

**BRIGHTON & HOVE**  
**HOUSING NEEDS SURVEY**  
**FINAL REPORT 2005**



# CONTENTS

<b>1</b>	<b>EXECUTIVE SUMMARY</b> .....	<b>4</b>
1.1	HOUSING NEEDS SURVEY .....	4
1.2	THE HOUSING STOCK.....	5
1.3	THE CITY POPULATION – FUTURE PROJECTIONS .....	5
1.4	THE HOUSING MARKET .....	7
1.5	THE BRIGHTON & HOVE HOUSING MARKET .....	7
1.6	KEY FINDINGS FROM THE HOUSEHOLD SURVEY .....	8
1.7	ADEQUACY OF THE EXISTING STOCK.....	8
1.8	COSTS OF PRESENT HOUSING AND HOUSEHOLD INCOME.....	9
1.9	MOVING HOUSEHOLDS .....	9
1.10	SUPPORT ISSUES.....	10
1.11	CONCEALED HOUSEHOLDS.....	10
1.12	CONCEALED HOUSEHOLDS’ HOUSING COSTS AND INCOMES .....	11
1.13	AFFORDABILITY AND ACCESS TO MARKET HOUSING .....	11
1.14	HOUSING STOCK BALANCE ANALYSIS .....	12
1.15	HOUSE TYPE PREFERENCES / SUPPLY.....	12
1.16	AFFORDABLE HOUSING NEED SUMMARY .....	13
1.17	SHELTERED HOUSING .....	14
1.18	SUPPORTED HOUSING.....	14
1.19	RECOMMENDATIONS .....	15
1.20	DISABLED HOUSEHOLDS .....	15
<b>2</b>	<b>SURVEY METHODOLOGY</b> .....	<b>16</b>
2.1	PURPOSE, AIMS AND OBJECTIVES.....	16
2.2	PROMOTION.....	16
2.3	METHODOLOGY .....	17
2.4	SAMPLING .....	18
2.5	SUB-REGIONAL INTERVIEW SURVEY FIELDWORK .....	18
2.6	POSTAL SURVEY PROCESS AND RESPONSE .....	19
2.7	SURVEY WEIGHTING .....	21
2.8	DEFINITIONS .....	22
2.9	SURVEY HOUSEHOLD DATA.....	22
<b>3</b>	<b>THE BRIGHTON &amp; HOVE HOUSING MARKET</b> .....	<b>23</b>
3.1	INTRODUCTION.....	23
3.2	NATIONAL PICTURE .....	23
3.3	REGIONAL PICTURE .....	24
3.4	THE HOUSING MARKET .....	24
3.5	SUB-AREA STRUCTURE.....	26
3.6	ENTRY SALES LEVELS IN THE CITY.....	27
3.7	PURCHASE INCOME THRESHOLDS.....	27
3.8	SECONDARY RESEARCH.....	28
3.9	PRIVATE SECTOR RENT LEVELS .....	29
3.10	ENTRY TO PRIVATE RENT .....	29
3.11	RENTAL INCOME THRESHOLDS .....	30
3.12	CONCLUSIONS .....	31
<b>4</b>	<b>CURRENT HOUSING IN BRIGHTON &amp; HOVE</b> .....	<b>32</b>
4.1	THE EXISTING STOCK.....	32
4.2	ADEQUACY OF PRESENT DWELLING / IMPROVEMENT REQUIRED .....	35
4.3	HOUSEHOLD COMPOSITION AND HOUSEHOLD PROFILE .....	40
4.4	COSTS OF PRESENT HOUSING AND INCOME .....	45
4.5	DEVELOPMENT.....	48
<b>5</b>	<b>MIGRATION</b> .....	<b>50</b>
5.1	IN MIGRATION TO BRIGHTON & HOVE .....	50
5.2	OUT-MIGRATION FROM BRIGHTON & HOVE .....	51
5.3	MIGRATION SUMMARY .....	53

<b>6</b>	<b>FUTURE HOUSING REQUIREMENTS .....</b>	<b>54</b>
6.1	MOVING HOUSEHOLDS WITHIN BRIGHTON & HOVE .....	54
6.2	HOUSING NEEDS OF EXISTING HOUSEHOLDS MOVING WITHIN BRIGHTON & HOVE .....	55
6.3	NEEDS OF CONCEALED HOUSEHOLDS MOVING WITHIN BRIGHTON & HOVE .....	60
<b>7</b>	<b>SUPPORTED AND ADAPTED HOUSING .....</b>	<b>70</b>
7.1	NEEDS OF DISABLED PEOPLE .....	70
7.2	SUPPORT NEEDS .....	72
7.3	ADAPTATIONS .....	73
7.4	SUPPORTED ACCOMMODATION .....	75
7.5	HOUSING NEEDS OF OLDER PEOPLE .....	75
<b>8</b>	<b>KEY WORKER HOUSING ISSUES.....</b>	<b>77</b>
8.1	INTRODUCTION.....	77
8.2	HOUSING ISSUES OF KEY WORKERS FROM EXISTING HOUSEHOLDS .....	77
8.3	HOUSING ISSUES OF KEY WORKERS FROM CONCEALED HOUSEHOLDS.....	80
<b>9</b>	<b>BLACK AND MINORITY ETHNIC NEEDS.....</b>	<b>82</b>
9.1	INTRODUCTION.....	82
9.2	CURRENT HOUSING .....	84
9.3	DISABILITY / LIMITING LONG TERM ILLNESS .....	86
9.4	ANNUAL INCOME .....	86
9.5	MOVING.....	87
9.6	EXISTING HOUSEHOLDS MOVING .....	88
9.7	NEW / CONCEALED HOUSEHOLDS MOVING.....	88
9.8	BME HOUSEHOLDS - CONCLUSIONS.....	89
<b>10</b>	<b>POPULATION GROWTH PROJECTIONS.....</b>	<b>90</b>
10.1	INTRODUCTION.....	90
10.2	DEMOGRAPHIC ANALYSIS .....	91
10.3	POPULATION PROJECTIONS.....	91
10.4	AGE STRUCTURE FORECAST 2003 - 2026 .....	92
10.5	SUMMARY.....	94
<b>11</b>	<b>NEEDS ASSESSMENT MODEL, PLANNING &amp; DELIVERY.....</b>	<b>95</b>
11.1	AFFORDABLE HOUSING NEEDS REQUIREMENT .....	95
11.2	AFFORDABLE HOUSING NEEDS ASSESSMENT MODEL .....	96
11.3	MODEL STRUCTURE .....	97
11.4	NEEDS ASSESSMENT .....	97
11.5	LAND AND AFFORDABLE HOUSING DELIVERY.....	97
11.6	PLANNING POLICIES FOR AFFORDABLE HOUSING.....	98
11.7	AFFORDABLE HOUSING .....	98
11.8	LOW COST MARKET HOUSING .....	99
11.9	PERPETUITY .....	99
11.10	OVERALL TARGET LEVELS.....	100
11.11	AFFORDABLE HOUSING NEED SUMMARY.....	100
11.12	AFFORDABLE RENTED ACCOMMODATION .....	100
11.13	SHARED OWNERSHIP/ EQUITY .....	101
11.14	MARKET RENT .....	101
11.15	NEEDS DISTRIBUTION BY SUB-AREA .....	101
11.16	LOCATION DEMAND ANALYSIS .....	101

**APPENDICES**

<b>Appendix I</b>	<b>Type Size and Tenure requirements for moving households by sub-area</b>
<b>Appendix II</b>	<b>Postal Survey Questionnaire</b>
<b>Appendix III</b>	<b>Promotional Poster</b>
<b>Appendix IV</b>	<b>Land Registry</b>
<b>Appendix V</b>	<b>Glossary of Terms</b>
<b>Appendix VI</b>	<b>Face to Face Interview Letter of Introduction</b>
<b>Appendix VII</b>	<b>Face to Face Interview Questionnaire</b>

# 1 EXECUTIVE SUMMARY

## 1.1 Housing Needs Survey

1.1.1 Brighton & Hove City Council formally commissioned David Couttie Associates (DCA) in October 2004 to carry out a City-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.

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

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

- ◆ To inform the development of each Council's Housing Strategy and other relevant strategies and plans;
- ◆ To provide robust information to support Housing and Planning policies;
- ◆ To assist in the provision of data in relation to the number, type and location of affordable new homes required over the next five years and beyond;
- ◆ To inform the decisions concerning future housing provision in relation to household aspirations;

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

- ◆ A postal questionnaire to 14,175 households in 21 wards forming 6 sub-areas across the City;
- ◆ A housing market survey utilising the Land Registry and Halifax House Price databases and a telephone survey of estate agents on the supply and cost of access level property and private rented housing;
- ◆ Secondary data analysis drawing upon HIP and Housing Register data on the flow of social stock and need, the 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.

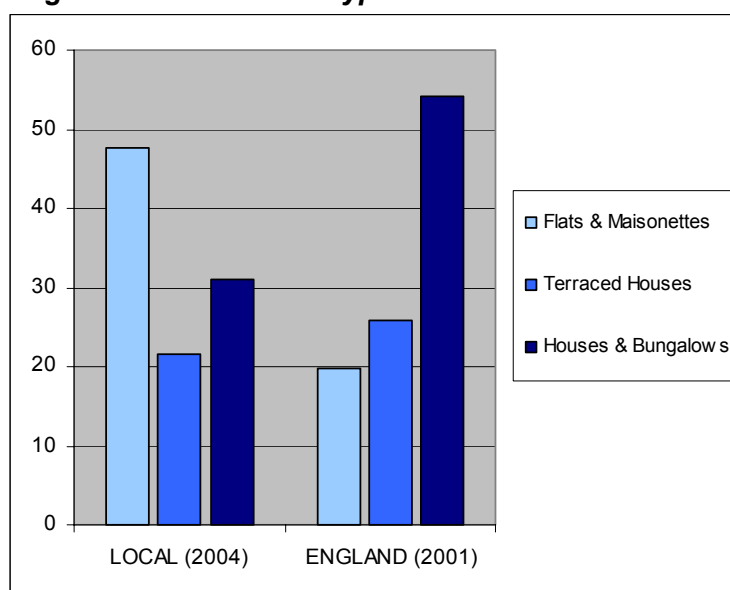
**KEY FINDINGS OF THE SURVEY**

- ◆ 81.4% of households live in accommodation suitable for their needs. Satisfaction varies from 96.1% in the owner occupied (no mortgage) sector to only 64.2% in the private rented sector;
- ◆ The average price of flats and terraced houses have risen by 91% and 66% since 2000 and are £167,067 and £246,975 respectively. Affordability is a major issue, particularly for new forming households;
- ◆ 67% cannot afford private rental and home ownership is beyond the reach of 80% of concealed households, even though over 16% of them earn over £27,300 pa, the national average;
- ◆ The social stock is 15.7%, lower than the national average of 19.3% and provides 1,064 net re-let units each year. Annually 2,520 affordable housing units are needed, 1,456 more than existing re-let supply, a new supply requirement almost 6 times current delivery levels;
- ◆ The retired population will increase by 6.9% by 2021. There is an inextricable link between ageing and disability. Over 51.5% of those with a support need are over the age of 60, and over half of these households contain a person with a walking difficulty (52.3%).

**1.2 The Housing Stock**

1.2.1 Figure 1-1 shows the characteristics of the City stock in 2004, compared to the national average level at the 2001 Census in each category.

1.2.2 Locally, the proportion of houses and bungalows (31.0%) is much lower than the national average of 54%. The supply of terraced properties is 21.5%, lower than the national average of 26%, and flats / maisonettes at 47.4 % are significantly above the national average of 20%.

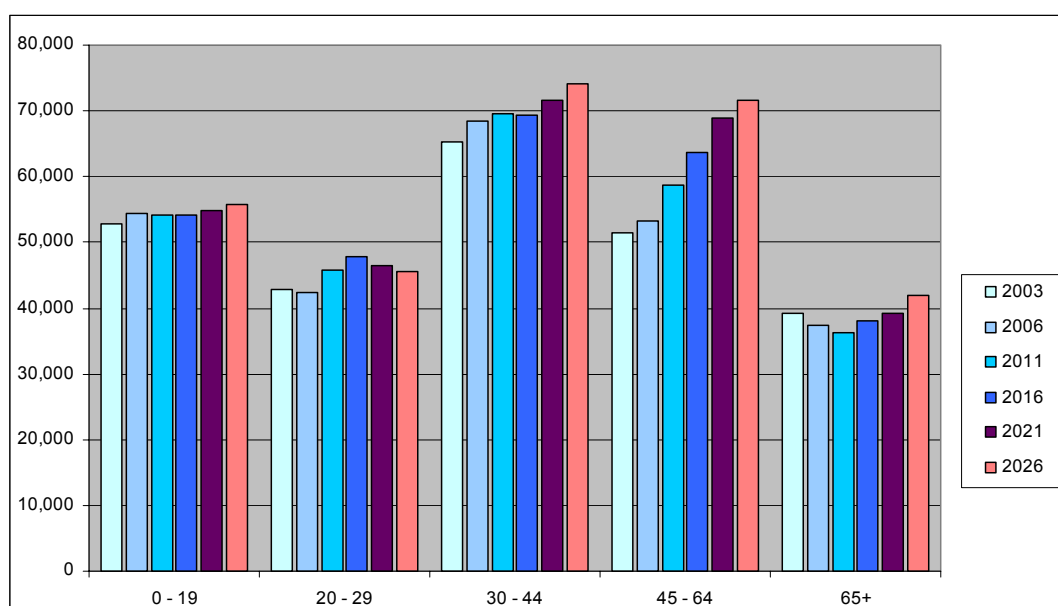
**Figure 1-1 House Types Local: National****1.3 The City Population – Future Projections**

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 Brighton & Hove City Council projections (2003) and ONS 2003 long term sub-national projections published by the ONS in 2004. 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 37,400 people, 14.9% over the 23 years to 2026, rising to 288,900 by 2026, increasing at an average annual rate of approximately 0.6%.
- 1.3.5 The 0-19 age range shows an increase overall (3,100; 5.9%). Figures fluctuate throughout the forecast period, rising between 2003 and 2011 (1,500; 2.8%), almost static from 2011 to 2016 and a rise up to 2026.
- 1.3.6 The 20-29 age range comprises of 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 (2,600; 6.1%), with the most significant increase seen between 2006 and 2011 (3,400; 8.0%).
- 1.3.7 The 30-44 age group, the main economically active and household moving group shows a rise (8,900; 13.6%). There is an increase of 4,200 people in the current decade to 2011.
- 1.3.8 The 45–64 age group shows the most significant rise over the forecast period with of increase of 20,200 individuals. There is a steady rise throughout the forecast period with the main increase occurring between 2011 and 2016 (5,000; 8.5%). Numbers rise by 7,200 to 2011.
- 1.3.9 In the over 65 age group an increase of 2,700 individuals is seen over the forecast period. A fall is forecast up to 2011 followed by a rise for the remaining forecast period.
- 1.3.10 The "older" population within the retirement group, those 80 and over grows significantly by 59.8%, 5,500 more people by 2026. Over a quarter of all 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 14,700 people in the area by 2026 who are much more likely to have care and support needs which should now be assessed in detail.

**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 15.7% 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%, reflecting the lower level of increases in the South generally last year.

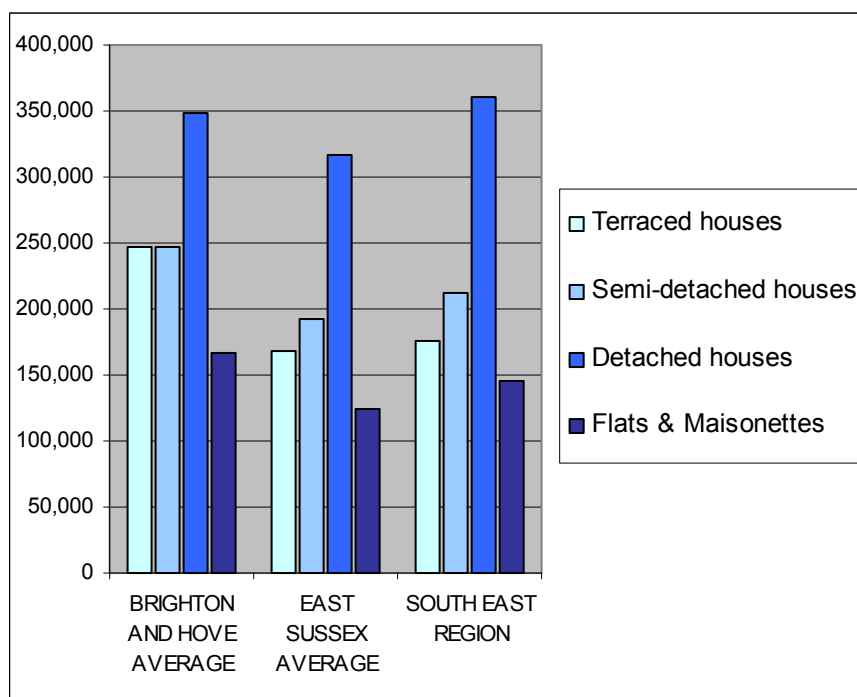
## **1.5 The Brighton & Hove Housing Market**

1.5.1 The evaluation of the market in Brighton & Hove 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, i.e. the lowest quartile stock and from the Halifax as the largest mortgage lender, analysing sales in the region.

1.5.2 The Land Registry recorded the average price for all dwellings in the City at £211,570. The average semi-detached dwelling was sold for £246,651, higher than the East Sussex average of £192,550. Figure 1-3 shows semi-detached house prices in the City are higher than the average for East Sussex, reflecting the level of prices for all property types in the City.

1.5.3 An income of £29,200 is required to buy a one bedroom flat in Sub-Area 5. A two bedroom flat requires an income of £39,000 in Sub Area 4 and up to £58,200 in Sub Area 6. Terraced properties require an income of £49,000 in Sub Area 1 and £61,500 in Sub Area 3. See Table 3-4 for sub-areas.

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. Additionally the private rented sector has low quality standards and is the housing preference of only around 8% of existing and 10% of concealed households. Even where this is the case lack of supply may cause some households to have to leave the City 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 January 2005 and provides a detailed picture of the current and future housing needs and preferences in the City. The study consisted of a postal questionnaire to 14,175 households, in 6 sub-areas across Brighton & Hove. 3,791 responses were achieved, providing statistical confidence at 95% ± 1.30% confidence interval. 3.3% of all households in the City 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

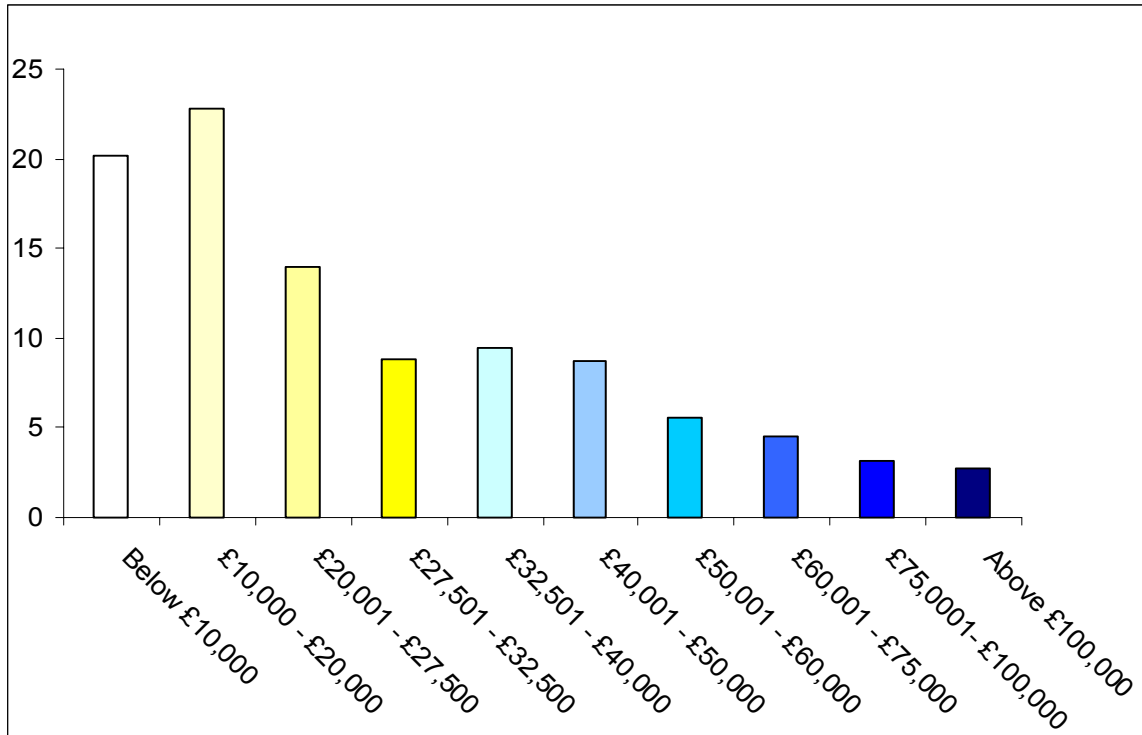
- 1.7.1 The vast majority of households have access to all the basic amenities and the perception of most residents is that their homes are well maintained and not in need of improvement.
- 1.7.2 81.4% of households indicated that their accommodation is adequate for their needs, much lower than the average of 89% in DCA surveys. 18.6% (21,009 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 (88.6%). Of those requiring a move 68.7% (11,608 implied) indicated that the dwelling was too small.
- 1.7.3 Based on a calculation of occupants to bedroom numbers, under-occupation affects approximately 31.3% of all households and over-occupation affects 2.5% of all existing households, just below the national average of 3%.



## 1.8 Costs of Present Housing and Household Income

- 1.8.1 A total of 21.6% paid less than £60 p.w.; 33.7% paid less than £70 p.w. Of owner-occupiers, with a mortgage 40.8% pay less than £350 per month. Around 1.4% of owner-occupier households pay in excess of £1,300 per month.
- 1.8.2 20.2% of households have incomes below £10,000, below the corresponding UK figure (28%). 43.0% of households in the City have incomes above £27,500, well above the UK average (27%).

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



- 1.8.3 35.5% of households were in receipt of financial support (40,408 implied), of whom 52.8% (21,339 implied) were in receipt of Housing Benefit or 48.1% of renters in the sample.

## 1.9 Moving Households

- 1.9.1 16,590 existing households and 5,817 new households will be moving or forming within Brighton & Hove in the next three years.
- 1.9.2 10,701 existing and new forming households anticipate moving away from the City. In the case of existing households moving, the single most common reason given for moving away was lack of affordable housing to buy (39.6%) and to rent (19.5%). In the case of concealed households moving, the most common reason was employment (50.4%) but with 24.7% leaving because of the lack of affordable housing to buy and 9% to rent.

## 1.10 Support Issues

- 1.10.1 19.8% of households in the City contain somebody with a support need (22,362 households implied), of which 14.0% had two members affected. 51.5% of all household members were over 60, including 25.9% over 75.
- 1.10.2 The largest group (11,316 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 8.1% of these households contained someone who was a wheelchair user, suggesting around 1,765 in Brighton & Hove as a whole. 21.4% of wheelchair user's households live in a property with suitable adaptation.
- 1.10.4 Of household members with support needs, some 25.7% (2,986 implied) felt they needed care or support which is not currently provided.
- 1.10.5 11.7% of all dwellings (13,242 implied) have been adapted to meet the needs of a disabled person. In terms of the nature of adaptations, 46.9% have handrails / grabrails; 41.8% have adaptations to enable access to their property and 36.2% have bathroom adaptations.

## 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 5.1% of households contained one or more households seeking independent accommodation giving a total of 5,817 cases over the next three years to 2007. Over 65.4% are the adult children of existing residents.
- 1.11.2 In the concealed households group:-
- ◆ 58.5% of the people in these concealed households are between 20 and 29 years of age and 22.5% are over 30;
  - ◆ 48.4% of households are being formed with a partner living in a separate household elsewhere in the City;
  - ◆ Only 2.6% of concealed households moving within the next year were registered on a housing waiting list. All being on the Brighton & Hove City Council List.
- 1.11.3 Their needs and preferences for specific house types were:-

Type	Need %	Preference %	Current Stock %
Flat	63.3	51.8	47.4
Terraced	14.3	16.6	21.5
Semi-detached	5.7	16.0	18.2

Size	Need %	Preference %	Current Stock %
One bed	63.7	26.5	26.2
Two bed	29.4	56.2	32.5
Three bed	6.4	14.5	28.9

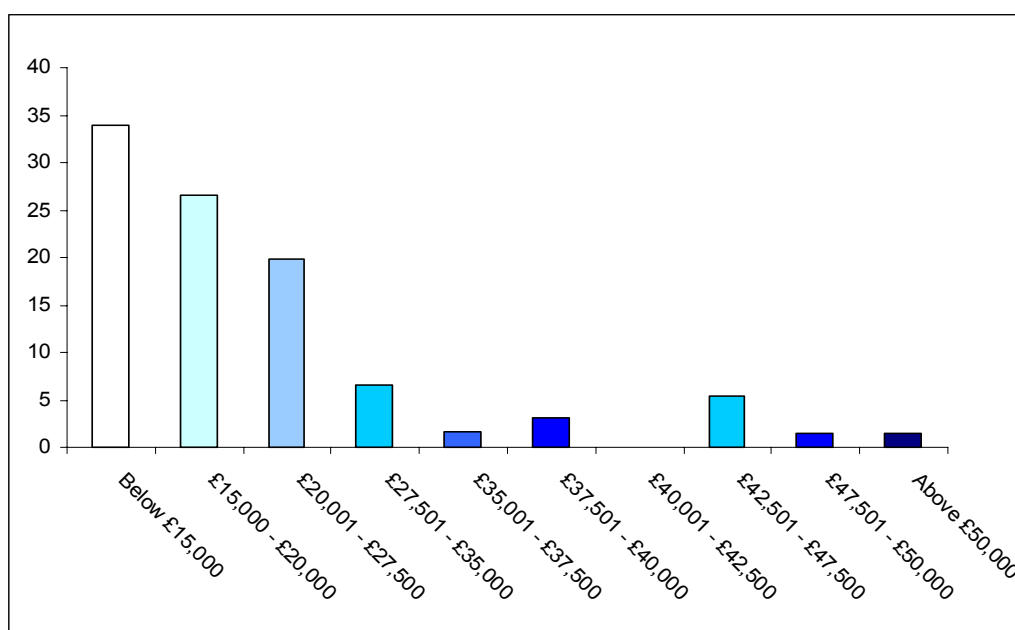
- ◆ Important differences exist between the levels of preference expressed for property types and their stock supply levels, especially the higher preference for terraces and to a lesser extent flats, than are present in the existing stock;
- ◆ 53.3% (3,100 implied) of the concealed households preferred owner occupation; 24.1% (1,402 implied) want private rent; 11.9% (692 implied) prefer Council rented and 5.6% (326 implied) want HA 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:-

- ◆ 30.8% of those wishing to rent are not able or willing to pay weekly rent of more than £70; 48.9% no more than £80;
- ◆ 45.1% wanting to buy are not able or willing to pay a mortgage of more than £400 per month;
- ◆ 33.9% have household incomes below £15,000 per annum, 26.5% earn between £15,001 - £20,000 and a further 19.8% between £20,001 and £27,500, giving a total of 86.8% with an income below £35,000.

