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1 EXECUTIVE SUMMARY

1.1 Introduction

- 1.1.1 Government guidance on housing and planning has emphasised the requirement for local authorities to assess housing need, create complementary strategies to address it and to co-ordinate effort in a corporate approach to their strategic and enabling role. In July 2002 Winchester City Council commissioned DCA to undertake a District-wide Housing Needs Assessment and projection of housing need, as the basic building block in informing housing, planning and care strategies for the future.
- 1.1.2 The survey is an up-date of that undertaken by DCA in 1999 and has been carried out in association with East Hampshire District Council, Eastleigh Borough Council, and Test Valley Borough Council.
- 1.1.3 The assessment process has been conducted to ensure that it is rigorous and able to withstand scrutiny, as outlined in Circular 6/98 and in the Revision of Planning Policy Guidance Note 3 issued in March 2000. The key objectives of the study were to:-
- ◆ assess the level of need for affordable housing in the District until 2011;
 - ◆ identify the need for various types of housing tenure in the District until 2011;
 - ◆ inform the Councils housing strategy;
 - ◆ give detailed and up to date analysis of need at a local level to inform and support affordable housing negotiations associated with planning applications.
- 1.1.4 The final report will:-
- ◆ 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 and PPG3.
- 1.1.5 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 at sub-area level calculated by sub-area responses to that sub-area household numbers. Where multiple choices are 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.
- 1.1.6 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.
- 1.1.7 All tables included in this report are extracted from the DCA Housing Survey data for the Winchester District, unless otherwise indicated.

- 1.1.8 This Executive Summary brings together the inter-related housing and planning issues identified in the separate elements of the research to assess their impact and implications for future housing and planning strategy. The key findings are summarised along with conclusions and recommendations for action.

1.2 Survey Response

- 1.2.1 8,400 questionnaires were sent to respondents in the week commencing 4th October 2002.
- 1.2.2 The final postal response was good with 3,406 questionnaires returned, which is more than double the 1,250 minimum level recommended in the ODPM Guidance.
- 1.2.3 The District was divided into 7 sub-areas for analysis. The highest response level was achieved in Kingsworthy with 42.8%. Three other areas achieved responses above 40%; Bishops Waltham, Colden Common and Alresford. The remaining three areas achieved responses above 35% (Winchester, Wickham and Denmead).
- 1.2.4 7.8% of all resident households in Winchester took part in the survey.

1.3 Winchester Housing Market

- 1.3.1 The annual rate of house price inflation in the Halifax Index in the South East Region at 30th September 2002 was 20.2%, slightly below the UK average of 21.0%.
- 1.3.2 The Land Registry data for average price for all dwellings in Winchester District during the year was around £260,903. House prices have risen significantly by 170% for flats and 94% for terraced houses in the last four years since the 1998 survey.
- 1.3.3 The largest volume of sales in the District was for detached houses (35.7%) selling at an average price of £312,276. Semi-detached houses are sold at an average price of £210,781 with 27.6% of sales. Terraced houses average £200,675 and are 24.3% of sales. Flats / maisonettes account for the least sales at 12.4% with an average price of £174,275.
- 1.3.4 Incomes of £23,500 are needed to buy a one bedroom flat and £35,500 for a two bedroom terrace in Bishops Waltham, the cheapest location. However in all other areas incomes of at least £33,500 are needed to buy a flat and £43,000 a terraced house.
- 1.3.5 Similar cost variation applies in the private rented sector across the District. Based on rent at 30% of gross income a one bed flat in Alresford requires £13,500 per annum and £16,000 in Bishops Waltham and Winchester City. The cost of a 2 bed flat would need an income of £27,000 on average and £24,000 for a terraced house, (but £27,000 in Winchester City).
- 1.3.6 Access to home ownership is beyond the reach of around 86% of the concealed households identified in the DCA survey on any realistic assessment of availability of suitable properties. Additionally, the private rented sector is expensive and makes only a limited contribution to access to affordable housing and this almost certainly underlies the problem of concealment that exists in the District.
- 1.3.7 Mortgage interest rates are at their lowest level for over 40 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 2003 and beyond would make access to market housing more difficult to achieve and would impact on households with marginal incomes most significantly.

1.4 Current Housing in Winchester

- 1.4.1 Some 39% of households in Winchester are owner-occupiers with a mortgage; nearly 36% own their homes outright - a total of 75% in owner occupation. 12% are in Council rented accommodation and fewer than 6% are in privately rented homes.
- 1.4.2 Nearly 36% of households live in detached houses and 24% are in semi-detached, nearly 16% live in terraced houses. 13% live in flats / maisonettes, bed sits or room only and almost 11% in bungalows.
- 1.4.3 Some 89% of households say that their accommodation is adequate for their needs. 11% (4,830 implied) say that it is inadequate. The largest single issue for those reporting a problem which could be resolved in-situ, was that the dwelling needed repairs / improvements (89%). Of those requiring a move, 77% (3,410, implied) mentioned that the dwelling was too small.
- 1.4.4 Single adult households make up 25% of all households in Winchester, close to the 1991 Census figure for the UK average (31%). Couples constitute 73% of Winchester households compared to 60% for the UK as a whole. The incidence of single parent households (2%) was below the UK average (9%).
- 1.4.5 Under-occupation affects 20% of all households in Winchester and over-occupation affects only 1%.
- 1.4.6 Around 49% of Council rents were below £60 per week; 77% below £70 per week. Of owner-occupiers with a mortgage, 58% pay less than £250 per month; only 8% pay in excess of £1,000 per month.
- 1.4.7 Incomes in the District are relatively high in comparison to national figures. 14% of households based on the sample had incomes below £10,000, well below the corresponding UK figure (28%), and only 32% had incomes below £20,000 compared to 60.6% nationally. 51% of households in the District had incomes above £30,000, far above the UK average.
- 1.4.8 16% or so of households were in receipt of financial support (6,840 implied), of whom 52% (3,539 implied) were in receipt of Housing Benefit.

1.5 Future Housing Requirements

- 1.5.1 Access to the market is clearly dependent on availability, a factor, which is particularly critical for low-income households who can only enter the market in any numbers where there is an adequate supply of affordable dwellings.
- 1.5.2 12% or so of all households (5,300 implied) are currently seeking to move or will do so in the next five years. This implies an average of around 2.4% per annum which is close to other DCA surveys (average 2.3%).
- 1.5.3 Around 4,550 households plan to leave Winchester in the next five years; some 34% due to family reasons, 29% due to employment, 25% due to lack of affordable housing and 24% due to retirement. 3,873 existing households and 1,906 new households will be moving or forming within the District in the next five years.
- 1.5.4 Key Findings of Existing households wishing to move:-
- ◆ 30% intend to do so within one year;

- ◆ 44% require detached accommodation, 22% semi-detached;
- ◆ 12% require a bungalow and 8% require terraced accommodation. The demand for flats / maisonettes was only 7%;
- ◆ 57% require two or three bedrooms;
- ◆ Some 77% would prefer owner occupation and around 15% indicated a preference for Council rented, with almost 4% indicating a preference for Housing Association Shared Ownership.

1.5.5 Key Findings of New or Concealed households wishing to move:-

- ◆ Around 90% of concealment relates to adult children of the existing household. The data suggests that almost 68% of concealment related to adults, between 20 to 29 years of age, a further 14% are over the age of 30;
- ◆ 63% would prefer owner occupation, 15% indicated a preference for Council rented accommodation, and 10% expressed an interest in private rented accommodation;
- ◆ 49% require a flat / maisonette, 18% require a semi-detached accommodation and also terraced accommodation, and around 13% semi-detached accommodation. The demand for detached houses (around 4%) and bungalows (2%) was low;
- ◆ 42% of new households say they need one bedroom and 49% two bedrooms. Preference levels for three bedrooms is only 9%;
- ◆ Around 15% (370 implied) of all new concealed / households moving were registered on a housing waiting list, with 85% of these being on the Winchester City Council list;
- ◆ Some 57% could afford a weekly rent of no more than £60, 75% no more than £70;
- ◆ 56% could not afford a mortgage of more than £300 per month;
- ◆ Some 67% have household incomes below £20,000 per annum; 19% have household incomes at or above the UK average of £23,000.

1.6 Supported and Adapted Housing Needs

- 1.6.1 14% of households in Winchester contain somebody with a special need, suggesting some 6,220 households.
- 1.6.2 The largest group affected by a special need was those with mobility problems of some kind affecting 52% of all those with a disability in the area. 514 wheelchair users were identified, 9% of those with a disability were wheelchair users.
- 1.6.3 In less than 9% of cases does someone using a wheelchair inhabit a home that has been adapted for a wheelchair, suggesting a mismatch between houses adapted and those where wheelchair users live.
- 1.6.4 Around 25% of Housing Association rented homes were adapted for a disabled person compared to just 4% in the owner occupied (no mortgage) sector, principally older people.
- 1.6.5 In terms of the nature of adaptations 17% have wheelchair adaptations; 57% have handrails / grab rails adaptations, 40% have a ground floor toilet and 40% also have bathroom adaptations.

- 1.6.6 There will be future provision requirements to address the changing needs from “Care in the Community” policies, but at this stage we believe that these are likely to be specific small developments of supported units.
- 1.6.7 It is however, important to recognise that some 3,101 households have someone with a mobility problem and 89% of wheelchair users do not live in an adapted dwelling. These are matters which should principally be dealt with by Part M of the Building Regulations.
- 1.6.8 Around 110 households require accommodation with visiting support or with a live in carer.

1.7 Population Growth and Household Formation

- 1.7.1 The population is projected to increase by 6,320 people, 6.3% over the 15 years to 2011.
- 1.7.2 The 0-19 age range show a steady fall in numbers overall, the majority of this fall occurred between 1996 and 2001(-426; 1.7%).
- 1.7.3 The 20-29 age group is projected to fall steadily up to 2006 (-701; 5.8%), after 2006 a rise occurs up to 2011 (+679; 6%). This age group shows a small overall fall in numbers over the forecast period (-61; 0.5%).
- 1.7.4 The 30-44 age group, which is the main economically active group, shows an overall decline. A small rise in numbers occurs up to 2006, followed by a decline up to 2011 (-928; 4.3%).
- 1.7.5 The most significant change occurs in the numbers of people aged 45 to 64, with an overall rise of 4,295 people. The main increase occurred between 2001 and 2006 (+1,573; 5.8%).
- 1.7.6 There is also a significant growth in numbers in the over 65 age group overall of around 3,576. The greatest rise is due to happen between 2006 and 2011(+1,885; 9.8%).
- 1.7.7 The "older" retirement group, those 80 and over, grows by nearly 32%, 1,582 more people by 2011. This increase represents 6,548 people aged over 80 present in the area by 2011, who are much more likely to have care and support needs which should now be assessed in detail.

1.8 Affordable Housing Need and Supply

- 1.8.1 The annual scale of need and supply of affordable housing is summarised below from the detailed assessment model in Section 8.

Table 1-1 Annual Need and Supply

Backlog of Existing Need (eliminated over 5 years)	95
Net new formation	339
Net increase in registered need	588
In-migrant need	<u>237</u>
Total annual need	1,259
Total Supply from re-lets	<u>480</u>
Net annual outstanding need	<u>779</u>

- 1.8.2 The total affordable housing need annually is for 1,259 units. Re-lets of the existing social stock average 480 units and is the major means of addressing the scale of need identified. Re-lets are likely to reduce as Right to Buy sales continue and the size of Local Authority Stock reduces.
- 1.8.3 After allowing for this level of supply, there will still be an annual affordable housing shortfall of 779 units which projected over the nine year period to 2011 is a total of 7,011 units. It is not expected to be able to achieve this scale of supply in this timescale. This level of need is nearly 8 times the number of units likely to be able to be delivered from acquisitions, new delivery or conversions, currently planned at around 100 units p.a. in the Housing Strategy, resulting in growing levels of unmet need each year.
- 1.8.4 Around 1,160 households intend to leave the District because of a lack of affordable housing over the next five years and they are not included in our needs assessment calculation.
- 1.8.5 The survey provides valuable data on the needs and preferences of concealed households who intend to form and wish to remain in Winchester District.
- 1.8.6 90% of concealed households are young people wishing to set up their own household who are the children of Winchester District residents. However, not all concealed households represent a household in need of subsidised affordable housing.
- 1.8.7 The House Price Survey revealed that any household with an income below £23,500 to £43,000 per annum, depending on location, would struggle financially to buy the smallest, acceptable quality units in the local housing market depending on location. Almost 95% of new households forming in the next year have incomes below £35,000 restricting access to one bedroom flats only. Incomes between £35,000 and £49,000 are needed to purchase two bedroom flats or terraces in the District.
- 1.8.8 The increases in house prices over the last four years have excluded a large proportion of 'first-time buyers' from the owner occupied market. This impact is also revealed in the need to subsidise housing for 'key workers'. 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 marginal element of affordable need.
- 1.8.9 It is however, also important to build balanced sustainable developments and a mix of subsidised units for sale and rent is needed where the overall level of up to 40% is negotiated.

1.9 House Type Preferences / Supply

- 1.9.1 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.
- 1.9.2 Both preference and need for flats at 39.0% and 50.5% respectively are much higher than the stock level of 10.3% reflecting the impact of changing household formation and preferences. New forming households show a level of interest in terraced housing similar to the stock supply of 15.5% and much lower than for flats. Sales of terraces are higher because they are the stock type to which there is currently the greatest supply of lower cost housing.

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

	Demand		2002 Stock Supply %	Sales
	New Household Need %	New Household Preference %		All Buyers %
Terraces	16.4	23.1	15.5	24.3
Flats	50.5	39.0	10.3	12.4

- 1.9.3 All site briefs and regeneration projects should promote housing types, which are under represented in the stock, in line with the principles in the PPG3 issued in March 2000.

1.10 Affordable Rented Accommodation

- 1.10.1 The local relationship between house prices and incomes is such that almost 95% of new forming households are unable to purchase in their own right. The impact of Right to Buy creates a decline in the availability of rented stock and the largest proportion of additional affordable units are required as rented properties, both for new forming households and existing families.

1.11 Low Cost Market Housing

- 1.11.1 The major preference of concealed households is for owner occupation but generally around 95% of new households have incomes inadequate to be able to purchase. The sustained period of high house price inflation has impacted on new forming households' ability to buy, some of whom could have done so two years ago.
- 1.11.2 There is a specific preference for around 100 Shared Ownership units a year, both from new forming household and existing households.

