5 Income levels within BME households are slightly lower than those in the whole population. The proportion of BME households on the lowest incomes, i.e. below £10,000 is 11%, lower than the figure for all households at 25%. However, 69% of BME households, on the basis of the survey data, had incomes above £27,500 compared to 68% for the whole population. 8% of BME households have incomes above £100,000 compared to 3 in the whole population.
- 9.8.6 76% of the BME households, who wished to move but cannot stated they were unable to afford to move and buy another home compared to 42% and 20% respectively for the whole population.
- 9.8.7 Safety/fear of crime (65%) and better area (53%) were the main reasons for leaving Rother compared to 18% and 28% respectively in the whole population.
- 9.8.8 The majority of existing BME households moving within Rother District in the next 3 years stated they required detached accommodation with four bedrooms and stated owner occupation as their preferred tenure.
- 9.8.9 42 concealed households are forming within Rother over the next three years. Of these 68% require terraced accommodation with two bedrooms. 81% of demand with regard to tenure was for owner occupation. However, it should be noted that responses relate to a low sample, consequently choices may be influenced by individual circumstances.

## 10 POPULATION GROWTH PROJECTIONS

### 10.1 Introduction

- 10.1.1 In this section of the report we provide a short background commentary to the demographic element in housing demand in Rother District. The purpose is two-fold. First, to provide a context in which the results of the postal questionnaire can be interpreted. Secondly, to give a more specific focus on the demand for affordable housing provision and to make projections for five and ten year periods.
- 10.1.2 Modelling housing needs is a very complex procedure and it is only very recently that attempts have been made to model local housing needs. Most of the established procedures are aimed at the provision of national level estimates of housing need, including:-
- ◆ simple estimates such as those provided by the ODPM, which measured the crude dwelling to household surplus (and concluded no additional building was necessary to meet need);
  - ◆ a second approach by the Audit Commission measured household growth minus expected private sector output;
  - ◆ Glen Bramley's work focused on local supply and demand to calculate for a particular point in time the proportion of new households unable to buy in the market (minus social sector re-lets);
  - ◆ Steve Wilcox described a 'Net Stock' approach which calculates net household increase and adds a factor for concealed households before deducting new private sector output to arrive at estimates of need in the social sector.
- 10.1.3 Kleinman and Whitehead have devised a so-called 'Gross Flows' approach which looks at gross household formation, tenure choice, demand from in-migrants and deducts these from new social output and re-lets to yield a measure of social housing requirements.
- 10.1.4 How these national models translate to the local level is not at all clear. Kleinman and Whitehead have attempted a 'Gross Flows' analysis for Cambridge but relied entirely on secondary data for their estimates. This is a problem in the model particularly for the incorporation of measures of concealed households and factors relating to affordability are not considered directly but by modelling the tenure propensities of new households.
- 10.1.5 Our method emphasises the affordability issue and gives much greater weight to the issue of concealment of households than most of the 'national' level studies.
- 10.1.6 The affordability measure is derived from primary data collected in the household's surveys and from access to the Land Registry database on house prices and the concealment issue is also addressed through the survey findings. We are mindful that because our study is targeted at Rother District, there are inevitable limitations because local housing markets encompass much wider areas than a single Council area.

## 10.2 Demographic Analysis

10.2.1 There are four basic components to changes in the number and composition of households. The aim of this section of the report is to highlight the issues which are relevant to the evaluation of housing needs in Rother District particularly the changes in:-

- ◆ the age distribution of the population arising from births, deaths and ageing of the indigenous population;
- ◆ family units such as marriage, divorce and child bearing patterns;
- ◆ the number and composition of households arising from migration, particularly due to employment opportunities in the area;
- ◆ the probabilities that family units form a separate household, particularly in response to changes in incomes in the labour market area.

10.2.2 In local area forecasting new household formation is mainly due to responses to income and employment opportunities. New household formation is also affected by life cycle patterns. This purely demographic influence on the number of households contributes to about 40% of the growth in the number of new households at any one time (Dicks, 1988; Ermisch, 1985).

10.2.3 The general demographic forecasts in the tables in this section have been provided by East Sussex County Council and the 2003 – based ONS sub-national population projections to 2021, and use the 2003 Mid Year Estimate as their starting point. The 2001 Census data has been taken into consideration in the production of these projections.