**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 and incomes needed to buy in locations across Brighton & Hove. See Table 1-1 below.

1.13.2 The following table shows the annual household income needed to buy in the lowest and highest priced areas in the City, based on a 95% mortgage availability and a 3-times gross income to lending ratio, the 2004 SEERA Good Practice Guidance recommended levels.

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

Area	Income Thresholds (£)		
	1-bed Flat	2-bed Flat	2-bed Terraced
Sub Area 1	34,400	41,000	49,000
Sub Area 2	36,800	46,400	58,200
Sub Area 3	31,700	45,800	61,500
Sub Area 4	32,000	39,000	51,800
Sub Area 5	29,200	44,400	49,900
Sub Area 6	34,200	58,200	53,000

See Table 3-4 for sub-areas

- 1.13.3 Although the average price of flats /maisonettes according to the Land Registry survey is £167,067, entry levels for a 1-bed property start at £92,075 in Sub Area 5, rising to £116,257 in Sub Area 2. Entry levels for 2-bed flats start at £123,113 in Sub Area 4 rising to £183,745 in Sub Area 6.
- 1.13.4 The survey findings indicate that income levels of around 80% of the new households who formed in the past 2 years are below the level necessary to be able to buy and 67% 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 51.8% and 63.3% respectively are higher than the stock level of 47.4% reflecting the impact of changing household formation and preferences and lower price levels. Sales of flats and terraces are higher because they are the most available stock type with the lowest prices.
- 1.15.3 New forming households show a lower level of preference for terraced houses at 16.6% than the stock supply of 21.5%, which may reflect the price differential.

**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	14.3	16.6	21.5	24.6
Flats	63.3	51.8	47.4	53.5

\* © Crown Copyright (Census)

- 1.15.4 Small units, flats and terraced houses are 68.9% 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 total annual level of outstanding affordable need of 1,456 units (1,202 shortfall + 254 assumed new units), after allowing for current re-let supply is clearly not economically deliverable or sustainable. 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 and essentially planning should be providing for balanced communities
- 1.16.3 Our significant experience of over 15 years affordable subsidised housing in mixed developments leads us to recommend that 45% of new units negotiated should be the level applied from the total of all suitable sites. This proportion includes both affordable housing for rent (25%) and subsidised low cost market housing (20%) to meet the needs of low income households, Key Workers and those on average incomes unable to purchase. Targets may vary above and below this level on a site by site basis.
- 1.16.4 In view of the scale of need, particularly in the period to 2008, subsidised affordable units should be negotiated on all suitable sites, the ‘target’ for each site taking into account existing supply, survey demand and other regeneration, planning, sustainability and economic factors.
- 1.16.5 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 (to be known as “intermediate” housing) than would have been the case four years ago when it was a more marginal element of affordable need.
- 1.16.6 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.

**Table 1-3 Affordable Need Summary**

Total Annual Need	2,520	
Existing Stock Re-lets	<u>1,064</u>	
Net New Units Needed	<u>1,456</u>	
<hr/>		
New Rental	800	55%
Shared Ownership / Shared Equity	656	45%
Discounted Market Rent		
<b>Total</b>	<b><u>1,456</u></b>	<b><u>100%</u></b>

1.16.7 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 sheltered accommodation, from older people currently living in the City (1,334 households) and those who may in-migrate to be beside their family (2,773 households) is 4,107 units, 2,346 in the affordable sector and 1,761 in the private market over the next 3 years.

1.17.2 Some of this requirement will be addressed by flow of the existing sheltered stock, but acceptability of existing stock to meet today's standards will need to be assessed in calculating the scale of new delivery.

1.17.3 The significantly higher level of elderly accommodation for people moving into the City is common to other DCA Surveys and is a new factor in the housing market. As discussed in Section 7.5.2 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 and actual migration should be monitored annually.

## **1.18 Supported Housing**

1.18.1 The Survey identified a need over the next three years for:-

- ◆ 768 units of independent accommodation with visiting support worker;
- ◆ 47 units of residential / nursing homes;
- ◆ 62 units of extra care sheltered housing.

## 1.19 Recommendations

### 1.19.1 Housing and Planning Strategies

- ◆ Provide a mix of house types and sizes in both market and social sectors to meet the needs of new and existing households and to provide a balanced housing market (*to be informed by Housing Stock Balance Analysis report*).
- ◆ 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 Unitary Development 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 house prices 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 45% of the total of all suitable sites negotiated.
- ◆ Within this target we recommend a balance of 25% for rent with around 20%, 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.
- ◆ 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.
- ◆ 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 (who has entered into a nomination agreement with the Local Authority) provided. These arrangements would be formalised within a legal agreement to ensure that provision meets with the Council's affordability criteria.
- ◆ Both the affordable housing target and the tenure balance within it may vary on a site by site basis and should take account of supply through empty properties brought back into use through regeneration strategy.

### 1.20 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;
- ◆ Continue to support Lifetime Homes standards for new housing.

## **2 SURVEY METHODOLOGY**

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

2.1.1 Brighton & Hove City Council, as part of an original joint tender brief with Wealden DC and Eastbourne BC, Hastings BC, Rother DC and Lewes DC formally commissioned DCA in October 2004 to carry out a City-wide Housing Needs Survey.

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

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 five 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, to assist policy formation in respect of the delivery of affordable housing through the planning system. Regard will need to be given to advice from Central and Regional Government and the particular circumstances of each Local Authority.

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 Local 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 City 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 City 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:-

- ◆ A postal questionnaire to 14,175 households in 21 wards forming 6 sub-areas;
- ◆ A housing market survey utilising the Land Registry and Halifax databases and an internet / telephone survey of estate agents assessing 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.

2.3.2 The questionnaire was designed in consultation with officers of Brighton & Hove 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 questionnaire is 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 City 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 made by taking the City's 21 wards and combining them into 6 sub-areas and selected by random probability from the Council Tax register.
- 2.4.5 The sample was 12.6% of resident households, determined to ensure statistical validity within each ward. As we see in 2.6.3, based on a 21 ward structure, a city-wide confidence interval of  $\pm 1.30\%$  was achieved in this survey. Confidence intervals at ward level ranged from  $\pm 5.20$  to  $\pm 6.69$ .
- 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 interviews were conducted across all six Districts with four groups of households. Each group were interviewed to a specifically created questionnaire to address their particularly needs. 120 interviews were undertaken with each of 4 interview groups, elderly, young, learning disabilities, 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, and utilised contacts provided by BMECP (Black & Minority Ethnic Community Participation).
- 2.5.4 Households containing a person with learning disabilities were identified to 146 addresses and interviews undertaken by pre-arranged appointments. In Brighton & Hove Community Support workers accompanied each interview. 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 14,175 questionnaires was dispatched for delivery on the 11<sup>th</sup> January 2005. The return deadline was 1<sup>st</sup> February 2005 allowing respondents a period of around nineteen days, including 3 weekends for completion and return after the survey reached the household.
- 2.6.2 The survey achieved a final postal response of 3,791 questionnaires returned, well above the level recommended in the ODPM Guidance providing a robust sample for analysis.
- 2.6.3 All wards reached response levels between 143 and 237 and are adequate to ensure statistical validity at a confidence level of 95%. The confidence interval ranged from  $\pm 2.55\%$  to  $\pm 3.98\%$  in each of the six sub-areas and was  $\pm 1.30\%$  at City-wide level.
- 2.6.4 3.3% of all resident households in Brighton & Hove 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 Ward**

Sub-Area		Households	Postal Sample	Postal Responses	Postal Response Rate %	Confidence Interval +/- %	Sub-Area Response Rate	Sub-Area Confidence Interval +/- %
Sub-Area 1	North Portslade	4,069	675	210	31.1	5.52	555	3.40
	South Portslade	3,801	675	161	23.9	6.30		
	Hangleton and Knoll	5,862	675	184	27.3	5.90		
Sub-Area 2	Stanford	4,056	675	196	29.0	5.71	839	2.76
	Withdean	6,017	675	237	35.1	5.20		
	Preston Park	6,097	675	186	27.6	5.87		
	Patcham	5,700	675	220	32.6	5.39		
Sub-Area 3	Wish	4,033	675	167	24.7	6.19	983	2.55
	Westbourne	4,249	675	187	27.7	5.85		
	Goldsmid	7,439	675	185	27.4	5.88		
	Central Hove	4,609	675	149	22.1	6.55		
	Brunswick & Adelaide	5,111	675	152	22.5	6.49		
	Regency	5,030	675	143	21.2	6.69		
Sub-Area 4	St Peters and North Laine	7,397	675	189	28.0	5.82	513	3.53
	Hanover and Elm Grove	6,129	675	172	25.5	6.10		
	Queen's Park	7,204	675	152	22.5	6.49		
Sub-Area 5	Hollingbury & Stanmer	4,902	675	181	26.8	5.95	496	3.59
	East Brighton	6,482	675	170	25.2	6.14		
	Moulescoomb & Bevendean	5,666	675	145	21.5	6.64		
Sub-Area 6	Woodingdean	3,901	675	214	31.7	5.47	405	3.98
	Rottingdean Coastal	6,064	675	191	28.3	5.79		
<b>Total</b>		<b>113,818</b>	<b>14,175</b>	<b>3,791</b>	<b>26.7</b>	<b>1.30</b>	<b>3,791</b>	<b>1.30</b>

## 2.7 Survey Weighting

- 2.7.1 We checked the data file against the 2001 Census Tenure data and the City 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 Register 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 City 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 Brighton & Hove.

**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	4.6	15.7	5,235	4.4
Council rented	11.1		12,621	10.3
Private rented	22.3	23.3	25,360	21.5
Tied to employment / other	1.0		1,124	2.1
Owner occupier - mortgage	35.0	61.0	39,828	35.1
Owner occupier - outright	25.8		29,417	26.0
Shared ownership	0.2		231	0.6
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>113,816</b>	<b>100.0</b>

\* © Crown Copyright (Census)

- 2.7.5 The tenure levels in the City have remained largely unchanged since 2001. In real terms, the levels of council tenure have not risen, yet a slight increase is reflected in the data due to the sampling structure used. Also, the 2005 data is taken from individual responses, which may have mistaken Council rented accommodation for other tenures.
- 2.7.6 The private rented sector as a whole accounts for 23.3% of households. This group includes those renting from a private landlord, from a relative or from an employer. At the Census 2001, 2,165 households, 8.2% of the total of 26,484 lived rent free and households in this sector are not therefore homogenous.

## 2.8 Definitions

- 2.8.1 The Housing Needs Survey 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 The view of DCA is that affordability is defined by the relationship between local incomes and the local general housing market. DCA's 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 ward responses to that ward 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 Brighton & Hove Council, 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 BRIGHTON & HOVE HOUSING MARKET**

### **3.1 Introduction**

- 3.1.1 Three data searches were commissioned to provide information on house price and sales volumes across the City:-
- ◆ 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, also included in the analysis is information about the volumes of sales of each type of dwelling.
- 3.1.3 As explained in 3.1.2 above, 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 (FTB) 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 was almost a third lower than on 2002 (532,000)<sup>1</sup>

---

<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%, 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.
- 3.3.3 House prices in East Sussex rose over the last year by 2.4% and in Brighton & Hove by 10.4% 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 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. The Land Registry data incorporates all transactions, at Local Authority 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>214,967</b>	<b>199,747</b>

Source: Halifax House Price Index, 4<sup>th</sup> Quarter 2004, © Copyright HBOS plc

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

© Crown Copyright

\* 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 below in Brighton & Hove.
- 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 City 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 & 2000**

Property Type	Land Registry Brighton & Hove Average Price	Land Registry % of sales in Brighton & Hove	2000 Land Registry Average Price	Increase % 2000 - 2004
Terraced	246,975	24.6	148,531	66.3
Semi-detached	246,651	14.6	150,918	63.4
Detached	348,043	7.3	242,146	43.7
Flats & maisonettes	167,067	53.5	87,585	90.7
<b>All properties</b>	<b>211,570</b>	<b>100.0</b>	<b>123,321</b>	<b>71.6</b>

Source: Land Registry Residential Property Price Report, 4<sup>th</sup> Quarter 2004  
 Land Registry Residential Property Price Report, 4<sup>th</sup> Quarter 2000  
 © Crown Copyright (Land Registry)

- 3.4.6 Table 3-3 shows that the city of Brighton & Hove has a much higher volume of flats/maisonette properties as a percentage of sales than the rest of East Sussex (53.5% compared to 18.6%). Flats / maisonettes prices averaged £167,067, while terraced properties averaged £246,975. Semi-detached and detached properties accounted for just 14.6% and 7.3% of sales respectively and averaged £246,651 for semi-detached and £348,043 for detached properties. Flats / maisonettes are assessed to be the main entry level property for first-time buyers in view of their comparatively low prices and significantly high volume of sales.
- 3.4.7 Over the last four years the prices of entry level stock, flats / maisonettes have increased by 90.7% and terraced houses have increased by 66.3%.
- 3.4.8 The sales levels of terraced properties in 2004, 24.6% are similar to 2000 levels (25.6%). Sales levels of flats (53.5%) are also similar to 2000 levels (52.8%).

<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 City has been divided into sub-areas. The six sub-areas analysed are:-

**Table 3-4 Sub-Areas**

Sub-Areas	Ward
Sub Area 1	North Portslade
	South Portslade
	Hangleton & Knoll
Sub Area 2	Stanford
	Withdean
	Preston Park
	Patcham
Sub Area 3	Wish
	Westbourne
	Goldsmid
	Central Hove
	Brunswick and Adelaide
	Regency
Sub Area 4	St Peter's and North Laine
	Hanover and Elm Grove
	Queen's Park
Sub Area 5	Hollingbury and Stanmer
	East Brighton
	Moulsecoomb and Bevendean
Sub Area 6	Woodingdean
	Rottingdean Coastal

### 3.6 Entry Sales Levels in the City

- 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 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 City wide level. In Brighton & Hove this is £137,500, 35.0% lower than the average of £211,570 in Table 3-3.
- 3.6.4 DCA have therefore undertaken an internet / telephone survey of the local estate agents to ascertain the cost of the cheapest units available i.e. the lowest quartile stock costs for sale in each of the six sub-areas. These are detailed below:-

**Table 3-5 Entry Sales Levels in Brighton & Hove – February 2005**

Property Type	Sub Area 1	Sub Area 2	Sub Area 3	Sub Area 4	Sub Area 5	Sub Area 6	City-wide
1-Bed Flat	108,725	116,257	100,088	100,967	92,075	108,125	104,373
2-Bed Flat	129,350	146,525	144,725	123,113	140,100	183,745	144,593
2-Bed Terraced	157,869	175,988	178,550	180,294	157,850	161,250	168,634
3-Bed Terraced	157,469	183,675	194,356	163,536	157,475	167,450	170,660

Source: DCA House Price Survey February 2005

- 3.6.5 Although the average price of terraced properties according to the Land Registry survey is £246,975, entry sales levels vary across the City with the lowest entry prices, for a 2-bed property, starting at around £157,850 in Sub-Area 5, rising to £180,294 in Sub-Area 4, as can be seen in Table 3-5 above. 3-bed terraced properties start at £157,469 in Sub-Area 1, rising to £194,356 in Sub-Area 3.
- 3.6.6 Table 3-5 shows, entry levels for flats start at £92,075 in Sub-Area 5, rising to £116,257 in Sub-Area 2, for a 1-bed unit. Entry levels for 2-bed flats start at £123,113 in Sub-Area 4, rising to £183,745 in Sub-Area 6.

### 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 six sub-areas in the City.

**Table 3-6 Purchase Income Thresholds- February 2005**

Area	Income Thresholds (£)		
	1-bed Flat	2-bed Flat	2-bed Terraced
Sub-Area 1	34,400	41,000	49,000
Sub-Area 2	36,800	46,400	58,200
Sub-Area 3	31,700	45,800	61,500
Sub-Area 4	32,000	39,000	51,800
Sub-Area 5	29,200	44,400	49,900
Sub-Area 6	34,200	58,200	53,000

Please note: figures are rounded to nearest hundred.

### 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 Brighton & Hove has the 20<sup>th</sup> highest house price-to-income ratio out of over 350 Local Authority areas in the country at 5.61 to 1. The report highlights that outside London, access to home ownership is problematic throughout the South East, where average house price to gross earned income ratios average 4.61 to 1.
- 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 Brighton & Hove and the South East Region.

**Table 3-7 Purchase Income Thresholds**

Area	Working Households		
	2003 Prices £	Income £	Ratio
Brighton & Hove	191,860	34,221	5.61
South East Region	183,175	39,734	4.61

Source: Joseph Rowntree Foundation 2003 Update

- 3.8.6 Additionally the Joseph Rowntree Foundation Study shows house price to income ratios across the 6 East Sussex authorities range from 5.07 to 5.86. Both Lewes (5.86) and Eastbourne (5.84) have higher house price to income ratios than Brighton & Hove, with Hastings having the lowest level in East Sussex at 5.07 to 1. 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. Brighton & Hove has the third highest house price ratio in East Sussex.

### 3.9 Private Sector Rent Levels

3.9.1 Some of the main private renting agencies operating in the City 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.

**Table 3-8 Average and Entry Rent Levels Per Calendar Month in Brighton & Hove February 2005**

Property Type (Average / Entry Level)	Sub-Area 1		Sub-Area 2		Sub-Area 3	
	Average	Entry	Average	Entry	Average	Entry
1-Bed Flat	550	<b>476</b>	552	<b>390</b>	602	<b>350</b>
2-Bed Flat	694	<b>476</b>	781	<b>520</b>	854	<b>675</b>
2-Bed Terraced	774	<b>695</b>	812	<b>650</b>	823	<b>725</b>
3-Bed Terraced	857	<b>750</b>	950	<b>750</b>	1,076	<b>758</b>
2-Bed Semi-detached	804	<b>700</b>	880	<b>700</b>	757	<b>520</b>
3-Bed Semi-detached	914	<b>775</b>	958	<b>800</b>	1,185	<b>950</b>

Property Type (Average / Entry Level)	Sub-Area 4		Sub-Area 5		Sub-Area 6		Brighton & Hove	
	Average	Entry	Average	Entry	Average	Entry	Average	Entry
1-Bed Flat	551	<b>300</b>	542	<b>380</b>	650	<b>500</b>	570	<b>399</b>
2-Bed Flat	834	<b>650</b>	758	<b>500</b>	882	<b>600</b>	813	<b>570</b>
2-Bed Terraced	905	<b>700</b>	864	<b>650</b>	800	<b>750</b>	843	<b>695</b>
3-Bed Terraced	951	<b>750</b>	1,032	<b>900</b>	1,067	<b>850</b>	979	<b>793</b>
2-Bed Semi-detached	783	<b>750</b>	710	<b>645</b>	800	<b>750</b>	814	<b>678</b>
3-Bed Semi-detached	940	<b>800</b>	950	<b>950</b>	863	<b>800</b>	1,012	<b>846</b>

Source: DCA House Price Survey February 2005

### 3.10 Entry to Private Rent

- 3.10.1 The availability of data for semi-detached properties in the private sector was much smaller than that for terraced or flat / maisonette properties. This reflects a smaller number of semi-detached properties in the rented sector in Brighton & Hove, when compared with other property types.
- 3.10.2 Entry rental costs in the private rented sector vary by location within the City. The private rented sector can be entered at £300 a month in Sub-Area 4, rising to £500 in Sub-Area 5 (see Table 3-8) for a one bedroom flat, the smallest unit. For a 2-bed flat, rents range from £476 in Sub-Area 1 to £675 in Sub-Area 3.
- 3.10.3 In the case of 2-bed terraced houses, it was found that the entry rent levels range from £650 p.m. in Sub-Areas 2 and 5 to £750 p.m. in Sub-Area 4. 3-bed terraced properties can be rented from £750 p.m. in Sub-Areas 1, 2, and 4 to £900 in Sub-Area 5.

- 3.10.4 The semi-detached properties that are on the rented market can be accessed at £520 in Sub-Area 5 for a two-bed property, ranging to a three-bed entry price of £775 in Sub-Area 3 and 5. Again, it is worth cautioning against the lower sample of data used in analysing semi-detached properties on the rental market.
- 3.10.5 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.
- 3.10.6 Concealed household's preference for private rented housing are generally quite low. Entry level rental prices in Brighton & Hove start at around £300 in sub-area 4, but are in excess of £350 in all other sub-areas for a one-bed flat. Only 54% of concealed households can afford to access the rental market at the very cheapest level, a figure that reduces to 39.8% accessing the market at £350 p.m. Just 5.7% of concealed households could afford to pay over £650 p.m. which allows access to most of the one and two bedroom units in the private rental market in the City.
- 3.10.7 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.
- 3.10.8 A range of property types are available in the sector as a whole and are found in a variety of locations within Brighton & Hove. 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 City 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 City.

**Table 3-9 Rental Income Thresholds- February 2005**

Area	Income Thresholds (£)		
	1-bed Flat	2-bed Flat	2-bed Terrace
Sub-Area 1	22,800	22,800	33,400
Sub-Area 2	18,700	25,000	31,200
Sub-Area 3	16,800	32,000	34,000
Sub-Area 4	14,400	31,200	33,600
Sub-Area 5	18,200	24,000	31,200
Sub-Area 6	24,000	28,800	36,000

*NB Figures rounded to nearest hundred.*

## 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%, above the UK average of 15.1%.
- ◆ The Land Registry data for average price for all dwellings in the City during the year was around £222,146.
- ◆ The largest volume of sales in the City were for flats / maisonettes (53.5%) selling at an average price of £167,067. Terraced houses account for 24.6% of sales with an average price of £246,975 and semi-detached average £246,651 and are 14.6% of sales. Detached houses average £348,043 and are just 7.3% of sales. Flats / maisonettes are assessed to be the main entry level property for first time buyers in view of their higher volume of sales but flats also provide a means of market access in the City.
- ◆ 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 City for low-income households.

### 3.12.2 Sub-Area Sales Prices / Incomes

- ◆ Prices vary across the City; a 1-bed flat can be purchased at £92,075 in Sub-Area 5, rising to £116,257 in Sub-Area 2. 2-bed terraced houses can be purchased at £157,850 in Sub-Area 5, rising to £180,275 in Sub-Area 4.
- ◆ An income of £29,200 is required to buy a one bedroom flat in Sub-Area 5, rising to £36,000 in Sub-Area 2. A two bedroom flat requires an income of £39,000 in Sub-Area 4 and up to £58,200 in Sub-Area 6. Terraced properties require an income of £49,000 in Sub-Area 1 rising to £61,500 in Sub-Area 3.
- ◆ The key fact is that, based on conservative assumptions, access to home ownership is beyond the reach of at least 80% of the concealed households identified in the DCA survey based on entry level stock prices in the six 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 City. Based on rent at 25%, the gross income needed to rent a one bed flat ranges from £14,400 per annum to £24,000 per annum. The cost of renting a 2-bed flat would need an income of £22,800 up to £32,000. A terraced house requires an income of between £31,200 and £36,000.
- ◆ The private rented sector makes only a limited contribution towards access to housing, providing access to housing for only 33% of concealed households.

## 4 CURRENT HOUSING IN BRIGHTON & HOVE

### 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	2005 Survey %	Survey Group %	N <sup>os</sup> implied	Local Area Census 2001 **
Semi-detached house	18.2	34.4	20,586	31.0
Detached house	7.6		8,479	
Bungalow	8.6		9,657	
Terraced	20.3	20.3	22,891	21.5
Flat / maisonette	41.6	45.3	46,967	47.4
Bedsit / studio / room only	3.7		4,194	
Caravan / mobile home	0.0 *	0.0	42	0.1
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>112,816</b>	<b>100.0</b>

\* Nearest decimal place

\*\* © Crown Copyright (Census)

4.1.2 The sample data shows only a small variance in the dwelling type structure in the Census 2001, with a higher proportion of semi detached and detached houses and bungalows from 31.0% to 34.4% (3.4%), with a correspondingly lower proportions of terraced houses and flats/maisonettes. Our analysis of concealed households in Section 6 of this report found 63.3% of expressed need to be for flats / maisonettes.

**Table 4-2**      **Form of Tenure by Property Type (%)**  
Question 2 by Question 1

Type	Owner occupier with mortgage	Owner occupier no mortgage	Private rented	Council rented	HA rented	Shared ownership*	Tied to employment / other*	Total
Semi-detached	45.5	29.1	7.6	14.0	2.7	0.3	0.8	100.0
Detached	49.6	44.0	3.0	1.9	1.5	0.0	0.0	100.0
Terraced	49.8	29.3	13.2	4.7	2.7	0.3	0.0	100.0
Bungalow	31.4	54.3	5.2	7.4	1.7	0.0	0.0	100.0
Flat / maisonette	24.3	15.8	37.0	14.2	6.5	0.2	2.0	100.0
Bedsit / studio / room only	6.7	4.2	55.6	17.4	16.1	0.0	0.0	100.0
Caravan / mobile home	0.0	0.0	0.0	100.0	0.0	0.0	0.0	100.0

(\* Low volume of data).



- 4.1.3 A cross-tabulation relating form of tenure to property type indicated that 59.8% of flat / maisonette accommodation was in the rented sector, only 34.7% of which was in the social rented sector. In terms of new demand, our analysis of concealed households in the City found that 70.0% of demand for flats / maisonettes was in the rented sector, of which 20.8% was in the social rented sector.
- 4.1.4 54.3% 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 had they lived at their present address. On the basis of a 99.2% response, 40.6% 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	12.1	13,642
1 – 2 years	11.0	12,423
2 – 10 years	36.3	41,054
Over 10 years	40.6	45,846
<b>Total</b>	<b>100.0</b>	<b>112,965</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	4.4	5,016
One	21.8	24,650
Two	32.5	36,840
Three	28.9	32,761
Four	9.6	10,841
Five or more	2.8	3,132
<b>Total</b>	<b>100.0</b>	<b>113,240</b>

- 4.1.7 The average across the stock in the City was 2.3-bedrooms, well below the level found in other recent DCA surveys (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 Question 1

Tenure	Bedsit	One	Two	Three	Four	Five+	Total
Properties owned	1.0	11.3	31.5	37.8	14.3	4.1	100.0
Properties rented	9.8	38.3	34.1	14.9	2.1	0.8	100.0
Council rented only	7.2	31.6	36.1	24.2	0.8	0.1	100.0

- 4.1.8 As might be expected, 90.9% four (or more) bedroom properties were in the owner occupied sector. 71.2% 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	Council rented	HA rented	Shared ownership*	Tied to employment / other
CH-F	82.0	88.0	83.1	71.7	78.4	83.3	100.0	81.5
CH-P	9.8	7.6	9.8	11.7	13.6	9.8	0.0	11.1
DG-F	52.6	51.5	62.4	30.5	76.1	51.9	13.0	44.7
DG-P	15.5	18.2	17.5	13.3	6.2	12.1	70.1	24.8
HWTJ	49.7	45.5	65.4	36.8	55.6	37.7	0.0	47.9
LI	45.6	56.5	60.6	16.1	42.1	23.4	62.3	8.9
WPI	26.0	31.3	38.0	9.9	18.2	11.8	22.5	6.9
CWI	22.4	21.3	30.9	6.0	42.3	13.0	13.0	0.0
DP	15.8	16.4	18.3	6.8	26.2	10.2	13.0	0.0

(\* Low volume of data).