1.12 Market Rent

- 1.12.1 Around 350 existing and new households express interest in private rental although this is a relatively small proportion of the current tenure balance. Initiatives to deliver discounted market rent could well assist households unable to afford full market costs which are high.
- 1.12.2 In addition to the scale of affordable housing to meet general households requirements outlined in 1.8.1, there are specific needs which should also be addressed. These are highlighted in the following paragraphs.

1.13 Sheltered Housing

- 1.13.1 In total the data suggests a combined requirement for 2,030 units of sheltered accommodation from older people currently living in the District (341 households) and those who may in-migrate to be beside their family (1,689 households). 752 are in the affordable sector and 1,278 in the private sector.
- 1.13.2 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.

- 1.13.3 The significantly higher level of elderly accommodation for people moving into the District is common to other DCA surveys. Generally the forecast is being made by their children who assist in the moving process. Conversely the indigenous older population prefer to continue in the area / surroundings they know and within their own home as long as possible.

1.14 Supported Housing

- 1.14.1 The Survey identifies a need for 111 units of independent accommodations, 87 units with a visiting support worker and 24 with a live in carer.

1.15 Recommendations

- 1.15.1 DCA make the following recommendations for the Council to consider in future housing and planning strategies:-

1.15.2 Housing Strategy

- ◆ In its enabling role support delivery agencies, mainly RSL's, working in the area to provide a mix of types but mainly flats and terraced houses to meet the needs of single adults and couples and address the shortages in the stock;
- ◆ Develop a comprehensive 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;
 - develop 'extra care' accommodation for the frail elderly population.
- ◆ Consider adopting Lifetime Homes standards for new housing.

1.15.3 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.

1.15.4 Planning Strategy

- ◆ Negotiate with prospective developers towards achieving up to 40% subsidised affordable homes from the total of all suitable sites coming forward for planning consent over the period of the Local Plan.
- ◆ Each site will need to be assessed individually, targets being subject to wider planning, economic priority, regeneration and sustainability considerations;
- ◆ This will require a flexible approach to individual site negotiations, taking account of the site size variance between major development areas, smaller urban sites and sites in smaller rural settlements.

2 SURVEY METHODOLOGY

2.1 Purpose, Aims and Objectives

2.1.1 Winchester City Council formally commissioned DCA in July 2002 to carry out a District-wide Housing Needs Study. The survey has been carried out in association with East Hampshire District Council, Eastleigh Borough Council, and Test Valley Borough Council.

2.1.2 The purpose of the study was to examine the housing requirements (needs, aspirations and demands) for the communities and households of the Winchester District, and to assess the wider implication effecting housing from the other three authorities.

2.1.3 The aims and objectives were to:-

- ◆ assess the level of need for affordable housing in the District until 2011;
- ◆ identify the need for various types of housing tenure in the District until 2011;
- ◆ inform the Councils housing strategy;
- ◆ give detailed and up to date analysis of need at a local level to inform and support affordable housing negotiations associated with planning applications.

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 and PPG3.

2.2 Definitions

2.2.1 The Housing Needs Study has been undertaken in line with the ODPM research Local Housing Needs Assessment: A Guide to Good Practice in assessing people's preferences as well as their needs.

2.2.2 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.

2.2.3 Affordability in our view is defined by the relationship between local incomes and the local general housing market. Our definition of affordable housing is as follows:-

Affordable housing is that provided, with subsidy, 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.

2.2.4 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.

2.3 Methodology

2.3.1 The study consisted of the following elements:-

- i. A postal questionnaire to 8,400 households in 7 sub-areas;
- ii. A housing market survey utilising the Land Registry and Halifax databases and a telephone survey of estate agents on the cost of access level property and on the supply and cost of private rented housing;
- iii. Secondary data analysis drawing upon HIP and Housing Register data on the flow of social stock and need, 1991 Census, household and population projections and other national research.

2.3.2 The postal questionnaire was designed in consultation with officers of Winchester City 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 Postal 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 Postal 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 both a 95% confidence rate and that our results reflect the population. Using simple random sampling, the degree of sampling error with a sample size of 1,580 households is in the region of 2% at District level.

2.4.3 This means, for example, that if 53% of respondents in a survey do not have central heating then we can be 95% confident that 53% of households plus or minus 2% do not have central heating (i.e. 51% - 55%).

2.4.4 The postal sample was stratified into 7 Management Areas and selected by random probability from the Council Tax Register. The sample was 30.3% of resident households in the District as a whole, determined to ensure statistical validity within each sub-area. As we see in 2.6.4, based on a 7 sub-area structure and a high response rate, a finer level of $\pm 1.11\%$ was achieved in this survey.

2.4.5 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.

2.5 Promotion

- 2.5.1 A comprehensive promotion campaign was agreed with the Council to create awareness of the survey, and its importance to the Council. All councillors and parish clerks in the District were contacted to inform them of the survey and enlist their assistance in publicising the survey and maximising the response rate.
- 2.5.2 Posters were prepared for display in public places in all wards throughout the District and a press release was issued to publicise the survey, both on the weekend of the survey being received and the final weekend for responses.

2.6 Survey Process and Response

- 2.6.1 The sample survey of 8,400 questionnaires was dispatched for delivery on 4th October 2002. The return deadline was 30th October 2002 allowing respondents a period of around twenty two days including three weekends for completion and return.
- 2.6.2 The final overall response was good with 3,406 questionnaires returned, which is more than two times the 1,250 minimum level recommended in the ODPM Guidance.
- 2.6.3 The highest response level was achieved in Kingsworthy with 42.8%. Three other areas achieved responses above 40%; Bishops Waltham, Colden Common and Alresford. The remaining three areas achieved responses above 35% (Winchester, Wickham and Denmead).
- 2.6.4 All sub-areas reached response levels based on household numbers adequate to ensure statistical validity at a confidence level of 95%. Sampling error ratio ranged from $\pm 3.75\%$ to $\pm 3.53\%$ at sub-area level and was $\pm 1.11\%$ at District-wide level.
- 2.6.5 7.8% of all resident households in the Winchester District will have taken part in the survey.
- 2.6.6 The response rate analysis by sub-area is detailed in Table 2-1 below.

Table 2-1 Response Rate by Area

Ward	Households	Postal Sample	Postal Returns	Response Rate %	Validity \pm %
Area 1 – Winchester	14,158	1,200	469	39.1%	3.69
Area 2 – Wickham	5,039	1,200	479	39.9%	3.66
Area 3 – Bishops Waltham	3,909	1,200	498	41.5%	3.58
Area 4 – Colden Common	5,649	1,200	484	40.3%	3.64
Area 5 - Alresford	4,096	1,200	507	42.3%	3.55
Area 6 - Denmead	3,945	1,200	455	37.9%	3.75
Area 7 - Kingsworthy	6,602	1,200	514	42.8%	3.53
Total	43,398	8,400	3,406	40.5%	1.37

3 THE WINCHESTER HOUSING MARKET

3.1 Introduction

- 3.1.1 Three data searches were commissioned to provide information on house price and sales volumes across the Winchester District:-
- ◆ from the Halifax, as the largest mortgage lender, analysing lending in the Region;
 - ◆ from the Land Registry, providing data on all sales in the area for the past year;
 - ◆ Estate Agency survey to assess access 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 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 third quarter of 2002 accelerated in most regions with an overall increase of 6.4%, above the 3.9% gain in the second quarter of 2002. However, this still remains well below the peak record in 1988 (34%). 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 30th September 2002 was recorded by Halifax at 21.0% and Land Registry at 17.3%.

3.3 Regional Picture

- 3.3.1 The annual rate of house price inflation in the Halifax Index in the South East Region at 30th September 2002 was 20.2%, slightly below the UK average of 21.0%.
- 3.3.2 House prices in the South East Region continue to rise, showing an increase of 3.5% during the third quarter of 2002.
- 3.3.3 House prices in Hampshire rose annually by 18.9% as calculated by Land Registry.

3.4 The Housing Market

- 3.4.1 The Regional Market is shown in the Table 3-1 below, which details the prices paid for the main categories of house types for the whole of the South East Region with comparisons against a different source of house price index data.

- 3.4.2 The Halifax data is based on actual sales of mortgaged properties and the information is a real indication of actual prices prevailing in the purchases being made in the South East Region. The Land Registry data incorporates all transactions for the Region and at County level in Hampshire.

Table 3-1 Average Region & County House Prices - All Buyers 2002

Property Type	Land Registry South East Average Price	Halifax South East Average Price	Land Registry Hampshire Average Price	Land Registry % of sales in Hampshire
Terraced	136,637	152,973	137,369	28.1
Semi-detached	169,326	188,281	165,845	24.9
Detached	302,671	312,267	284,817	34.0
Bungalows	*	203,556	*	*
Flats & maisonettes	112,761	120,962	108,749	13.0
All properties	185,175	198,646	190,898	100.0

Source: *Halifax House Price Index, 3rd quarter 2002.*

Land Registry Residential Property Price Report, 3rd quarter 2002.

** Land Registry figures do not identify bungalows separately.*

- 3.4.3 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.
- 3.4.4 The table below examines average house prices for the Winchester District recorded in September 2002 by the Land Registry against house prices in June 1998 in the previous Housing Needs Survey.

Table 3-2 Average House Prices and Sales - All Buyers 2002

Property Type	Winchester District			
	2002		1998	
	Land Registry Average Price	Land Registry % of sales	Halifax Average Price	Increase % 1998 / 2002
Terraced	200,675	24.3	103,503	93.9
Semi-detached	210,781	27.6	107,615	95.9
Detached	370,555	35.7	172,596	114.7
Flats & maisonettes	174,275	12.4	64,397	170.6
All properties	260,903	100.0	127,619	104.4

Source: *Land Registry Residential Property Price Report, 3rd quarter 2002*

Halifax House Price Index, 3rd Quarter 1998

- 3.4.5 Whilst the overall house price increase in the Winchester District is 104.4% over the last four years, the price of terraced houses and flats – the access level stock, have increased by nearly 94% and 170% respectively. Prices of flats have increased by 35% and terraced houses by 19% in the last year to September 2002.
- 3.4.6 The largest volume of sales in the District was for detached houses (35.7%) selling at an average price of £370,555. Semi-detached houses average £210,781 and are 27.6% of sales. Terraced houses account for 24.3% of sales with an average price of £200,675. Flats & maisonettes only account for 12.4% of sales and average £174,275. Therefore we do not see these as the main access property type due to under supply in all areas of the District. It would therefore be deemed that terraced houses are the main access property for first time buyers.
- 3.4.7 The survey data shows that 607 existing households and 553 new forming households plan to leave the District because of a lack of affordable housing. There are also 994 households who said they wished to move but could not do so because of a lack of affordable rented housing.
- 3.4.8 These significant price increases have major impact on households' ability to access the local market. The following table reflects the changed incomes requirement to be able to purchase in the District.

Table 3-3 Income Requirements 1998 - 2002

Property Type	June 1998	September 2002	
	Income	Access Units	Average
Terraced	£30,800	£45,000	£51,000
Flats (2-bed)	£19,370	£41,000	£45,500

3.5 Access Sales Levels in the District

- 3.5.1 Access to the market is clearly dependent on availability, a factor, which is particularly critical for low- income households who can only enter the market in any numbers where there is an adequate supply of affordable dwellings.
- 3.5.2 DCA undertook a survey of the local estate agents to ascertain the cost of the cheapest units available both for private rent and for sale across 5 sub-areas. There was a very low level of properties available with relation to flat sales for Wickham and for both flat and terraced sales for Denmead. Therefore the samples obtained should not be taken as an average.
- 3.5.3 Although the average price of terraces according to the Land Registry survey is £200,675, access sales levels vary across the Winchester District area with the lowest access prices, for a 2-bed property, starting at around £109,950 in Bishops Waltham rising to £155,000 in Alresford as can be seen in Table 3-4 below.

Table 3-4 Average and Access Sales Levels in the District - September 2002

Property Type	Winchester		Bishops Waltham		Wickham		Alresford		Denmead		District-Wide	
	Average	Access	Average	Access	Average	Access	Average	Access	Average	Access	Average	Access
1-Bed Flat	135,290	105,000	89,338	74,950	110,000	110,000	-nd-	-nd-	-nd-	-nd-	111,543	96,650
2-Bed Flat	174,589	153,000	144,154	109,950	135,000	135,000	-nd-	-nd-	119,995	119,995	143,435	129,486
2-Bed Terraced	204,204	145,000	152,237	109,950	149,975	135,000	170,304	155,000	130,000	130,000	161,344	134,990
3-Bed Terraced	199,006	150,000	157,964	119,950	135,950	135,950	181,806	164,500	138,111	130,000	162,567	140,080
2-Bed Semi-Det	221,867	210,000	186,965	168,950	191,667	185,000	227,500	220,000	185,000	185,000	202,600	193,790
3-Bed Semi-Det	203,606	159,950	190,855	127,500	202,250	199,500	220,313	177,500	164,187	145,000	196,242	161,890

Source: DCA House Price Survey

3.6 Purchase Income Thresholds

- 3.6.1 The cheapest access prices 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 Table 3-5 below outlines the income ranges needed to enter the market in the main settlements in Winchester District. The survey suggests that few flats are likely to be available in the certain areas. For example in the Wickham and Denmead areas only one flat sale is represented as this is the only data for flats that could be obtained in these areas.

Table 3-5 Purchase Income Thresholds

Area	Income Thresholds		
	1 bed Flat	2 bed Flat	2 bed Terrace
Winchester	33,500	48,500	46,000
Bishops Waltham	23,500	35,000	35,000
Wickham	35,000	43,000	43,000
Alresford	-nd-	-nd-	49,000
Denmead	-nd-	38,000	41,000

3.7 The Private Rented Sector

- 3.7.1 We offer below a few comments on the private rented sector but must stress that the evidence available is largely empirical. We approached some of the main private renting agencies operating in the District.
- 3.7.2 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.
- 3.7.3 A range of property types are available in the sector as a whole and are found in a variety of locations within the District. It would appear that the difference in rent level between furnished and unfurnished property is marginal with respondents indicating they do charge only slightly more for furnished accommodation. They indicated that the difference in cost was marginal, although many agencies do not deal with furnished property due to the fire regulations involved.
- 3.7.4 As with the sales data there were certain areas where low samples were obtained, specifically with regard Wickham where only one rental was obtained and also Denmead where the rental information was low for flats and terraced properties. The figures for these two areas therefore should not be taken as an average.