10.2.4 The factors which combine to produce the population and household forecasts are:- population age-sex structures, headship rates, survival factors, infant mortality, fertility rates, base numbers of dwellings, vacancy rates, building / demolition programmes and the age-sex structure of migrants. The summary of this data is provided in the following tables with the population changes for a 3 year interval 2003 – 2006 and then 5 year intervals from 2006 - 2021. This is due to the fact that the projections were published from 2003 based data rather than 2001 based data.

10.2.5 These projections are produced periodically by the Government and use the 2003 mid year estimate as their starting point. They assume the continuation of current trends in fertility and mortality and migration moves into and out of the area. They do not reflect change due to future housing development in the area.

## 10.3 Population Projections

10.3.1 The projections in Table 10-1 are based on the predictions made by East Sussex County Council (2001-based). These figures are based on the assumptions outlined in paragraphs 10.2.1 to 10.2.4 regarding mortality, fertility and migration etc, and are contained in population projections for Rother for the period 2003 -2021 provided by East Sussex County Council.

**Table 10-1 Population Change in Rother District, 2003 - 2021**

	2003	2006	2011	2016	2021	Change
Total Population	85,900	87,700	90,700	94,100	98,000	
Change		+ 1,800	+ 3,000	+ 3,400	+ 3,900	+ 12,100
% Change		+ 2.1	+ 3.4	+ 3.7	+ 4.1	+ 14.1

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- 10.3.2 The table shows a large increase in the population of Rother District of about 12,100 over the forecast period. A steady increase is seen across the forecast period, with the main increase occurring between 2016 and 2021 (3,900; 4.1%).

## 10.4 Age Structure Forecast 2003 - 2021

- 10.4.1 The next stage in the forecast is to disaggregate the population data into age bands because there may be changes in the population structure with significant housing implications. Table 10-2 is based on the net migration model and for this purpose best represents the position.

**Table 10-2 Population Age Band Forecast, Rother District, 2003 - 2021**

	2003	2006	2011	2016	2021	Change
0 - 19	18,100	18,200	17,600	17,200	17,100	- 1,000
20 - 29	5,400	5,800	6,600	7,000	6,900	+ 1,500
30 - 44	14,500	14,000	12,800	12,100	12,500	- 2,000
45 - 64	23,300	24,800	26,800	27,300	28,300	+ 5,000
65 +	24,500	24,900	26,900	30,600	33,200	+ 8,700
<b>Total</b>	<b>85,900</b>	<b>87,700</b>	<b>90,700</b>	<b>94,100</b>	<b>98,000</b>	<b>+ 12,100</b>
% Change		+ 2.1	+ 3.4	+ 3.7	+ 4.1	+ 14.1

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Percentage change is measured between year bands, not the base population. This is a better representation of the incremental change.

Figures are rounded to the nearest 100 so totals may not agree with the sum of their rounded counter parts.

- 10.4.2 As we show above there will be an average rise in the population of Rother District of approximately 0.8% per annum over the forecast period according to the forecast model. There is projected to be around 12,100 more people in Rother District in 2021 than in 2003.
- 10.4.3 The 0-19 age range shows a decrease (1,000; 5.5%), with the largest fall being seen between 2006 and 2011 (600; 3.3%).

- 10.4.4 The 20-29 age range comprises new households forming and will have implications for future affordable housing need both in the short and longer term. Overall this age group shows a rise (1,500; 27.8%), with the most significant increase seen between 2006 and 2011 (800; 13.8%) followed by a slight fall between 2016 and 2021 (100; 1.4%).
- 10.4.5 The 30-44 age group, the main economically active group shows a decline overall (2,000; 13.8%). The largest fall is seen between 2006 and 2011 (1,200; 8.6%).
- 10.4.6 The 45-64 age group shows an overall rise in numbers. Over the forecast period there is an increase of 5,000 people (21.5%). A steady rise is seen throughout the forecast period, with an increase of 2,000 people between 2006 and 2011.
- 10.4.7 The most significant feature here is the growth of the population in the over 65 age group with an increase of 8,700 people (35.5%) seen over the forecast period. Numbers rise throughout the forecast period, with a large rise of 6,300 occurring in between 2011 and 2021.
- 10.4.8 Numbers in the 80+ age group increase by 2,100 (25.6%) up to 2021. The greatest rise proportionately in percentage terms occurs between 2016 and 2021 (1,000; 10.8%), although a rise of 500 people (6.4%) is seen to 2011. Given the resource demands often associated with very elderly people, these are significant figures.