Heating / Insulation facilities:-

CH-F (central heating -full), CH-P (central heating -partial), DG-F (double glazing -full), DG-P (double glazing -partial), HWTJ (hot water tank jacket), 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 91.8% were around the national average in the 2001 Census (91.5%).
- 4.1.10 In the case of Council rented accommodation alone, 92.0% had some form of central heating, much the same as the all tenure average but only 78.4% had full central heating as compared with the all tenure average of 82.0%. The Council rented sector performed particularly well in relation to the level of full double glazing and cavity wall insulation. Full double glazing was 23.5 percentage points above the all tenure average.
- 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 the nominated facilities than the all tenure average. Full central heating was available in only 71.7% of properties; full double glazing in only 30.5% with very 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. 81.4% indicated that their accommodation was adequate; 18.6% (21,009 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 15,350 households in the City.
- 4.2.2 From a cross-tabulation some discrepancy in satisfaction by tenure was evident. The satisfaction level for Council rented accommodation (71.9%) was well below the average emerging for social rented accommodation from recent DCA surveys (around 82%). Satisfaction in the private rented sector (64.2%) was well below the all tenure average, as might be expected from our comment at 4.1.11 above.

**Table 4-7 Adequacy by Tenure**

Question 8a by Question 1

Tenure	% adequate
Owner occupied with mortgage	85.1
Owner occupied no mortgage	96.1
Private rented	64.2
Council rented	71.9
HA rented	76.9
Shared ownership*	90.9
Tied to employment / other*	76.9

(\* 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 57.5% (12,085 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. 88.6% 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 repair / improvement	70.6	88.6	10,703
Too costly to heat	29.4	36.9	4,466
<b>Total</b>	<b>100.0</b>		<b>15,169</b>

**Table 4-9 Reason for Inadequacy of Present Accommodation Likely to Require a Move**  
Question 8bii

Reasons	% responses	% households	N <sup>os</sup> implied (all choices)
Too small	49.7	68.7	11,608
Rent / mortgage too expensive	25.7	35.5	6,005
Housing affecting health	11.0	15.2	2,569
Tenancy insecure	10.6	14.6	2,468
Too large	3.0	4.2	703
<b>Total</b>	<b>100.0</b>		<b>23,353</b>

4.2.5 80.4% (16,900 implied) of the group indicated a solution requiring a move. The largest single issue was that the home was too small, referred to by 68.7% of households indicating a solution likely to require a move, and implying 11,608 cases in the City as a whole. The bedroom standard test for overcrowding at 4.3.6 suggests that around 2,850 households are currently in this situation. Households may however be expecting an addition to the family or have an elderly parent coming to live with them creating an imminent overcrowding situation, but this has been discounted. There is however concern that families may be trapped in property that is too small for their needs as a result of high and rising local house prices.

4.2.6 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	35.0	26.2	2,806
Owner no mortgage	25.8	5.7	616
Private rented	22.3	45.5	4,869
Council rented	11.1	18.0	1,924
HA rented	4.6	3.6	383
Shared ownership	0.2	0.0	0
Tied to employment / other	1.0	1.0	106
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>10,704</b>

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

**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	20.2	28.4	2,301
£10,001 - £20,000	22.8	23.3	1,888
£20,001 - £27,500	14.0	16.7	1,353
£27,501 - £32,500	8.8	8.7	707
£32,501 - £40,000	9.5	7.6	612
£40,001 - £50,000	8.7	6.1	498
£50,001 - £60,000	5.6	4.3	347
£60,001 - £75,000	4.5	1.5	123
£75,001 - £100,000	3.2	1.4	110
Above £100,000	2.7	2.0	163
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>8,102</b>

- 4.2.8 We found little correlation between lower incomes and higher repair need.

**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
16 – 19	0.4	2.2	228
20 – 29	11.3	21.2	2,168
30 – 44	31.3	41.4	4,235
45 – 59	25.2	22.4	2,288
60 – 74	20.1	9.5	975
75+	11.7	3.3	338
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>10,232</b>

- 4.2.9 Repair need was disproportionately found in particular among households where the head of household was aged 20 – 44. Repairs were apparently not a problem for those above 60 years of age.
- 4.2.10 21.5% of households with a disability felt their home was inadequate (compared to 18.6% among all households). Of respondents with a disability, 84.7% of those saying their home was inadequate also said they had a repair need, compared to 88.6% 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 21,649)	% households with a repair need (in sample of 2,936)	N <sup>os</sup> implied
Wheelchair user	8.1	7.5	188
Walking difficulty	52.3	50.4	1,257
Learning difficulty	7.8	16.9	420
Mental health problem	18.1	22.3	557
Visual / hearing impairment	17.6	10.4	258
HIV /Aids	3.0	8.1	202
Drug / alcohol problem	3.0	3.0	76
Limiting long term illness	36.9	46.0	1,147
<b>Total</b>			<b>4,105</b>

- 4.2.11 Repair need was disproportionately found among households with a member with a learning difficulty or with HIV /Aids but, in broader terms, appeared to be no significant difference between repair need levels and the sample.

**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	20.2	20.5	1,042
£10,000 - £20,000	22.8	22.9	1,168
£20,000 - £27,500	14.0	24.9	1,269
£27,500 - £32,500	8.8	9.3	474
£32,500 - £40,000	9.5	7.9	401
£40,000 - £50,000	8.7	5.6	288
£50,000 - £60,000	5.6	4.3	217
£60,000 - £75,000	4.5	0.5	24
£75,000 - £100,000	3.2	3.6	182
Above £100,000	2.7	0.5	24
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>5,089</b>

- 4.2.12 There appeared to be limited co-relation between lower incomes and cost. The most significant problems were found among households with incomes between £20,001-£27,500 which could only be explained either by some impact of benefit thresholds or higher mortgage commitments within that group.
- 4.2.13 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.
- 4.2.14 The next question in the section sought to identify which aspects of a given range of work respondents felt were required on their property.
- 4.2.15 59.2% (67,422 implied) of the sample responded to the question. Responses were again on multiple choice basis with respondents making around 2.0 choices on average.

**Table 4-15 Repairs / Improvements Required**

Question 8c

Improvements	% responses	% households	N <sup>os</sup> implied
Window repairs	26.6	52.2	35,217
Additional security	13.9	27.4	18,469
Improved heating	13.6	26.8	18,063
Insulation	12.7	24.9	16,793
Roof repairs	12.0	23.5	15,841
Damp proofing	11.6	22.9	15,412
Re-wiring	9.6	18.8	12,668
<b>Total</b>	<b>100.0</b>		<b>132,463</b>

- 4.2.16 Window repairs (52.2%) were by some margin the most common single choice. Otherwise, choices were quite evenly spread across the categories.

**Table 4-16 Work Required on the Property by Tenure**

Question 8c by Question 1

Work required	Owner occupier with mortgage	Owner occupier no mortgage	Private rented	Council rented	HA rented	Shared ownership*	Tied to employment / other*
Additional security	27.2	22.1	31.4	30.8	27.0	33.8	0.0
Improved heating	22.1	24.4	37.3	26.0	20.0	0.0	18.9
Re-wiring	17.1	23.1	17.9	21.0	17.0	18.7	0.0
Damp proofing	18.7	15.1	36.4	20.2	22.5	31.6	16.0
Roof repairs	30.4	32.1	12.0	14.0	16.9	36.7	15.1
Window repairs	53.6	41.3	57.4	49.7	64.9	59.7	69.3
Insulation	24.7	20.6	32.5	15.1	26.6	43.2	30.7

(\* Low volume of data.)

- 4.2.17 Overall, requirements in the Council rented sector were higher than the all tenure average in only two of the seven categories but were generally similar in five of the seven categories, being quite significantly lower in the case of insulation and roof repairs.

- 4.2.18 In the private rented sector, the profile was very much compatible with our comment at 4.1.11 above, in that a higher average work requirement was identified in five of the seven categories with a particularly high need for damp proofing and improved heating.

### 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	23.6	38.1	39.3
1 adult under 60	11.1		
1 adult + other	3.4		
Couple no child	30.1	54.3	52.1
Couple 1-2 children	18.6		
Couple 3+ children	3.4		
Couple + others	2.2		
Single parent	7.6	7.6	8.6
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

\* © Crown Copyright (Census)

- 4.3.2 Our survey sample shows very close household type distribution to the Local Area Census 2001 but suggested a small shift from single adult and single parent households to couple households.

**Table 4-18 Population Age Groups**

Question 14d

Age Group	Sample %	Local Area Census 2001 *
0 – 10	11.2	16.6
11 – 15	5.2	
16 – 19	3.7	4.7
20 – 29	13.2	17.0
30 – 44	25.6	24.6
45 – 59	19.0	16.5
60 – 74	14.3	12.0
75+	7.8	8.6
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

\* © Crown Copyright (Census)



- 4.3.3 Table 4-18 shows the ages of all household members in the sample. Our figures show no significant deviation from the 2001 Census data although there was a somewhat greater concentration of persons in our data in the 45 – 59 age band, in particular with a lower concentration in the 20 – 29 age band.

**Table 4-19 Number in Household**

Question 14a

Number in household	%	N <sup>os</sup> implied
One	38.6	43,856
Two	35.8	40,711
Three	11.8	13,351
Four	9.9	11,286
Five	2.9	3,358
Six	0.7	841
Seven	0.2	185
Eight or more	0.1	79
<b>Total</b>	<b>100.0</b>	<b>113,667</b>

- 4.3.4 The profile emerging from our survey equated to 2.1 persons per household on average – well under the UK average of 2.4 (as endorsed by 2001 Census data) but the same as the City 2001 Census figure of 2.1.

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

Question 14a by Question 1

Tenure	N <sup>os</sup> in household
Owner occupier with mortgage	2.5
Owner occupier no mortgage	1.8
Private rented	1.8
Council rented	1.9
HA rented	1.7
Shared ownership*	2.4
Tied to employment / other*	2.0

(\* 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 Council rented sector figure was around the average for that sector in our survey experience, but with a somewhat higher level of single person households (50.5%) than found on average in recent surveys (around 44%). 86.9% 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. 24.8% of the owner-occupier with mortgage households were single person households, well 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 one or more ‘spare’ bedrooms above requirement has been categorised as under-occupied.

- 4.3.7 Our overall over-occupation level (2.5%) 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 31.3% but it is well below that found in the most recent DCA surveys (around 46%).
- 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 Question 5 &amp; Question 1

Tenure	% under occupied	% over occupied
Owner occupied with mortgage	31.8	1.8
Owner occupied no mortgage	51.0	0.6
Private rented	5.4	4.0
Council rented	15.9	8.4
HA rented	7.7	4.6
Shared ownership*	7.1	7.1
Tied to employment / other*	17.6	0.0

(\* Low volume of data).

- 4.3.9 The Council rented over-occupation level was relatively high in our data at 8.4%, compared to the all tenure figure of 2.5% and double the average of all East Sussex Authorities average of 4.7.
- 4.3.10 Under occupation within the owner occupied no mortgage sector (51.0%), which will include a higher proportion of elderly households, was below the level of around 63% found in the most recent survey. Council rented under-occupation was low at 15.9% 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
Full-time employee (30+ hours)	36.3	38,745
Wholly retired	28.5	30,402
Part-time employee (up to 30 hours)	11.0	11,758
Self-employed	9.2	9,788
Looking after the home	5.6	5,955
Permanently sick / disabled	4.9	5,216
Unemployed / available for work	2.8	2,972
In full-time education	1.5	1,645
On Government training scheme	0.2	264
<b>Total</b>	<b>100.0</b>	<b>106,745</b>

- 4.3.11 93.8% of Heads of Households responded to the question on employment. 56.5% 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. 28.5% were retired – somewhat below the average in our survey experience. 2.8% indicated that they were unemployed and available for work, higher than 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

<b>Occupation</b>	<b>%</b>	<b>N<sup>os</sup> implied</b>
Professional	50.9	33,645
Managerial / Technical	18.0	11,937
Skilled, manual	6.6	4,358
Skilled, non manual	6.1	4,046
Unskilled	5.6	3,727
Partly skilled	4.5	2,948
Other	8.3	5,480
<b>Total</b>	<b>100.0</b>	<b>66,141</b>

4.3.12 In the case of occupation type 58.1% (66,141 implied) of the sample responded, broadly in line with the proportion indicating that they were in work in Table 4-22 above. Of those, 50.9% described themselves as professional.

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

Question 14h

<b>Workplace</b>	<b>%</b>	<b>N<sup>os</sup> implied</b>
Brighton & Hove	63.3	38,657
Crawley / Mid Sussex	8.2	5,010
London	7.0	4,272
Work from home	4.6	2,820
Elsewhere in South East	4.6	2,794
Worthing	3.3	2,035
Elsewhere in UK	2.5	1,550
Lewes	2.0	1,224
Adur	1.5	901
Eastbourne	1.1	680
Abroad	0.6	381
Wealden	0.5	275
Rother	0.3	154
Arun	0.3	182
Hastings	0.2	138
<b>Total</b>	<b>100.0</b>	<b>61,073</b>

4.3.13 92.3% of those responding to the question on occupation also responded to a further question on the location of their workplace. 63.3% of heads of household worked in Brighton & Hove.

- 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. 97.5% respondents answered the ethnic origin question. The results largely mirrored the Census 2001 data in terms of the British and other white proportion but differed in the make-up of then other 7% of the returns. BME households were also interviewed to a specific questionnaire as a sub-regional group across East Sussex.

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

Question 14b

<b>Ethnic Origin</b>	<b>%</b>	<b>N<sup>os</sup> implied</b>	<b>Local Area Census 2001 *</b>
British	88.3	98,355	88.0
Other White	4.7	5,220	4.6
Irish	1.7	1,861	1.6
Other mixed	1.3	1,489	0.6
White & Asian	0.8	910	0.6
White & Black Caribbean	0.6	708	0.3
White & Black African	0.5	568	0.4
Chinese	0.4	501	0.5
Other Asian background	0.4	422	0.4
Indian	0.3	381	0.9
Caribbean	0.2	271	0.2
African	0.2	203	0.6
Other Black background	0.2	176	0.1
Bangladeshi	0.1	140	0.4
Pakistani	0.1	51	0.2
Other	0.2	196	0.6
<b>Total</b>	<b>100.0</b>	<b>111,452</b>	<b>100.0</b>

*No data for gypsy / traveller*

\* © Crown Copyright (Census)

- 4.3.15 Two further questions related to cars and travel. The first asked how many cars respondents had in their household. 35.0% had no car based on a response rate of 87.2%.

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

Question 15

	%	N <sup>os</sup> implied
One	47.1	46,734
Two	15.4	15,291
Three or more	2.5	2,472
None	35.0	34,751
<b>Total</b>	<b>100.0</b>	<b>99,248</b>

4.3.16 47.7% of Heads of Household working / in education travelled to work / college by car.

#### 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 36.6% of households (41,606 implied) - or 93.8% of households indicating a rented tenure.

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

Question 16a

Weekly rent	%	Cum %
Under £60 pw / £260 pm	21.6	21.6
£60 - £70 pw / £260 - £300 pm	12.1	33.7
£71 - £80 pw / £301 - £350 pm	7.1	40.8
£81 - £100 pw / £351 - £430 pm	8.9	49.7
£101 - £150 pw / £431 - £650 pm	29.4	79.1
£151 - £200 pw / £651 - £865 pm	15.9	95.0
£201 - £250 pw / £866 - £1,080 pm	2.7	97.7
£251 - £300 pw / £1,081 - £1,300 pm	0.9	98.6
Above £300 pw / £1,300 pm	1.4	100.0

4.4.2 The table indicates that only 21.6% of renters in the sample paid less than £60 per week; 40.8% less than £80 per week. 40.3% of those renting were in the social rented sector.

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

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

Question 16a by Question 1

Weekly rent	Private rented	Council rented	HA rented
Below £60 pw / - £260 pm	3.4	64.3	15.1
£60 - £70 pw / £260 - £300 pm	3.0	26.5	25.2
£71 - £80 pw / £301 - £350 pm	4.1	4.6	28.2
£81 - £100 pw / £351 - £430 pm	10.6	1.1	17.0
£101 - £150 pw / £431 - £650 pm	46.4	1.9	10.8
£151 - £200 pw / £651 - £865 pm	25.5	1.5	2.4
£201 - £250 pw / £866 - £1,080 pm	3.9	0.1	0.6
£251 - £300 pw / £1,081 - £1,300 pm	1.3	0.0	0.7
Above £300 pw / £1,300 pm	1.8	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

4.4.4 21.1% of private sector rents appeared to be relevant to households on lower incomes (i.e. under £100 per week). 64.3% of Council rents were below £60 per week. HA rents continue to be significantly higher than Council rents but well below market rents.

4.4.5 The next table shows that, of the 58.3% (66,406 implied) responding to this question as homeowners in the sample (95.9% of owner occupiers), 42.9% had no mortgage and a further 20.4% paid less than £450 per month.

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

Question 16b

Monthly mortgage	%	Cum %
Nil	42.9	42.9
Below £250	6.1	49.0
£250 - £350	6.9	55.9
£351 - £450	7.4	63.3
£451 - £600	11.4	74.7
£601 - £750	9.1	83.8
£751 - £1,000	8.1	91.9
£1,001 - £1,250	3.7	95.6
Above £1,250	4.4	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	20.2	20.2	21.6
£10,000 - £20,000	22.8	43.0	48.4
£20,001 - £27,500	14.0	57.0	
£27,501 - £32,500	8.8	65.8	
£32,501 - £40,000	9.5	75.3	30.0
£40,001 - £50,000	8.7	84.0	
£50,001 - £60,000	5.6	89.6	
£60,001 - £75,000	4.5	94.1	
£75,001 - £100,000	3.2	97.3	
Above £100,000	2.7	100.0	

\* Source: DWP Family Resources Survey 2002-2003, © Crown Copyright

- 4.4.7 The response rate to the income question was 75.7% and should give a good picture of the income levels in the City. The table shows that 20.2% of households had incomes below £10,000, slightly below the corresponding UK figure (21.6%). The total proportion in the City earning below the approximate national average household income of £27,300 per annum was 56.6%, below the average for the UK as a whole (63.6%). 34.2% of the households in the City on the basis of the survey data had incomes above £32,500 per annum, well above the UK average (30.0%).
- 4.4.8 Cross-tabulation produced the following split of income levels by tenure for the five main tenure types.

**Table 4-31 Annual Income by Tenure**  
Question 16c by Question 1

Tenure	Below £10k	£10k - £20k	£20k - £27.5k	£27.5k - £32.5k	£32.5k - £40.0k
Owner occupier– mortgage	4.2	13.0	13.8	12.7	14.0
Owner occupier– outright	27.5	35.0	13.1	5.2	5.7
Private rented	24.4	24.0	18.7	8.8	9.7
Council rented	57.7	29.0	6.5	2.5	1.0
HA rented	57.6	34.6	1.6	4.0	1.2

Tenure	£40.0k- £50k	£50k- £60k	£60k - £75k	£75k - £100k	Above £100k	Total
Owner occupier– mortgage	13.8	10.1	7.7	6.2	4.5	<b>42.3.0</b>
Owner occupier– outright	4.5	3.1	2.3	1.1	2.5	<b>13.5.0</b>
Private rented	7.0	2.3	3.0	1.6	0.5	<b>14.4.0</b>
Council rented	2.2	1.1	0.0	0.0	0.0	<b>3.3.0</b>
HA rented	1.0	0.0	0.0	0.0	0.0	<b>1.0</b>

- 4.4.9 The profiles were largely as would be expected 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. Council rented sector incomes were concentrated (86.7%) below £20,000 per annum. Private rented sector incomes were generally much higher than Council rented sector incomes but 48.4% were still below £20,000 per annum. HA rented incomes were marginally lower than Council rented incomes with 92.2% below £20,000, suggesting, in conjunction with our comment at 4.4.4 above, that the claim of housing cost on disposable incomes was considerably higher in that sector.
- 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 The 2004 Annual Survey of Hours and Earnings (ASHE) data shows that the mean incomes of people in work in Brighton & Hove have increased by only 9.21% between 2001 and 2004, around 3% p.a. In 2004 the median income was £21,328 p.a. and 75% of all employees earned below £29,378 p.a.
- 4.4.12 35.5% of households were in receipt of financial support (40,408 implied), well 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 1.7 forms of financial support.

**Table 4-32 Financial Support**

Question 16d

Support	Responses %	Households %	N <sup>os</sup> implied
Housing Benefit	31.0	52.8	21,339
Income Support	16.9	28.8	11,654
Disability Allowance	16.0	27.2	11,008
Working Family Tax Credit	12.6	21.4	8,650
Pensions Credit	10.1	17.2	6,961
Job Seekers Allowance	3.7	6.3	2,553
Other	9.7	16.5	6,675
<b>Total</b>	<b>100.0</b>		<b>68,840</b>

- 4.4.13 52.8% of households responding were in receipt of Housing Benefit (21,339 implied) or 48.1% 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 Brighton & Hove. The responses from 94.8% of the sample (107,954 implied) to a multiple choice question are set out in Table 4-33 below, with each respondent making 3.3 choices on average.



**Table 4-33**      **Types of Housing Needed in Brighton & Hove**

Question 37

<b>Type</b>	<b>Responses %</b>	<b>Households %</b>	<b>N<sup>os</sup> implied</b>
Affordable housing for local people	21.5	70.7	76,278
Housing for young people	15.1	49.5	53,425
Housing for Key Workers	14.2	46.4	50,316
Housing for families	13.5	44.3	47,803
Environmentally friendly housing	11.4	37.4	40,425
Housing for older people	10.9	35.7	38,589
Housing for disabled people	9.6	31.4	33,856
No more housing required	1.3	4.4	4,780
No opinion	2.5	8.1	8,708
<b>Total</b>	<b>100.0</b>		<b>354,180</b>

- 4.5.2 As usual in our surveys where a development question is posed, the highest proportion opted for affordable housing for local people with 70.7% making it one of their choices.

## 5 MIGRATION

### 5.1 In Migration to Brighton & Hove

- 5.1.1 This section looks at the patterns of migration for the Brighton & Hove area. In the first part of the section we asked the 32,106 implied households (28.2% of the sample) who had moved in the last 2 years where they had moved from. 66.2% had previously lived within Brighton & Hove.
- 5.1.2 Of those households in-migrating to the Borough, 4.9% had moved from elsewhere within UK (i.e. from beyond the South East). A further 11.9% moved from London and the South East, and 4.5% from Crawley / Mid Sussex. There were very low levels of in-migration from authorities within East Sussex, the highest levels were from Eastbourne (0.8%) and Hastings (0.8%). The inward flow from the other authorities was slightly less; Lewes (0.4%), Rother (0.3%) and Wealden (0.3%).

**Table 5-1**            **Location of Previous Dwelling**  
Question 4a

Location	%	N <sup>os</sup> implied
Within Brighton & Hove	66.2	21,246
Elsewhere in South East	10.1	3,245
Abroad	7.1	2,285
Elsewhere in UK	4.9	1,564
Crawley / Mid Sussex	4.5	1,455
London	1.8	578
Adur	1.5	469
Worthing	1.1	354
Eastbourne	0.8	273
Hastings	0.8	244
Lewes	0.4	127
Rother	0.3	97
Wealden	0.3	89
Arun	0.2	80
<b>Total</b>	<b>100.0</b>	<b>32,106</b>

- 5.1.3 Those who had moved within the last 2 years were then asked what the most important reason was for moving home. 85.6% (27,466 implied) of the group indicating a move responded to the question.

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

Question 4d

Reason	%	N <sup>os</sup> implied
Needed more space	26.7	7,340
New job	10.6	2,905
Wanted to buy	10.6	2,913
Relationship / family breakdown	10.4	2,867
Move to a cheaper home	7.2	1,979
Education	6.1	1,660
Health reasons	6.0	1,636
New relationship	5.9	1,617
To be near relative	5.1	1,388
Closer to work	4.6	1,274
Retirement	3.7	863
Needed less space	3.1	1,024
<b>Total</b>	<b>100.0</b>	<b>27,466</b>

- 5.1.4 The need for more space (26.7%) was the most common reason given for moving in contrast with the results in our recent surveys in which employment reasons have been the most popular choice.
- 5.1.5 89.2% of the group indicating a move (28,624 implied) answered a further question on whether the move was to a first home. 84.6% said that it was not their first home.

## 5.2 Out-Migration from Brighton & Hove

- 5.2.1 Out-migration is expected to account for 33.6% of all moves for both existing and concealed households over the next 3 years (10,701 moves implied). Out-migration will account for 35.7% (9,205 implied) of all intended moves for existing households and 32.7% (1,496) in the case of concealed households over the next 3 years.
- 5.2.2 Those moving out of the City were asked where they were thinking of moving to. In this case 8,784 implied existing households (95.4%) and 1,422 implied concealed households (95.1%) responded to the question.

**Table 5-3 Location of Move for those Moving Outside Brighton & Hove**  
Question 17c

Location	Existing households		Concealed households	
	%	N <sup>os</sup> implied	%	N <sup>os</sup> implied
Elsewhere in UK	27.4	2,410	40.2	571
Abroad	20.7	1,818	12.1	172
Elsewhere in South East	16.6	1,460	20.4	290
London	12.6	1,105	29.7	422
Crawley / Mid Sussex	7.2	630	3.8	54
Eastbourne	6.3	553	2.0	28
Adur	6.2	542	3.7	53
Lewes	6.0	524	1.7	24
Worthing	5.5	486	3.7	53
Arun	2.1	187	1.5	22
Hastings	1.9	170	0.0	0
<b>Total</b>		<b>9,885</b>		<b>1,689</b>

(No data for Rother)

- 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 27.4% of existing households moving and 40.2% of concealed households moving giving that location.
- 5.2.4 In the case of existing households a more significant proportion were interested in moving abroad (20.7%). For new households the second most common focus of interest was London (29.7%).
- 5.2.5 Those moving out of the City were asked their reasons for moving away. 8,382 implied existing households, 91.1% of those intending to move out of the City, and 1,373 implied concealed households, 91.8% of those intending to move outside the City, responded to a multiple choice question, offering around 1.9 choices in the case of existing households and 1.6 in the case of new households.