3.8 Private Rent Sector Levels

3.8.1 From the various sources approached, we set out below the prevailing private sector rent levels.

Table 3-6 Average and Access Rent Levels in the Winchester District (£/month) - June 2002

Property Type	Winchester		Bishops Waltham		Wickham		Alresford		Denmead		District Wide	
	Average	Access	Average	Access	Average	Access	Average	Access	Average	Access	Average	Access
1-Bed Flat	607	440	493	450	-nd-	-nd-	497	380	525	525	531	449
2-Bed Flat	685	625	660	625	795	795	604	575	588	575	666	639
2-Bed Terraced	778	700	617	525	-nd-	-nd-	638	600	613	600	661	606
3-Bed Terraced	800	650	750	750	-nd-	-nd-	690	675	725	700	741	694
2-Bed Semi-Det	791	650	663	625	-nd-	-nd-	662	600	600	600	679	619
3-Bed Semi-Det	813	675	750	750	-nd-	-nd-	729	700	750	700	761	706

nd: no data available.

Source: DCA House Price Survey

- 3.8.2 Access rental costs in the private rented sector vary significantly by location within the Winchester City. The private rented sector can be accessed at a level of £380 a month in Alresford, £440 in Winchester and £450 in Bishops Waltham (see Table 3-6 below) for a one bedroom flat, the smallest unit.
- 3.8.3 For a 2-bed flat, rents range from £575 in Alresford to £625 in Winchester and Bishops Waltham.
- 3.8.4 In the case of 2-bed terraced houses, we found that the access rent levels were £525 p.m. in Bishops Waltham to £700 in Winchester. Semi-detached properties can be rented from £600 (for a 2-bed property) to a maximum of £750 (for a 3-bed property).
- 3.8.5 Based on rent at 30% of gross income, an income of around £15,200 would be needed to be able to access the private rented sector through the one bed flats, the smallest units, in Alresford the cheapest location. In Bishops Waltham the income requirement would be £18,000 and £17,600 in Winchester City.

- 3.8.6 The cost of a 2 bed flat would require an income of £23,000 in Alresford, and a 2 bedroomed terraced house an income of £21,000 in Bishops Waltham.
- 3.8.7 The new / concealed households gave us details of how much rent per week they could afford to pay. We examined this data to see if those new concealed households who had specified their preferred tenure as Private Rent could actually access the market price levels that were identified in the Estate Agents Survey.
- 3.8.8 We found preference for private rented housing in concealed households generally very low. 93% of new households could not afford to pay more than £380 per month, allowing them to access only the cheapest one bed flat in the District, as shown in Table 3-6 above. Only 4.2% of new households moving in the next year could pay between £351 and £430, and therefore only a very small proportion of this group could access the cheapest one bed flat in the District at £380. None of the new households forming in the next year could afford between £431 and £650 which would allow them access to the cheapest two-bed flat at £575.
- 3.8.9 Less than 1% of these households could pay between £651 and £865 per month which would allow access through the private rented market to all property types.

3.9 Conclusions

- 3.9.1 The key fact is that, based on conservative assumptions, access to home ownership is beyond the reach of around 86% of the concealed households identified in the DCA survey on any realistic assessment of availability of properties. Additionally, the private rented sector makes little contribution to access to affordable housing and this almost certainly underlies the problem of concealment that exists in the District.
- 3.9.2 The analysis shows that the housing market excludes many families and single person households who are currently seeking access to local housing. This concealed demand requiring affordable housing is mainly in addition to Waiting List numbers. There clearly is an 'affordability' problem in the District for low-income households.
- 3.9.3 House prices have risen significantly by 170% for flats and 94% for terraced houses in the last four years since 1998. Incomes of £23,500 are needed to buy a one bedroom flat and £35,500 for a two bedroom terrace in Bishops Waltham, the cheapest location. However in all other areas incomes of at least £33,500 are needed to buy a flat and £43,000 a terraced house.
- 3.9.4 Mortgage interest rates are at their lowest level for over 35 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 2003 would make access to market housing more difficult to achieve and would impact on households with marginal incomes most significantly.
- 3.9.5 Similar cost variation applies in the private rented sector across the District. Based on rent at 30% of gross income a one bed flat in Alresford requires £15,200 per annum, £18,000 in Bishops Waltham and £17,600 in Winchester City. The cost of a 2 bed flat would need an income of £25,500 on average and £24,000 for a terraced house, (but £28,000 in Winchester City).

4 CURRENT HOUSING IN THE CITY

4.1 Tenure, Type and Amenities

- 4.1.1 This section deals with the analysis of the survey data on existing households and issues relating to their current accommodation. Given the nature of the random sample of households within agreed sub-areas embodied in the postal survey, we would expect tenure type to provide some broad validation of the representativeness of the sample.
- 4.1.2 It should be noted that in all cross-tabulations data is included only where the respondent has answered each element (question) involved, hence some small discrepancies when compared with the tables relating to a single data source.
- 4.1.3 The data set out on tenure at Table 4-1 has been weighted to be in line with data provided by the Council on social housing stock in the 2002 HIP Return 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 Winchester.

Table 4-1 **Tenure of Present Households**
Question 1

Tenure	%	Group %	N ^{os} implied	UK Census 1991	Local Area Census 1991
Council rented	12.0	16.5	5,199	22.0	18.3
HA rented	4.2		1,832		
Shared ownership	0.3		107		
Private rented	5.7	7.8	2,477	10.0	12.0
Tied to employment	2.1		904		
Owner occupier - mortgage	39.3	75.7	17,065	68.0	69.7
Owner occupier - outright	36.4		15,814		
Total	100.0	100.0	43,398	100.0	100.0

- 4.1.4 The UK Local Area Census figures for Winchester for 1991 are now eleven years out of date and relate to a total figure of around 37,400 occupied dwellings as compared with around 43,400 on the Council tax register in 2002, a growth of 6,000 dwellings.
- 4.1.5 The proportion of owner occupiers has increased from 70% to around 76% with the bulk of new properties being in that sector. There was a steep decline in level of accommodation tied to employment (close to 2,000 in 1991) but the further impact of Right to Buy legislation appears to have been largely offset by new housing association rented accommodation.
- 4.1.6 The proportion of owner-occupiers without mortgage has increased by 2002 to 36.4% as compared with 25.3% in 1991. The trend towards paying off mortgage as tax incentives decrease appears to have applied in Winchester on the basis of our data at much the same level as in the majority of our recent surveys, although arguably the ageing of the population may also have a bearing on this issue.

- 4.1.7 Table 4-2 below indicates the type of accommodation occupied by the households responding to the question (based on 74 fewer raw data cases than for tenure).

Table 4-2 Type of Accommodation

Question 2

Type	%	Group %	N ^{os} implied	UK Census 1991	Local Area Census 1991
Semi-detached house	23.5	72.8	9,964	53.0	63.4
Detached house	35.9		15,251		
Bungalow	13.4		5,683		
Terraced	15.5	15.5	6,596	27.0	22.1
Flat / Maisonette	10.3	10.9	4,366	19.0	13.1
Bedsit / Studio / Room only	0.6		266		
Caravan / Mobile home	0.8	0.8	324	1.0	1.4
Total	100.0	100.0	42,450	100.0	100.0

- 4.1.8 The Local Area Census data 1991 shows a lower proportion of detached and semi-detached houses and bungalows compared to our sample, and a significantly higher proportion of terraced houses. New building since 1991 has principally been in the private sector and would be likely to be predominantly in the form of detached or semi-detached houses. Our figure suggests a growth in houses other than terraced houses of some 30% since 1991 as compared with the overall growth of 16%. While some understatement of terraced houses may apply, we did not feel that any further re-weighting of the data was needed, especially in view of the tenure balance accuracy referred to at 4.1.3 above.

Table 4-3 Form of Tenure by Property Type

Question 2 by Q.1

Type	Owner occupier with mortgage	Owner occupier no mortgage	Private rented	Council rented	HA rented	Shared ownership*	Tied to employment *
Semi-detached	23.8	19.5	26.1	34.3	16.0	51.0	28.4
Detached	45.8	43.2	20.1	0.4	0.9	12.0	37.3
Terraced	18.1	10.9	22.4	13.8	25.8	17.4	19.0
Bungalow	9.2	19.3	6.2	18.3	2.0	0.0	6.0
Flat / Maisonette	2.7	5.2	24.5	32.4	45.9	19.6	6.5
Bedsit / Room only	0.2	0.2	0.0	0.8	9.4	0.0	0.9
Caravan / Mobile Home	0.2	1.7	0.7	0.0	0.0	0.0	1.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

(* Low volume of data).

- 4.1.9 A cross-tabulation relating form of tenure to property type also indicated that some 71% of flat / maisonette accommodation was in the rented sector, although that form of tenure represented only 24% of tenure type. Around 52% of bungalow accommodation was in the owner-occupied no mortgage sector, perhaps reflecting the older age of respondents in that sector.

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

Table 4-4 Number of Bedrooms

Question 5

Bedrooms	%	N ^{os} implied
Bedsit	0.7	286
One	6.9	2,992
Two	21.2	9,182
Three	37.4	16,188
Four	24.7	10,665
Five or more	9.1	3,920
Total	100.0	43,233

4.1.11 The average across the stock in the District was 3.1 bedrooms, above the level found in other recent DCA surveys (2.8). The breakdown of size by bedroom in percentage terms as between the ownership and rental sectors was accessed by cross-tabulation with the following results:-

Table 4-5 Number of Bedrooms by Tenure

Question 5 by Q1

Tenure	Bedsit	One	Two	Three	Four	Five+	Total
Properties owned	0.2	2.0	16.8	39.0	30.9	11.1	100.0
Properties rented	2.2	22.7	35.0	32.4	5.2	2.5	100.0
Council rented only	0.9	26.8	38.3	33.8	0.2	0.0	100.0

4.1.12 As might be expected, some 94% of four (or more) bedroom properties were in the owner occupied sector. 79% of bedsit / one bedroom properties were in the rented sector.

Table 4-6 Access to Basic Facilities

Question 6

H/IF	All tenures %	Owner occupier with mortgage	Owner occupier no mortgage	Private rented	Council rented	HA rented	Shared ownership *	Tied to employment
CH-F	88.8	92.0	87.5	78.1	86.0	94.4	100.0	83.6
CH-P	7.8	5.5	9.5	10.3	10.3	3.7	0.0	9.9
HWTJ	75.3	75.9	83.0	65.6	62.8	51.9	57.1	75.2
LI	75.1	84.4	79.6	49.1	60.2	31.4	88.0	60.3
DG-F	64.7	63.5	63.7	39.4	86.6	64.6	88.0	41.5
DG-P	16.2	17.3	20.3	16.8	4.8	4.0	12.0	10.6
WPI	48.2	56.0	56.1	21.0	22.0	24.4	80.6	31.2
CWI	36.2	37.6	38.6	15.1	42.5	17.4	53.0	18.7
DP	25.1	26.4	24.3	11.2	33.9	15.6	37.3	17.2

(* Low volume of data).

Heating / Insulation facilities:-

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

- 4.1.13 Households with some form of central heating at around 97% were well above the national average in the 1991 Census (78%). At local area level, around 91% of households in Winchester had central heating in 1991.
- 4.1.14 In the case of Winchester Council rented accommodation alone, 96% or so had some form of central heating, marginally below the all tenure average. The Council rented sector performed relatively poorly in relation to levels of water pipe, loft insulation and hot water tank jackets. However, the level of full double-glazing (87%) was very high and far above the all sector average.
- 4.1.15 The other particularly significant pattern to emerge from the cross tenure analysis was that private rented accommodation had a lower level of access to all the nominated facilities than the all tenure average (and in most cases a far lower level of access). Full central heating was available in only 78% or so of properties; full double glazing in only 39% with very low levels of insulation (other than hot water tank jackets).
- 4.1.16 Around 75% of respondents indicated that their main source of heating fuel was mains gas; 11% oil; 9% electricity.

4.2 Adequacy of Present Dwelling / Improvement Required

- 4.2.1 Respondents were asked if their current accommodation was adequate for their needs. Some 89% indicated that their accommodation was adequate; some 11% (4,830 implied) that it was inadequate. A level in the region of 89% has been a typical result in recent DCA surveys.
- 4.2.2 From a cross-tabulation some discrepancy in satisfaction by tenure was evident but fairly consistent with results in other DCA surveys. The satisfaction level for Council rented accommodation (around 82%) was marginally higher than the average emerging for social rented accommodation from recent DCA surveys (81%). Satisfaction in the private rented sector (around 75%) was well below the all tenure average, as might be expected from the comments at 4.1.15, above but higher than that for HA rented accommodation which was very low (61%) in our experience.

Table 4-7 Adequacy by Tenure

Question 8a by Q.1

Tenure	% adequate
Owner occupied with mortgage	89.3
Owner occupied no mortgage	95.8
Private rented	75.5
Council rented	82.5
HA rented	60.9
Shared ownership*	77.8
Tied to employment	85.8

(* 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. 92% (4,450 implied) a solution requiring a move.
- 4.2.4 47% of the group (2,280 implied) indicated an 'in-house'. The results are shown in Table 4-8 below solution. 89% of households selected the need for repair / improvements.

Table 4-8 Reason for Inadequacy of Present Accommodation Where an “In House” Solution May Be Possible

Question 8bi

Reasons	% responses	% households	N ^{os} implied (all choices)
Needs repair / improvement	73.6	89.1	2,036
Too costly to heat	26.4	32.0	732
Total	100.0		2,768

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

Question 8bii

Reasons	% responses	% households	N ^{os} implied (all choices)
Too small	66.3	76.7	3,415
Rent / mortgage too expensive	13.2	15.3	680
Too large	9.0	10.4	461
Housing affecting health	7.1	8.2	366
Tenancy insecure	4.4	5.1	225
Total	100.0		5,147

4.2.5 In the case of solutions requiring a move, the largest single issue was that the dwelling was too small, referred to by some 77% of households involved and implying around 3,410 cases in the District as a whole. (The proportion of each property type referring to ‘too small’ as a reason was between 77-80% in every case with the exception of bungalows (62%)).