**Table 10-3 Numbers of 80+ in Rother District, 2003 - 2021**

	2003	2006	2011	2016	2021	Change
80+	8,200	8,400	8,700	9,300	10,300	
Change		+ 200	+ 300	+ 600	+ 1,000	+ 2,100
% Change		+ 2.4	+ 3.6	+ 6.9	+ 10.8	+ 25.6

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## 10.5 Forecast Change in Households 2001 - 2021

- 10.5.1 Table 10-4 outlines the household formation forecasts for the Rother District available only for the 10-year period from 2001 to 2011. It is based on the statistics provided by East Sussex County Council, and we consider it the best available forecast on currently available data of household change in the Rother District.

**Table 10-4 Forecast Change in Households in Rother District, 2001 - 2011**

	2001 Census	2001	2006	2011	Change
Households	38,115	39,839	41,061	42,575	
Household change	- 1,724		+ 1,222	+ 1,514	+ 2,736
% change	- 4.5		+ 3.1	+ 3.7	+ 6.9

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- 10.5.2 There have been significant changes in household formation over the last decade which result in much higher household numbers compared to population growth and average household size. There is a large increase in single person households through elderly people living longer, separation and divorce and young people forming single person households.



## 10.6 Summary

- ◆ The forecasts to 2021 are based on the assumptions outlined in paragraphs 10.2.1 to 10.2.4 regarding mortality, fertility and migration etc, and are contained in population projections for Rother District for the period 2003 - 2021 provided by East Sussex County Council.
- ◆ The population is projected to increase by 12,100 people, 14% over the 18 years to 2021.
- ◆ The 0-19 age range shows a decrease (1,000; 5.5%) overall. The largest fall is seen between 2006 and 2011 (600; 3.3%).
- ◆ The 20-29 age range comprises new households forming and will have implications for future affordable housing need both in the short and longer term. Overall this age group shows a rise (1,500; 27.8%), with the most significant increase seen between 2006 and 2011 (800; 13.8%) followed by a slight fall between 2016 and 2021 (100; 1.4%).
- ◆ The 30-44 age group, the main economically active group shows a decline overall (2,000; 13.8%). The greatest fall is seen between 2006 and 2011 (1,200; 8.6%).
- ◆ The 45-64 age group shows an overall rise in numbers. Over the forecast period there is an increase of 5,000 people (21.5%). A steady rise is seen throughout the forecast period, with an increase of 2,000 people between 2006 and 2011.
- ◆ The most significant feature here is the growth of the population in the over 65 age group with an increase of 8,700 people (35.5%) seen over the forecast period. Numbers rise throughout the forecast period, with a large rise of 6,300 mainly occurring between 2011 and 2021.
- ◆ The "older" retirement group, those 80 and over rises by 26%, 2,100 more people by 2021. The majority of people with a disability are over 75 and over half have a walking difficulty, with likely requirements for adaptations and support services and the link between ageing and frailty is therefore significant. This group represents 10,300 people in the area by 2021 who are much more likely to have care and support needs which should now be assessed in detail.
- ◆ Household formation over the 10 years to 2011 is forecast to rise at a rate of 6.9%, greater than the population increase of 5.5% over this period. This is due to a large increase in single person households, through elderly people living longer, separation and divorce, and young people forming single person households.
- ◆ Household size in 2001 was 2.25 persons per household this is set to decrease to 2.14 person by 2006 and 2.13 persons by 2011

# 11 NEEDS ASSESSMENT MODEL, PLANNING & DELIVERY

## 11.1 Affordable Housing Needs Requirement

- 11.1.1 In this section, we calculate the overall affordable housing needs requirement on an annual basis. The need requirement calculation is structured from the survey data to take account of the key demand sources, households requiring subsidised housing, homeless households not assessed in the survey, households living in unsuitable housing whose needs can only be resolved in a different dwelling and concealed household formation emanating from demographic change.
- 11.1.2 Each category has been adjusted to ensure that proper account is taken of households who can access the lowest quartile stock in the owner occupied market without assistance (income >£25,100 / £56,200) subject to location. The private rent sector costs are estimated at an access cost of £375 / £575 per month for the vast majority of households in this sector, requiring an annual income of at least £18,000 / £27,600 per annum.
- 11.1.3 The model has been prepared in accordance with the 2000 Good Practice Guidance (ODPM).