**Table 5-4 Reason for Moving Out of Brighton & Hove**  
Question 17d

Reason	Existing Households		Concealed households	
	% households	N <sup>os</sup> implied	% households	N <sup>os</sup> implied
Lack of affordable housing to buy	39.6	3,323	24.7	339
Employment	29.3	2,455	50.4	692
Safety / fear of crime	22.7	1,904	1.9	27
Lack of affordable housing to rent	19.5	1,633	9.0	124
To be near family / carer	17.8	1,488	5.6	77
Retirement	14.1	1,179	0.0	0
Better access to work	13.6	1,144	19.3	265
Better shops / leisure facilities	13.0	1,089	25.6	351
To start a family	12.2	1,023	1.5	20
Better education facilities	12.1	1,013	25.6	351
<b>Total</b>		<b>16,251</b>		<b>2,246</b>

- 5.2.6 The single most common reason given by existing households moving outside the City was lack of affordable housing to buy (39.6%), followed by employment (29.3%) and safety/fear of crime (22.7%). In the case of concealed households moving, choices were more focused on employment reasons (50.4%) and better education facilities (25.6%) as might be expected from a group likely to have a younger profile, although interest in a lack of affordable housing was chosen by a smaller proportion of the concealed households moving group. The latter also indicated a higher level of interest in shopping / leisure facilities (25.6%).

### 5.3 Migration Summary

- 5.3.1 This table reflects the net migration position for existing Brighton & Hove households only. The Sub-regional report will examine cross boundary movement between all Councils in greater detail.

**Table 5-5 Existing Households**

Migration Areas	Eastbourne	Lewes	Hastings	Rother	Wealden
Moving Into Brighton & Hove from	273	127	244	97	89
Moving Out of Brighton & Hove to	553	524	170	- nd -	- nd -
Net Migration	- 280	- 397	74	97	89

Reasons	Retirement	Employment	Education
Moving Into Brighton & Hove	863	2,905	1,660
Out of Brighton & Hove	1,179	2,455	1,013
<b>Net Impact</b>	<b>- 316</b>	<b>+ 450</b>	<b>+ 647</b>

- 5.3.2 There is a positive net level of in-migration relating to employment of 450 existing households but 692 concealed households are also out-migrating resulting in a negative net position.

## 6 FUTURE HOUSING REQUIREMENTS

### 6.1 Moving Households within Brighton & Hove

- 6.1.1 Moving intentions were tested in several sections of the questionnaire with an emphasis on future plans to move within the City 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 26.5% of all households responding (30,270 implied) planned a move. A further 10.0% (11,472 implied) indicated that they wished to move but were unable to do so.
- 6.1.3 The scale of movement implied, at an average of around 8.8% per annum, was much higher than that found in other recent surveys carried out by DCA in which an average annual figure of 4.8% has emerged (but the figure includes periods of up to 5 years). This proportion would rise to 12.2% 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 1.7 choices on average. However, the number of implied households responding was 13,771, not 11,472 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 by far the most important factor with 56.4% indicating an inability to afford to move / buy another house and 21.5% a lack of affordable rented housing.

**Table 6-1**            **Reasons Preventing a Move**

Question 17e

Reason	% responses	% households	N <sup>os</sup> implied
Unable to afford to buy a new home	39.3	67.3	9,262
Lack of affordable rented housing	21.5	36.8	5,062
Unable to afford to move	17.1	29.2	4,019
Location of employment	4.1	7.1	977
Family reasons	2.9	4.9	672
Local education choices	2.5	4.3	586
Other	12.6	21.6	2,969
<b>Total</b>	<b>100.0</b>		<b>23,547</b>

## 6.2 Housing Needs of Existing Households Moving Within Brighton & Hove

- 6.2.1 The percentages in all tables in this section (except cross tabulations) have been applied to the control total of 16,590 implied existing households moving within the City, 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 City. 43.6% of the group were owners; 46.1% tenants in private rented property. Only 8.6% were Council rented sector tenants as compared with around 12% for the social rented sector in recent DCA surveys.

**Table 6-2 Current Tenure of Existing Households Moving Within Brighton & Hove**  
Question 17b by Question 1

Tenure	% of moving households	N <sup>os</sup> implied
Owner occupier with a mortgage	35.1	5,821
Owner occupier no mortgage	8.5	1,408
Private rented	46.1	7,660
Council rented	6.1	1,007
HA rented*	2.5	415
Tied to employment / other*	1.7	279
<b>Total</b>	<b>100.0</b>	<b>16,590</b>

(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	47.2	7,830
1 - 2 years	32.3	5,359
2 – 3 years	20.5	3,401
<b>Total</b>	<b>100.0</b>	<b>16,590</b>

- 6.2.3 The table shows that 47.2% 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
Flat / maisonette	37.4	6,205
Semi-detached	27.7	4,595
Terraced	14.2	2,356
Detached	9.3	1,543
Bungalow	8.5	1,410
Supported housing	1.8	299
Bedsit / studio / room only	1.1	182
<b>Total</b>	<b>100.0</b>	<b>16,590</b>

(No data for caravan / mobile home)

- 6.2.4 Table 6-4 indicates that only 9.3% of these respondents felt that they required detached houses – far below the average for this group found in recent DCA surveys (32.0%). Interest in flats / maisonettes at 37.4% was high and far above that found in recent DCA surveys (8.0%).

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

Question 20

Bedrooms	%	N <sup>os</sup> implied
One	19.9	3,302
Two	40.1	6,653
Three	28.0	4,645
Four	9.9	1,642
Five or more	2.1	348
<b>Total</b>	<b>100.0</b>	<b>16,590</b>

- 6.2.5 68.1% of existing household moving respondents indicated that they required two or three bedroom accommodation. The requirement for one bedroom accommodation (19.9%) was far higher than that found in other recent surveys carried out by DCA in which 8% has been around the average, as would be expected given the high level of interest in flats / maisonettes indicated 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 Question 20

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	0.5	25	27.0	1,247	55.7	2,575	14.5	672	2.3	105	<b>4,624</b>
Detached	0.0	0	19.2	299	35.3	550	34.5	538	11.0	172	<b>1,559</b>
Terraced*	1.4	32	51.0	1,202	33.5	790	10.8	255	3.3	78	<b>2,357</b>
Flat / maisonette	44.4	2,741	49.2	3,043	5.1	315	1.3	80	0.0	0	<b>6,179</b>
Bungalow	8.6	119	54.6	752	29.9	412	6.9	95	0.0	0	<b>1,378</b>
Bedsit / studio / room only *	100.0	193	0.0	0	0.0	0	0.0	0	0.0	0	<b>193</b>
Supported housing*	71.7	215	28.3	85	0.0	0	0.0	0	0.0	0	<b>300</b>
<b>Total</b>		<b>3,325</b>		<b>6,628</b>		<b>4,642</b>		<b>1,640</b>		<b>355</b>	<b>16,590</b>

(\* low volume of data)

- 6.2.7 54.6% of bungalow demand was for 2-bed accommodation. 45.5% of detached demand favoured 4+ bed accommodation; 35.3% for 3-bed accommodation. 55.7% of semi-detached demand was for 3-bed accommodation; 27.0% for 2-bed accommodation. 51.0% of terraced house demand was for 2-bed accommodation, as was 49.2% of demand for flats / maisonettes. 44.4% of demand for the latter was for 1-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	69.0	11,447
Private rented	13.0	2,157
Council rented	12.4	2,057
HA rented	4.9	813
HA shared ownership	0.7	116
<b>Total</b>	<b>100.0</b>	<b>16,590</b>

(No data for 'tied to employment')

- 6.2.9 69.0% (11,447 implied) saw owner occupation as their preference – below the average found in recent DCA surveys (around 73%). 17.3% 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 (2,870 implied) was higher than the number of social rented tenants indicating an intention to move in Table 6-2 above (1,422 implied) and implies a required turnover of 16.1% in the three year period.
- 6.2.10 Of those hoping to move into Council housing 42.7% were already Council tenants; 43.3% were moving from private rented accommodation; 12.2% from HA rented accommodation.
- 6.2.11 Existing households moving were also asked, if they had to move, could they afford an alternative suitable sized home within Brighton & Hove. 44.8% of respondents said they would be able to afford such a move, but 55.2% would not be able to afford a suitable alternative home in Brighton & Hove.
- 6.2.12 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 Question 21

Type	Owner occupation		Private rented		Council 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>	N <sup>OS</sup>
Semi-detached	82.7	3,631	3.4	149	11.4	501	2.5	109	0.0	0	<b>4,390</b>
Detached	86.9	1,330	1.6	25	11.5	176	0.0	0	0.0	0	<b>1,531</b>
Terraced	82.7	1,981	13.0	310	4.3	104	0.0	0	0.0	0	<b>2,395</b>
Flat / maisonette*	55.0	3,493	22.7	1,445	11.8	751	8.6	547	1.9	122	<b>6,358</b>
Bungalow	64.0	901	4.6	64	27.9	393	3.5	49	0.0	0	<b>1,407</b>
Bedsit / studio / room only*	13.5	27	73.0	146	0.0	0	13.5	27	0.0	0	<b>200</b>
Supported housing*	27.2	84	0.0	0	45.9	142	26.9	83	0.0	0	<b>309</b>
<b>Total</b>		<b>11,447</b>		<b>2,139</b>		<b>2,067</b>		<b>815</b>		<b>122</b>	<b>16,590</b>

(\*Low volume of data).

- 6.2.13 36.3% of demand in the Council rented sector was for flats/maisonettes housing; 24.2% for semi-detached houses. 31.7% of owner-occupation demand was for semi-detached houses; 30.5% for flats/maisonettes. 67.8% of demand in the private rented sector was for flats/maisonettes.
- 6.2.14 86.9% of demand for detached houses; 82.7% of demand for semi-detached and terraced houses; 64.0% of demand for bungalows and 55.0% of demand for flats/maisonettes was for owner-occupation. 27.9% of demand for bungalows was for Council rented accommodation; 22.7% of demand for flats/maisonettes was for private rental accommodation.
- 6.2.15 14.0% of existing moving households (2,319 implied) were registered on a housing waiting list, 92.0% indicating registration on the Brighton & Hove Council list. 32.6% were registered with another Council.
- 6.2.16 Existing households moving were asked where accommodation was required. Up to two choices were invited but on average only 1.6 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)
Sub-Area 3	31.8	49.4	7,322	686
Sub-Area 4	24.0	37.3	5,525	693
Sub-Area 2	20.9	32.5	4,816	616
Sub-Area 1	10.2	15.9	2,363	585
Sub-Area 5	7.1	11.0	1,629	310
Sub-Area 6	6.0	9.4	1,396	235
<b>Total</b>	<b>100.0</b>		<b>23,051</b>	<b>3,125</b>

See Table 3-4 for sub-areas

- 6.2.17 Interest was predominantly for sub areas 2, 3 and 4 with the largest single sub area demand being for sub area 3.
- 6.2.18 We ran a separate cross tabulation looking at the locations required by those seeking Council rented accommodation who made 1.7 choices on average. Demand among those seeking Council rented accommodation was more focused on sub area 1; less on sub-area 3.
- 6.2.19 The final question in this section asked respondents why they preferred a particular location. The average number of choices was 2.8. Quality of neighbourhood was by some margin the most common reason given with 60.4% making it one of their choices. A clear second choice was nearness to better shopping/leisure facilities (41.5%). Familiarity with the area ('always lived here') was less of a focus than usually found in our surveys.

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

Question 26

Reason	% responses	% households	N <sup>os</sup> implied (all choices)
Quality of neighbourhood	21.4	60.4	9,028
Nearer / better shopping / leisure facilities	14.7	41.5	6,205
Employment / closer to work	10.8	30.6	4,569
Better public transport	10.7	30.2	4,518
Always lived here	10.0	28.3	4,227
Near family / carer	6.7	18.9	2,832
Nearer / better schools / colleges	6.4	18.0	2,692
Greater availability of larger homes	6.1	17.2	2,571
Greater availability of cheaper housing	4.9	13.7	2,052
Nearer hospital / doctor	3.7	10.4	1,555
Greater availability of smaller homes	2.8	7.9	1,178
More homes suitable for adaptation	1.8	5.1	766
<b>Total</b>	<b>100.0</b>		<b>42,193</b>

## 6.3 Needs of Concealed Households Moving Within Brighton & Hove

- 6.3.1 In this section we look in detail at those people living in an existing household but are described as a 'concealed' household which we take as a proxy for the extent of 'concealment' of housing need within the City. 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 4,579 households with one concealed household (as per Q17b on the nature of move) and 1,238 with a second concealed household (based on the average responses in the detailed data tables), giving a total of 5,817 concealed households in the City.
- 6.3.3 The tables below show both the findings for all concealed households planning to move within the next 3 years (5,817 households) and the findings for those moving within the next 12 months (2,007 households).
- 6.3.4 The vast majority (65.4%) of the total of concealed households consisted of people described as children of the household as set out in Table 6-11 below. Brighton & Hove the proportion of lodgers was high in our experience at 18.4%. The level of relationship breakdown at 4.4% is slightly higher than normal (below 4%).

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

Persons forming household	%	N <sup>os</sup> implied
Children 16 +	65.4	3,804
Lodger	18.4	1,070
Friend	6.7	390
Partner / Spouse	4.4	256
Other relative	3.3	192
Parent / grandparent	1.8	105
<b>Total</b>	<b>100.0</b>	<b>5,817</b>

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

Age	%	N <sup>os</sup> implied
16 – 19	19.0	1,390
20 – 29	58.5	4,291
30 – 44	16.3	1,192
45 – 59	3.4	253
60 – 74	2.5	181
75 +	0.3	24
<b>Total</b>	<b>100.0</b>	<b>7,331</b>

- 6.3.5 The age question refers to individual adult household members. Table 6-12 above suggests 19.0% of concealment related to the 16 - 19 age group with 77.5% relating to all those under 30 years of age, in other East Sussex Authorities the average the age groups were consistent with the findings in Brighton with an average of 82% below the age of 30.

**Table 6-13 Number of Children**

Question 28d

Children	%	N <sup>os</sup> implied
Child due	0.4	23
One	4.1	239
Two	1.0	58
None	94.5	5,497
<b>Total</b>	<b>100.0</b>	<b>5,817</b>

- 6.3.6 The survey found that children (under the age of 16) were involved in only 5.5% of all cases (320 implied) but 16.7% of those immediately forming.
- 6.3.7 We asked if the new household was being formed as a single or couple household. 72.7% indicated formation as a single person household. We also asked those indicating a couple household, where their partner was currently living. In 48.4% of cases the partner was living elsewhere within Brighton & Hove; in 29.6% of cases in the existing household; in 22.0% of cases outside Brighton & Hove.

**Table 6-14 Time of Move**

Question 30

When required	%	N <sup>os</sup> implied
Within 1 year	34.5	2,007
1 - 2 years	31.4	1,826
2 - 3 years	34.1	1,984
<b>Total</b>	<b>100.0</b>	<b>5,817</b>

- 6.3.8 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 the City would be 1,916.
- 6.3.9 Guidance also requires that double counting is avoided and the following numbers, relating to two person formation with a partner living elsewhere in the City and those already on the Housing Register, are removed.

**Table 6-15 Double Counting Removal**

9. New household formation (gross p.a.)	1,916
10. MINUS - Two person formation (13.2%) x 0.5	<u>126</u>
	1,790
11. MINUS - Households registered on waiting list (2.2%)	<u>39</u>
<b>Total</b>	<b>1,751</b>

- 6.3.10 The net level of 1,751 households is that considered to form each year and is used in the Assessment Model at Section 11.2.

- 6.3.11 34.5% (2,007 implied) of those in the concealed households moving group required accommodation within one year, compared with 47.2% 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
Private rented	50.0	2,908	53.0	1,064
Owner occupation	30.3	1,763	29.6	594
Council rented	14.1	820	8.8	177
HA shared ownership	2.9	169	5.7	114
HA rented	2.7	157	2.9	58
<b>Total</b>	<b>100.0</b>	<b>5,817</b>	<b>100.0</b>	<b>2,007</b>

(No data for 'tied to employment')

- 6.3.12 The highest proportion (50.0%) of all concealed households moving say their need is for private rented accommodation. Those moving within a year had a similar profile but with a lower proportion opting for Council rented accommodation.

**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	53.3	3,100	41.2	827
Private rented	24.1	1,402	29.4	590
Council rented	11.9	692	12.5	251
HA rented	5.6	326	5.7	114
HA shared ownership	4.4	256	9.3	187
Tied to employment	0.7	41	1.9	38
<b>Total</b>	<b>100.0</b>	<b>5,817</b>	<b>100.0</b>	<b>2,007</b>

(No data for 'tied to employment')

- 6.3.13 In the case of tenure preference, the choices of all concealed households moving were, not surprisingly, more aspirational, with higher preference for owner occupation over the other forms of tenure but still only at 41.2%. Concealed households moving within one year indicated a lower level of preference for owner occupation than for all concealed households moving, with a higher level of interest in private rented accommodation or shared ownership.

**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	63.3	3,682	58.5	1,174
Terraced	14.3	832	18.0	361
Bedsit / studio / room only	14.1	820	13.3	267
Semi-detached	5.7	332	6.0	121
Detached	0.9	52	0.0	0
Bungalow	0.8	47	2.3	46
Supported housing	0.6	35	1.9	38
Caravan / mobile home	0.3	17	0.0	0
<b>Total</b>	<b>100.0</b>	<b>5,817</b>	<b>100.0</b>	<b>2,007</b>

6.3.14 The results from the survey showed a different profile from existing households moving, as might be expected for a generally younger group. 63.3% of all concealed moving households required flats / maisonettes, higher than the level of 40-50% commonly found in our surveys. Demand for bedsits was unusually high at 14.1%. The profile of those moving within 1 year was broadly similar but with slightly more interest in terraced houses.

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

Question 31b

Bedrooms	All concealed households moving		Concealed households moving within one year	
	%	N <sup>os</sup> implied	%	N <sup>os</sup> implied
Flats / maisonette	51.8	3,013	42.5	853
Terraced	16.6	966	19.1	383
Semi-detached	16.0	931	20.8	418
Detached	10.3	599	8.5	171
Bedsit / studio / room only	3.2	186	5.7	114
Bungalow	1.1	64	1.4	28
Supported housing	1.0	58	2.0	40
<b>Total</b>	<b>100.0</b>	<b>5,817</b>	<b>100.0</b>	<b>2,007</b>

(No data for caravan / mobile home)

- 6.3.15 The more aspirational view, usually reflected amongst all concealed households moving on preference for type (i.e. more houses; fewer flats,) could be seen but was not as evident in Brighton & Hove as in most of our other recent surveys. The position in relation to those moving within 1 year was broadly similar but with a somewhat higher shift from flats / maisonette to houses.

**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	63.7	3,706	64.7	1,299
Two	29.4	1,710	31.3	628
Three	6.4	372	4.0	80
Four or more	0.5	29	0.0	0
<b>Total</b>	<b>100.0</b>	<b>5,817</b>	<b>100.0</b>	<b>2,007</b>

- 6.3.16 In line with the proportion of flats/maisonettes indicated in Table 6-18 above, 63.7% of all new household need was for one bedroom. The profile for those moving within a year was much the same.

**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	26.5	1,542	29.0	582
Two	56.2	3,269	60.3	1,210
Three	14.5	843	8.2	165
Four or more	2.8	163	2.5	50
<b>Total</b>	<b>100.0</b>	<b>5,817</b>	<b>100.0</b>	<b>2,007</b>

- 6.3.17 The results for all concealed households moving reflected the interest in larger house types referred to at 6.3.15 above in that preference for 2-bed properties was much higher (56.2%) as compared with need (29.4%) at Table 6-20. The results for concealed households moving within one year show a slightly higher level of interest in 2-bed properties, compatible with our comment at 6.3.15 above on the somewhat higher shift from flats/maisonettes in the type preferred.



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

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

Question 31a by Question 32a

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	11.9	40	41.1	138	47.0	158	<b>336</b>
Detached*	56.4	31	43.6	24	0.0	0	<b>55</b>
Terraced	6.2	52	74.7	626	191	160	<b>838</b>
Flat / maisonette	73.8	2,713	23.9	879	2.3	83	<b>3,675</b>
Bedsit / studio / room only	95.6	773	4.4	36	0.0	0	<b>809</b>
Bungalow*	57.4	27	42.6	20	0.0	0	<b>47</b>
Supported house*	100.0	37	0.0	0	0.0	0	<b>37</b>
Caravan / mobile home*	100.0	20	0.0	0	0.0	0	<b>20</b>
<b>Total</b>		<b>3,693</b>		<b>1,723</b>		<b>401</b>	<b>5,817</b>

(No data for 4-bed+)

- 6.3.19 As might be expected 73.8% of demand for flats / maisonettes is for 1-bed property; 23.9% for 2-bed property. 74.7% demand for terraced housing is for 2-bed property. 47.0% of demand for semi-detached houses is for 3-bed property.

**Table 6-23 Type Needed by Tenure Needed**  
Question 31a by Question 29a

Type	Owner Occupation		Private rented		Council 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>	N <sup>os</sup>
Semi-detached	80.1	234	0.0	0	8.9	26	11.0	32	0.0	0	<b>292</b>
Detached	43.6	24	56.4	31	0.0	0	0.0	0	0.0	0	<b>55</b>
Terraced	54.2	468	35.9	310	2.7	23	2.4	21	4.8	41	<b>863</b>
Flat / maisonette	27.4	1,000	55.4	2,021	14.6	532	0.0	0	2.6	95	<b>3,648</b>
Bedsit / studio / room only	0.0	0	69.4	591	18.6	158	7.8	66	4.2	36	<b>851</b>
Bungalow	100.0	48	0.0	0	0.0	0	0.0	0	0.0	0	<b>48</b>
Supported housing	0.0	0	0.0	0	0.0	0	100.0	39	0.0	0	<b>39</b>
Caravan / mobile home	100.0	21	0.0	0	0.0	0	0.0	0	0.0	0	<b>21</b>
<b>Total</b>		<b>1,795</b>		<b>2,953</b>		<b>739</b>		<b>158</b>		<b>172</b>	<b>5,817</b>

- 6.3.20 55.7% of interest in owner occupied accommodation was for flats / maisonettes; 26.0% for terraced houses. 72.0% of interest in Council rented accommodation and 68.4% of interest in private rented accommodation was for flats / maisonettes.
- 6.3.21 80.1% of interest in semi-detached houses and 54.2% of interest in terraced houses was for owner occupied accommodation. 69.4% of interest in bedsits and 55.4% of interest in flats / maisonettes was in the private rented sector.
- 6.3.22 Only 2.6% of all concealed households moving (151 implied) were registered on a housing waiting list, all on the Brighton & Hove Council list. The proportion fell to 2.2% (45 implied) among concealed households moving within one year, all being on the Brighton & Hove Council list.
- 6.3.23 Concealed households were asked the same questions on location as existing households moving. Respondents gave around 1.5 choices on average in the case of both all concealed households and concealed households moving within one year, based on response rates of 93.4% and 92.3% respectively.

**Table 6-24 Choice of Location**

Question 34

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
Sub-Area 4	30.1	45.9	2,494	28.3	41.3	765
Sub-Area 3	28.5	43.5	2,363	33.4	48.9	904
Sub-Area 2	15.7	24.0	1,304	16.6	24.2	448
Sub-Area 1	13.9	21.1	1,149	12.7	18.5	342
Sub-Area 6	6.3	9.6	524	6.7	9.8	182
Sub-Area 5	5.5	8.4	456	2.3	3.3	61
<b>Total</b>	<b>100.0</b>		<b>8,290</b>	<b>100.0</b>		<b>2,702</b>

6.3.24 For both all concealed households moving and concealed households moving within one year interest was focused primarily on sub-areas 3 and 4.

**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)
Employment / closer to work	17.5	49.3	2,837	16.3	44.4	847
Quality of neighbourhood	14.7	41.5	2,387	13.7	37.4	712
Near family / carer	14.1	39.8	2,289	14.4	29.3	750
Better public transport	11.2	31.7	1,822	9.3	25.3	482
Always lived here	10.9	30.8	1,774	9.2	25.1	479
Nearer / better shopping / leisure facilities	10.6	29.8	1,717	12.0	32.8	626
Greater availability of cheaper housing	7.4	20.8	1,197	9.4	25.8	492
Greater availability of smaller homes	6.7	18.7	1,078	9.8	26.8	511
Nearer / better schools / colleges	4.4	12.5	720	3.7	10.0	191
More homes suitable for adaptation	2.5	7.0	401	2.2	6.0	114
<b>Total</b>	<b>100.0</b>		<b>16,222</b>	<b>100.0</b>		<b>5,204</b>

- 6.3.25 The most popular reason given by all concealed households moving was employment / closer to work (49.3%). The second most common was quality of neighbourhood (41.5%) just ahead of nearness to family / carer (39.8%). Familiarity with the area ('always lived here') was at a lower level than usually found in our surveys. The results for concealed households moving within one year differed to some extent but without any pronounced trend except perhaps in relation to a greater interest in the availability of smaller homes.

**Table 6-26 Maximum Weekly / Monthly Rent of Concealed Households**  
Question 36a

Weekly rent	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Below £50 pw / £215 pm	17.3	17.3	4.5	4.5
£50 - £60 pw / £215 - £260 pm	15.1	32.4	9.6	14.1
£61 - £70 pw / £261 - £300 pm	14.9	47.3	16.7	30.8
£71 - £80 pw / £301 - £350 pm	15.9	63.2	18.1	48.9
£81 - £100 pw / £351 - £430 pm	11.1	74.3	13.0	61.9
£101 - £150 pw / £431 - £650 pm	20.0	94.3	34.1	96.0
£151 - £200 pw / £651 - £865 pm	4.5	98.8	0.0	96.0
Above £200 pw / £865 pm	1.2	100.0	4.0	100.0

- 6.3.26 Responses were received from 76.5% (4,449 implied) of all concealed households moving. Of those, 32.4% are able and willing to pay a weekly rent of no more than £60; 63.2% no more than £80 (as compared with 40.8% in the existing household profile at Table 4-27). In the case of the movers within 1 year, 48.9% (1,382 implied) are able and willing to pay no more than £80 per week based on a 68.9% response.