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

Tenure	Repair / Improvement by Tenure		Tenure Profile of Whole Sample
	% responses	N ^{os} implied	%
Owner occupation	52	1,060	76
Council rented	21	430	12
Private rented	12	250	6
HA rented	10	210	4

Table 4-11 Repair Needed / Type

Question 8bi / Question 2

Type	Repair / Improvement by Type		Type Profile of Whole Sample
	% responses	N ^{os} implied	%
Semi-detached	35	690	24
Detached	22	440	36
Flat / maisonette	16	320	10
Bungalow	14	280	13
Terraced	12	240	15

Table 4-12 Repair / Household Income

Question 8bi / Question 16c

Income	Repair / Improvement by Income		Income Profile of Whole Sample
	% responses	N ^{os} implied	%
Below £10,000	22	320	13
Below 20,000	34	500	32
Above 30,000	42	610	51

4.2.7 Table 4-12 above suggests some link between the need for repair / improvements and lower incomes but not one of any particular significance.

Table 4-13 Repair / Age Group

Question 8bi / Question 14d

Age	Repair / Improvement by Age Group		Age Group Profile of Whole Sample
	% responses	N ^{os} implied	%
25 – 44	44	880	23
45 – 59	22	440	23
60+	30	610	27

4.2.8 The need for repairs did not appear to be unduly prevalent in the 60+ age groups. A similar position applied to responses in the 'too costly to heat' category with some 33% of all households responses attributable to 60+ age groups.

4.2.9 Around 15.9% of households with a disability felt their home was inadequate (compared to 11.3% among all households). Of respondents with a disability 89.9% of those saying their home was inadequate also said they had a repair need, compared to 85.5% of all respondents. Both repair need and levels of inadequacy were slightly higher among households with a disability. The nature of the disability for those with a repair need is shown in Table 4-14 below.

4.2.10 Looking at the individual types of disability however we did find that repair need was disproportionately found among respondents with mental health problems, learning difficulties and those with asthmatic / respiratory problems.

Table 4-14 Repair / Disability

Question 8bi / Question 10c

Repair / Disability	% of all households in sample (of 6,009)	% households with a repair need	N^{os} implied (of 289)
Wheelchair user	8.5	15.7	41
Mobility problems	51.6	44.3	115
Learning difficulty	4.8	14.4	38
Mental health problem	7.4	29.3	76
Visual / hearing impairment	18.5	25.7	67
Asthmatic / respiratory problems	17.6	30.2	78
Limiting long term illness	30.7	12.2	39
Other physical disability	19.0	15.2	32
Total			486

Table 4-15 Rent / Mortgage too Expensive / Income

Question 8bii / Question 16c

Income	% of all households in sample	% households rent / mortgage too expensive	N^{os} implied
Below £10,000	13.5	12.4	62
£10,001 - £20,000	18.8	29.3	147
£20,001 - £30,000	16.7	36.2	181
£30,001 - £40,000	12.7	4.0	20
£40,001 - £50,000	10.8	3.6	18
£50,001 - £60,000	7.2	4.3	21
£60,001 - £75,000	7.4	0.0	0
£75,001 - £100,000	6.5	8.6	43
£100,001 +	6.3	1.6	8

- 4.2.11 As might be expected, we found a correlation between annual income and the ability to pay the rent / mortgage. Some 18% of those with incomes below £20,000 per year said their rent / mortgage was too expensive, compared to around 7% with incomes above £30,000.
- 4.2.12 29% (200 implied) of those who said that inadequacy related to the rent / mortgage being too expensive were in receipt of financial support, of which around 60% received Working Family Tax Credit; 55% Housing Benefit.
- 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. The large group saying their current dwelling was too small may to some extent represent a natural demand in market terms (i.e. people looking to move 'up-market').

- 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 Some 37% (15,980 implied) of the sample responded to the question. Responses were again on multiple choice basis with respondents making around 1.7 choices on average.

Table 4-16 Work Required on the Property

Question 8c

Improvements	% responses	% households	N ^{os} implied
Additional security	23.8	40.3	6,440
Window repairs	20.7	35.1	5,607
Insulation	14.6	24.7	3,954
Roof repairs	12.7	21.5	3,430
Improved heating	11.8	20.1	3,208
Re-wiring	9.4	15.9	2,534
Damp proofing	7.0	11.9	1,899
Total	100.0	169.5	

- 4.2.16 Additional security (40%) was the main single item chosen as is usually found in DCA surveys in which that category is nominated. Window repairs (over 35%), the most common category in surveys which do not include the additional security option, were at much the same level. A breakdown by tenure is offered below.

Table 4-17 Work Required on the Property by Tenure

Question 8c by Q.1

Work required	Owner occupier with mortgage	Owner occupier no mortgage	Private rented	Council rented	HA rented	Shared ownership*	Tied to employment
Additional security	39.6	36.0	38.5	54.5	51.9	74.8	33.4
Improved heating	20.9	15.0	33.2	23.5	12.4	15.4	26.2
Re-wiring	13.6	20.6	14.2	15.2	8.3	40.7	20.8
Damp proofing	8.8	10.6	25.7	13.5	22.1	15.4	13.6
Roof repairs	25.3	23.7	17.7	8.1	1.1	15.4	22.0
Window repairs	39.9	28.3	53.6	12.2	39.6	40.7	39.1
Insulation	27.0	22.7	30.2	20.5	10.6	0.0	34.3

(* Low volume of data).

- 4.2.17 Overall requirements in the Council rented sector were significantly higher than the all tenure average for additional security but much lower for window repairs and roof repairs. The need for additional security in the HA rented sector was also high. In the private sector, the profile was broadly compatible with our comments at 4.1.15 above in that a higher average work requirement was identified in 4 of the 7 categories with major requirement for window repairs and improved heating.
- 4.2.18 We then asked respondents what repairs / improvements they intended to carry out over the next three years. 25% of the sample (10,890 implied) responded to a multiple choice question with each giving on average 1.5 choices.

Table 4-18 Work On The Property Intended In The Next 3 Years

Question 8d

Work Intended	% responses	% households	N ^{os} implied
Window repairs	24.9	37.7	4,111
Additional security	22.1	33.5	3,646
Roof repairs	17.6	26.7	2,908
Insulation	11.7	17.8	1,937
Improved heating	10.7	16.2	1,758
Re-wiring	7.7	11.7	1,272
Damp proofing	5.3	8.0	867
Total	100.0	151.6	

4.2.19 The intended work seemed to reflect broadly the types of work required identified in Table 4-16 above.

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 the same due to the manner in which the different data sets are collected.

Table 4-19 Family Composition

Question 14b&c

Family Composition	%	Group %	UK Census 1991	Local Area Census 1991
1 adult >60	7.8	24.5	31.0	24.9
1 adult <60	15.5			
1 adult + other	1.2			
Couple no child	38.2	73.2	60.0	72.8
Couple 1-2 children	26.4			
Couple 3+ children	6.2			
Couple + others	2.4			
Single parent	2.3	2.3	9.0	2.3
Total	100.0	100.0	100.0	100.0

4.3.2 Our survey indicated very little change from the Local Area Census 1991. The level of single parent households had not risen at all since 1991 and was well below that found in many recent DCA surveys (around 5%). The 'couple no child' category (38%) was marginally above the average level found in the Survey of English Housing 2001/2 (37%).

Table 4-20 Population Age Groups

Question 14a

Number in household	%	Census 1991
0 – 10	12.3	18.8
11 – 15	6.6	
16 – 24	8.7	12.4
25 – 44	22.6	27.7
45 – 59	22.6	18.6
60 – 74	18.5	14.5
75+	8.7	8.0
Total	100.0	100.0

- 4.3.3 The figures show a considerable deviation between the sample and the 1991 Census local area data on a category by category basis as far as comparable figures are available. There was a greater concentration of persons in our data in the 45-74 age groups (41.1%) as compared with 33.1% in the Census. The 16-44 age groups in our data showed 31.3% against 40.1% in the Census. The 0-15 group had actually increased by 0.1 percentage points; the 75+ groups had increased by 0.7 percentage points. The over 60 age groups together had increased by 21%; the over 75 age group by 9%. The profile overall appears to indicate ageing of the population at the higher end of the scale found in many of our other recent surveys in which the percentage by which the 45-74 age groups increase and the 16-44 age groups decrease has commonly been 6-8 percentage points.

Table 4-21 Number in Household

Question 14a

Number in household	%	N ^{os} implied
One	25.6	11,072
Two	40.1	17,356
Three	12.3	5,325
Four	15.1	6,519
Five	5.4	2,347
Six	1.1	482
Seven	0.3	138
Eight or more	0.1	58
Total	100.0	43,297

- 4.3.4 The profile emerging from our survey equated to some 2.4 persons per household on average – the same as the UK average (as endorsed by the Survey of English Housing 2001/2) but well below the 1991 District Census figure of around 2.6 despite the similar proportion of single person and lightly lower proportion of one adult households as in 1991 evidenced at Table 4-19. The breakdown by tenure is set out at Table 4-22 below.

Table 4-22 Number in Household by Tenure

Question 14a by Q.1

Tenure	N ^{os} in household
Owner occupier with mortgage	2.9
Owner occupier no mortgage	1.9
Private rented	2.5
Council rented	2.0
HA rented	1.9
Shared ownership*	3.1
Tied to employment	2.6

(* 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 Winchester Council rented sector figure was similar to the level found for the social rented sector in other DCA surveys with almost the same level of single person households as found on average in recent surveys (44%). 83% 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. Around 14% of the owner-occupier with mortgage households were single person households, similar to the average in recent DCA surveys (15%).
- 4.3.6 We offer below a broad assessment of ‘under-occupation’ and ‘over-occupation’ based on a detailed analysis of family composition. We established the number of bedrooms required in each household allowing for age and gender of occupants. In the case of over-occupation any dwelling without sufficient bedrooms to meet that requirement has been categorised as over-occupied. In the case of under-occupation, any dwelling with two or more ‘spare’ bedrooms above requirement has been categorised as under-occupied.
- 4.3.7 Our overall over-occupation level (1.3%) 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 19.6% but recent DCA surveys suggest an average of around 18%.
- 4.3.8 The assessment of under / over occupation by tenure revealed some quite wide disparity between tenure types as indicated at Table 4-23 below.

Table 4-23 Under / Over Occupation by Tenure

Question 14a by Q.5 & Q.1

Tenure	% under occupied	% over occupied
Owner occupied with mortgage	16.5	1.5
Owner occupied no mortgage	29.4	0.4
Private rented	4.1	4.1
Council rented	2.1	2.4
HA rented	4.4	4.3
Shared ownership*	0.0	0.0
Tied to employment	16.9	0.0

- 4.3.9 Under occupation within the owner occupied no mortgage sector (some 29%), which will include a higher proportion of elderly households, was well above the all sector average but much the same as the average found in recent DCA surveys. Council rented under-occupation (around 2%) was very low in comparison with the all-tenure average.
- 4.3.10 The Council rented over-occupation level (2.4%) was below the UK average over-occupation figure referred to above (3%) but above the overall level in the District on the basis of our survey (1.3%).

Table 4-24 Employment Status of Head of Household

Question 14e

	%	N ^{os} implied
Wholly retired	37.1	15,513
Full-time employee (30+ hours)	33.5	14,020
Part-time employee (up to 30 hours)	10.4	4,349
Self-employed	9.1	3,813
Looking after the home	6.4	2,675
Permanently sick / disabled	1.3	525
Unemployed / available for work	1.2	501
In full-time education	0.9	399
On Government training scheme	0.1	50
Total	100.0	41,845

- 4.3.11 96% or so of Heads of Households responded to the question on employment. Some 33% of Heads of Household specifically indicated full-time (30+ hours per week) employment. 53% indicated that they were in paid work as compared with the 60% average identified for Heads of Household in the Survey of English Housing 2001/2. Around 37% were retired. 1.2% indicated that they were unemployed and available for work, similar to our recent survey experience in which the average has been between 1-2%. The position for all household members responding is set out at Table 4-25 below, the percentage relating to the 86% or so of the total implied population actually offering a reply. Some 33% indicated full time employment, the same as the average in our recent surveys. The proportion in full-time education was around 16%.

Table 4-25 Employment Status of All Household Members

Question 14e

	%	N ^{os} implied
Full-time employee	32.7	29,392
Wholly retired	26.3	23,579
In full-time education	15.9	14,254
Part-time employee	8.9	8,017
Self-employed	7.4	6,597
Looking after the home	6.3	5,679
Permanently sick / disabled	1.3	1,215
Unemployed / available for work	1.1	953
On Government training scheme	0.1	67
Total	100.0	89,753

- 4.3.12 In the case of ethnic origin the breakdown at Table 4-26 below refers only to 'Self' which we take in the main to be the Head of Household. 98% or so of respondents answered the ethnic origin question.

Table 4-26 Ethnic Origin of Households

Question 14b

	%	N ^{os} implied
British	96.8	41,086
Other White	1.2	519
Irish	0.7	287
Other Mixed	0.3	113
White & Asian	0.2	98
White & Black Caribbean	0.2	104
White & Black African	0.2	65
Chinese	0.1	35
Indian	0.1	23
Caribbean	0.1	43
Other Asian background	0.1	59
African	0.0	8
Total	100.0	42,440

(NB. No data for other categories)

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 around 22% of households (9,380 implied) – 90% of households indicating a rented tenure in Table 4-1 above.

Table 4-27 Weekly Rent Paid for Present Accommodation

Question 16a

Weekly rent	%	Cum %
Below £60 pw / £260 pm	36.3	36.3
£61 - £70 pw / £261 - £300 pm	21.2	57.5
£71 - £80 pw / £301 - £350 pm	14.9	72.4
£81 - £100 pw / £351 - £430 pm	7.9	80.3
£101 - £150 pw / £431 - £650 pm	7.9	88.2
£151 - £200 pw / £651 - £865 pm	5.0	93.2
£201 - £250 pw / £866 - £1,080 pm	2.2	95.4
£251 - £300 pw / £1,081 - £1,300 pm	1.4	96.8
Above £300 pw / £1,300 pm	3.2	100.0

- 4.4.2 The table indicates that only 36% of renters in the sample paid less than £60 per week; around 57% less than £70 per week. Table 4-1 shows that around 67% 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 Q.1

Weekly rent	Private rented	Council rented	HA rented
Below £60 pw / £260 pm	10.3	49.3	34.0
£61 - £70 pw / £261 - £300 pm	8.2	28.1	24.3
£71 - £80 pw / £301 - £350 pm	8.6	13.6	30.3
£81 - £100 pw / £351 - £430 pm	9.8	6.1	10.2
£101 - £150 pw / £431 - £650 pm	25.9	1.5	0.3
£151 - £200 pw / £651 - £865 pm	16.5	0.0	0.0
£201 - £250 pw / £866 - £1,080 pm	5.8	0.9	0.9
£251 - £300 pw / £1,081 - £1,300 pm	3.7	0.3	0.0
Above £300 pw / £1,300 pm	11.2	0.2	0.0
Total	100.0	100.0	100.0

- 4.4.4 Around 37% of private sector rents appeared to be relevant to households on lower incomes (i.e. under £100 per week). 77% or so of Council rents were below £70 per week; 49% below £60 per week. HA sector rents remained significantly higher than Council rents.
- 4.4.5 The next table shows that, of the 71% (30,920 implied) responding as homeowners in the sample (some 94% of owner occupiers in Table 4-1 above), 51% or so had no mortgage and a further 20% or so paid less than £450 per month.