	<b>The Backlog of existing housing need is as follows:-</b>	
1.	Households living in unsuitable housing in the District who are planning to move in the next three years.	HNS 4.2.1
2.	RSL tenant households living in unsuitable housing are excluded because a move would release a unit of affordable housing and it is therefore assumed that there would be no overall net effect.	HNS
3.	Households in unsuitable housing who can have their need resolved in situ.	HNS
4.	Proportion of existing households unable to buy (i.e. income <£25,100 / £56,200) or rent (£18,000 / £27,600) depending on location and need to move.	HNS 3.7.1 and 3.11.1
5.	Priority homeless in temporary accommodation.	RDC
<b>6.</b>	<b>Total Backlog need.</b>	
7.	Quota to eliminate backlog over a 5-year period (20%) as recommended in guidance.	ODPM Guidance
<b>8.</b>	<b>Total net annual need.</b>	
	<b>Newly Arising Need is as follows:-</b>	
9.	Concealed households identified in the survey, annualised at the average level of those forming in the first two years.	HNS 6.3.11
10.	Proportion unable to buy (i.e. income <£25,100 / £56,200) or rent (£18,000 / £27,600)	HNS 3.7.1
11.	Ex-institutional population moving into community p.a.	RDC
12.	Housing Register priority need new applications 2004-2005 less cancellations.	RDC
13.	In-migrant households over the last year who live in social housing.	RDC
<b>14.</b>	<b>Total newly arising need.</b>	
	<b>Supply of Affordable Units is as follows:-</b>	
15.	Existing social stock re-lets from the RSL's net of transfers. (HIP 2004)	RDC
16.	Increased vacancies and units taken out of management.	RDC
17.	Future new supply each year based on average level over next three years.	RDC
18.	Total affordable supply per annum.	
19.	Total affordable need per annum.	

## 11.2 Affordable Housing Needs Assessment Model

<b><u>Backlog of Need</u></b>		
1.	Households in unsuitable housing and intend to move	1,882
2.	MINUS – Council & RSL tenants	318
3.	Cases where in-situ solution most appropriate	<u>753</u>
		1,071
		<u>811</u>
4.	TIMES - Proportion unable to afford to buy or rent	30%
5.	PLUS - Backlog (non-households)	<u>11</u>
<b>6.</b>	<b>TOTAL BACKLOG NEED</b>	<b>254</b>
7.	TIMES - Quota to progressively reduce backlog *	20%
<b>8.</b>	<b>ANNUAL NEED TO REDUCE BACKLOG</b>	<b><u>51</u></b>
<b><u>Newly Arising Need:</u></b>		
9.	New household formation	448
10.	TIMES Proportion unable to buy (83%) or rent (76%) in market	76%
11.	PLUS - Ex-institutional population moving into community	4
12.	Existing households falling into priority need	123
13.	In-migrant households unable to afford market housing	<u>75</u>
<b>14.</b>	<b>TOTAL NEWLY ARISING NEED</b>	<b><u>542</u></b>
<b><u>Supply of Affordable Units:</u></b>		
15.	Supply of social re-lets p.a.	338
16.	MINUS Increased vacancies (if applicable) and units taken out of management. Right to Buy	15 x 8%
		<u>1</u>
		337
17.	PLUS - Committed units of new affordable supply (not able to predict accurately)	0
<b>18.</b>	<b>AFFORDABLE SUPPLY</b>	<b><u>337</u></b>
	Annual need to reduce backlog	51
	Newly arising need	<u>542</u>
<b>19.</b>	<b>TOTAL AFFORDABLE NEED</b>	<b>593</b>
	MINUS - Affordable supply	<u>337</u>
<b>20.</b>	<b>OVERALL ANNUAL SHORTFALL</b>	<b><u>256</u></b>

\* Elimination over a five year period is recommended in the Guidance for model purposes but the Council can make a Policy decision to do so over a longer period (e.g. 10 years or years to 2011).