**Table 6-27 Maximum Monthly Mortgage of 'Concealed' Households**  
Question 36c

Monthly mortgage	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Below £250	16.5	16.5	10.3	10.3
£250 - £300	20.5	37.0	20.3	30.6
£301 - £400	17.7	54.7	14.5	45.1
£401 - £500	24.2	78.9	28.5	73.6
£501 - £600	6.9	85.8	7.5	81.1
£601 - £750	8.6	94.4	11.5	92.6
Above £750	5.6	100.0	7.4	100.0

- 6.3.27 62.5% (3,633 implied) of all concealed households moving responded. For those seeking to buy a dwelling, 54.7% are not able or willing to pay a mortgage of more than £400 per month. In the case of concealed households moving within one year, 45.1% are not able or willing to pay a mortgage of more than £400 per month based on a 59.1% response (1,186 implied). The mortgage bands selected might reflect to some degree perceptions of the actual cost of access to home ownership.
- 6.3.28 87.8% (5,107 implied) of all concealed households responded to a question asking about the level of savings available to meet the deposit, stamp duty and legal costs on their new home. 53.3% had less than £1,000 savings; 27.7% had £1,000 - £5,000 savings. The proportion among those moving within a year based on a response rate of 85.1% was 55.3% with less than £1,000, 21.2% with £1,000 - £5,000 nearly 70.0% of immediately forming households. Only 15.5% have over £10,000, the level needed to purchase two bedroom accommodation.

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

Question 36d

Savings	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Under £1,000	53.3	53.3	55.3	55.3
£1,000 - £5,000	27.7	81.0	21.2	76.5
£5,001 - £10,000	8.6	89.6	8.0	84.5
£10,001 - £15,000	1.0	90.6	0.0	84.5
Above £15,000	9.4	100.0	15.5	100.0

6.3.29 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 36e

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 £15,000	46.9	46.9	2,728	33.9	33.9	680
£15,000 - £20,000	21.9	68.8	1,274	26.5	60.4	532
£20,001 - £27,500	15.0	83.8	872	19.8	80.2	398
£27,501 - £35,000	6.8	90.6	396	6.6	86.8	133
£35,001 - £37,500	1.3	91.9	76	1.7	88.5	34
£37,501 - £40,000	2.7	94.6	157	3.1	91.6	62
£40,001 - £42,500	0.5	95.1	29	0.0	91.6	0
£42,501 - £47,500	2.7	97.8	157	5.4	97.0	108
£47,501 - £50,000	0.5	98.3	29	1.5	98.5	30
£50,001 - £55,000	0.0	98.3	0	0.0	98.5	0
Above £55,000	1.7	100.0	99	1.5	100.0	30
<b>Total</b>	<b>100.0</b>		<b>5,817</b>			<b>2,007</b>

6.3.30 A response was received from 95.8% concealed household respondents (5,571 implied). The proportion of concealed households with annual incomes above the approximate average UK annual household income of £27,300 was 16.6%, the same as the average in recent DCA surveys. The proportion in the sub £15,000 per annum category was 46.9%. Concealed households moving within one year indicated a somewhat higher income profile, based on an 88.4% response (1,775 implied).

6.3.31 The current incomes of households who formed in the City over the last two years are only marginally higher than those about to form. 62% earn below £25,000 including 40% below £10,000, but 17.9% earn over £32,500 compared to 7%. These income levels are used in the Assessment Model calculation in Section 11.2.

6.3.32 On the basis of 84.4% response, 15.9% (779 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, only 7.7% (127 implied) would be likely to claim Housing Benefit based on a 81.7% 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 19.8% of households in the area did contain somebody with a disability, suggesting 22,362 households in the City 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 Council rented (44.3%) and HA rented (48.8%) figures are similar to the average for the social housing sector found in recent DCA surveys (around 39%) but are over double the average of all households and people with a disability are over double the proportion of this sector of all tenures. A similar pattern exists in the HA sector.
- 7.1.5 The level for owner occupiers with no mortgage (23.0%) 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	Tenure %	Disability %	N <sup>os</sup> implied
Owner occupied with mortgage	35.0	9.2	3,654
Owner occupied without mortgage	25.8	23.0	6,764
Private rented	22.3	14.1	3,544
Council rented	11.1	44.3	5,534
HA rented	4.6	48.8	2,521
Shared ownership*	0.2	40.3	93
Tied to employment / other*	1.0	22.4	252

\* low levels of data

- 7.1.6 In 86.0% of cases only one household member had a disability; in 14.0% two members had a disability. On this basis we identified 25,435 individuals in the City with a disability. However, the age profile and nature of disability data referred to below suggest marginally different totals.

- 7.1.7 The age groups of all disabled household members are shown in Table 7-2 below. 51.5% of all disabled household members were over the age of 60 including 27.9% over 75; 25.9% are under 45.

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

Question 10b

Age	%	N <sup>os</sup> implied
0 - 15	4.8	1,215
16 - 24	1.9	471
25 - 44	19.2	4,792
45 - 59	22.6	5,646
60 - 74	23.6	5,908
75+	27.9	6,976
<b>Total</b>	<b>100.0</b>	<b>25,008</b>

- 7.1.8 The next table shows the nature of the disability of members of the household. 21,649 implied responses were received to a multiple choice question from the 1<sup>st</sup> household member with a disability and 3,351 implied responses from the 2<sup>nd</sup> member, giving an average of 1.5 and 1.3 choices respectively for each household member.

**Table 7-3 Nature of Disability or Limiting Long-term Illness**

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	35.6	52.3	11,316	31.0	39.6	1,328
Limiting long-term illness	25.1	36.9	7,988	22.8	29.1	975
Mental health problem	12.3	18.1	3,912	14.5	18.5	621
Visual / hearing impairment	12.0	17.6	3,807	13.3	16.9	568
Wheelchair user	5.6	8.1	1,765	4.7	6.0	202
Learning disability	5.3	7.8	1,698	11.5	14.8	495
HIV / Aids	2.1	3.0	651	2.2	2.8	95
Drug / alcohol problem	2.0	3.0	646	0.0	0.0	0
<b>Total</b>	<b>100.0</b>		<b>31,783</b>	<b>100.0</b>		<b>4,284</b>

- 7.1.9 By far the largest group of people were those with a walking difficulty (52.3%). 8.1% of households contained a member who was a wheelchair user suggesting 1,765 in the City as a whole.
- 7.1.10 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 21.4% of cases (476 of the 2,228 at Table 7-7), suggesting a major mismatch between houses adapted and those where wheelchair users lived. It would appear that 1,289 households with a wheelchair user (73.0%) did not live in suitably adapted premises (viz. 1,765 in Table 7-3 above less 476).

## 7.2 Support Needs

- 7.2.1 25,165 implied household members responded to the question on need for care or support. 46.9% indicated a need for care or support (11,808 implied).
- 7.2.2 74.3% of those with a care or support need felt they were getting enough support, the data implying 25.7% (2,986 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 3,266 respondents, each making an average of 2.1 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	22.9	47.3	1,544
Personal care	20.6	42.5	1,387
Claiming welfare benefits / managing finances	18.1	37.3	1,219
Establishing personal safety / security	12.9	26.7	873
Establishing social contacts / activities	10.5	21.6	705
Someone to act for you	10.3	21.2	694
Accessing training / employment	4.7	9.6	315
<b>Total</b>	<b>100.0</b>		<b>6,737</b>

- 7.2.4 Help in looking after the home was the most required form of support with 47.3% making it one of their choices. The need for personal care was the second most common choice at 42.5% but help claiming welfare benefits / managing finances was also significant at 37.3%, as is usually found in our surveys.
- 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. 53.3% of those with a mental health problem needed help establishing social contact / activities. 56.8% of those with a learning disability needed someone to act for them managing finances. 59.5% of those with HIV / Aids needed help with personal care. 74.1% of wheelchair users needed help looking after their home.
- 7.2.6 The Supporting People programme, was introduced in April 2003, and provides a structure for funding the housing related support services outlined in Table 7-4 above. New services developed after April 2003 will have to compete for resources with established schemes within the City. The Local Authority will need to develop plans to meet outstanding needs through the Supporting People programme.
- 7.2.7 Those who currently received care and support services were asked who provided their support. In 42.6% of cases (4,064 implied) support was provided by Social Services / Voluntary Body. In the majority of cases (68.1% or 6,498 cases) support was provided by family / friends / neighbours. In 1,025 cases (10.7%) support was received from both sources.



## 7.3 Adaptations

7.3.1 Three questions sought information from all households in the City 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	13,242
Not adapted	88.3	100,178
<b>Total</b>	<b>100.0</b>	<b>113,420</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 Question 1

Tenure	%	N <sup>os</sup> implied
Owner occupied with mortgage	5.6	2,208
Owner occupied no mortgage	13.3	3,911
Private rented	8.4	2,130
Council rented	23.8	2,996
HA rented	33.5	1,745
Tied to employment / other*	22.4	252

(\* No data for shared ownership)

7.3.3 Adaptation in the Council rented sector (23.8%) was considerably higher than in the owner occupied sector. Adaptations for owner occupied properties with no mortgage (13.3%) were only slightly above the average for the City, even though a higher proportion of elderly persons tend to be within that sector.

7.3.4 13,561 implied households actually responded to the question on which adaptations had been provided, suggesting an adaptation level of 11.9% (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 2.0 choices on average.

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

Question 11b

<b>Adaptations</b>	<b>% responses</b>	<b>% households</b>	<b>N<sup>os</sup> implied (all choices)</b>
Handrails / grabrails	23.2	46.9	6,357
Access to property	20.7	41.8	5,674
Bathroom adaptations	17.9	36.2	4,909
Stairlift / vertical lift	14.4	29.1	3,947
Ground floor toilet	12.3	24.7	3,356
Wheelchair adaptations	8.2	16.4	2,228
Extension	0.7	1.3	178
Other	2.6	5.3	721
<b>Total</b>	<b>100.0</b>		<b>27,370</b>

7.3.5 Wheelchair adaptations at 16.4% (2,228 implied) were slightly above the average level found in recent DCA surveys (around 15%). The data taken in conjunction with 7.1.10 above suggests that many adapted premises are no longer occupied by wheelchair users (1,752 properties implied). 46.9% had handrails / grabrails fitted, usually the most common type of adaptation in DCA survey experience. 41.8% had improved access to the property; 36.2% had bathroom adaptations.

7.3.6 17,807 implied households (79.6% of all households with a disability) responded to a further question on what facilities still needed to be provided to ensure current members of the household can remain in the property now or for the next 3 years. Respondents made around 1.5 choices on average.

**Table 7-8** *Types of Adaptations Needed for Current Member in Next 3 Years*

Question 12

<b>Adaptations</b>	<b>% responses</b>	<b>% households</b>	<b>N<sup>os</sup> implied (all choices)</b>
Bathroom adaptations	22.0	32.5	5,790
Handrails / grabrails	14.7	21.8	3,877
Stairlift / vertical lift	10.6	15.7	2,790
Extension	10.3	15.2	2,712
Access to property	9.3	13.7	2,442
Ground floor toilet	8.1	12.0	2,140
Wheelchair adaptations	7.0	10.4	1,845
Other	18.0	26.7	4,758
<b>Total</b>	<b>100.0</b>		<b>26,354</b>

7.3.7 Access to property and handrails / grabrails 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 (32.5%) remained relatively high, even though significant adaptation work appears to have been carried out. Interest in extensions was high at 15.2%. The relatively low demand for wheelchair adaptation (10.4% implying 1,845 cases) would not appear to be compatible with the mismatch referred to at 7.1.10 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

Type	%	N <sup>os</sup> implied
Council / HA sheltered housing	46.1	1,078
Independent accommodation (with external support)	32.9	768
Private sheltered housing	11.0	256
Independent accommodation (with live in carer)	5.3	125
Sheltered housing with extra care	2.7	62
Residential / nursing home	2.0	47
<b>Total</b>	<b>100.0</b>	<b>2,336</b>

7.4.2 Demand for supported accommodation (other than sheltered accommodation) was primarily for independent accommodation with external support. 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 99.5% response, 5.2% of existing households (5,876 implied) indicated that they had elderly relatives (over 60) who would need to move to the City in the next three years. 6,134 implied households responded to a further multiple-choice question on the type of accommodation required, with respondents making 1.2 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)
Private sheltered housing	20.0	24.5	1,505
Private Housing	19.0	23.3	1,430
Council / HA sheltered housing	16.8	20.7	1,268
Live with respondent (need extension / adaptation)	14.9	18.4	1,127
Residential care / nursing home	10.6	13.1	802
Council / HA Housing	9.9	12.1	743
Live with respondent (existing home adequate)	8.8	10.8	663
<b>Total</b>	<b>100.0</b>		<b>7,538</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, 20.7% of demand was for Council / HA sheltered housing; 24.5% for private sheltered housing. Only 13.1% of demand was for residential / nursing home accommodation. 29.2% (1,790 households implied) indicated that their relative could live with them but in 63.0% of cases (1,127 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 City were captured within the question for all movers within the City on supported housing.
- 7.5.4 The combined requirement for sheltered housing in both sectors from existing households living in the City and in-migrating parents / relatives is shown below.

**Table 7-11 Sheltered Housing Demand**

	<b>Private Market</b>	<b>Affordable Sector</b>	<b>All Sectors</b>
Existing Households*	256	1,078	<b>1,334</b>
In-migrant Households	1,505	1,268	<b>2,773</b>
<b>Total</b>	<b>1,761</b>	<b>2,346</b>	<b>4,107</b>

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

*\* Excludes sheltered accommodation with extra care.*

- 7.5.5 The significantly higher level of elderly accommodation for people moving into the City 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 City (1,334 households) and those who may in-migrate to be beside their family (2,773 households) of 4,107 units, 2,346 in the affordable sector and 1,761 in the private sector over the next 3 years.
- 7.5.7 Some of this requirement will be addressed by flow of the existing sheltered stock, 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 within the Public Sector. If the respondent is employed in the Public Sector (Education, Health, Local Authority, Police & Fire) within the City of Brighton & Hove 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 public service workers considered vital for provision of public services and sustaining the economy.
- 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
Education	34.8	6,863
Health	36.5	7,200
Local Authority	25.9	5,119
Police	2.3	450
Fire	0.5	110
<b>Total</b>	<b>100.0</b>	<b>19,742</b>

- 8.2.2 Around 19,742 implied households (17.3% of all households in Brighton & Hove) gave details of their work in the Public Sector, with 35.6% (7,200 implied) indicating work in the health services, 34.8% (6,863 implied) work in education and 25.9% (5,119 implied) work in Local Authority services. Numbers working in police and fire services were far lower than all other sectors. 2.3% (450 implied) work in the police service and 0.5% (110 implied) work in the fire services.
- 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 City. Around 6.4% (1,275 implied) of the Key Workers identified in Table 8-1 are existing households leaving the City, 59.0% of whom (864 implied) are leaving due to lack of affordable housing to buy. 27.3% (401 implied) are leaving due to better employment, 27.2% are leaving in search of better education provision and 24% are leaving due to lack of affordable housing to rent.

**Table 8-2 Annual Household Income of Key Workers (%)**  
Question 16c

Income	Health	Education	Local Authority	Police	Fire
Below £10,000	4.1	4.4	1.2	9.2	0.0
£10,000 - £20,000	13.5	18.1	28.9	6.7	0.0
£20,001 - £27,500	25.2	15.5	27.7	7.9	100
£27,501 - £32,500	19.4	10.0	12.6	0.0	0.0
£32,501 - £40,000	11.8	11.5	10.9	14.0	0.0
£40,001 - £50,000	10.4	17.4	8.7	54.7	0.0
£50,001 - £60,000	5.8	7.9	6.3	7.5	0.0
£60,001 - £75,000	6.0	8.7	1.6	0.0	0.0
£75,001 - £100,000	2.2	5.0	1.3	0.0	0.0
Above £100,000	1.6	1.5	0.8	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>

- 8.2.5 Of 19,742 existing household Key Workers, 12,584 gave details of their total household income (i.e. including spouse / partners income), shown in Table 8-2 above.
- 8.2.6 Access to the owner-occupied market in the City through the cheapest 1-bed flats, requires an income of at least £29,200. We found that the proportions who could not afford to owner occupy in Brighton & Hove were:-
- ◆ 62.0% of Local Authority staff
  - ◆ 49.4% of Health staff
  - ◆ 41.4% of Education staff
  - ◆ 23.8% of Police
  - ◆ All Fire staff
- 8.2.7 We ran a series of cross tabulations on Key Worker households who stated they would be moving within the City, to find information on their tenure and house type preferences. There was no data for fire service workers.

**Table 8-3 Key Workers House Tenure Preference (%)**

Question 21

Tenure	Health	Education	Local Authority	Police
Owner occupation	80.5	88.5	67.4	64.1
Private rent	15.1	11.5	28.1	35.9
HA rent	0.0	0.0	1.9	0.0
HA shared ownership	4.4	0.0	2.6	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

*NB No data for Council rent or tied to employment*

- 8.2.8 Of those responding to the question on tenure preference, the majority of all Key Workers who are moving within the City prefer owner occupation, including 88.5% of education workers. Over a third of police workers (35.9%) expressed preference for private rent, as did 28.1% of Local Authority workers.
- 8.2.9 Table 8-4 shows the type of housing preferred by Key Workers moving within Brighton & Hove. Again, there was no data for fire service workers.

**Table 8-4 Key Workers House Type Required (%)**

Question 14g x Question 19

Tenure	Health	Education	Local Authority	Police
Semi-detached	31.6	26.2	38.0	100.0
Detached	12.3	12.4	0.0	0.0
Terraced	16.8	24.8	13.7	0.0
Flats / maisonette	30.3	30.7	43.1	0.0
Bungalows	6.7	2.7	0.0	0.0
Bedsit / studios / room only	2.3	3.2	5.2	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

*N.B: No data for other house types and fire service workers*

- 8.2.10 All police staff responding required semi-detached accommodation as did 38.0% of Local Authority staff and 31.6% of health staff. 41.3% of Local Authority staff required flats / maisonettes, as did 30.7% of education staff and 30.3% of health service workers.

**Table 8-5 Number of Bedrooms Required (%)**

Question 14g x Question 20

	Health	Education	Local Authority	Police
One	11.0	16.3	38.3	0.0
Two	45.7	43.9	37.7	64.0
Three	24.5	17.2	21.0	36.0
Four	11.2	13.3	3.0	0.0
Five or more	7.6	9.3	0.0	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

*There was no data for Fire Service workers.*

- 8.2.11 Table 8-5 indicates the number of bedrooms required by Key Workers moving within the City. Interest was mainly focused around two bedroomed accommodation, with 45.7% of health service workers staff, 64.0% of police staff, 37.7% of Local Authority workers and 43.9% of education staff requiring two bedroomed accommodation. 38.3% of Local Authority staff said that they required one bedroom, while 22.6% of Educational staff said that they required four or more bedrooms.

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

- 8.3.1 The responses received from concealed Key Workers were high compared to other recent studies. Respondents were asked to state which area of the Public Sector they were employed in, see Table 8-6 below for results.
- 8.3.2 Although there was no data for fire service workers, a total of 1,652 (implied) concealed Key Workers responded to the survey, including 813 Local Authority workers, 411 educational staff and 392 health service workers.

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

Question 14g

	%
Local Authority	49.2
Health	23.7
Education	24.9
Police	2.2
<b>Total</b>	<b>100.0</b>

- 8.3.3 Of the concealed workers responding around 49.2% (813 implied) work in Local Authority services, 23.7% (392 implied) work in health 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 £20,001 and £27,500; 33.9%. Almost 29% said their incomes were less than £15,000. 22.2% had incomes between £15,000 and £20,000. No concealed Key Worker households earned over £47,500.



**Table 8-7 Annual Household Income of Key Workers (Concealed)**

Question 36e

Income	Key Workers %
Below £15,000	28.7
£15,000 - £20,000	22.2
£20,001 - £27,500	33.9
£27,501 - £32,500	4.9
£32,501 - £35,000	2.8
£35,001 - £40,000	2.6
£40,001 - £45,000	0.0
£45,001 - £47,500	4.9
<b>Total</b>	<b>100.0</b>

*N.B. No incomes above £47,500*

- 8.3.5 Looking at the access levels to the owner-occupied market in the Brighton & Hove, requiring an income of £29,200, we found that around 86.4% of the concealed Key Workers could not afford to owner occupy in the City.
- 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. The majority, over 59% had less than £1,000 saved to meet these costs, 27.6% had between £1,001 and £5,000 saved. 7.5% had between £5,001 and £10,001 and the remaining 5.6% had over £10,000 saved.
- 8.3.7 We ran a series of cross tabulations on Key Worker households who stated they would be moving within the City, to find information on their tenure and house type preferences.
- 8.3.8 Table 8-8 below, shows that the most popular tenure was owner occupation, mentioned by 29.0% of the concealed Key Workers. Private rent was also a popular tenure, mentioned by 23.4% of the concealed Key Workers. 27.4% of concealed Key Workers said they preferred HA shared ownership. The demand for Council rent was 20.2%. There was no demand for HA rent.

**Table 8-8 Preferred Tenure of Concealed Key Workers**

Question 29b

Tenure	Key Workers %
Owner Occupation	29.0
Private rent	23.4
HA Shared ownership	27.4
Council rent	20.2
<b>Total</b>	<b>100.0</b>

- 8.3.9 We asked the concealed Key Workers what type of accommodation was needed by the new household. 66.3% said they needed a flat / maisonette, 20.2% expressed a need for a bedsit / studio / room only, 9.5% terraced accommodation and 2.2% expressed a need for a semi-detached. There was also a small percentage of demand for caravans / mobile homes (1.8%), but no demand for any other types of accommodation.
- 8.3.10 Over 62% of concealed Key Workers stated they needed two bedroom accommodation, and 29.9% said they needed one bedroom; 7.4% required 3-bedrooms. There was no demand for anything larger than three 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. Table 9-1 shows that 98,335 (88.3%) of households ethnic origin was British. The remaining 13,097 (11.8%) household's ethnic origins 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	88.3	98,355	88.0
Other White	4.7	5,220	4.6
Irish	1.7	1,861	1.6
Other mixed	1.3	1,489	0.6
White & Asian	0.8	910	0.6
White & Black Caribbean	0.7	708	0.3
Chinese	0.5	501	0.5
White & Black African	0.5	568	0.4
Indian	0.3	381	0.9
Other Asian background	0.2	422	0.4
Caribbean	0.2	271	0.2
Other Black background	0.2	176	0.1
African	0.2	203	0.6
Pakistani	0.1	51	0.2
Bangladeshi	0.1	140	0.4
Other	0.2	196	0.6
<b>Total</b>	<b>100.0</b>	<b>111,452</b>	<b>100.0</b>

(No data for Gypsy / Traveller)

\* - Nearest decimal place.

\*\* © Crown Copyright (Census)

- 9.1.3 Table 9-2 illustrates the ethnic breakdown in more detail within Brighton & Hove. 390 Black and Minority Ethnic (BME) respondents provide statistical validity of  $\pm 4.05\%$ . This sample represents 13,097 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 the City. The BME responders include categories of 'White Irish' and 'White Other' (in line with the Census definition), which represents 7,081 (54%) of BME implied households across the City.
- 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 as are other special household group interviews.

**Table 9-2 Ethnic Origin**

	N <sup>os</sup>	%	2001 Census *
White Other	5,220	39.8	38.6
White Irish	1,861	14.2	13.3
Other Mixed	1,489	11.4	4.8
White & Asian	910	7.0	5.3
White & Black Caribbean	708	5.4	2.8
White & Black African	568	4.3	3.3
Chinese	501	3.8	4.4
Other Asian	422	3.2	3.1
Indian	381	2.9	7.1
Black Caribbean	271	2.1	1.6
Black African	203	1.6	4.7
Other ethnic	196	1.5	5.4
Other Black	176	1.3	0.5
Bangladeshi	140	1.1	3.3
Pakistani	51	0.4	1.8
<b>Total</b>	<b>13,097</b>	<b>100.0</b>	<b>100.0</b>

\* © Crown Copyright (Census)

-nd- no data available

## 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 Question 5

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	5.7	99	14.6	253	53.2	922	20.8	359	5.7	99	<b>1,732</b>
Detached	0.0	0	0.0	0	0.0	0	30.2	270	44.4	397	25.4	227	<b>894</b>
Terraced	0.0	0	1.1	26	28.7	684	48.7	1,164	12.79	427	3.6	87	<b>2,388</b>
Flat / maisonette	22.5	158	40.7	2,691	51.3	3,398	4.5	297	2.2	77	0.0	0	<b>6,621</b>
Bungalow	0.0	0	0	0	57.6	341	30.2	179	12.2	72	0.0	0	<b>592</b>
Bedsit / room only	76.8	545	23.3	165	0.0	0	0.0	0	0.0	0	0.0	0	<b>710</b>
Caravan / mobile home	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	<b>0</b>
<b>Total</b>		<b>703</b>		<b>2,981</b>		<b>4,676</b>		<b>2,832</b>		<b>1,332</b>		<b>413</b>	<b>12,937</b>

9.2.2 The majority of respondents (around 51.2%) live in flats / maisonettes, followed by terraced housing (18.5%), of whom the majority live in two or three bedroom accommodation. Detached and semi-detached housing makes up just 6.9% and 13.4% of respondents respectively, of which the majority live in 3 or 4-bedroom accommodation.

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

Question 6

Facilities	N <sup>os</sup>	%	All households
Central heating (full)	9,968	79.9	82.0
Central heating (part)	1,503	12.1	9.9
Double glazing (full)	5,036	40.9	52.6
Double glazing (part)	2,390	19.2	15.5
Cavity wall insulation	2,225	18.2	22.4
Loft insulation	3,771	30.2	45.6
Water pipes insulated	2,898	23.2	26.0
Hot water tank insulated	5,537	42.0	49.7
Draught proofing	1,883	15.1	14.6

- 9.2.3 Households with central heating at 92.0% (compared with 91.9% for the whole population) were just above the national average in the 2001 Census (91.5%) but were below the average of 94% found in the 2001 English House Condition Survey (EHCS). Full double-glazing at 40.9% (52.6% for the whole population) was well below the UK average of 70% (EHCS 2001).
- 9.2.4 67.7% of BME respondents indicated that their homes were adequate. 4,229 (32.3%) 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. 53.2% of the group indicated an 'in-house' solution (compared to 57.5% in the whole population) of which 83.5% (88.7 for the whole population) selected need for repairs / improvements as one of their choices; 35.1% selected too costly to heat compared to 37.0% for the whole population.
- 9.2.5 Table 9-5 below sets out the other choices with 80.7% opting for solutions likely to require a move. A total of 3,414 BME households answered the question with 4,789 responses, giving an average of 1.4 choices 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 large	51	1.5	4.1
Too small	2,489	72.9	68.7
Housing affecting health	346	10.1	15.2
Rent / mortgage too expensive	1,573	46.1	35.3
Tenancy insecure	300	8.8	14.6
<b>Total</b>	<b>4,759</b>		

- 9.2.6 As in the whole population, the largest single issue was that the dwelling was too small. The extent to which this represents natural demand in market terms or a response to overcrowding is debatable. The second largest issue mentioned by BME households was that rent/mortgage was too expensive, mentioned by 46.1%, compared to 35.3% of the whole population.