Table 4-29 Monthly Mortgage Paid for Present Accommodation

Question 16b

Monthly mortgage	%	Cum %
Nil	50.8	50.8
Below £250	7.0	57.8
£251 - £350	6.3	64.1
£351 - £450	6.4	70.5
£451 - £600	8.9	79.4
£601 - £750	6.2	85.6
£751 - £1,000	6.4	92.0
£1,001- £1,250	3.3	95.3
Above £1,250	4.7	100.0

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

Table 4-30 Gross Annual Income of Households

Question 16c

Annual income	%	Cum %	UK 1999-2000 *
Below £10,000	13.6	13.6	28.3
£10,001 - £20,000	18.8	32.4	28.8
£20,001 - £30,000	16.7	49.1	18.4
£30,001 - £40,000	12.7	61.8	24.5
£40,001 - £50,000	10.8	72.6	
£50,001 - £60,000	7.2	79.8	
£60,001 - £75,000	7.4	87.2	
£75,001 - £100,000	6.5	93.7	
Above £100,000	6.3	100.0	

(* Household income levels per DSS Family Resources Survey 1999-2000).

- 4.4.7 The response rate to the income question was around 74% and should give a good picture of the income levels in the District. The table shows less than 14% of households based on the sample had incomes below £10,000, far below the corresponding UK figure (28%). The total proportion in Winchester earning below the approximate national average household income of £23,000 per annum (some 37%) was also far below the UK average of around 63%. Some 51% of the households in Winchester on the basis of the survey data had incomes above £30,000 per annum, correspondingly far above the UK average.
- 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 Q.1

Tenure	Below £10k	£10k - £20k	£20k - £30k	£30k - £40k	£40k - £50k	£50k - £60k	£60k - £75k	£75k - £100k	Above £100k	Total
Owner occupier - mortgage	2.9	8.6	14.3	15.0	14.8	12.0	12.7	9.8	9.9	100.0
Owner occupier - outright	17.9	28.7	18.5	12.8	7.3	2.6	3.7	4.0	4.5	100.0
Private rented	12.2	20.5	18.6	8.0	15.0	12.8	4.6	6.8	1.5	100.0
Council rented	51.1	23.4	19.6	5.1	0.4	0.0	0.0	0.4	0.0	100.0
HA rented	45.1	33.1	17.7	4.1	0.0	0.0	0.0	0.0	0.0	100.0

- 4.4.9 The profiles were largely as would be expected as between owner-occupiers and renters, especially bearing in mind that a significant proportion of owner-occupiers without mortgage would be people with limited pension income. Council rented sector incomes were concentrated (74%) below £20,000 per annum. HA rented sector incomes were very similar which suggest in conjunction with our comment at 4.4.4 above, that demand on disposable incomes from housing cost was significantly higher in that sector. Private rented sector incomes were markedly higher than social rented sector incomes with only 33% having incomes below £20,000 per annum.

- 4.4.10 Only 16% or so of households were in receipt of financial support (6,840 implied) as compared with an average of 26% in recent DCA surveys. The results from those responding to a multiple-choice question are set out in Table 4-32 below. On average, each respondent indicated 1.5 forms of financial support.

Table 4-32 Financial Support

Question 16d

	Responses %	Households %	N ^{os} implied
Housing Benefit	35.4	51.7	3,539
Disability / Attendance Allowance	20.0	29.1	1,994
Income Support	19.7	28.8	1,971
Working Family Tax Credit	14.3	20.8	1,425
Incapacity Benefit	9.0	13.2	904
Job Seekers Allowance	1.6	2.4	164
Total	100.0	146.0	

4.5 Migration

- 4.5.1 As part of the process of establishing some data on the movement of households, we asked existing households which had moved in the last 5 years where they previously had lived and why they had moved. Some 39% (16,970 households implied) indicated that they had been involved in such a move. Some 37% had previously lived within Winchester; 71% within Hampshire.

Table 4-33 Location of Previous Dwelling

Question 4b

	%	N ^{os} implied
Elsewhere in Winchester	36.6	6,218
Elsewhere in Hampshire	22.8	3,867
Elsewhere in the South	10.5	1,779
Elsewhere in the UK	9.8	1,664
London	5.7	977
Southampton	5.0	847
Abroad	3.4	569
Eastleigh	3.3	552
Basingstoke	1.7	284
Romsey	0.8	138
Andover	0.4	73
Total	100.0	16,968

- 4.5.2 Of this group of movers, 12.3% (2,090 implied) were currently Council tenants; 6.6% (1,130 implied) HA tenants. 66% (1,390 implied) of this group of Council tenants were resident in Winchester itself at the time of the move; 57% (640 implied) of the HA tenants, suggesting 1,180 in-migrants in the last five years to social sector rented accommodation.

- 4.5.3 The group who had moved in the last 5 years were then asked what the most important reason was for moving home. Some 85% (14,380 implied) responded to the question. By far the most important choice was family reasons selected by some 54% of the group. 23% indicated employment reasons (including better access to work).

Table 4-34 Reason for the Move

Question 4c

	%	N ^{os} implied
Family reasons	53.7	7,727
Retirement	15.0	2,163
Employment	13.4	1,923
Better access to work	9.6	1,376
Education / Schools	6.3	912
Better shops / leisure facilities	2.0	282
Total	100.0	14,383

- 4.5.4 Out migration accounted for 45% (4,730 implied) of all intended moves for both existing (2,550 implied) and concealed households (2,180 implied). Those moving out of Winchester District were asked their reasons for moving. 2,430 implied existing households, 95% all those intending to move outside Winchester District and 2,120 implied concealed households, 97% of those intending to move outside Winchester District responded to a multiple choice question, offering 1.5 and 1.3 choices respectively.

Table 4-35 Reason for Moving Outside Winchester District

Question 17d by Q.17b (3&4)

Location	Existing Households			Concealed Households		
	% responses	% households	N ^{os} implied	% responses	% households	N ^{os} implied
Family reasons	23.3	34.0	826	6.4	8.1	172
Employment	19.8	28.8	701	40.9	51.5	1,092
Lack of affordable housing	17.1	25.0	607	20.7	26.1	553
Retirement	16.6	24.2	588	2.2	2.8	58
Better shops / leisure facilities	9.5	13.8	336	4.4	5.5	118
Better access to work	5.0	7.3	178	9.3	11.7	248
Education / schools	3.9	5.7	138	13.9	17.6	373
Anti-social behaviour/n'bour problems	2.7	3.9	95	0.0	0.0	0
Lack of high quality housing facilities	1.5	2.1	52	1.8	2.3	48
Harassment of any kind	0.6	0.9	22	0.4	0.5	10
Total	100.0	145.7		100.0	126.1	

- 4.5.5 In the case of existing households moving outside Winchester District choices were concentrated fairly evenly over four categories - family reasons, employment, lack of affordable housing and retirement. In the case of concealed households there was far more emphasis on employment and education (as well as a lack of affordable housing) as might be expected from a younger group.
- 4.5.6 The same group were asked where they were thinking of moving. In this case 2,480 implied existing households, 97% of those intending to move outside Winchester District and 2,040 implied concealed households, 93% of those intending to move outside Winchester District, responded to the question.

Table 4-36 Location of Move for those Moving Outside Winchester District
Question 17c by Q.17b (3&4)

Location	Existing Households		Concealed Households	
	%	N ^{os} implied	%	N ^{os} implied
Elsewhere in UK	32.7	811	41.3	841
Elsewhere in South	31.2	774	12.9	263
Abroad	15.5	385	4.6	93
Elsewhere in Hampshire	12.8	317	11.3	229
London	3.0	73	16.1	328
Southampton	1.8	45	9.2	188
Romsey	1.3	33	0.0	0
Basingstoke	0.8	21	0.0	0
Andover	0.5	13	0.6	13
Eastleigh	0.4	10	4.0	82
Total	100.0	2,482	100.0	2,037

- 4.5.7 In the case of existing households moving outside Winchester District, around a third wished to live elsewhere in the UK (i.e. not in the South); 31% wished to live elsewhere in the South. Over 15% intended to move abroad. Interest in moving out of the South of the UK was even stronger in the concealed household group (41%) which also showed significantly more interest in moving to London (16%) than existing households moving.

4.6 Development

- 4.6.1 Respondents were asked what, if any, housing they felt was needed in the area, each respondent being offered up to 3 choices. The results from the 91% (39,670 implied) of the sample offering an opinion are set out at Table 4-37 below.

Table 4-37 Type of Housing Needed
Question 36

	Responses %	Households %	N ^{os} implied
Affordable housing for local people	33.1	67.0	26,593
Housing for young people	23.1	46.8	18,576
Housing for families	13.7	27.9	11,050
Housing for older people (over 60)	12.1	24.6	9,742
Housing for people with special needs	6.1	12.3	4,886
Other housing need	2.7	5.4	2,136
No more housing required	9.2	18.6	7,360
Total	100.0	202.6	

- 4.6.2 67% indicated a need for affordable housing for local people as one of their choices; 47% a need for housing for young people. Less than 10% of all responses suggested that no more housing was required.

5 FUTURE HOUSING REQUIREMENTS

5.1 All Households Moving within Winchester District

- 5.1.1 Moving intentions and behaviour were tested for both existing households moving and concealed households, the latter representing an existing pent up demand for housing.
- 5.1.2 Respondents were asked to say whether they or any members of the household were currently seeking to move within Winchester District or would do so in the next five years. The result was that 12.2% of all households responding (5,300 implied) planned such a move. Breakdown by tenure is set out in Table 5-1 below. A further 6.9% (2,980 implied) indicated that they wished to move but were unable to do so.
- 5.1.3 The scale of movement implied, at an average of around 2.4% per annum, was similar to that found in other recent surveys carried out by DCA in which an average figure of around 2.3% has emerged.

Table 5-1 *Percentage of Each Form of Tenure Intending to Move*
Question 17a by Q.1 *Within Winchester District*

Tenure	% of tenure moving	% of all movers
Owner occupier with mortgage	16.5	45.4
Owner occupier no mortgage	8.6	23.2
Private rented	39.0	15.6
Council rented	9.2	8.7
HA rented	12.5	4.3
Shared Ownership*	40.2	0.8
Tied to employment	15.4	2.0
Total		100.0

(* Low volume of data).

- 5.1.4 The percentage of Council tenants intending to move (9.2%) was below the average for the sector in our recent surveys (12%) and the all sector average (12.2%).
- 5.1.5 Those indicating a wish to move within Winchester District but an inability so to do offered the following reasons for not being able to move. Respondents offered around 1.6 choices on average. However, the number of implied households responding was 3,480, not 2,980 as indicated by the basic responses on moving referred to at 5.1.2 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 five years.
- 5.1.6 It would seem clear from Table 5-2 below that affordability was the most important single factor with some 65% offering cost of moving as one of their choices; 27% a lack of affordable rented housing. 32% or so indicated inability to buy a home.

Table 5-2 Reasons Preventing a Move

Question 17e

	% responses	% households	N ^{os} implied
Unable to afford to move	40.8	65.3	2,272
Unable to buy a home	19.9	31.8	1,107
Lack of affordable rented housing	16.8	26.8	934
Family reasons	4.8	7.8	270
Location of employment	3.3	5.2	182
Local education choices	2.5	4.0	139
Other	11.9	19.1	663
Total	100.0	160.0	

5.1.7 Table 5-3 below sets out the split between existing households moving and concealed households moving. As more than one move per existing household applies in some cases, the total of all moves exceeds the 5,300 referred to at 5.1.2 above. The totals in Table 5-3 are used (rounded) in Section 5.2 and 5.3 below as the household totals on which the key tables are based.

Table 5-3 Households Planning to Move by Current Tenure

Question 17b by Q.1

Tenure	Existing households moving within Winchester District	Concealed households moving within Winchester District	Total (all moves)
Owner occupied with mortgage	1,753 (43.2)	1,025 (53.8)	2,778
Owner occupied no mortgage	794 (20.5)	593 (31.1)	1,387
Private rented	788 (20.3)	58 (3.0)	846
Council rented	263 (6.8)	185 (9.7)	448
HA rented *	165 (4.3)	11 (0.6)	176
Shared ownership *	30 (0.8)	13 (0.7)	43
Tied to employment *	80 (2.1)	21 (1.1)	101
Total	3,873 (100.0)	1,906 (100.0)	5,779

(*Low volume of data)

5.2 Housing Needs of Existing Households Moving Within Winchester District

5.2.1 The first question to existing households moving related to the time when accommodation was required.

Table 5-4 When is the Accommodation Required

Question 18

Time accommodation required	%	N ^{os} implied
Within 1 year	30.4	1,176
Within 1 - 2 year	27.9	1,080
2 - 3 years	15.4	596
3 - 5 years	26.3	1,018
Total	100.0	3,870

5.2.2 The table shows that some 30% of potential movers sought to do so within one year; some 58% within 2 years. Around 26% of the respondents indicated an intention to move in the longer term (i.e. 3 - 5 years from now).

Table 5-5 Type of Accommodation Required

Question 19

Type	%	N ^{os} implied
Detached	44.3	1,714
Semi-detached	22.2	859
Bungalow	11.6	449
Terraced	8.2	317
Flat / Maisonette	7.2	279
Supported Housing	5.5	213
Bedsit / Studio Room only*	1.0	39
Total	100.0	3,870

(No data for caravan / mobile home)

5.2.3 Table 5-5 indicates that 44% or so of these respondents felt that they required detached houses – well above the average for this group (31%) found in recent DCA surveys. 22% selected semi-detached houses. Interest in flats / maisonettes was low at around 7% but in recent DCA surveys interest in flats from existing households moving has typically only been around 8%.