### 11.3 Model Structure

- 11.3.1 The model is structured on a ‘flows’ basis, taking account of recent experience over the previous three years and examining projections over the next two years. It has to be assumed that this ‘annualised’ data will occur each year to 2011. The primary data gathering will of course be undertaken again before 2011, but unless there are major changes, up or down, in house prices and incomes it is unlikely that there will be much variation in the overall situation.
- 11.3.2 The data from HIP returns for the three years to 31/3/2004 shows the following trends:-

**Table 11-1 2003 to 2005 Affordable Housing Supply**

Supply	2003	2004	2005	Average
RSL Re-lets	355	337	321	338
New RSL Supply	61	63	47	57
Other New Supply	<u>4</u>	<u>0</u>	<u>2</u>	<u>2</u>
Total New Supply	<u>65</u>	<u>63</u>	<u>49</u>	<u>59</u>
<b>Total Supply</b>	<b>420</b>	<b>400</b>	<b>370</b>	<b>397</b>
Right to Buy	22	20	3	15

- 11.3.3 38.5% of existing stock re-lets are sheltered flats and bungalows and the net level of units available for general households is around 230 units per annum.

### 11.4 Needs Assessment

- 11.4.1 The total affordable housing need annually is for 593 units. Net re-lets of the existing social stock, after Right to Buy (RTB) impact, average 337 units and is the major means of addressing the scale of need identified.
- 11.4.2 After allowing for existing stock net re-let supply (337) there will still be an annual affordable housing shortfall of 256 units, 1,536 units in total over the six years to 2011.
- 11.4.3 Based on the average supply of around 59 units over the last 3 years, this level of annual need is over four times the number of units likely to be able to be delivered from new delivery and conversions resulting in growing levels of unmet need each year. New delivery is projected to increase to around 67 units in 2006 and 114 in 2007, and actual delivery will need to be monitored in annual updates.
- 11.4.4 Additionally, 168 existing and 176 concealed households intend to leave Rother over the next three years because of a lack of affordable housing. These are not included in our needs assessment calculation, although we could be justified in doing so.

### 11.5 Land and Affordable Housing Delivery

- 11.5.1 Land supply is crucial to the provision of housing. Land available at a discount is often the key to making a social housing scheme viable, particularly given the limited funding available. Therefore, local authority housing and planning strategies need to ascertain the availability of sites and propose ways of bringing sites forward.
- 11.5.2 The inter-relationship of the land and subsidy issues is important in the negotiation process. It is clear from the scale of affordable need identified in the survey that the Council will need to negotiate with private landowners and developers to be able to deliver the scale of housing required.

- 11.5.3 Whilst the survey data provides identified demand levels in each strategic housing area, the Council must apply its own judgement as to the suitability of sites for affordable housing for low income families, particularly related to the nature of the area and provision of services, and other planning policy requirements.

## 11.6 Planning Policies for Affordable Housing

- 11.6.1 Planning Guidance Note 3 on Housing gives the planning system a role in affordable housing provision in urban and rural areas. Policy HG1 of the District Local Plan Revised Deposit (November 2003) addresses affordable housing on sites with a threshold of over 15 units or 0.5 hectares. The current affordable housing target in the Policy is 40%. On sites in villages thresholds proposed are 0.2 hectares or 5 units. Policy HG2 addresses 'exceptions' sites in rural areas outside development boundaries.

## 11.7 Affordable Housing

- 11.7.1 Circular 6/98 emphasises the need for local authorities to provide a local definition of affordable housing. A basis for a definition of affordable housing, which would assist within the context of the Local Plan, is discussed in Para 11.7.2 below.
- 11.7.2 The Council needs to define affordable housing in setting future planning policy and we would suggest that as simple a definition as possible be provided. We have attempted to provide text which identifies the requirement but leaves the percentage to be achieved as an issue for negotiation on a site by site basis. Our definition is:-

*“Affordable housing is that provided with subsidy, both for rent and low cost market housing, for people who are unable to resolve their housing requirements in the local private sector housing market because of the relationship between housing costs and incomes. This definition covers housing for social rent, shared ownership, low cost home ownership and sub-market rent.”*

- 11.7.3 The types of affordable housing which comply with our definition are as follows:-

- ◆ *RSL units for rent, the major requirement;*
- ◆ *shared ownership with grant;*
- ◆ *shared equity where land value is retained to provide housing for sale at below market levels and where control of the 'equity discount' can be retained as long as they are needed;*
- ◆ *discounted market rented housing.*