### 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. 12.9% of the BME sample had a member of their household with a disability or long-term illness, a much lower level to that found for the whole population (19.8%). In the majority of cases only one person was affected and in 289 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 Table 9-6 below. 1,694 1st household members gave 2,506 responses, making an average of 1.5 choices. 208 2nd household members gave 208 responses to the question indicating perhaps that second members tend to suffer from a single form of disability.

**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)
Wheelchair user	228	13.5	0	0.0
Walking difficulty (not in wheelchair)	616	36.4	0	0.0
Learning difficulty	186	11.0	51	24.5
Mental health problem	434	25.6	33	15.9
Visual / hearing impairment	197	11.6	0	0.0
HIV / AIDS	33	1.9	33	15.9
Drug / Alcohol problem	112	6.6	0	0.0
Limiting long-term illness	700	41.3	91	43.8
<b>Total</b>	<b>2,506</b>		<b>208</b>	

- 9.3.3 The highest number of 1st member respondents (41.3%) had a limiting long-term illness. In the general population, the corresponding figure (36.9%) was exceeded by the number of respondents with a walking difficulty (52.3%). 434 BME respondents had mental health problems (25.6%), while 228 were wheelchair users (13.5%).

### 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	16.4	16.4	20.2
£10,000 - £20,000	20.1	36.5	43.0
£20,001 - £25,000	20.3	56.8	57.0
£25,001 - £30,500	7.7	64.5	65.9
£30,001 - £40,000	9.0	73.5	75.5
£40,001 - £50,000	7.6	81.1	84.3
£50,001 - £60,000	7.9	89.0	89.9
Above £60,000	11.0	100.0	100.0

- 9.4.2 The response rate to the income question was 80.9% (10,587 households). The table shows that 16.4% of households had incomes below £10,000, compared to 20.2% in the whole population and well below the corresponding UK figure (33.0%). 35.5% of BME households, on the basis of the survey data, had incomes above £30,000 which is similar to 34.1% in the whole population. 18.9% of BME households had incomes above £50,000 compared to 15.7% 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 9-7 below. As was found for the whole population, the majority of the BME households said they were unable to afford to buy another home (1,550 implied; 69.1%). Lack of affordable rented housing (32.8%) and 'other reasons' (24.1%) were also significant choices for BME households unable to move.

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

Question 17e

	N <sup>os</sup>	% households	All households %
Unable to buy another home	1,550	69.1	67.3
Unable to afford to move	1,496	22.1	29.2
Local education choices	53	2.3	4.3
Family reasons	23	1.0	4.9
Location of employment	255	11.4	7.1
Lack of affordable rented housing	734	32.8	36.8
Other	539	24.1	24.1
<b>Total</b>	<b>4,650</b>		

- 9.5.2 Respondents were also asked to indicate the reasons for moving out of Brighton & Hove. 1675 respondents gave 3224 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 the City*

Question 17d

	N <sup>os</sup>	% cases (3,224)	All H/Holds %
Employment	755	45.1	30.9
Better access to work	244	14.6	14.0
To be near family / carer	304	18.1	15.6
Better education facilities	203	12.1	13.5
Safety / fear of crime	189	11.3	20.2
Better shops / leisure	215	12.9	12.2
Retirement	123	7.3	12.5
To start a family	280	16.7	10.3
Lack of affordable housing to buy	593	35.4	38.3
Lack of affordable housing to rent	318	19.0	17.4

- 9.5.3 The most important reason for BME households leaving Brighton & Hove was for employment reasons, with 45.1% mentioning this compared to 30.9% for the whole population. The second most important reason for BME households leaving the City was due to lack of affordable housing to buy, mentioned by 35.4% of BME households responding. This was followed by a desire to be nearer family / carer, mentioned by 18.1% of BME respondents.

## 9.6 Existing Households Moving

**Table 9-10 Type Required by Number of Bedrooms**  
Question 19 by Question 20

	Semi-detached	Detached	Flat / maisonette	Terraced	Bungalow	Total
One	24	0	372	0	0	<b>396</b>
Two	203	114	675	311	0	<b>1,303</b>
Three	650	166	77	53	109	<b>1,055</b>
Four	139	26	77	35	0	<b>277</b>
Five or more	24	23	0	0	0	<b>47</b>
<b>Total</b>	<b>1,040</b>	<b>329</b>	<b>1,201</b>	<b>399</b>	<b>109</b>	<b>3,078</b>

- 9.6.1 3,096 of BME existing households indicated they would be moving within the City in the next 3 years. 38.8% indicated they required detached accommodation of which 56.2% required 2-bedrooms. 33.6% of moving BME households required semi-detached accommodation and of these 62.5% required three bedrooms. The largest demand for existing households moving was for 2-bed accommodation (42.1%). There was also a demand for 3-bed properties (34.1%).
- 9.6.2 An assessment was made of the type of accommodation required, by tenure preference. 72.8% of BME respondents expressed a preference for owner occupation, 14.1% private rented accommodation. 12.5% Council rented accommodation and the remaining 0.6% whose preference was HA rent.

## 9.7 New / Concealed Households Moving

- 9.7.1 556 concealed BME households are forming within Brighton & Hove over the next three years. Of these 30.0% are forming within 1 year and 49.3% between 1-2 years.
- 9.7.2 91.0% of the concealed BME households will contain no children. 0.0% will contain one child and 10.0% will contain two or more children. This is compared to the general population in which 94.5% did not contain children. 8.2% contained one child and 1.0% contained two or more children.
- 9.7.3 58.9% of the concealed BME households said that they required a flat / maisonette. 26.9% required bedsit / studio accommodation; 8.2% required semi-detached accommodation; 5.6% required terraced accommodation and 4.1% required a bungalow.
- 9.7.4 The majority (77.3%) required one bedroom, followed by 22.2% of respondents who needed two bedroom accommodation. 4.9% required three bedrooms and no BME respondents needed 4 or more bedrooms.
- 9.7.5 With regard to tenure, over half of demand (53.6%) from concealed BME households moving was for private rented accommodation, 25.2% indicated a preference for Council rented accommodation and 5.8% preferred HA rented accommodation. 11.9% wanted owner occupation.



## **9.8 BME Households - Conclusions**

- 9.8.1 390 Black and Minority Ethnic (BME) returns, representing 13,097 implied households, have been drawn from the Survey and analysed separately, to give an insight into the specific housing needs of BME households in Brighton & Hove. The BME returns include the categories of 'White Irish' and 'White Other', which represent 7,081 implied households across the City.
- 9.8.2 The majority of BME households who responded to the DCA survey are living in 1 and 2-bedroom accommodation, 25.1% and 36.1% respectively. Around 51% live in flats/ maisonettes and 18.5% live in terraced accommodation.
- 9.8.3 83% of those BME households who said their home was inadequate, cited 'too small' as the reason for inadequacy. This was higher than the 70% found in the whole population.
- 9.8.4 The majority of BME respondents (41.3%) had a limiting long term illness compared to 36.9% in the general population. Following on from this, 41.3% of BME respondents had a walking difficulty as with the general population at 52.3%. BME respondents have a higher percentage of drug /alcohol problems (6.6%) than the general population (3.0%).
- 9.8.5 Income levels within BME households are similar to those in the whole population. However, the proportion of BME households on the lowest incomes, i.e. below £10,000 is 16.4%, much lower than the figure for all households of 20.2%. 35.5% of BME households, on the basis of the survey data, had incomes above £30,000 compared to 34.1% for the whole population.
- 9.8.6 91.2% of the BME households, who wished to move but cannot, said they could not afford to move or buy a home compared to 96.2% for the whole population. Lack of affordable housing at 32.8% also affected BME households' ability to move.
- 9.8.7 Employment (45.1%) and lack of affordable housing to buy (35.4%) were the main reasons for leaving Brighton & Hove as to 30.9% and 38.3% respectively in the whole population.
- 9.8.8 The majority of existing BME households moving within Brighton & Hove in the next 3 years stated they required flats / maisonette with two bedrooms. 72.8% of respondents stated owner-occupation as their preferred tenure.
- 9.8.9 556 new BME households are forming within the City in the next three years, 58.9% require a flat / maisonette and 26.9% require a bedsit / studio. The majority (77.3%) require one bedroom and 22.2% require a two bedroom accommodation.

## 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 Brighton & Hove. 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.
  - ◆ Kleinman and Whitehead 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.
- 10.1.3 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.
- 10.1.4 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.
- 10.1.5 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 Brighton & Hove, 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 Brighton & Hove 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 Brighton & Hove Council and Office of National Statistics (ONS) 2003 long-term sub-national projections published by the ONS in 2004. Since completing the Population Section Brighton and Hove Council has produced updated population figures, however these have not been taken into account within this report as the change overall is minimal. 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 2003 - 2026. 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 Table 10-1 is based on the predictions made in 2003 by East Sussex County Council. 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 Brighton & Hove for the period 2003 -2026 provided by Brighton & Hove Council.

**Table 10-1 Population Change in Brighton & Hove, 2003 - 2026**

	2003	2006	2011	2016	2021	2026	Change
Total Population	251,500	255,800	264,500	273,100	281,300	288,900	
Change		+ 4,300	+ 8,700	+ 8,600	+ 8,200	+ 7,600	+ 37,400
% Change		+ 1.7	+ 3.4	+ 3.3	+ 3.0	+ 2.7	+ 14.9

© Crown Copyright

- 10.3.2 The table shows an increase in the population of Brighton & Hove of 37,400 over the forecast period. A steady increase is seen across the forecast period, with the main rises occurring between 2006 and 2011 (8,700; 3.4%).

## 10.4 Age Structure Forecast 2003 - 2026

- 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, Brighton & Hove, 2003 - 2026**

	2003	2006	2011	2016	2021	2026	Change
0 - 19	52,700	54,400	54,200	54,100	54,900	55,800	+ 3,100
20 - 29	42,900	42,300	45,700	47,800	46,400	45,500	+ 2,600
30 - 44	65,300	68,500	69,500	69,400	71,700	74,200	+ 8,900
45 - 64	51,500	53,200	58,700	63,700	68,900	71,700	+ 20,200
65 +	39,200	37,300	36,300	38,100	39,200	41,900	+ 2,700
<b>Total</b>	<b>251,500</b>	<b>255,800</b>	<b>264,500</b>	<b>273,100</b>	<b>281,300</b>	<b>288,900</b>	<b>+ 37,400</b>
% Change		+ 1.7	+ 3.4	+ 3.3	+ 3.0	+ 2.7	+ 14.9

© Crown Copyright

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

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

- 10.4.2 As we see in Table 10-2 above there will be an average rise in the population of Brighton & Hove of approximately 0.6% per annum over the forecast period according to the forecast model. There is projected to be around 37,400 more people in Brighton & Hove in 2003 than in 2026.
- 10.4.3 The 0-19 age range shows an increase overall (3,100; 5.9%). Figures fluctuate throughout the forecast period, rising between 2003 and 2011 (1,500; 2.8%), almost static from 2011 to 2016 and a rise up to 2026.
- 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 (2,600; 6.1%), with the most significant increase seen between 2006 and 2011 (3,400; 8.0%).
- 10.4.5 The 30-44 age group, the main economically active and household moving group shows a rise (8,900; 13.6%). There is an increase of 4,200 people in the current decade to 2011.

- 10.4.6 The 45–64 age group shows the most significant rise over the forecast period with an increase of 20,200 individuals. There is a steady rise throughout the forecast period with the main increase occurring between 2011 and 2016 (5,000; 8.5%). Numbers rise by 7,200 to 2011.
- 10.4.7 In the over 65 age group an increase of 2,700 individuals is seen over the forecast period. A fall is forecast up to 2011 followed by a rise for the remaining forecast period.
- 10.4.8 Numbers in the 80+ age group increase by 5,500 (59.8%) up to 2026. Numbers increase steadily to 2026, but with the greatest rise in percentage terms occurring between 2021 and 2026 (2,500; 20.5%). Given the resource demands often associated with very elderly people, these are significant figures.

**Table 10-3**      **Numbers of 80+ in Brighton & Hove, 2003 - 2026**

	2003	2006	2011	2016	2021	2026	Change
80+	9,200	9,300	10,000	11,000	12,200	14,700	
Change		+ 100	+ 700	+1,000	+1,200	+ 2,500	+5,500
% Change		+ 1.2	+ 7.5	+ 10.0	+ 10.9	+ 20.5	+ 59.8

© Crown Copyright

## 10.5 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 Brighton & Hove for the period 2003 - 2026 provided by Brighton & Hove Council.
- ◆ The population is projected to increase by 37,400 people, 15% over the 23 years to 2026.
- ◆ The 0-19 age range shows an increase overall (3,100; 5.9%). Figures fluctuate throughout the forecast period, rising between 2003 and 2011 (1,500; 2.8%), almost static from 2011 to 2016 and a rise up to 2026.
- ◆ 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 (2,600; 6.1%), with the most significant increase seen between 2006 and 2011 (3,400; 8.0%).
- ◆ The 30-44 age group, the main economically active and household moving group shows a rise (8,900; 13.6%). There is an increase of 4,200 people in the current decade to 2011.
- ◆ The 45–64 age group shows the most significant rise over the forecast period with an increase of 20,200 individuals. There is a steady rise throughout the forecast period with the main increase occurring between 2011 and 2016 (5,000; 8.5%). Numbers rise by 7,200 to 2011.
- ◆ In the over 65 age group an increase of 2,700 individuals is seen over the forecast period. A fall is forecast up to 2011 followed by a rise for the remaining forecast period.
- ◆ Numbers in the 80+ age group increase by 5,500 (59.8%) up to 2026. Numbers increase steadily to 2026, but with the greatest rise in percentage terms occurring between 2021 and 2026 (2,500; 20.5%). Given the resource demands often associated with very elderly people, these are significant figures.
- ◆ The "older" population within the retirement group, those 80 and over grows significantly by 59.8%, 5,500 more people by 2026. Over a quarter of all 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 14,700 people in the area by 2026 who are much more likely to have care and support needs which should now be assessed in detail.

# 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 >£29,200 / £53,000) subject to location. The private rent sector costs are estimated at an access cost of £350 / £675 per month for the vast majority of households in this sector, requiring an annual income of at least £14,400 / £32,000 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 City who are planning to move in the next three years.	HNS 4.2.1
2.	Council & 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 <£29,200 / £53,000) or rent (£14,400 / £32,000) depending on location and need to move.	HNS 3.7.1 and 3.11.1
5.	Priority homeless in temporary accommodation.	BHCC
<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 <£29,200 / £53,000) or rent (£14,400 / £32,000)	HNS 3.7.1 and 3.11.1
11.	Ex-institutional population moving into community p.a.	BHCC
12.	Housing Register priority need new applications 2003-2004 less cancellations.	BHCC
13.	In-migrant households over the last year who live in social housing.	BHCC
<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 Local Authority / RSL's net of transfers. (HIP 2004)	BHCC
16.	Increased vacancies and units taken out of management.	BHCC
17.	Future new supply each year based on average level over next three years.	BHCC
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	15,350
2.	MINUS – Council & RSL tenants	2,713
3.	Cases where in-situ solution most appropriate	<u>7,017</u>
		9,730
		<u>9,730</u>
4.	TIMES - Proportion unable to afford to buy or rent	54%
5.	PLUS - Backlog (non-households)	<u>122</u>
<b>6.</b>	<b>TOTAL BACKLOG NEED</b>	<b>3,157</b>
7.	TIMES - Quota to progressively reduce backlog *	20%
<b>8.</b>	<b>ANNUAL NEED TO REDUCE BACKLOG</b>	<b><u>631</u></b>
<b><u>Newly Arising Need:</u></b>		
9.	New household formation	1,751
10.	TIMES Proportion unable to buy (80%) or rent (67%) in market	67%
11.	PLUS - Ex-institutional population moving into community	No data
12.	Existing households falling into priority need	533
13.	In-migrant households unable to afford market housing	<u>183</u>
<b>14.</b>	<b>TOTAL NEWLY ARISING NEED</b>	<b><u>1,889</u></b>
<b><u>Supply of Affordable Units:</u></b>		
15.	Supply of social re-lets p.a.	1,073
16.	MINUS Increased vacancies (if applicable) and units taken out of management. Right to Buy	(159 x 5.6%)
		<u>9</u>
		1,064
17.	PLUS - Committed units of new affordable supply	254
<b>18.</b>	<b>AFFORDABLE SUPPLY</b>	<b><u>1,318</u></b>
	Annual need to reduce backlog	631
	Newly arising need	<u>1,889</u>
<b>19.</b>	<b>TOTAL AFFORDABLE NEED</b>	<b>2,520</b>
	MINUS - Affordable supply	<u>1,318</u>
<b>20.</b>	<b>OVERALL ANNUAL SHORTFALL</b>	<b><u>1,202</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 2004 Affordable Housing Supply**

Supply	2002	2003	2004	Average
Council Re-lets	725	740	652	706
RSL Re-lets	<u>379</u>	<u>516</u>	<u>207</u>	<u>367</u>
<b>Total</b>	<b>1,104</b>	<b>1,256</b>	<b>859</b>	<b>1,073</b>
New RSL Supply	254	137	290	227
Other New Supply	21	36	24	27
Total New Supply	<u>275</u>	<u>173</u>	<u>314</u>	<u>254</u>
Total Supply	1,379	1,429	1,173	1,327
Right to Buy	82	169	226	159

## 11.4 Needs Assessment

- 11.4.1 The total affordable housing need annually is for 2,520 units. Net re-lets of the existing social stock, after Right to Buy (RTB) impact, average 1,064 units and is the major means of addressing the scale of need identified. New unit delivery averages 254 p.a. however, the average level of RTB of 159 units over the last three years is only 95 less than new delivery, resulting in a limited increase in stock levels.
- 11.4.2 After allowing for existing stock net re-let supply, there will still be an annual affordable housing shortfall of 1,202 units 7,212 units in total over the six years to 2011. The total need however, taking account of the requirement for 254 assumed new units is 1,456 units, 8,736 units to 2011.
- 11.4.3 Based on the average supply of around 254 units over the last 3 years, this level of annual need is almost 6 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 continue an average of around 250 units in 2005 and 2006.
- 11.4.4 Additionally, 3,323 existing and 339 concealed households intend to leave Brighton & Hove over the next three years because of a lack of affordable housing to buy, and 1,633 existing and 124 concealed households plan to leave due to lack of affordable housing to rent. 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. Policy H01 of the Brighton & Hove Local Plan (Adopted July 2005) identifies targets for affordable housing units on allocated sites and Policy H02 sets a 40% target for affordable housing on 'windfall' sites with a threshold of over 10 units.

## **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 Unitary Development Plan, is discussed in Para 11.7.2 below.
- 11.7.2 The Council definition of affordable housing in setting future planning policy is set out in Policy H02:-

*“Residential accommodation that is provided with a subsidy to ensure that rents/prices remain at a level that is genuinely affordable to local people whose income means that they are unable to meet their housing needs through the housing market. In Brighton & Hove, affordable housing will typically be for rent, and will be managed by a Registered Social Landlord”.*

- 11.7.3 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”.*

- 11.7.4 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.*

11.7.5 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.*

11.7.6 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 1,456 units, after allowing for current re-let supply is clearly not economically deliverable or sustainable, bearing in mind past new supply levels averaging 254 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 and essentially planning should be providing for balanced communities.
- 11.10.2 Our significant experience over 15 years of affordable subsidised housing in mixed developments leads us to recommend that 45% of new units negotiated should be the level applied from the total of all sites negotiated. 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. Targets may vary above and below this level on a site by site basis and should take account of the empty units being brought back into use through the regeneration strategies.
- 11.10.3 In view of the scale of need, particularly in the period to 2008, 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.
- 11.10.4 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.

## 11.11 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 in Table 11-2 below.

**Table 11-2 Affordable Need Summary**

Total Annual Need	2,520	
Existing Stock Re-lets	<u>1,064</u>	
Net New Units Needed	<u>1,456</u>	
New Rental	800	55%
Shared Ownership / Shared Equity	656	45%
Discounted Market Rent		
<b>Total</b>	<u>1,456</u>	<u>100%</u>

## 11.12 Affordable Rented Accommodation

- 11.12.1 The local relationship between house prices and incomes is such that around 80% of new forming households are unable to purchase in their own right depending on location. Social stock is 15.7% of housing in the City 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 Shared Ownership/ Equity Sharing**

- 11.13.1 Concealed households forming in the next year express a need (53%) or preference (41%) for owner occupation but generally around 80% 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 458 Shared Ownership units from new forming (342) and existing households (116) over the next three years, around 150 each year, a significant level relative to current new delivery levels.
- 11.13.3 These households could afford shared equity at 70% of market price based on the incomes of those about to form.

### **11.14 Market Rent**

- 11.14.1 Around 1,670 new households and 2,157 existing households, 3,827 in total, express a preference for private rental over the next 3 years. 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. Some future development may be undertaken on Council owned land but as this supply is running out, 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 area 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 City and cross-tabulations to check on the actual income capacity of households expressing preference to live in the areas which 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 2007 are listed below:-

Location	Net New / Concealed Households*	Net Affordable Need	
		%	N <sup>os</sup> implied
Sub Area 1	753	93.7	706
Sub Area 2	855	85.2	728
Sub Area 3	1,550	89.8	1,392
Sub Area 4	1,635	92.7	1,516
Sub Area 5	299	100.0	299
Sub Area 6	344	94.7	326
<b>Total</b>	<b>5,436</b>	<b>91.4</b>	<b>4,967</b>

11.16.4 In individual locations, between 85.2% and all of the concealed households earn below the required income threshold to enter the owner occupied market. Generally 91.4% of new / concealed households need some form of affordable housing across Brighton & Hove.

## **APPENDIX I**

### **TYPE, SIZE & TENURE REQUIREMENTS FOR MOVING HOUSEHOLDS BY SUB-AREA**

## Brighton and Hove Housing Needs Survey 2005

### SUB AREA 1

#### Type and Size Required for All Households Moving by Private Sector Tenure

Property Type / Size	Owner Occupation	Private Rented	Tied to employment	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	87	111	0	198
1 Bed Bungalows	18	0	0	18
1 Bed Houses	26	0	0	26
2 Bed Flats	211	145	0	356
2 Bed Bungalows	107	0	0	107
2 Bed Houses	145	48	0	193
3 Bed Flats	0	0	0	0
3 Bed Bungalows	19	0	0	19
3 Bed Houses	355	28	0	383
4+ Bed Flats	0	0	0	0
4+ Bed Bungalows	18	0	0	18
4+ Bed Houses	55	0	0	55
<b>Total</b>	<b>1,041</b>	<b>332</b>	<b>0</b>	<b>1,373</b>

#### Type and Size Required for All Households Moving by Affordable Sector Tenure

Property Type / Size	Council Rent	HA Rent	HA Shared Ownership	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	288	49	21	358
1 Bed Bungalows	49	0	0	49
1 Bed Houses	0	0	0	0
2 Bed Flats	44	29	0	73
2 Bed Bungalows	0	0	0	0
2 Bed Houses	45	0	12	57
3 Bed Flats	0	0	0	0
3 Bed Bungalows	0	0	0	0
3 Bed Houses	99	16	0	115
<b>Total</b>	<b>525</b>	<b>94</b>	<b>33</b>	<b>652</b>



## Brighton and Hove Housing Needs Survey 2005

### SUB AREA 2

#### Type and Size Required for All Households Moving by Private Sector Tenure

Property Type / Size	Owner Occupation	Private Rented	Tied to employment	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	212	393	0	605
1 Bed Bungalows	0	0	0	0
1 Bed Houses	0	0	0	0
2 Bed Flats	303	181	0	484
2 Bed Bungalows	112	0	0	112
2 Bed Houses	700	114	0	814
3 Bed Flats	0	0	0	0
3 Bed Bungalows	83	0	0	83
3 Bed Houses	821	38	0	859
4+ Bed Flats	0	0	0	0
4+ Bed Bungalows	44	0	0	44
4+ Bed Houses	533	0	0	533
<b>Total</b>	<b>2,808</b>	<b>726</b>	<b>0</b>	<b>3,534</b>

#### Type and Size Required for All Households Moving by Affordable Sector Tenure

Property Type / Size	Council Rent	HA Rent	HA Shared Ownership	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	187	127	13	327
1 Bed Bungalows	0	0	0	0
1 Bed Houses	0	0	0	0
2 Bed Flats	83	0	15	98
2 Bed Bungalows	45	0	0	45
2 Bed Houses	74	0	0	74
3 Bed Flats	0	0	0	0
3 Bed Bungalows	38	0	0	38
3 Bed Houses	0	0	0	0
<b>Total</b>	<b>427</b>	<b>127</b>	<b>28</b>	<b>582</b>

## Brighton and Hove Housing Needs Survey 2005

### SUB AREA 3

#### Type and Size Required for All Households Moving by Private Sector Tenure

Property Type / Size	Owner Occupation	Private Rented	Tied to employment	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	491	1,032	0	1,523
1 Bed Bungalows	18	0	0	18
1 Bed Houses	16	36	0	52
2 Bed Flats	999	366	0	1,365
2 Bed Bungalows	40	0	0	40
2 Bed Houses	678	88	0	766
3 Bed Flats	65	55	0	120
3 Bed Bungalows	68	0	0	68
3 Bed Houses	1,042	69	0	1,111
4+ Bed Flats	55	0	0	55
4+ Bed Bungalows	0	0	0	0
4+ Bed Houses	369	53	0	422
<b>Total</b>	<b>3,841</b>	<b>1,699</b>	<b>0</b>	<b>5,540</b>

#### Type and Size Required for All Households Moving by Affordable Sector Tenure

Property Type / Size	Council Rent	HA Rent	HA Shared Ownership	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	275	60	79	414
1 Bed Bungalows	0	0	0	0
1 Bed Houses	20	0	0	20
2 Bed Flats	69	29	21	119
2 Bed Bungalows	71	29	0	100
2 Bed Houses	25	61	0	86
3 Bed Flats	0	0	0	0
3 Bed Bungalows	0	0	0	0
3 Bed Houses	36	0	0	36
<b>Total</b>	<b>496</b>	<b>179</b>	<b>100</b>	<b>775</b>