Table 5-6 *Number of Bedrooms Required*

Question 21

Bedrooms	%	N ^{os} implied
One	3.9	151
Two	24.3	940
Three	33.0	1,277
Four	31.7	1,227
Five or more	7.1	275
Total	100.0	3,870

5.2.4 65% or so of existing household moving respondents indicated that they required three or four bedroom accommodation. The requirement for one bedroom accommodation (under 4%) was lower than that found in other recent surveys carried out by DCA where 8% has been around the average.

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

Table 5-7 *Type Required by Size Required*

Question 21 by Q.19

Type	1-bed		2-bed		3-bed		4-bed		5+ bed		Total
	%	N ^{os}	%	N ^{os}	%	N ^{os}	%	N ^{os}	%	N ^{os}	N ^{os}
Semi-detached	0.0	0	19.9	176	48.0	424	32.1	284	0.0	0	884
Detached	0.0	0	1.1	19	32.2	562	50.5	881	16.2	283	1,745
Terraced *	9.5	30	39.6	126	41.4	132	9.5	30	0.0	0	318
Flat / Maisonette *	19.1	55	68.2	195	8.6	25	4.1	12	0.0	0	287
Bungalow	4.4	20	53.4	242	29.2	133	13.0	59	0.0	0	454
Bedsit / Studio / Room only *	0.0	0	100.0	39	0.0	0	0.0	0	0.0	0	39
Supported Housing *	19.5	43	65.6	144	14.9	33	0.0	0	0.0	0	220
Total		148		941		1,309		1,266		283	3,947

(* Low volume of data).

5.2.6 Some 53% of bungalow demand was for 2-bed accommodation as compared with only 1% of detached demand, of which some 67% favoured 4+ bed accommodation. 48% of semi-detached demand was for 3-bed accommodation; 32% for 4-bed accommodation. 68% of the limited flats / maisonettes demand were for 2-bed accommodation.

5.2.7 Existing moving households were next asked if they were looking to rent or buy. The results are set out in Table 5-8.

Table 5-8 Preferred Tenure

Question 22

Tenure	%	N ^{os} implied
Owner occupation	77.4	2995
Council rented	14.9	577
HA shared ownership	3.8	147
Private rented	2.9	112
HA rented	1.0	39
Total	100.0	3,870

(No data for tied to employment)

5.2.8 Some 77% (2,990 implied) saw owner occupation as their priority – higher than the average of 72% found in recent DCA surveys. Some 15% of the group indicated a preference for Council rented accommodation – lower than the level found in recent DCA surveys in which a figure of 20% has been the average. Interest in the private rented and HA rented sectors was negligible.

5.2.9 We ran a cross-tabulation to compare type of property required with type of tenure preferred with the following results.

Table 5-9 Type Required by Preferred Tenure

Question 22 by Q.19

Type	Owner Occupation		Private rented		Council rented		HA rented		HA shared ownership		Total
	%	N ^{os}	%	N ^{os}	%	N ^{os}	%	N ^{os}	%	N ^{os}	N ^{os}
Semi-detached	80.2	709	0.0	0	18.4	163	0.5	5	0.9	8	885
Detached	95.2	1,648	1.2	20	2.9	50	0.0	0	0.7	13	1,731
Terraced *	36.8	120	21.2	69	42.0	137	0.0	0	0.0	0	326
Flat / maisonette*	48.2	138	4.5	13	27.6	79	9.1	26	10.6	30	286
Bungalow	66.6	308	0.0	0	22.5	104	0.0	0	10.9	50	462
Bedsit / Studio / Room Only*	100.0	39	0.0	0	0.0	0	0.0	0	0.0	0	39
Supported Housing*	36.0	67	7.0	13	25.8	48	4.3	8	26.9	50	186
Total		3,029		115		581		39		151	3,915

(* Low volume of data).

5.2.10 Demand in the Council rented sector was predominantly for semi-detached (28%) and terraced houses (24%) but demand was relatively well spread across tenures. Around 54% of owner-occupation demand was for detached houses; 23% for semi-detached houses. Some 95% of demand for detached houses; 80% demand for semi-detached houses and 67% of demand for bungalows was for owner-occupation. 42% of demand for terraced houses and 28% of demand for flats / maisonettes was for Council rented accommodation.

- 5.2.11 Only 15% or so of existing moving households (570 implied) were registered on a housing waiting list – over 91% indicating registration on the Winchester City Council list. 22% or so indicated registration on more than one list.
- 5.2.12 Existing households moving were asked where accommodation was required. Up to two choices were permitted. On average each respondent offered around only 1.3 choices.

Table 5-10 **Where Accommodation is Required**
Question 24

Location	% responses	% households	N ^{os} implied (all choices)	N ^{os} implied (Council tenants only)
Winchester	41.1	55.2	2,124	190
Bishops Waltham	7.5	10.1	388	29
Alresford	6.0	8.1	311	15
Denmead	3.3	4.4	170	10
Wickham	1.9	2.6	99	8
West of Waterlooville New Settlement	0.9	1.2	45	10
Anywhere in Winchester District	22.3	29.9	1,151	73
In existing Village	13.6	18.3	702	23
In another village	3.4	4.6	179	0
Total	100.0	134.4		

- 5.2.13 Clearly, the bulk of interest was in Winchester itself with some 55% making that location one of their choices. However, it should be noted that 85% of existing households moving currently living in Winchester chose that area, 58% of all demand for Winchester. Some 30% suggested flexibility on location anywhere in Winchester District.
- 5.2.14 Of the very limited number of responses relating to households currently living in Council rented accommodation, 70% (190 implied) chose Winchester; 27% indicated flexibility on location in Winchester District.

5.3 Housing Needs of Concealed Households Moving Within Winchester District

- 5.3.1 This section focuses on the profile of concealed households moving within Winchester District. As more than one concealed household per existing household can apply the key tables relate to a control total of 2,400 households being some 1,910 1st households as referred to at Section 5.1.7 and Table 5-3 above and some 490 2nd households (based on the average response in the detailed data tables). We also identify from Table 5-13 onwards another control total of 500 which refers only to concealed households intending to move within one year based on Table 5-12 below.
- 5.3.2 The vast majority (around 90%) of the total of concealed households consisted of people described as children of the household as set out in Table 5-11 below.

Table 5-11 Person Looking to Form Concealed Households

Question 26

Persons forming household	%	N ^{os} implied
Children 16 +	90.4	2,169
Lodger	5.9	142
Partner / Spouse	3.4	82
Parent / Grandparent	0.3	7
Total	100.0	2,400

Table 5-12 Age Structure of Concealed Households

Question 27b&c

Age	%	N ^{os} implied
16 - 19	18.6	578
20 - 29	67.5	2,098
30 - 44	10.4	325
45 - 59	2.9	91
60 – 74	0.3	9
75+	0.3	9
Total	100.0	3,110

- 5.3.3 The age question refers to individual adult household members and Table 5-12 above suggests that some 67% of concealment related to the 20-29 age group with around 86% relating to all those under 30 years of age.

Table 5-13 Number of Children

Question 27d

Children	%	N ^{os} implied
Child due	0.4	9
One	4.7	113
Two	1.9	46
None	93.0	2,232
Total	100.0	2,400

- 5.3.4 The survey found that children (under the age of 16) were involved in only 7% of cases (less than 170 implied).
- 5.3.5 We asked if the concealed household was being formed with a partner currently living in a separate household elsewhere in Winchester District. Around 20% (490 implied) indicated that this was the case.

Table 5-14 Time of Move

Question 28

When required	%	N ^{os} implied
Within 1 year	20.6	495
1 - 2 years	29.3	703
2 - 3 years	16.1	386
3 - 5 years	34.0	816
Total	100.0	2,400

- 5.3.6 Less than 21% of the concealed household moving group required accommodation within one year as compared with around 30% in the case of existing households moving. 34% of the group saw their requirement as longer term (3-5 years).

Table 5-15 Tenure Needed

Question 29a

Tenure	All concealed households moving		Concealed households moving within one year	
	%	N ^{os} implied	%	N ^{os} implied
Owner occupation	42.8	1,027	42.4	212
Council rented	22.5	540	23.8	119
HA shared ownership	10.5	252	14.2	71
Private rented	19.4	466	14.2	71
HA rented	4.8	115	5.4	27
Total	100.0	2,400	100.0	500

- 5.3.7 The bulk (43% or so) of concealed households moving opted for owner occupation but interest in the other tenures, apart from HA, rented was well spread with a relatively high level of interest in shared ownership. Concealed households moving within one year had a similar profile.

Table 5-16 Tenure Preferred

Question 29b

Tenure	All concealed households moving		Concealed households moving within one year	
	%	N ^{os} implied	%	N ^{os} implied
Owner-occupation	63.2	1,517	47.6	238
Council rented	14.5	348	21.2	106
Private rented	9.7	233	9.5	47
HA shared ownership	7.8	187	15.2	76
HA rented	4.8	115	6.5	33
Total	100.0	2,400	100.0	500

- 5.3.8 In the case of preference, the choices of concealed households moving were, not surprisingly, more aspirational, favouring owner occupation over the other forms of tenure. Concealed households moving within one year, however, maintained a profile similar to that for need in Table 5-15 above.

Table 5-17 Type of Accommodation Needed
Question 30a

Type	All concealed households moving		Concealed households moving within one year	
	%	N ^{os} implied	%	N ^{os} implied
Flat / maisonette	49.4	1,186	50.5	253
Semi-detached	18.3	439	15.6	78
Terraced	17.5	420	16.4	82
Bedsit / Studio / Room only	9.1	219	7.1	35
Detached	4.1	98	5.1	25
Bungalow	1.6	38	5.3	27
Total	100.0	2,400	100.0	500

(No data for sheltered housing)

- 5.3.9 The results from the survey showed a very different profile from existing households moving, as might be expected for a generally younger group. 49% or so of all concealed households moving required flats / maisonettes compared to 7% among existing households moving. Aspiration to detached houses was very limited. The profile was similar for those moving within 1 year.

Table 5-18 Type of Accommodation Preferred
Question 30b

Bedrooms	All concealed households moving		Concealed households moving within one year	
	%	N ^{os} implied	%	N ^{os} implied
Semi-detached	33.0	792	39.0	195
Flats / maisonette	28.5	684	19.3	97
Terraced	21.8	523	23.1	115
Detached	11.9	286	8.5	42
Bedsit / Studio / Room only	2.6	62	0.0	0
Bungalow	2.2	53	10.1	51
Total	100.0	2,400	100.0	500

(No data for sheltered housing)

- 5.3.10 Generally, a more aspirational view was again reflected amongst all concealed households moving on preference for type (i.e. more houses; fewer flats). Only 28% or so preferred flats / maisonettes compared to 49% expressing a need. Interest in detached and semi-detached houses showed significant increases. Those moving within 1 year indicated more interest in semi-detached houses and bungalows with even less emphasis on flats / maisonettes.

Table 5-19 Number of Bedrooms Needed

Question 31a

Bedrooms	All Concealed households moving		Concealed households moving within one year	
	%	N ^{os} implied	%	N ^{os} implied
One	41.6	999	39.7	199
Two	49.0	1,176	45.7	229
Three	8.8	211	13.1	65
Four or more	0.6	14	1.5	7
Total	100.0	2,400	100.0	500

5.3.11 The need for a higher proportion of smaller dwellings was also reflected in the number of bedrooms needed as can be seen in Table 5-19. Less than 10% (220 implied) of all concealed households moving needed three+ bedroom accommodation. 42% needed only 1 bedroom. The profile was similar for those moving within a year.

Table 5-20 Number of Bedrooms Preferred

Question 31b

Bedrooms	All concealed households moving		Concealed households moving within one year	
	%	N ^{os} implied	%	N ^{os} implied
One	9.6	230	10.6	53
Two	60.9	1,462	56.3	282
Three	23.9	574	28.5	142
Four or more	5.6	134	4.6	23
Total	100.0	2,400	100.0	500

5.3.12 The results for all concealed households moving reflected the interest in larger properties referred to at 5.3.10 above in that preference for 1-bed properties was very low (under 10%) as compared with need (42%) at Table 5-19. The results for concealed households moving within one year again showed no significant difference.

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

Table 5-21 Type Needed by Size Needed

Question 31a by Q30a

Type	1-bed		2-bed		3-bed		4-bed		Total
	%	N ^{os}	%	N ^{os}	%	N ^{os}	%	N ^{os}	N ^{os}
Semi-detached	6.6	29	55.1	243	36.5	161	1.8	8	441
Detached*	0.0	0	37.0	37	55.0	55	8.0	8	100
Terraced	26.8	113	71.3	301	1.9	8	0.0	0	422
Flat / maisonette	54.5	643	45.5	537	0.0	0	0.0	0	1,180
Bedsit / Studio / Room only*	94.1	206	5.9	13	0.0	0	0.0	0	219
Bungalow*	0.0	0	100.0	39	0.0	0	0.0	0	39
Total		991		1,170		224		16	2,401

(* Low volume of data).

- 5.3.14 Some 54% of flatted accommodation demand was for 1-bed property; 45% for two-bed property. Some 71% of terraced demand and 55% of semi-detached demand was for 2-bed property.

Table 5-22 Type Needed by Tenure Preferred

Question 29a by Q.30a

Type	Owner Occupation		Private Rented		Council rented		HA rented		HA Shared Ownership		Total
	%	N ^{os}	%	N ^{os}	%	N ^{os}	%	N ^{os}	%	N ^{os}	N ^{os}
Semi-detached	56.7	250	2.7	12	23.8	105	2.3	10	14.5	64	441
Detached*	85.4	76	0.0	0	0.0	0	14.6	13	0.0	0	89
Terraced	62.0	263	8.5	36	24.3	103	0.0	0	5.2	22	424
Flat / maisonette	30.5	355	28.1	327	19.9	231	7.4	86	14.1	164	1,163
Bedsit / Studio / Room only*	0.0	0	52.1	99	43.7	83	0.0	0	4.2	8	190
Bungalow*	33.3	13	0.0	0	66.7	26	0.0	0	0.0	0	39
Total		957		474		548		109		258	2,346

(* Low volume of data)

- 5.3.15 42% of interest in Council rented accommodation was for flats / maisonettes. 37% of interest in owner-occupation was for flats / maisonettes; 27% for terraced houses; 26% for semi-detached houses. 62% of interest in terraced houses, 57% of interest in semi-detached houses and 30% of interest in flats / maisonettes was for owner occupied accommodation. Some 28% of interest in flats / maisonettes was for private rented accommodation; 20% for Council rented accommodation.
- 5.3.16 Around 15% of all concealed / households moving (370 implied) were registered on a housing waiting list, 90% or so being on the Winchester City Council list. Some 33% (160 implied) of concealed households moving within one year were so registered with 85% being on the Winchester City Council List.
- 5.3.17 Concealed households were asked the same questions on location as existing households moving. Respondents gave around 1.3 choices on average in the case both all concealed households and concealed households moving within one year.