- 11.7.4 The DCA definition of affordable housing has been followed in the Good Practice Guidance published in January 2004 by the South East Regional Assembly (SEERA) including reference to subsidy:-

*“housing provided with a subsidy to enable the asking price or rent to be substantially lower than the prevailing market prices or rents in the locality”.*

- 11.7.5 All definitions vary slightly but the core meaning is the same. The Draft from the South East Plan Policy H4 however also provides a very clear definition and stresses the importance of “subsidy”. The policy text is as follows:-

*“Affordable housing is defined as that provided with a subsidy to enable the asking price or rent to be substantially lower than the prevailing market prices or rents in the locality and where mechanisms exist to ensure that the housing remains affordable for those who cannot afford market housing. The subsidy is provided from the public sector, usually through a local authority or registered social landlord, or from the private sector through planning obligations. This definition covers housing for social rent, shared ownership, low cost home ownership and sub-market rent.*

- 11.7.6 The policy guidance gives the Council the power to negotiate with developers on all new permissions, subject to the ability to provide defensible data to justify need following a rigorous and up to date assessment provided in this survey.

## **11.8 Low Cost Market Housing**

- 11.8.1 Circular 6/98 lacks clarity particularly regarding low cost market housing. We do not accept that “low cost market housing”, provided without subsidy, satisfies ODPM’s own definition of affordable housing and have always questioned the lack of clarity in the Guidance definition, particularly in areas with high house prices relative to local income levels.
- 11.8.2 Low cost market housing is not small units which are provided without subsidy to meet the needs of households with income levels just adequate to access the housing market. These are ‘starter’ homes and are part of the general market. A household able to buy a house-builders cheapest new unit is not included in our calculation of affordable housing need because they could buy market re-sales.
- 11.8.3 Low cost market housing can be provided with subsidy (i.e. shared equity) and if this is the case it would be incorporated within our definition and target for affordable housing.
- 11.8.4 The consultation paper ‘Planning for Mixed Communities’ identifies the types of housing described at 11.7.5 (other than social rented) as “intermediate housing” which should remove the lack of understanding of what was previously termed, ‘low cost market housing’.

## **11.9 Perpetuity**

- 11.9.1 It is important that additional affordable housing units provided through acquisition, conversion or new delivery add to the available affordable stock in the long term. Many past initiatives have provided subsidy which has been of benefit to the first occupier only and perpetuity providing control of the subsidy element, whether provided by free land, grant or discount is vital if the benefit is to be passed to subsequent occupiers for as long as it is needed.
- 11.9.2 To ensure the delivery and long term occupation of the affordable housing, it will be preferable for a specialist organisation such as an RSL or trust to be involved in the ownership and management of the dwellings to be provided. These arrangements would be formalised within a legal agreement to ensure that provision meets with the Council’s affordability criteria.

## 11.10 Overall Target Levels

- 11.10.1 The annual level of outstanding affordable need of 256 units, after allowing for current re-let supply is clearly not economically deliverable or sustainable, bearing in mind past new supply levels averaging 59 units each year. Despite the evidence of the scale of need from existing and concealed households, there are wider issues to consider when setting targets for delivery of affordable housing from new developments. Primarily there is a need to build viable, sustainable developments.
- 11.10.2 The District Local Plan Deposit (November 2003) highlights the residual requirement for the 2006 to 2011 period, is 837 units, 167 each year. The scale of annual affordable housing need is 256 units, 153% of supply still to be negotiated. This is clearly not viable and a judgement has to be made to determine target levels.
- 11.10.3 Essentially however, planning should be providing for balanced communities, which acknowledge the need for social compatibility if the problems of housing in the past are not to be repeated. Our significant experience of affordable subsidised housing in mixed developments leads us to support the current target of 40% of new units negotiated should be the level applied from the total of all sites.
- 11.10.4 The increases in house prices over the last four years have excluded many of 'first-time buyers' from the owner occupied market. We believe therefore that the proportion of affordable housing provided on new sites should encompass more subsidised low cost market housing than would have been the case four years ago when it was a more marginal element of affordable need.
- 11.10.5 This proportion includes both affordable housing for rent and subsidised low cost market housing to meet the needs of low income households, key workers and those on average incomes unable to purchase and broadly the balance should be 25% / 15% rental to intermediate housing although affordability will still be a key issue for delivery.
- 11.10.6 In view of the scale of need, in the period to 2011, subsidised affordable units should be negotiated on all suitable sites. The Council should set a 'target' for each site taking into account existing supply, survey demand and other regeneration, planning, sustainability and economic factors.