## Brighton and Hove Housing Needs Survey 2005

### SUB AREA 4

#### Type and Size Required for All Households Moving by Private Sector Tenure

Property Type / Size	Owner Occupation	Private Rented	Tied to employment	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	610	977	0	1,587
1 Bed Bungalows	0	0	0	0
1 Bed Houses	0	20	0	20
2 Bed Flats	658	394	0	1,052
2 Bed Bungalows	15	0	0	15
2 Bed Houses	377	102	0	479
3 Bed Flats	57	55	0	112
3 Bed Bungalows	33	0	0	33
3 Bed Houses	602	40	0	642
4+ Bed Flats	55	0	0	55
4+ Bed Bungalows	0	0	0	0
4+ Bed Houses	175	107	0	282
<b>Total</b>	<b>2,582</b>	<b>1,695</b>	<b>0</b>	<b>4,277</b>

#### Type and Size Required for All Households Moving by Affordable Sector Tenure

Property Type / Size	Council Rent	HA Rent	HA Shared Ownership	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	278	231	100	609
1 Bed Bungalows	0	0	0	0
1 Bed Houses	0	0	0	0
2 Bed Flats	123	34	0	157
2 Bed Bungalows	0	0	0	0
2 Bed Houses	22	0	0	22
3 Bed Flats	0	49	0	49
3 Bed Bungalows	0	0	0	0
3 Bed Houses	144	18	0	162
<b>Total</b>	<b>567</b>	<b>332</b>	<b>100</b>	<b>999</b>

## Brighton and Hove Housing Needs Survey 2005

### SUB AREA 5

#### Type and Size Required for All Households Moving by Private Sector Tenure

Property Type / Size	Owner Occupation	Private Rented	Tied to employment	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	57	199	0	256
1 Bed Bungalows	0	0	0	0
1 Bed Houses	0	0	0	0
2 Bed Flats	58	82	0	140
2 Bed Bungalows	19	0	0	19
2 Bed Houses	172	48	0	220
3 Bed Flats	37	0	0	37
3 Bed Bungalows	0	0	0	0
3 Bed Houses	200	0	0	200
4+ Bed Flats	0	0	0	0
4+ Bed Bungalows	0	0	0	0
4+ Bed Houses	37	0	0	37
<b>Total</b>	<b>580</b>	<b>329</b>	<b>0</b>	<b>909</b>

#### Type and Size Required for All Households Moving by Affordable Sector Tenure

Property Type / Size	Council Rent	HA Rent	HA Shared Ownership	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	42	16	0	58
1 Bed Bungalows	0	0	0	0
1 Bed Houses	0	0	0	0
2 Bed Flats	0	0	15	15
2 Bed Bungalows	22	0	0	22
2 Bed Houses	27	49	0	76
3 Bed Flats	0	0	0	0
3 Bed Bungalows	0	0	0	0
3 Bed Houses	119	0	0	119
<b>Total</b>	<b>210</b>	<b>65</b>	<b>15</b>	<b>290</b>

## Brighton and Hove Housing Needs Survey 2005

### SUB AREA 6

#### Type and Size Required for All Households Moving by Private Sector Tenure

Property Type / Size	Owner Occupation	Private Rented	Tied to employment	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	98	19	0	117
1 Bed Bungalows	0	0	0	0
1 Bed Houses	0	0	0	0
2 Bed Flats	77	16	0	93
2 Bed Bungalows	69	0	0	69
2 Bed Houses	104	32	0	136
3 Bed Flats	19	0	0	19
3 Bed Bungalows	101	0	0	101
3 Bed Houses	347	0	0	347
4+ Bed Flats	0	0	0	0
4+ Bed Bungalows	26	0	0	26
4+ Bed Houses	131	0	0	131
<b>Total</b>	<b>972</b>	<b>67</b>	<b>0</b>	<b>1,039</b>

#### Type and Size Required for All Households Moving by Affordable Sector Tenure

Property Type / Size	Council Rent	HA Rent	HA Shared Ownership	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	45	0	0	45
1 Bed Bungalows	0	0	0	0
1 Bed Houses	0	0	0	0
2 Bed Flats	24	0	0	24
2 Bed Bungalows	0	0	0	0
2 Bed Houses	22	0	0	22
3 Bed Flats	0	0	0	0
3 Bed Bungalows	38	0	0	38
3 Bed Houses	52	0	0	52
<b>Total</b>	<b>181</b>	<b>0</b>	<b>0</b>	<b>181</b>

## Brighton and Hove Housing Needs Survey 2005

### DISTRICT-WIDE

#### Type and Size Required for All Households Moving by Private Sector Tenure

Property Type / Size	Owner Occupation	Private Rented	Tied to employment	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	1,554	2,732	0	4,286
1 Bed Bungalows	36	0	0	36
1 Bed Houses	42	56	0	98
2 Bed Flats	2,306	1,184	0	3,490
2 Bed Bungalows	362	0	0	362
2 Bed Houses	2,175	433	0	2,608
3 Bed Flats	177	110	0	287
3 Bed Bungalows	304	0	0	304
3 Bed Houses	3,368	175	0	3,543
4+ Bed Flats	110	0	0	110
4+ Bed Bungalows	88	0	0	88
4+ Bed Houses	1,300	160	0	1,460
<b>Total</b>	<b>11,822</b>	<b>4,850</b>	<b>0</b>	<b>16,672</b>

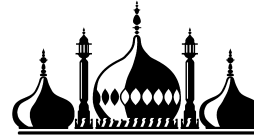
#### Type and Size Required for All Households Moving by Affordable Sector Tenure

Property Type / Size	Council Rent	HA Rent	HA Shared Ownership	Total
	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>	N <sup>os</sup>
1 Bed Flats	1,114	483	214	1,811
1 Bed Bungalows	49	0	0	49
1 Bed Houses	20	0	0	20
2 Bed Flats	343	92	50	485
2 Bed Bungalows	138	29	0	167
2 Bed Houses	214	110	12	336
3 Bed Flats	0	49	0	49
3 Bed Bungalows	76	0	0	76
3 Bed Houses	449	34	0	483
<b>Total</b>	<b>2,403</b>	<b>797</b>	<b>276</b>	<b>3,476</b>

## **APPENDIX II**

### **POSTAL SURVEY QUESTIONNAIRE**

# BRIGHTON AND HOVE HOUSING SURVEY



**Brighton & Hove**

Dear Resident

I am writing to ask for your help with a very important survey which is taking place in Brighton and Hove.

Your household is one of over 14,000 to have been selected to participate in a survey to assist Brighton and Hove City Council in developing its housing and planning priorities. These priorities will help to meet the housing needs of local people over the next three years. With this in mind, I hope you can spare a little time to fill in the enclosed questionnaire. Whether you own or rent your home, or live in a large or small property, we need your views. Please reply even if you are not planning to move or do not foresee a change in your housing circumstances.

The Council has appointed DCA, an experienced and independent housing consultant, to complete this work. I can assure you that this survey is confidential and no individual name or address is requested, although the questionnaire has been coded to identify your area of residency. None of the completed questionnaires will be seen by the Council. All data comes back to the Council in a generalised statistical format, and will be used for housing and planning purposes only.

If you have any general queries or concerns about the survey, please contact **Petra Davis** at Brighton and Hove City Council on **(01273) 293288**, or call **DCA Research Team free on (0800) 169 7865**.

I would be grateful for your co-operation, and a pre-paid envelope is provided for your reply. Please return your completed questionnaire by **NO LATER THAN TUESDAY 1ST FEBRUARY 2005**.

Yours sincerely

Cllr. Jack Hazelgrove  
Chair, Housing Committee  
Brighton and Hove City Council



housing consultants

**Buckden Mount**  
**8 Thornhill Road**  
**HUDDERSFIELD**  
**HD3 3AU**



## TO BE COMPLETED BY THE HOUSEHOLDER

Please answer the questionnaire on behalf of everyone in the household - that is everyone for whom this is their main residence (including any children away at college and lodgers).

Tick one box only for each question unless instructed otherwise.

### A: ABOUT YOUR EXISTING HOUSING

**1 Is your present home:-**

owner occupied paying mortgage <sup>1</sup> <input type="checkbox"/>	owner occupied no mortgage <sup>2</sup> <input type="checkbox"/>	private rented <sup>3</sup> <input type="checkbox"/>	council rented <sup>4</sup> <input type="checkbox"/>
housing association rented <sup>5</sup> <input type="checkbox"/>	shared ownership (part rent / part buy) <sup>6</sup> <input type="checkbox"/>	tied to your employment <sup>7</sup> <input type="checkbox"/>	other e.g. hostel <sup>8</sup> <input type="checkbox"/>

**2 What type of property is your home?**

semi-detached house <sup>1</sup> <input type="checkbox"/>	detached house <sup>2</sup> <input type="checkbox"/>	terraced house <sup>3</sup> <input type="checkbox"/>	bungalow <sup>4</sup> <input type="checkbox"/>
flat / maisonette <sup>5</sup> <input type="checkbox"/>	bedsit / studio / room only <sup>6</sup> <input type="checkbox"/>	caravan / mobile home (permanently sited) <sup>7</sup> <input type="checkbox"/>	

**3 How long have you lived at your present address?**

less than 1 year <sup>1</sup> <input type="checkbox"/>	Between 1 and 2 years <sup>2</sup> <input type="checkbox"/>	Between 2 and 10 years <sup>3</sup> <input type="checkbox"/>	Over 10 years <sup>4</sup> <input type="checkbox"/>
---	--	---	--

**4a If you moved home in the last two years, where did you previously live?**

Within Brighton and Hove <sup>1</sup> <input type="checkbox"/>	Eastbourne <sup>2</sup> <input type="checkbox"/>	Lewes <sup>3</sup> <input type="checkbox"/>	Hastings <sup>4</sup> <input type="checkbox"/>	Rother <sup>5</sup> <input type="checkbox"/>
Wealden <sup>6</sup> <input type="checkbox"/>	Adur <sup>7</sup> <input type="checkbox"/>	Arun <sup>8</sup> <input type="checkbox"/>	Worthing <sup>9</sup> <input type="checkbox"/>	Crawley / Mid Sussex <sup>10</sup> <input type="checkbox"/>
London <sup>11</sup> <input type="checkbox"/>	Elsewhere in the South East <sup>12</sup> <input type="checkbox"/>	Elsewhere in the UK <sup>13</sup> <input type="checkbox"/>	Abroad <sup>14</sup> <input type="checkbox"/>	

**4b If you moved home in the last two years, was this your first home?**

Yes <sup>1</sup>  No <sup>2</sup>

**4c If you moved home in the last two years, what was the most important reason for moving?**

new job <sup>1</sup> <input type="checkbox"/>	closer / easier to commute to work <sup>2</sup> <input type="checkbox"/>	to be near a relative <sup>3</sup> <input type="checkbox"/>	education <sup>4</sup> <input type="checkbox"/>	needed more space <sup>5</sup> <input type="checkbox"/>	needed less space <sup>6</sup> <input type="checkbox"/>
relationship / family break down <sup>7</sup> <input type="checkbox"/>	retirement <sup>8</sup> <input type="checkbox"/>	new relationship <sup>9</sup> <input type="checkbox"/>	to move to a cheaper home <sup>10</sup> <input type="checkbox"/>	wanted to buy <sup>11</sup> <input type="checkbox"/>	health reasons <sup>12</sup> <input type="checkbox"/>

**5 How many bedrooms are in your current home?**

bedsit <sup>1</sup> <input type="checkbox"/>	one <sup>2</sup> <input type="checkbox"/>	two <sup>3</sup> <input type="checkbox"/>	three <sup>4</sup> <input type="checkbox"/>	four <sup>5</sup> <input type="checkbox"/>	five or more <sup>6</sup> <input type="checkbox"/>
--	---	---	---	--	--

**6 Does your home have any of the following? Please tick all that apply**

central heating (all rooms) <sup>1</sup> <input type="checkbox"/>	central heating (partial) <sup>2</sup> <input type="checkbox"/>	double glazing (all rooms) <sup>3</sup> <input type="checkbox"/>	double glazing (partial) <sup>4</sup> <input type="checkbox"/>	hot water tank jacket <sup>5</sup> <input type="checkbox"/>
cavity wall insulation <sup>6</sup> <input type="checkbox"/>	loft insulation <sup>7</sup> <input type="checkbox"/>	draught proofing <sup>8</sup> <input type="checkbox"/>	water pipes insulated <sup>9</sup> <input type="checkbox"/>	

**7 What facilities, if any, do you share with people not in your household? Please tick all that apply**

toilet <sup>1</sup> <input type="checkbox"/>	bath / shower <sup>2</sup> <input type="checkbox"/>	kitchen <sup>3</sup> <input type="checkbox"/>	eating area <sup>4</sup> <input type="checkbox"/>	living room <sup>5</sup> <input type="checkbox"/>	none <sup>6</sup> <input type="checkbox"/>
--	---	---	---	---	--

**8a In your opinion, is your present accommodation adequate for your household's needs?**

Yes <sup>1</sup>  No <sup>2</sup>   
**GO TO 8c** **GO TO 8b**

**8b If, in your opinion, your present accommodation is not adequate for your needs, what are the reasons?**

Please tick all that apply

i) need improvements / repairs <sup>1</sup> <input type="checkbox"/>	too costly to heat <sup>2</sup> <input type="checkbox"/>	housing affecting health of any household member <sup>3</sup> <input type="checkbox"/>	rent / mortgage too expensive <sup>4</sup> <input type="checkbox"/>	tenancy insecure <sup>5</sup> <input type="checkbox"/>
ii) too large <sup>1</sup> <input type="checkbox"/>	too small <sup>2</sup> <input type="checkbox"/>			

**8c Do you think the property will require any of the following repairs or improvements in the next three years?**

Please tick **all** that apply

additional security <sup>1</sup>  improved heating <sup>2</sup>  re-wiring <sup>3</sup>  damp proofing <sup>4</sup>  roof repairs <sup>5</sup>  window repairs <sup>6</sup>  insulation <sup>7</sup>

**9 Does any member of your household have a disability or a limiting long-term illness?**

Yes <sup>1</sup>  No <sup>2</sup>

If YES ➡ GO TO Question 10a. If NO ➡ GO TO Question 11a.

**10a If yes, how many members of your household have a disability or have a limiting long-term illness?**

one <sup>1</sup>  two <sup>2</sup>

**10b What age groups are they?**

Member 1	0 - 15	<sup>1</sup> <input type="checkbox"/>	16 - 24	<sup>2</sup> <input type="checkbox"/>	25 - 44	<sup>3</sup> <input type="checkbox"/>	45 - 59	<sup>4</sup> <input type="checkbox"/>	60 - 74	<sup>5</sup> <input type="checkbox"/>	75+	<sup>6</sup> <input type="checkbox"/>
Member 2	0 - 15	<sup>1</sup> <input type="checkbox"/>	16 - 24	<sup>2</sup> <input type="checkbox"/>	25 - 44	<sup>3</sup> <input type="checkbox"/>	45 - 59	<sup>4</sup> <input type="checkbox"/>	60 - 74	<sup>5</sup> <input type="checkbox"/>	75+	<sup>6</sup> <input type="checkbox"/>

**10c What is the nature of the disability or limiting long-term illness?**

Please tick **all** that apply

	<b>Member 1 Member 2</b>		<b>Member 1 Member 2</b>		<b>Member 1 Member 2</b>		<b>Member 1 Member 2</b>				
wheelchair user	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	walking difficulty (not in wheelchair)	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	learning disability	<sup>5</sup> <input type="checkbox"/>	<sup>6</sup> <input type="checkbox"/>	mental health problem	<sup>7</sup> <input type="checkbox"/>	<sup>8</sup> <input type="checkbox"/>
visual / hearing impairment	<sup>9</sup> <input type="checkbox"/>	<sup>10</sup> <input type="checkbox"/>	HIV / AIDS	<sup>11</sup> <input type="checkbox"/>	<sup>12</sup> <input type="checkbox"/>	drug or alcohol problem	<sup>13</sup> <input type="checkbox"/>	<sup>14</sup> <input type="checkbox"/>	limiting long-term illness	<sup>15</sup> <input type="checkbox"/>	<sup>16</sup> <input type="checkbox"/>

**10d Do you and / or any other member of the household require care / support?**

Yes <sup>1</sup>  <sup>2</sup>  No <sup>3</sup>  <sup>4</sup>

**10e If yes, are you / they currently receiving sufficient care / support?**

Yes <sup>1</sup>  <sup>2</sup>  No <sup>3</sup>  <sup>4</sup>

**10f If you / they are currently receiving sufficient care / support, who provides it?**

Social Services / voluntary body <sup>1</sup>  <sup>2</sup>  family / neighbour / friend <sup>3</sup>  <sup>4</sup>

**10g If you / they are not receiving sufficient care / support, which of the following do you / they require help with:**

Please tick **all** that apply

	<b>Member 1 Member 2</b>		<b>Member 1 Member 2</b>		<b>Member 1 Member 2</b>		<b>Member 1 Member 2</b>				
claiming welfare benefit / managing finances	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	someone to act for you	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	establishing social contact / activities	<sup>5</sup> <input type="checkbox"/>	<sup>6</sup> <input type="checkbox"/>	personal care	<sup>7</sup> <input type="checkbox"/>	<sup>8</sup> <input type="checkbox"/>
establishing personal safety / security	<sup>9</sup> <input type="checkbox"/>	<sup>10</sup> <input type="checkbox"/>	looking after your home	<sup>11</sup> <input type="checkbox"/>	<sup>12</sup> <input type="checkbox"/>	accessing training / employment	<sup>13</sup> <input type="checkbox"/>	<sup>14</sup> <input type="checkbox"/>			

**11a Has your home, or the access to it, been built or adapted to meet the needs of a disabled resident or visitor?**

Yes <sup>1</sup>  No <sup>2</sup>

**11b If yes, what facilities have been provided?**

Please tick **all** that apply

wheelchair adaptations	<sup>1</sup> <input type="checkbox"/>	access to property	<sup>2</sup> <input type="checkbox"/>	vertical lift / stair lift	<sup>3</sup> <input type="checkbox"/>	bathroom adaptations	<sup>4</sup> <input type="checkbox"/>
extension	<sup>5</sup> <input type="checkbox"/>	ground floor toilet	<sup>6</sup> <input type="checkbox"/>	handrails / grabrails	<sup>7</sup> <input type="checkbox"/>	other	<sup>8</sup> <input type="checkbox"/>

**12 What facilities need to be provided to ensure current members of your household can remain in your property, now or in the next three years?**

Please tick **all** that apply

wheelchair adaptations	<sup>1</sup> <input type="checkbox"/>	access to property	<sup>2</sup> <input type="checkbox"/>	vertical lift / stair lift	<sup>3</sup> <input type="checkbox"/>	bathroom adaptations	<sup>4</sup> <input type="checkbox"/>
extension	<sup>5</sup> <input type="checkbox"/>	ground floor toilet	<sup>6</sup> <input type="checkbox"/>	handrails / grabrails	<sup>7</sup> <input type="checkbox"/>	other	<sup>8</sup> <input type="checkbox"/>

**13a Do you have elderly relatives who may need to move to Brighton and Hove within the next three years?**

Yes <sup>1</sup>  No <sup>2</sup>

**13b If yes, what kind of accommodation might they need?**

live with you (existing home adequate)	<sup>1</sup> <input type="checkbox"/>	live with you (need extension / adaptation)	<sup>2</sup> <input type="checkbox"/>	private sheltered housing	<sup>3</sup> <input type="checkbox"/>	Council / Housing Assoc. sheltered housing	<sup>4</sup> <input type="checkbox"/>
residential care / nursing home	<sup>5</sup> <input type="checkbox"/>	private housing	<sup>6</sup> <input type="checkbox"/>	Council / Housing Association property	<sup>7</sup> <input type="checkbox"/>		

**14a** How many people live in your home (including yourself)? <sup>1</sup>

**14b** Which of these categories best describes the ethnic origin of your household <sup>2</sup>

Please write the appropriate number from the following list in the box.

- |               |                           |                               |                               |                       |
|---------------|---------------------------|-------------------------------|-------------------------------|-----------------------|
| <b>White</b>  | <b>Mixed</b>              | <b>Asian or Asian British</b> | <b>Black or Black British</b> | <b>Other Ethnic</b>   |
| British 1     | White & Black Caribbean 4 | Indian 8                      | Caribbean 12                  | Chinese 15            |
| Irish 2       | White & Black African 5   | Pakistani 9                   | African 13                    | Gypsy / Travellers 16 |
| Other White 3 | White & Asian 6           | Bangladeshi 10                | Other Black background 14     | Any other 17          |
|               | Other Mixed background 7  | Other Asian background 11     |                               |                       |

**PLEASE COMPLETE THE APPROPRIATE LINE IN THE TABLE BELOW FOR EACH PERSON LIVING IN YOUR HOME, WHETHER MEMBERS OF YOUR FAMILY OR NOT (E.G. INCLUDE LODGERS). USE ONE LINE PER PERSON.**

**14c/d** Please tick the appropriate box in column c) Gender and column d) Age

**14e** Please write the number which best describes each member's employment type from the following list in column e) Employment

- |                                  |                                       |                                   |
|----------------------------------|---------------------------------------|-----------------------------------|
| Full time employee (30+ hours) 1 | Part time employee (up to 30 hours) 2 | Self - employed 3                 |
| On Government Training Scheme 4  | Full time education (age 16+) 5       | Unemployed & available for work 6 |
| Permanently sick / disabled 7    | Wholly retired from work 8            | Looking after the home 9          |

**14f** Please write the number which best describes each member's occupation type from the following list in column f) Occupation

- |                     |                          |                       |                   |
|---------------------|--------------------------|-----------------------|-------------------|
| Professional 1      | Managerial & Technical 2 | Skilled, non-manual 3 | Skilled, manual 4 |
| Partially skilled 5 | Unskilled 6              | Other 7               |                   |

**14g** If a household member works in the Public Sector, please write the number which describes the area of employment from the following list in column g) Key Worker

- |                                     |          |             |
|-------------------------------------|----------|-------------|
| Local Authority (excl. Education) 1 | Health 2 | Education 3 |
| Police 4                            | Fire 5   |             |

**14h** Which of these categories best describes where each member of the household works?  
Please write the appropriate number from the following list in column h) Work Place

- |                    |                         |                   |                            |
|--------------------|-------------------------|-------------------|----------------------------|
| Brighton & Hove 1  | Eastbourne 2            | Lewes 3           | Hastings 4                 |
| Rother 5           | Wealden 6               | Adur 7            | Arun 8                     |
| Worthing 9         | Crawley / Mid Sussex 10 | London 11         | Elsewhere in South East 12 |
| Elsewhere in UK 13 | Abroad 14               | Work from Home 15 |                            |

**14i** Please write the number which best describes how each member of the household travels to work / college from the following list in column i) Travel to work

- |         |        |         |
|---------|--------|---------|
| Car 1   | Bus 2  | Train 3 |
| Cycle 4 | Walk 5 | Other 6 |

Household Member	c) Gender		d) Age							e) Employment	f) Occupation	g) Key Worker	h) Work Place	i) Travel to work	
	M	F	0-10	11-15	16-19	20-29	30-44	45-59	60-74						75+
Self	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Spouse/Partner	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Child 1	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Child 2	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Child 3	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Child 4	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Partner of child	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Grandchild 1	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Grandchild 2	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Parent 1	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Parent 2	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Lodger 1	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Lodger 2	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Other	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15

**15** How many cars do you have available within the household?

- one <sup>1</sup>  two <sup>2</sup>  three or more <sup>3</sup>  none <sup>4</sup>

**HOUSE PRICES ARE A RECOGNISED ISSUE IN BRIGHTON AND HOVE AND WE WOULD BE GRATEFUL IF YOU WOULD COMPLETE THE FOLLOWING QUESTION(S) ON HOUSING COSTS AND INCOME. THE INFORMATION PROVIDED IS CONFIDENTIAL AND WILL NOT BE LINKED TO ANY INDIVIDUAL HOUSEHOLD.**

**16 Please advise what your household pays in rent or mortgage costs for accommodation. Please complete columns A or B and column C.**

a) If renting, include rent covered by Housing Benefit	b) If owner / shared ownership, total <u>monthly housing</u> costs (including endowment premiums).	c) Please give total <u>annual income</u> of household (before tax and deductions, but including benefits / allowances).
under £60 pw / £260 pm <input type="checkbox"/>	no mortgage <input type="checkbox"/>	below £10,000 <input type="checkbox"/>
£60 - £70 pw / £260 - £300 pm <input type="checkbox"/>	under £250 <input type="checkbox"/>	£10,000 - £20,000 <input type="checkbox"/>
£71 - £80 pw / £301 - £350 pm <input type="checkbox"/>	£250 - £350 <input type="checkbox"/>	£20,001 - £27,500 <input type="checkbox"/>
£81 - £100 pw / £351 - £430 pm <input type="checkbox"/>	£351 - £450 <input type="checkbox"/>	£27,501 - £32,500 <input type="checkbox"/>
£101 - £150 pw / £431 - £650 pm <input type="checkbox"/>	£451 - £600 <input type="checkbox"/>	£32,501 - £40,000 <input type="checkbox"/>
£151 - £200 pw / £651 - £865 pm <input type="checkbox"/>	£601 - £750 <input type="checkbox"/>	£40,001 - £50,000 <input type="checkbox"/>
£201 - £250 pw / £866 - £1,080 pm <input type="checkbox"/>	£751 - £1,000 <input type="checkbox"/>	£50,001 - £60,000 <input type="checkbox"/>
£251 - £300 pw / £1,081 - £1,300 pm <input type="checkbox"/>	£1,001 - £1,250 <input type="checkbox"/>	£60,001 - £75,000 <input type="checkbox"/>
above £300 pw / £1,300 pm <input type="checkbox"/>	above £1,250 <input type="checkbox"/>	£75,001 - £100,000 <input type="checkbox"/>
		above £100,000 <input type="checkbox"/>

**16d Does your household receive any financial support? Please tick all that apply**

Housing Benefit <input type="checkbox"/>	Income Support <input type="checkbox"/>	Job Seekers Allowance <input type="checkbox"/>	Working Family Tax Credit <input type="checkbox"/>	Pension Credits <input type="checkbox"/>	Disability Allowance <input type="checkbox"/>	other <input type="checkbox"/>
--	---	--	--	--	---	--------------------------------

**WE WOULD NOW LIKE TO ASK ABOUT THE FUTURE HOUSING REQUIREMENTS OF YOU AND THE OTHER MEMBERS OF YOUR HOUSEHOLD**

**17a Are you expecting to move, or is any member of your household currently, or likely to require their own accommodation over the next three years?**

Yes <input type="checkbox"/>	Wish To Move But Cannot <input type="checkbox"/>	No <input type="checkbox"/>
<b>GO TO 17b</b>	<b>GO TO 17e</b>	<b>GO TO SECTION D ON PAGE 7</b>