Table 5-23 Choice of Location

Question 33

Location	All concealed households moving			Concealed households moving within one year		
	% responses	% households	N ^{os} implied	% responses	% households	N ^{os} implied
Winchester	35.7	47.2	1,167	36.2	48.0	243
Anywhere in Winchester District	23.3	30.8	760	18.7	24.9	126
Bishops Waltham	11.4	15.0	371	11.7	15.6	79
Alresford	9.1	12.0	297	14.0	18.6	94
In existing village	8.2	10.8	267	5.8	7.7	39
Wickham	4.9	6.5	160	5.4	7.1	36
Denmead	3.7	4.9	122	3.9	5.1	26
West of Waterlooville Settlement	1.9	2.6	63	1.3	1.8	9
In another village	1.8	2.3	58	3.0	4.0	20
Total	100.0	132.1		100.0	132.8	

5.3.18 As for existing households moving, all concealed households moving strongly favoured Winchester (47%) with 31% or so indicating flexibility within Winchester District. The profile for households moving within one year was again similar.

5.3.19 Concealed households were also asked the reasons for their preferred location. All new households moving made an average of 3.1 choices, those moving within a year gave an average of 2.9 reasons for their preferred location.

Table 5-24 Reason for Preferred Location
Question 34

Reason	All concealed households moving			Concealed households moving within 1 year		
	% responses	% households	N ^{os} implied (all choices)	% responses	% households	N ^{os} implied (all choices)
Always lived here	17.4	53.6	1,286	16.7	49.5	248
Near family / carer	17.0	52.3	1,255	16.7	49.7	249
Employment / closer to work	17.3	53.3	1,279	20.2	60.1	301
Nearer / better shopping / leisure facilities	3.8	11.8	283	4.7	14.3	72
Greater availability of cheaper housing	2.0	6.3	151	1.6	4.6	23
Nearer / better schools / colleges	2.8	8.2	197	3.7	10.9	55
Better public transport	4.6	14.0	336	2.5	7.3	37
Nearer hospital / doctor	4.8	14.9	358	4.7	14.3	72
Greater availability of smaller homes	1.7	5.3	127	2.7	7.9	40
More homes suitable for adaptation	0.1	0.3	7	0.0	0.0	0
Better area	9.7	29.9	718	9.1	26.9	135
Fewer neighbour problems / anti social behaviour	6.2	18.9	454	4.9	14.5	73
Safer / less crime	7.3	22.6	542	6.5	19.3	97
Away from harassment	5.3	16.3	391	6.0	17.9	93
Total	100.0		7,384	100.0		1,495

5.3.20 The most popular reason given for all households moving was always lived here. Employment and to be near family / carer were also important reasons for choosing a particular location. The profile of households moving within one year is similar to that of all households moving, except the importance of employment / closer to work is a more significant issue to this group.

Table 5-25 Maximum Weekly / Monthly Rent of Concealed Households
Question 35a

Weekly rent	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Below £50 pw / £220 pm	28.2	28.2	33.7	33.7
£51 - £60 pw / £221 - £260 pm	28.3	56.5	24.4	58.1
£61 - £70 pw / £261 - £300 pm	18.9	75.4	21.5	79.6
£71 - £80 pw / £301 - £350 pm	17.0	92.4	10.0	89.6
£81 - £100 pw / £351 - £430 pm	1.7	94.1	3.9	93.5
£101 - £150 pw / £431 - £650 pm	3.2	97.3	0.0	93.5
£151 - £200 pw / £651 - £865 pm	0.7	98.0	3.9	97.4
Above £200 pw / £865 pm	2.0	100.0	2.6	100.0

5.3.21 Responses were received from some 69% (1,660 implied) of all concealed households moving. Of those, some 56% could afford a weekly rent of no more than £60; 75% or so no more than £70 (as compared with around 57% in the existing household profile at Table 4-27). In the case of the movers within 1 year, 80% or so could afford to pay no more than £70 per week based on a 62% response.

Table 5-26 Maximum Monthly Mortgage of Concealed Households
Question 35c

Monthly mortgage	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Below £250	26.7	26.7	12.9	12.9
£251 - £300	29.4	56.1	32.3	45.2
£301 - £400	19.3	75.4	13.8	59.0
£401 - £500	16.6	92.0	20.3	79.3
£501 - £600	5.8	97.8	12.4	91.7
£601 - £750	1.2	99.0	3.5	95.2
£751 - £1,000	0.5	99.5	2.4	97.6
Above £1,000	0.5	100.0	2.4	100.0

5.3.22 73% (1,760 implied) of all concealed households moving responded. For those seeking to buy a dwelling, 75% or so could not or would not pay a mortgage of more than £400 per month. In the case of concealed households moving within one year, 59% could not or would not pay a mortgage of more than £400 per month based on a 68% response. The mortgage bands selected might reflect to some degree perceptions of the actual cost of access to home ownership.

Table 5-27 Savings of 'Concealed' Households

Question 35d

Monthly mortgage	All concealed households moving		Concealed households moving within one year	
	%	Cum %	%	Cum %
Under £1,000	35.7	35.7	29.2	29.2
£1,001 - £3,000	27.5	63.2	23.7	53.0
£3,001 - £5,000	11.0	74.2	21.0	74.0
£5,001 - £10,000	10.4	84.6	1.9	75.9
Over £10,000	15.4	100.0	24.2	100.0

5.3.23 On the basis of an 81% response, 36% or so (690 implied) of all concealed households moving had savings below £1,000. The level for those moving within one year was 29% (120 implied) based on an 83% response.

5.3.24 The concealed households were asked for further information on their financial position via a question on annual income. These findings are presented in Table 5-28 below.

Table 5-28 Annual Income of Concealed Households

Question 35e

Monthly mortgage	All concealed households moving			Concealed households moving within one year		
	%	Cum %	N ^{os} implied	%	Cum %	N ^{os} implied
Below £10,000	22.2	22.2	532	17.1	17.1	86
£10,001 - £15,000	24.3	46.5	583	26.4	43.5	132
£15,001 - £17,500	8.3	54.8	199	2.2	45.7	11
£17,501 - £20,000	12.4	67.2	298	20.2	65.9	101
£20,001 - £22,500	12.4	79.6	298	7.5	73.4	37
£22,501 - £25,000	6.0	85.6	144	8.6	82.0	43
£25,001 - £27,500	4.2	89.8	101	2.0	84.0	10
£27,501 - £30,000	6.2	96.0	149	4.4	88.4	22
£30,001 - £35,000	2.2	98.2	53	6.0	94.4	30
£35,001 - £40,000	0.0	98.2	0	0.0	94.4	0
Above £40,000	1.8	100.0	43	5.6	100.0	28
Total			2,400			500

5.3.25 A response was received from around 84% (2,020 implied) of all concealed household respondents. The proportion of concealed households with annual incomes at or above the approximate average UK annual household income of £23,000 was around 19%, above the average in recent DCA surveys (15%). The proportion in the sub £10,000 per annum category (around 22%) was below the average for new households moving found in other recent DCA surveys (28%). Concealed households moving within one year indicated a marginally higher income profile based on a 90% response (450 implied).

5.3.26 On the basis of an 83% response, around 11% (270 implied) of concealed households moving would be likely to claim Housing Benefit. 17% has been the average in our recent surveys. In the case of concealed households moving within one year, 18% (90 implied) would be likely to claim Housing Benefit based on an 81% response.

6 SUPPORTED AND ADAPTED HOUSING

6.1 Needs of Disabled People

- 6.1.1 Issues relating to households with one or more member affected by a disability or long-term illness term were addressed through a series of questions. This section draws together the findings from these questions.
- 6.1.2 We found that 14.4% of households in the area did contain somebody with a special need, suggesting 6,220 households in Winchester District were affected in some way.
- 6.1.3 Assessment of an 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.
- 6.1.4 From cross-tabulation we established that the comparative figures for the various tenures were as per Table 6-1 below. The Council rented figure (some 29%) was well below the average found in recent DCA surveys (38%).

Table 6-1 Incidence of Disability by Tenure
Question 9 by Q.1

Tenure	%	N ^{os} implied
Owner occupied with mortgage	7.9	1,342
Owner occupied without mortgage	15.6	2,468
Private rented	11.2	276
Council rented	29.3	1,512
HA rented	24.9	456
Shared ownership*	7.6	8
Tied to employment	17.9	160

(* Low volume of data).

- 6.1.5 In around 85% of cases only one household member was involved; in 15% two members were involved, giving an implied total of around 7,000 individuals with a disability or limiting long term illness in Winchester District.
- 6.1.6 The age groups of all disabled household members are shown in Table 6-2 below based on an implied total of 7,200 household members. Around 66% of all disabled household members were over the age of 60; 20% under 45.

Table 6-2 Age of all Household Members with a Disability

Question 10b

Age	%	N ^{os} implied
0 - 15	6.9	497
16 - 24	4.2	304
25 - 44	9.1	656
45 - 59	14.3	1,030
60 - 74	28.9	2,082
75+	36.6	2,636
Total	100.0	7,205

6.1.7 The next table addresses the nature of the disability of members of the household. The results reflect the fact that more than one choice was offered, based on 6,010 and 1,050 implied cases for 1st and 2nd members respectively, giving an average of 1.6 and 1.5 choices respectively.

Table 6-3 Nature of Disability

Question 10c

Disability	1 st Member			2 nd Member		
	% responses	% households	N ^{os} implied (all choices)	% responses	% households	N ^{os} implied (all choices)
Mobility problems	32.7	51.6	3,101	22.5	33.5	351
Limiting long-term illness	19.4	30.7	1,842	19.2	28.4	299
Other physical disability	12.0	19.0	1,144	10.3	15.2	160
Visual / hearing impairment	11.7	18.5	1,111	18.0	26.6	280
Heart / asthmatic / respiratory problems	11.1	17.6	1,058	14.2	21.2	222
Wheelchair user	5.4	8.5	514	7.2	10.7	112
Mental health problem	4.7	7.4	444	3.7	5.4	57
Learning difficulty	3.0	4.8	286	4.9	7.2	76
Total	100.0	158.1		100.0	148.2	

6.1.8 The largest group was those with mobility problems (around 52%) but some 31% gave limiting long-term illness as one of their choices. Under 9% of the households in the group contained someone who was a wheelchair user suggesting some 510 in the Winchester District as a whole. Of the 2nd members with a disability, some 110 were also wheelchair users.

6.1.9 We ran a cross-tabulation to see if the houses which had been adapted for a wheelchair were indeed the dwellings where people using a wheelchair lived and found this to apply in only 8% or so of cases (58 of the 711 at Table 6-7), suggesting a mismatch between houses adapted and those where wheelchair users lived. By extension, it would appear that 456 households (around 89%) did not live in suitably adapted premises (viz. 514 in Table 6-3 above less 58).

6.1.10 44% or so (3,110 implied) of household members with a disability indicated a need for care / support. Of those, 74% were receiving sufficient care / support.

6.2 Support Needs

- 6.2.1 7,030 people responded to the question on need for care or support, 46% indicated a need for care or support (3,111 implied).
- 6.2.2 74% of those with a care or support need felt they were getting enough support, the data implied around 26% with outstanding support needs (865 implied).
- 6.2.3 Those with an outstanding care or support need were asked what types of support they needed. Responses were received from 861 respondents, or 99% of those with an outstanding need. Respondents made an average of 2 choices each.

**Table 6-4 Type Of Care / Support Required
(All Disabled Household Members)**

Question 10f

Care / Support	% responses	% households	N ^{os} implied
Claiming welfare benefits / managing finance	22.7	46.1	397
Supervising health / well being	7.6	15.4	133
Emotional support / managing behaviour	10.8	22.1	190
Establishing social contacts / activities	16.3	33.1	285
Establishing personal safety / security	7.8	15.8	136
Advice / advocacy	15.3	31.2	269
Looking after your home	4.2	8.5	73
Accessing training / employment	15.3	31.2	269
Total	100.0		1,752

- 6.2.4 Needs were well spread over the range of options offered. The most common need was for help claiming benefits / managing finance, but the need for help establishing social contacts / activities was also significant.
- 6.2.5 A cross tabulation looked at the type of disability effecting those with an outstanding support need. The specific needs of different groups were clearly highlighted in the data. We found that 100% of people with learning difficulties needed help supervising health and well being. 89% of people with mental health problems require emotional support / managing behaviour. 63% of wheelchair users and 57% of those with mobility problems needed help claiming benefits / managing finance; while 92% of people with mental health problems, 46% with visual / hearing impairment and 32% of people with mobility problems needed help looking after the home.
- 6.2.6 The Supporting People programme, due to be introduced in April 2003, will provide a structure for funding the housing related support services outlined in Table 6-4 above. New services developed after April 2003 will have to compete for resources with established schemes within the County. The local authority will need to develop plans to meet outstanding needs through the Supporting People programme.
- 6.2.7 Those who currently receive care and support services were asked who provided their support. In 35% of cases (870 cases implied) support was provided by Social Services / Voluntary Body, in the majority of cases however (65%, 1,601 cases) support was provided by family / friends / neighbours.

6.3 Adaptation

- 6.3.1 Two questions sought information of the degree to which the home had been built or adapted to meet the needs of disabled persons.

Table 6-5 Adaptations for the Disabled

Question 11a

Adaptations	%	N ^{os} implied
Adapted	9.1	3,921
Not adapted	90.9	39,225
Total	100.0	43,146

- 6.3.2 As can be seen from the table above, around 9% of properties had been so adapted, the same as the average level found in other recent DCA surveys.
- 6.3.3 The split by tenure is set out in the table below.