## 11.11 Affordable Housing Need Summary

- 11.11.1 The following summary is our assessment of the broad balance of affordable unit delivery between rental and subsidised low cost market housing by unit need numbers and percentages. These are summarised Table 11-2 below.

**Table 11-2 Affordable Need Summary**

Total Annual Need	593	
Existing Stock Re-lets (337)	<u>337</u>	
Additional Net New Units Needed	<u>256</u>	
<hr/>		
New Rental	160	62.5% (25%)
Shared Ownership / Shared Equity	96	37.5% (15%)
Discounted Market Rent		
<b>Total</b>	<b><u>256</u></b>	<b><u>100% (40%)</u></b>

## **11.12 Affordable Rented Accommodation**

11.12.1 The local relationship between house prices and incomes is such that around 83% of new forming households are unable to purchase in their own right depending on location. Social rented stock is now 11.3% of housing in the District well below the national level of 19.3%. The availability of rented stock through re-lets is low relative to the expectation that existing stock flows should address 90% of all need. The largest proportion of additional affordable units are required as rented properties, both for new forming households and existing families.

## **11.13 Low Cost Market Housing**

11.13.1 Concealed households forming in the next three years express a need (38.7%) or preference (73.7%) for owner occupation but generally around 83% of them have incomes inadequate to be able to purchase. The sustained period of high house price inflation, however, has impacted on new forming households' ability to buy and requires an increase in supply of low cost housing to assist those on middle incomes including key workers.

11.13.2 There is an expressed need for around 17 Shared Ownership units from existing households and 187 concealed households forming over the next three years, a total of around 68 each year, a very high level relative to new formation levels and reflecting the level of local housing costs and incomes. These households could afford shared ownership or shared equity at 70% of market price based on the income distribution.

11.13.3 Based on existing shared ownership schemes at 50% purchase and shared equity at 70% of market prices this level of intermediate housing is deliverable to over 50 households each year, based on recent income levels.

## **11.14 Market Rent**

11.14.1 Around 215 new households and 81 existing households, 296 in total express a preference for private rental over the next 3 years, around 98 a year. Initiatives to deliver discounted market rent could well assist households, including key workers unable to afford full market costs.

11.14.2 Quality housing provided in this sector could also address the short term needs of key worker and other middle income households expressing interest in shared ownership, especially those at the early stages of their careers or on limited employment contracts who are looking for flexibility in their housing arrangements.

## **11.15 Needs Distribution by Sub-Area**

11.15.1 There will be variance at local level between demand and existing stock supply and the localised supply / demand analysis report will be valuable in setting site targets, both to address affordable housing and in particular by house type and size. Future subsidy through land provision will need to be negotiated with private landowners and developers in the provision of planning permission.

11.15.2 The survey data disks contain a breakdown of the whole of the future housing needs section of the questionnaire, which can be used by officers to identify specific needs by parish by cross-tabulation.

11.15.3 The data tables provided give a localised breakdown of each question, analysed both by existing households planning to move and the newly forming "concealed" households and facilitates the preparation of localised housing type and size requirements which will be useful for site development briefs.



## 11.16 Location Demand Analysis

- 11.16.1 It is important to assess localised ability to buy within the District and cross-tabulations to check on the actual income capacity of households expressing preference to live in the areas are outlined in the table below.
- 11.16.2 Local entry level prices in each area were assessed against the incomes of concealed households expressing preference to live in that specific area to calculate the numbers of households unable to purchase.
- 11.16.3 The locational preferences (up to two) expressed by concealed households forming in each area to 2009 are listed below:-

Location	Net New / Concealed Households*	Net Affordable Need	
		%	N <sup>os</sup> implied
Bexhill	676	93.0	629
Battle	214	100.0	214
Battle Rural	0	0.0	0
Rye	255	100.0	255
Rye Rural	123	100.0	123
Ticehurst Rural	84	90.1	76
<b>Total</b>	<b>1,352</b>	<b>95.9</b>	<b>1,297</b>

- 11.16.4 In individual locations, between 90.1% and all of the concealed households earn below the required income threshold to enter the owner occupied market. Generally around 96% of new / concealed households need some form of affordable housing across Rother.