**17b If YES, please tick the appropriate boxes below:-**

**Moving within Brighton and Hove**

the existing household is moving <input type="checkbox"/>	<b>GO TO SECTION B ON PAGE 5</b>	a member is forming a new home <input type="checkbox"/>	<b>GO TO SECTION C ON PAGE 6</b>
---	----------------------------------	---	----------------------------------

**Moving outside Brighton and Hove**

the existing household is moving <input type="checkbox"/>	<b>GO TO 17c+d</b>	a member is forming a new home <input type="checkbox"/>	<b>GO TO 17c+d</b>
---	--------------------	---	--------------------

**17c If moving outside Brighton and Hove, which area are you thinking of moving to?**

Eastbourne <input type="checkbox"/>	Lewes <input type="checkbox"/>	Hastings <input type="checkbox"/>	Rother <input type="checkbox"/>
Adur <input type="checkbox"/>	Arun <input type="checkbox"/>	Worthing <input type="checkbox"/>	Crawley / Mid Sussex <input type="checkbox"/>
London <input type="checkbox"/>	Elsewhere in the South East <input type="checkbox"/>	Elsewhere in the UK <input type="checkbox"/>	Abroad <input type="checkbox"/>

**17d If moving outside Brighton and Hove, please indicate your reasons for moving away:- Please tick all that apply**

employment <input type="checkbox"/>	better access to work <input type="checkbox"/>	to be near family / carer <input type="checkbox"/>	better education facilities <input type="checkbox"/>	safety / fear of crime <input type="checkbox"/>
better shops / leisure <input type="checkbox"/>	retirement <input type="checkbox"/>	to start a family <input type="checkbox"/>	lack of affordable housing to buy <input type="checkbox"/>	lack of affordable housing to rent <input type="checkbox"/>

**NOW PLEASE GO TO SECTION D ON PAGE 7**

**17e If you wish to move, but cannot do so, which of the following reasons are preventing you? Please tick all that apply**

unable to afford to buy a home <input type="checkbox"/>	unable to afford moving costs <input type="checkbox"/>	local education choices <input type="checkbox"/>	family reasons <input type="checkbox"/>	location of employment <input type="checkbox"/>	lack of affordable rented housing <input type="checkbox"/>	other <input type="checkbox"/>
---	--	--	---	---	--	--------------------------------

**NOW PLEASE GO TO SECTION D ON PAGE 7**

## B: EXISTING HOUSEHOLD MOVING

**Complete this section ONLY if your existing household intends to move WITHIN Brighton and Hove in the next three years**

**18 When do you plan to move?**

Within 1 year  <sup>1</sup>                     
 Between 1 and 2 years  <sup>2</sup>                     
 Between 2 and 3 years  <sup>3</sup>

**19 What type of accommodation is required?**

semi-detached house  <sup>1</sup>                     
 detached house  <sup>2</sup>                     
 terraced house  <sup>3</sup>                     
 flat / maisonette  <sup>4</sup>  
 bungalow  <sup>5</sup>                     
 bedsit / studio / room only  <sup>6</sup>                     
 caravan / mobile home (permanently sited)  <sup>7</sup>                     
 supported housing (including sheltered)  <sup>8</sup>

**20 How many bedrooms are required?**

one  <sup>1</sup>                     
 two  <sup>2</sup>                     
 three  <sup>3</sup>                     
 four  <sup>4</sup>                     
 five or more  <sup>5</sup>

**21 What tenure is preferred?**

owner occupation  <sup>1</sup>                     
 private rent  <sup>2</sup>                     
 council rented  <sup>3</sup>  
 housing association rent  <sup>4</sup>                     
 housing assoc. shared ownership (part rent / part buy)  <sup>5</sup>                     
 tied to employment  <sup>6</sup>

**22 If you needed to move to a different house, could you afford a home of a suitable size in Brighton and Hove?**

Yes  <sup>1</sup>                     
 No  <sup>2</sup>

**23 If you require supported housing, which of the following types do you require?** Please tick **all** that apply

independent accommodation with external support  <sup>1</sup>                     
 independent accommodation with live-in carer  <sup>2</sup>                     
 residential / nursing home  <sup>3</sup>  
 extra care housing (for frail older people needing support)  <sup>4</sup>                     
 private sheltered housing  <sup>5</sup>                     
 council / housing association sheltered housing  <sup>6</sup>

**24 Are you registered on any of the following Housing Waiting Lists?** Please tick **all** that apply

Brighton and Hove City Council  <sup>1</sup>                     
 Another Council  <sup>2</sup>                     
 Housing Association  <sup>3</sup>

**25 Where is accommodation required?** Please refer to the enclosed map provided. Please tick **up to two** boxes only

Sub Area 1  <sup>1</sup>                     
 Sub Area 2  <sup>2</sup>                     
 Sub Area 3  <sup>3</sup>  
 Sub Area 4  <sup>4</sup>                     
 Sub Area 5  <sup>5</sup>                     
 Sub Area 6  <sup>6</sup>

**26 Why is the above location preferred?** Please tick **all** that apply

always lived here  <sup>1</sup>                     
 nearer family / carer  <sup>2</sup>                     
 employment / closer to work  <sup>3</sup>                     
 nearer / better shopping / leisure facilities  <sup>4</sup>  
 greater availability of cheaper housing  <sup>5</sup>                     
 better / nearer schools and colleges  <sup>6</sup>                     
 better public transport  <sup>7</sup>                     
 nearer hospital / doctor  <sup>8</sup>  
 greater availability of larger homes  <sup>9</sup>                     
 greater availability of smaller homes  <sup>10</sup>                     
 more homes suitable for adaptation  <sup>11</sup>                     
 quality of neighbourhood  <sup>12</sup>

**IF A NEW HOUSEHOLD IS ALSO FORMING, GO TO SECTION C ON PAGE 6 OTHERWISE GO TO SECTION D ON PAGE 7**

# C: NEW FORMING HOUSEHOLDS

**If a member, or members, of your household intend to set up a home of their own WITHIN Brighton and Hove within the next three years, please provide details for up to two "new" households likely to form**

**27 Who is looking / likely to look for accommodation in the next three years?**  
Please tick all that apply

	Household	
	1	2
Parent / Grandparent .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Child (16+) .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Partner / Spouse .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Lodger .....	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Friend .....	5 <input type="checkbox"/>	6 <input type="checkbox"/>
Other relative .....	6 <input type="checkbox"/>	7 <input type="checkbox"/>

**28a Is the "new" household being formed as a single person or with a partner?**

	Household	
	1	2
Single .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Couple .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>

**28b If a "couple" household is being formed, is the partner currently living:-**

	Household	
	1	2
In your existing household .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Elsewhere within Brighton and Hove .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Outside Brighton and Hove .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>

**28c What is the age of each adult in each "new" household?**

	Household1		Household2	
	Adult 1	Adult 2	Adult 1	Adult 2
16 - 19 .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
20 - 29 .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
30 - 44 .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
45 - 59 .....	4 <input type="checkbox"/>	5 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
60 - 74 .....	5 <input type="checkbox"/>	6 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
75+ .....	6 <input type="checkbox"/>	7 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>

**28d How many children under 16 will be in each "new" household?**

	Household	
	1	2
Child due .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
One .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Two or more .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>
None .....	4 <input type="checkbox"/>	5 <input type="checkbox"/>

**29 What tenure is a) needed, and b) preferred for each "new" household?**

	Needed		Preferred	
	1	2	1	2
Owner occupation .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Private rent .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Council rented .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Housing Assoc. rent .....	4 <input type="checkbox"/>	5 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Housing Assoc. Shared Ownership (part rent / part buy) .....	5 <input type="checkbox"/>	6 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
Tied to employment .....	6 <input type="checkbox"/>	7 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>

**30 When will each "new" household need their home?**

	Household	
	1	2
Within 1 year .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Between 1 and 2 years .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Between 2 and 3 years .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>

**31 What type of accommodation is a) needed, and b) preferred for each "new" household?**

	Needed		Preferred	
	1	2	1	2
Semi-detached house .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Detached house .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Terraced house .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Flat / Maisonette .....	4 <input type="checkbox"/>	5 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Bedsit / Studio / Room only .....	5 <input type="checkbox"/>	6 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
Bungalow .....	6 <input type="checkbox"/>	7 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>
Supported housing (including sheltered) .....	7 <input type="checkbox"/>	8 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
Caravan / Mobile home (permanently sited) .....	8 <input type="checkbox"/>	9 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>

**32 How many bedrooms are a) needed, and b) preferred for each "new" household?**

	Needed		Preferred	
	1	2	1	2
One .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Two .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Three .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Four or more .....	4 <input type="checkbox"/>	5 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

**33 Is the "new" household registered on any Housing Waiting Lists?**

	Household	
	1	2
Brighton and Hove City Council .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Another Council .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Housing Association .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>

**34 Where is accommodation required?**  
Please refer to the enclosed map provided  
Please tick **up to two** boxes per household

	Household	
	1	2
Sub Area 1 .....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Sub Area 2 .....	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Sub Area 3 .....	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Sub Area 4 .....	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Sub Area 5 .....	5 <input type="checkbox"/>	6 <input type="checkbox"/>
Sub Area 6 .....	6 <input type="checkbox"/>	7 <input type="checkbox"/>

**35 Why is the above location preferred?**

Please tick all that apply

	Household	
	1	2
always lived here .....	<input type="checkbox"/>	<input type="checkbox"/>
nearer family / carer .....	<input type="checkbox"/>	<input type="checkbox"/>
employment / closer to work .....	<input type="checkbox"/>	<input type="checkbox"/>
nearer / better shopping / leisure facilities .....	<input type="checkbox"/>	<input type="checkbox"/>
greater availability of cheaper housing .....	<input type="checkbox"/>	<input type="checkbox"/>
better / nearer schools and colleges .....	<input type="checkbox"/>	<input type="checkbox"/>
better public transport .....	<input type="checkbox"/>	<input type="checkbox"/>
greater availability of smaller homes .....	<input type="checkbox"/>	<input type="checkbox"/>
more homes suitable for adaptation .....	<input type="checkbox"/>	<input type="checkbox"/>
quality of neighbourhood .....	<input type="checkbox"/>	<input type="checkbox"/>

**36a If renting, what would each new household be able and willing to pay?**

	Household	
	1	2
under £50 pw / £215 pm .....	<input type="checkbox"/>	<input type="checkbox"/>
£50 - £60 pw / £215 - £260 pm .....	<input type="checkbox"/>	<input type="checkbox"/>
£61 - £70 pw / £261 - £300 pm .....	<input type="checkbox"/>	<input type="checkbox"/>
£71 - £80 pw / £301 - £350 pm .....	<input type="checkbox"/>	<input type="checkbox"/>
£81 - £100 pw / £351 - £430 pm .....	<input type="checkbox"/>	<input type="checkbox"/>
£101 - £150 pw / £431 - £650 pm .....	<input type="checkbox"/>	<input type="checkbox"/>
£151 - £200 pw / £651 - £865 pm .....	<input type="checkbox"/>	<input type="checkbox"/>
above £201 pw / £866 pm .....	<input type="checkbox"/>	<input type="checkbox"/>

**36b Is the "new" household likely to be claiming Housing Benefit?**

	Household	
	1	2
Yes .....	<input type="checkbox"/>	<input type="checkbox"/>
No .....	<input type="checkbox"/>	<input type="checkbox"/>

**36c If buying a property, how much could each household afford to pay in mortgage costs per month?**

	Household	
	1	2
under £250 .....	<input type="checkbox"/>	<input type="checkbox"/>
£250 - £300 .....	<input type="checkbox"/>	<input type="checkbox"/>
£301 - £400 .....	<input type="checkbox"/>	<input type="checkbox"/>
£401 - £500 .....	<input type="checkbox"/>	<input type="checkbox"/>
£501 - £600 .....	<input type="checkbox"/>	<input type="checkbox"/>
£601 - £750 .....	<input type="checkbox"/>	<input type="checkbox"/>
above £750 .....	<input type="checkbox"/>	<input type="checkbox"/>

**36d What savings does each household have to meet a deposit and legal costs?**

	Household	
	1	2
under £1,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
£1,000 - £5,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
£5,001 - £10,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
£10,001 - £15,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
over £15,000 .....	<input type="checkbox"/>	<input type="checkbox"/>

**36e Please give total annual income for each new household (including benefits & allowances but before tax & deductions)**

	Household	
	1	2
below £15,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
£15,000 - £20,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
£20,001 - £27,500 .....	<input type="checkbox"/>	<input type="checkbox"/>
£27,501 - £35,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
£35,001 - £37,500 .....	<input type="checkbox"/>	<input type="checkbox"/>
£37,501 - £40,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
£40,001 - £42,500 .....	<input type="checkbox"/>	<input type="checkbox"/>
£42,501 - £47,500 .....	<input type="checkbox"/>	<input type="checkbox"/>
£47,501 - £50,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
£50,001 - £55,000 .....	<input type="checkbox"/>	<input type="checkbox"/>
above £55,000 .....	<input type="checkbox"/>	<input type="checkbox"/>

**D: HOUSING COMMENTS**

**37 What types of housing, if any, do you think are needed in Brighton and Hove? (Tick all that apply)**

housing for young people .....	<input type="checkbox"/>
housing for families .....	<input type="checkbox"/>
housing for older people (i.e. over 60) .....	<input type="checkbox"/>
housing for disabled people .....	<input type="checkbox"/>
affordable housing for local people .....	<input type="checkbox"/>
environmentally friendly housing .....	<input type="checkbox"/>
housing for key workers (i.e. nurses, teachers, police) .....	<input type="checkbox"/>
no more housing required .....	<input type="checkbox"/>
no opinion .....	<input type="checkbox"/>

**38 How important are the following features when choosing your home (either rent or buy)?**

Tick all that apply

	Important	Not important
Open plan living space .....	<input type="checkbox"/>	<input type="checkbox"/>
En-suite bathroom .....	<input type="checkbox"/>	<input type="checkbox"/>
White goods included .....	<input type="checkbox"/>	<input type="checkbox"/>
Own parking space .....	<input type="checkbox"/>	<input type="checkbox"/>
Energy efficient / cheap to heat .....	<input type="checkbox"/>	<input type="checkbox"/>
Balcony / garden / terrace .....	<input type="checkbox"/>	<input type="checkbox"/>
Accommodation that includes working space e.g. study, studio or workshop .....	<input type="checkbox"/>	<input type="checkbox"/>
Open spaces .....	<input type="checkbox"/>	<input type="checkbox"/>
Children's Play area .....	<input type="checkbox"/>	<input type="checkbox"/>
Close to public transport & services .....	<input type="checkbox"/>	<input type="checkbox"/>

THANK YOU FOR COMPLETING THE QUESTIONNAIRE. PLEASE RETURN IT IN THE PRE-PAID ENVELOPE PROVIDED.

## **APPENDIX III**

### **PROMOTIONAL POSTER**



# BRIGHTON & HOVE HOUSING SURVEY



**Brighton & Hove**

## **WE NEED YOUR HELP!**

**WE ARE SENDING QUESTIONNAIRES TO OVER 14,000  
HOUSEHOLDS IN THE CITY DURING JANUARY 2005**

**THE INFORMATION REQUESTED IS VERY IMPORTANT  
TO THE COUNCIL AS IT SEEKS TO ASSESS AND HELP US  
MEET PRESENT AND FUTURE HOUSING NEEDS**



**COMPLETED FORMS NEED TO BE  
RETURNED BY 1ST FEBRUARY 2005**

**THANK YOU FOR YOUR SUPPORT**

## **APPENDIX IV**

### **LAND REGISTRY**

## LAND REGISTRY HOUSE PRICE DATA

### House Price Inflation England & Wales

% change in prices for the period Oct - Dec 2003 to Oct - Dec 2004 inclusive

	Detached Price		Semi Detached Price		Terraced Price		Flat/Maisonette Price		Overall Price	
Oct - Dec 2003	£247,524	+ 14.1%	£147,052	+ 15.0%	£124,151	+ 12.1%	£156,200	+ 7.9%	£163,829	+ 11.7%
Oct - Dec 2004	£282,517		£169,074		£139,122		£168,571		£182,920	

Source: Land Registry, © Crown Copyright

### House Price Inflation South East

% change in prices for the period Oct - Dec 2003 to Oct - Dec 2004 inclusive

	Detached Price		Semi Detached Price		Terraced Price		Flat/Maisonette Price		Overall Price	
Oct - Dec 2003	£329,774	+ 9.1%	£194,924	+ 8.8%	£160,956	+ 8.8%	£134,616	+ 8.3%	£205,695	+ 8.0%
Oct - Dec 2004	£359,877		£212,143		£175,077		£145,832		£222,147	

Source: Land Registry, © Crown Copyright

### House Price Inflation East Sussex

% change in prices for the period Oct - Dec 2003 to Oct - Dec 2004 inclusive

	Detached Price		Semi Detached Price		Terraced Price		Flat/Maisonette Price		Overall Price	
Oct - Dec 2003	£285,309	+ 10.8%	£176,758	+ 8.9%	£153,526	+ 9.7%	£113,504	+ 9.7%	£185,093	+ 7.9%
Oct - Dec 2004	£316,024		£192,550		£168,352		£124,561		£199,747	

Source: Land Registry, © Crown Copyright

### House Price Inflation Brighton

% change in prices for the period Oct - Dec 2003 to Oct - Dec 2004 inclusive

	Detached Price		Semi Detached Price		Terraced Price		Flat/Maisonette Price		Overall Price	
Oct - Dec 2003	£281,231	+ 23.8%	£178,297	+ 38.3%	£159,985	+ 54.4%	£136,267	+ 22.6%	£169,646	+ 24.7%
Oct - Dec 2004	£348,043		£246,651		£246,975		£167,067		£211,570	

**Average House Prices by Property Type****South East***Oct - Dec 2004*

Detached		Semi Detached		Terraced		Flat/Maisonette		Overall	
Av. Price	Sales	Av. Price	Sales	Av. Price	Sales	Av. Price	Sales	Av. Price	Sales
£359,877	12,636	£212,143	14,379	£175,077	14,780	£145,832	11,804	£222,147	53,599

*Source: Land Reigstry, © Crown Copyright***Average House Prices by Property Type****East Sussex***Oct - Dec 2004*

Detached		Semi Detached		Terraced		Flat/Maisonette		Overall	
Av. Price	Sales	Av. Price	Sales	Av. Price	Sales	Av. Price	Sales	Av. Price	Sales
£316,024	696	£192,550	574	£168,352	662	£124,561	745	£199,747	2,677

*Source: Land Reigstry, © Crown Copyright***Average House Prices by Property Type****Brighton***Oct - Dec 2004*

Detached		Semi Detached		Terraced		Flat/Maisonette		Overall	
Av. Price	Sales	Av. Price	Sales	Av. Price	Sales	Av. Price	Sales	Av. Price	Sales
£348,043	92	£246,651	184	£246,975	309	£167,067	673	£211,570	1,258

*Source: Land Reigstry, © Crown Copyright*

## **APPENDIX V**

### **GLOSSARY OF TERMS**

# GLOSSARY

<b>ADP – Approved Development Programme</b>	This is the Housing Corporation's total capital programme in any one year. It is normally broken down into rented housing, shared ownership and other home ownership initiatives. This is now called the National Affordable Housing Programme.
<b>Affordability</b>	<p>A measure of whether households can access and sustain the costs of private sector housing. DCA use two types of affordability: mortgage and rental.</p> <p><u>Mortgage affordability</u> measures whether households can afford a deposit and a mortgage; <u>rental affordability</u> measures whether a household can afford a private rental.</p> <p>Mortgage affordability is based on conditions set by mortgage lenders - a minimum level of household income and savings. We use a 3 times multiple of gross income. Rental affordability is defined as the rent being less than a proportion of a household's income. We use a 25% level of rental affordability.</p>
<b>Affordable Housing</b>	Affordable housing is that provided, with subsidy <sup>1</sup> , for people who are unable to resolve their housing requirements, in the general housing market because of the relationship between local housing costs and incomes. This definition covers housing for social rent, shared ownership, low cost home ownership and sub-market rent.
<b>Bedroom Standard<sup>2</sup></b>	<p>The standard number of bedrooms allocated to each household in accordance with its age/sex/marital status composition and the relationship of the members to one another.</p> <p>A separate bedroom is allocated to each married couple, any person aged 21 or over, each pair of adolescents aged 10 – 20 of the same sex, and each pair of children under 10. Any unpaired person aged 10 – 20 is paired, if possible with a child under 10 of the same sex, or, if that is not possible, he or she is given a separate bedroom, as is any unpaired child under 10. This standard is then compared with the actual number of bedrooms available for the sole use of the household and the differences are tabulated.</p>
<b>Concealed Household</b>	A Concealed Household is someone living within a household wanting to move to their own accommodation and form a separate household (e.g. adult children living with their parents).
<b>Cost rented housing</b>	Housing let at rents which are set to cover development and management costs only, i.e. not for profit. Cost rents are above the Housing Corporation's rent caps but below market rents.
<b>Data Entry Checks</b>	Checks on errors in keying survey data into computer systems.
<b>Data Processing and Analysis</b>	The process by which the responses on a questionnaire are converted into numbers or categories. These are then used to produce outputs such as tables and charts.

---

<sup>1</sup> This subsidy is not always public subsidy.

<sup>2</sup> This definition is taken from the Survey of English Housing, ODPM.

<b>Housing Demand</b>	Is the quantity and type / quality of housing which households wish to buy or rent and are able to afford. It therefore takes account of preferences and ability to pay.
<b>Discounted Market Rented Housing</b>	New Units utilising the equity from the discounted or free land from the planning process where Housing Associations could build at only development cost and provide, without grant, units which would be available at lower than private rented market cost but above Housing Corporation rent caps.
<b>Existing Household</b>	An existing household encompasses the household in its entirety.
<b>Existing Household In Unsuitable Accommodation</b>	Refers to all circumstances where households are living in housing which is in some way unsuitable, whether because of its size, type, design, location, condition, security or cost.
<b>Focus Group</b>	A type of <b>qualitative research</b> in which the views of <b>respondents</b> are sought and recorded in a group setting. Also known as a 'group discussion'.
<b>Homeless Household</b>	A household is accepted as statutorily homeless by the authority if it meets the criteria set out in the Housing Act 1996.
<b>Household</b>	The Census definition of a household is:-  <i>"A household comprises either one person living alone or a group of people (not necessarily related) living at the same address with common housekeeping - that is, sharing at least one meal a day or sharing a living room or sitting room."</i>
<b>Households In Unregistered Need</b>	Households in unregistered need are those households that are in need but not registered on the Council's Waiting or Transfer List.
<b>Housing Register</b>	A register of people waiting for affordable housing. It may have two components: a list for those not currently occupying affordable housing (more properly known as the Housing Register) and a Transfer List for those tenants who wish to move to another affordable home within the same District.
<b>Key Worker</b>	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", and includes teachers, nurses, other public sector workers and employees of businesses considered vital to sustaining the economy of an area.
<b>Inadequate Housing</b>	Housing which is inadequate or unsuitable in meeting the needs of the household, comprising a range of criteria on house condition, size, cost and security of tenure. These criteria are used to assess whether the unsuitability can be resolved by improvements to the dwelling, or whether the household has to move to another home.

<b>Intermediate Housing</b>	Housing at prices or rents above those of social rented but below market prices of rents. This includes shared ownership, shared equity, sub-market renting or low cost home ownership.
<b>Housing Need</b>	Refers to households lacking their own housing or living in housing which is inadequate or unsuitable, who are unlikely to be able to meet their needs in the local housing market without some assistance.
<b>ODPM</b>	Office of the Deputy Prime Minister has responsibility for local and regional government, housing, planning, fire, regeneration, social exclusion and neighbourhood renewal with the ambition to create sustainable communities for all.
<b>ONS</b>	Office for National Statistics.
<b>Over Occupation</b>	Over occupation occurs when, using the <b>bedroom standard</b> , there are insufficient bedrooms in the property based on the number of residents and their age/sex/marital status composition. Over occupation is more common in the public sector than the private sector.
<b>Qualitative Research</b>	A type of research designed to reveal a full range of views and circumstances of the population under study, giving an in-depth picture. Examples of this approach are <b>depth interviews</b> and <b>focus groups</b> . It differs from <b>quantitative research</b> in not providing statistically reliable numerical data.
<b>Quantitative Research</b>	Research designed to provide numerical information about a topic which is statistically reliable. If carried out using adequate methodology, quantitative data from a sample of the population can be extrapolated to assume that the results apply to the population as a whole, to greater or lesser degrees of reliability. Data is usually collected by post, telephone or by face-to face interview.
<b>Random Sample</b>	A sample where no member of the target population has a greater chance of being of being chosen than any other. Also known as <b>Simple Random Sampling</b> .
<b>Relets</b>	Local Authority or RSL rented accommodation that becomes vacant due to the departure of a previous tenant; therefore the accommodation can be re-let to another tenant or new applicant on the Housing Register.
<b>Rent caps / Target rents</b>	Rent limits provided by the Housing Corporation specified by Total Cost Indicators <sup>3</sup> and by floor area, for all new affordable housing schemes.
<b>RSL – Registered Social Landlords</b>	A Housing Association or a not-for-profit company, registered by the Housing Corporation, providing social housing. SHG can only be paid to an RSL.

---

<sup>3</sup> TCI are costs the Housing Corporation publish annually which show the maximum allowable costs for new development to be funded by SHG.



<b>SO – Shared Ownership</b>	Housing produced by an RSL, either new or existing properties purchased by an RSL, which the RSL then sells on a part rent / part buy basis. The shared owner buys a percentage of the property, funded by mortgage and/or savings. The remaining percentage is still owned by the RSL who charges a rent on it.
<b>SDS – Scheme Development Standards</b>	A set of standards published by the Housing Corporation setting out the essential and desirable standards for SHG-funded property acquired or developed an RSL.
<b>SHG – Social Housing Grant</b>	Capital provided by the Housing Corporation, or Local Authority, to fully or partially fund RSLs when development social housing. SHG is paid under s18 of the Housing Act 1996.
<b>Section 106 sites (S106 of the Town and County Planning Act 1990)</b>	A general term to describe a housing site which is large enough to require a developer to contribute affordable housing as part of a development scheme. S106 of the Act allows Planning Authorities to negotiate planning obligations as part of a development and could include, among other things, a proportion of affordable housing.
<b>Transfer List</b>	A list of Local Authority and RSL tenants that have applied for alternative Local Authority housing. Housing Associations may keep their own Transfer Lists.
<b>Under Occupation</b>	A household is under-occupying if more than one spare bedroom is available, using the <b>bedroom standard</b> as a test. Under-occupation is common in the private sector.