Table 6-6 Adaptations by Tenure

Question 11a by Q.1

Tenure	%	N ^{os} implied
Owner occupied with mortgage	4.1	702
Owner occupied no mortgage	10.1	1,598
Private rented	5.5	136
Council rented	18.9	953
HA rented	25.4	452
Shared ownership*	15.7	17
Tied to employment	7.0	63

- 6.3.4 Adaptation in the Council rented sector was, as might be expected, considerably higher (around 19%) than in the mortgage paying owner occupied sector where adaptation levels were very low (around 4%). Adaptation in the owner occupied no mortgage sector (around 10%) was only slightly above the average for Winchester District, even though a higher proportion of elderly persons tends to be within that sector.
- 6.3.5 4,130 implied households actually responded to the question on which adaptations had been provided, suggesting an adaptation level of 9.5% (rather than 9.1% in Table 6-5 above). The following adaptations were identified based on responses to a multiple-choice question, respondents making around 2.2 choices on average.

Table 6-7 Types of Adaptations Provided

Question 11b

Adaptations	% responses	% households	N ^{os} implied (all choices)
Handrails / grabrails	25.9	56.8	2,349
Ground floor toilet	18.3	40.0	1,656
Bathroom adaptations	18.0	39.5	1,631
Access to property	16.8	36.8	1,520
Wheelchair adaptations	7.8	17.2	711
Stairlift / Vertical lift	7.8	17.2	709
Extension	2.7	6.0	248
Other	2.7	6.0	247
Total	100.0	219.5	

- 6.3.6 Wheelchair adaptations (around 17%) were at a higher level than the average found in recent DCA surveys (14%). The data taken in conjunction with 6.1.9 above suggests that many adapted premises are no longer occupied by wheelchair users. Around 57% had had handrails / grabrails adaptations, the most commonly chosen item in DCA surveys. Ground floor toilets (40%), bathroom adaptations (39%) and access to property (37%) also featured prominently in Winchester.
- 6.3.7 4,360 implied households (70% of all households with a disability) responded to a further question on what facilities still needed to be provided, now or in the next five years, to meet the needs of a current member of the household. Respondents made around 1.5 choices on average.

Table 6-8 **Types of Adaptations Needed for Current Member**
Question 12

Adaptations	% responses	% households	N^{os} implied (all choices)
Bathroom adaptations	26.9	41.5	1,807
Handrails / grabrails	17.1	26.3	1,147
Stairlift / vertical lift	13.7	21.1	919
Extension	11.9	18.3	798
Ground floor toilet	9.5	14.7	640
Access to property	7.4	11.5	501
Wheelchair adaptations	7.1	10.9	475
Other	6.4	10.0	434
Total	100.0	154.3	

- 6.3.8 Handrails / grabrails adaptations, ground floor toilets and access to property all featured much less prominently when compared to adaptations provided, presumably reflecting levels of work completed as indicated in Table 6-7 above. However, demand for bathroom adaptations remained very high, even though considerable adaptation work appears to have been carried out. The need for an extension to the property featured more prominently. Demand for wheelchair adaptation (under 11% and implying 470 or so cases) was quite low and appears to run counter to the implied mismatch referred to at 6.1.9 above, although arguably it is compatible with our comment at 6.3.6 above.

6.4 Supported Accommodation

- 6.4.1 Around 11% of existing households moving (410 implied) indicated an interest in supported accommodation. This group was asked what type of supported housing they required. Table 6-9 below shows the responses from that group to a multiple choice question with respondents making an average 1.2 choices.

Table 6-9 Type of Supported Accommodation Required

Question 20

Type	% responses	% households	N ^{os} implied
Council / HA sheltered housing	41.4	51.7	213
Private sheltered housing	24.9	31.0	128
Independent accommodation (with visiting support worker)	16.9	21.2	87
Residential / nursing home	12.1	15.0	62
Independent accommodation (with live in carer)	4.7	5.8	24
Total	100.0	124.7	

(No data for hostel / group home).

- 6.4.2 There was a demand for around 210 Council / HA and 130 private sheltered housing units. Around 110 units of independent accommodation were also required and 62 nursing home places.

6.5 Accommodation for Older People

- 6.5.1 Based on a 99% response, 8.8% of existing households (3,780 implied) indicated that they had elderly relatives (over 60) who would need to move to Winchester District in the next five years. 3,810 implied households responded to a further multiple-choice question on the type of accommodation required, with respondents making 1.3 choices on average.

Table 6-10 Accommodation Required by Elderly Relatives in Next 5 Years

Question 13b

	% responses	% households	N ^{os} implied (all choices)
Live with respondent (need extension / adaptation)	18.3	23.6	898
Residential care / nursing home	18.5	23.8	907
Private sheltered housing	23.5	30.2	1,150
Council / HA sheltered housing	11.0	14.1	539
Private Housing	15.8	20.3	773
Live with respondent (existing home adequate)	8.0	10.4	394
Council / HA Housing	4.9	6.3	242
Total	100.0	128.7	

- 6.5.2 Only around 14% showed an interest in Council / HA sheltered housing; over 30% in private sheltered housing. Around 24% of respondents expected their relative to live with them provided that extension / adaptation work was completed. Some 24% opted for residential / nursing home care.
- 6.5.3 The combined requirement for sheltered housing in both sectors from existing households living in Winchester District and in-migrating parents / relatives is shown below.

Table 6-11 Sheltered Housing Demand

	Private Market	Affordable Sector	All Sectors
Existing Households	128	213	341
In-migrant Households	1,150	539	1,689
Total	1,278	752	2,030

- 6.5.4 The significantly higher level of elderly accommodation for people moving into Winchester District is common to other DCA Surveys. Generally, the forecast is being made by their children who assist in the moving process. Conversely, the indigenous older population prefer to continue in the area / surroundings they know and within their own home as long as possible.
- 6.5.5 In total, the data suggests a combined requirement for sheltered accommodation from older people currently living in Winchester District (341 households) and those who may in-migrate to be beside their family (1,689 households) making a total of 2,030 units, 752 in the affordable sector and 1,278 in the private sector.
- 6.5.6 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.

7 POPULATION GROWTH AND HOUSEHOLD FORMATION PROJECTIONS

7.1 Introduction

7.1.1 In this section of the report we provide a short background commentary to the demographic element in housing demand in Winchester. 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.

7.1.2 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 Office of the Deputy Prime Minister (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.

7.1.3 Kleinman and Whitehead have devised a so-called 'Gross Flows' approach which looks at gross household formation, tenure choice, demand from in-migrants and deducts these from new social output and re-lets to yield a measure of social housing requirements.

7.1.4 How these national models translate to the local level is not at all clear. Kleinman and Whitehead have attempted a 'Gross Flows' analysis for Cambridge but relied entirely on secondary data for their estimates. This is a problem in the model particularly for the incorporation of measures of concealed households and factors relating to affordability are not considered directly but by modelling the tenure propensities of new households.

7.1.5 Our method emphasises the affordability issue and gives much greater weight to the issue of concealment of households than most of the 'national' level studies.

7.1.6 The affordability measure is derived from primary data collected in the household's surveys and from access to the Land Registry database on house prices and the concealment issue is also addressed through the survey findings. We are mindful that because our study is targeted at Winchester, there are inevitable limitations because local housing markets encompass much wider areas than a single Council area.

7.2 Demographic Analysis

7.2.1 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 Winchester 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.

7.2.2 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).

7.2.3 The Long Term Population Projections in the tables in this section follow ODPM household formation rates (1996 based). The data has been provided by Hampshire County Council Planning Department.

7.2.4 The Long-Term Population Projections are based on a set of assumptions which accord as closely as possible to the latest Government projections of household formation rates applied to the latest national population forecasts.

7.2.5 The distribution and phasing of development acceptable to the Government is indicated in Regional Planning guidance and in approved structure and unitary development plans.

7.2.6 Thus, the Long-Term Population Projections produced by the County Planning Department incorporate the most recent ODPM household formation rates (expressed as age, sex, marital status specific household representative rates), and the adopted County Structure Plan dwellings proposals, phased broadly evenly over the plan period but taking account of relevant local factors.

7.2.7 The household formation rates determine the likely number of households which will be formed from the resident population, and thus demand for dwellings. The difference between supply of dwellings, as given by the structure plan proposals, and the demand indicates the number of dwellings available for in-migrants and ultimately the level of net migration.

7.2.8 Hampshire County Council would recommend that these should be used bearing in mind that they are likely to define the lower end of the range of possible outcomes.

7.2.9 Difference between the forecasts and the projections should be largely confined to differences in the scale of population growth. We would not expect substantial differences in age distributions.

7.3 2001 Census

7.3.1 The population data has only just been published by the Office of National Statistics following completion of the 2001 Census. We are therefore outlining the age band population numbers from the Census for 2001 along side the population model in Table 7-2.

- 7.3.2 We have discussed the updating of the population model with Hampshire County Council and they, like all other Counties, will not be in a position to update the model to reflect the actual figures at 2001 from the Census until the middle of 2003. The base model used is a national model maintained at Anglia University, and there are a range of issues that need to be taken into account, particularly headship rates, before longer term projections can be prepared.
- 7.3.3 Whilst there is variance in the actual population numbers we would not expect any major difference in the longer term trends in population change within age groups, which in our view is the critical issue for household formation and its impact on stock requirements.

7.4 Population Projections

- 7.4.1 The projections in Table 7-1 are based on County predictions (1996-based). These figures are based on the assumptions regarding mortality, fertility and migration etc, and are contained in population and household projections for Winchester District for the period 1996-2011 provided by Hampshire County Council and consistent with the baseline housing provision in the Adopted County Structure Plan.

Table 7-1 Population Change in Winchester, 1996 - 2011

	1996	2001	2001 Census	2006	2011	Change
Total Population	100,949	102,156	107,213	104,511	107,269	
Change		+1,207	+6,264	+2,355	+2,758	+6,320
% Change		+1.2	+6.2	+2.3	+2.6	+6.3

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- 7.4.2 The table shows an increase in the population of Winchester of about 6,320 over the forecast period. The main increase in the overall population numbers is forecast to take place between 2006 and 2011 with 2,758 more individuals (+ 2.6%).

7.5 Age Structure Forecast 1996 - 2011

- 7.5.1 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 7-2 is based on the net migration model and for this purpose best represents the position.

Table 7-2 Population Age Band Forecast, Winchester, 1996 - 2011

	1996	2001	2001 Census	2006	2011	Change
0 - 19	24,406	23,980	25,978	23,868	23,598	-808
20 - 29	12,002	11,301	12,379	11,262	11,941	-61
30 - 44	21,226	21,379	22,885	21,472	20,544	-682
45 - 64	25,684	27,014	27,569	28,587	29,979	+4,295
65 +	17,631	18,482	18,402	19,322	21,207	+3,576
Total	100,949	102,156	107,213	104,511	107,269	+6,320
% Change		+1.2	+6.2	+2.3	+2.6	+6.3

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Percentage change is measured between 5 year bands, not the base population. This is a better representation of the incremental change.

- 7.5.2 As we show above there will be an average rise in the population of Winchester of approximately 0.4% per annum over the forecast period according to the forecast model. There is projected to be around 5,113 more people in Winchester in 2011 than in 2001.
- 7.5.3 The 0-19 age range show a steady fall in numbers over the forecast period (-808; 3.3%). The majority of this fall occurred between 1996 and 2001 (-426; 1.7%).
- 7.5.4 Numbers in the 20-29 age group are projected to fall steadily up to 2006 (-701; -5.8%). After 2006 a rise occurs up to 2011 (+679; 6%). This age group shows a small overall fall in numbers over the forecast period (-61; -0.5%).
- 7.5.5 Numbers in the 30-44 age group, the main economically active group show a decrease overall. There is a small rise in numbers in this group up to 2006, numbers then fall after 2006 to 2011 (-928; 4.3%).
- 7.5.6 The most significant feature here is the growth of population in the 45-64 age range. Over the forecast period it increases by 4,295 people; 16.7%. The main increase occurred between 2001 and 2006 (+1,573; 5.8%).
- 7.5.7 The over 65 age group shows a steady rise in numbers over the forecast period. The greatest rise is due to happen between 2006 and 2011 (+1,885; 9.8%). The figures in Table 7-3 indicate that Winchester continues to have an ageing population.
- 7.5.8 Numbers in the 80+ age group increase by 1,582 (31.9%) up to 2011. The main increase is projected to occur after 2006 (+567; 9.5%), but numbers continually rise from 1996 to 2011. Given the resource demands often associated with very elderly people, these are significant figures.

Table 7-3 Numbers of 80+ in Winchester, 1996 - 2011

	1996	2001	2001 Census	2006	2011	Change
80+	4,966	5,479	5,381	5,981	6,548	
Change		+513	+415	+502	+567	+1,582
% Change		+10.3	+8.4	+9.2	+9.5	+31.9

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7.6 Forecast Change in Households 1996 – 2011

- 7.6.1 Table 7-4 outlines the household formation forecasts for the District in the 15-year period from 1996 to 2011. It is based on the statistics provided by Hampshire County Council, and we consider it the best available forecast on currently available data of household change in the District.

Table 7-4 Forecast Change in Households in the District 1996 - 2011

	1996	2001	2006	2011	Change 1996-2011
	40,246	42,387	44,914	47,340	
Change		+2,141	+2,527	+2,426	+7,094
% Change		+5.3	+5.9	+5.4	+17.6

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

7.7 Summary

- ◆ The 2001 Census data shows that the population of Winchester is currently 107,213 people. This data has only just been produced and will not be reflected in population model projections until the middle of 2003. We would not however expect the following trends within age bands, taken from the existing Population and Housing Model which are outlined below, to alter in any significant way;
- ◆ The forecasts to 2011 are based on the assumptions outlined in paragraphs 7.2.1 and 7.2.7 regarding mortality, fertility and migration etc, and are contained in population projections for Winchester for the period 1996-2011 provided by Hampshire County Council and consistent with baseline housing provision in the Adopted County Structure Plan;
- ◆ The population is projected to increase by 6,320 people, 6.3% over the 15 years to 2011;
- ◆ The 0-19 age range show a steady fall in numbers overall, the majority of this fall occurred between 1996 and 2001(-426; 1.7%);
- ◆ The 20-29 age group is projected to fall steadily up to 2006 (-701; 5.8%), after 2006 a rise occurs up to 2011 (+679; 6%). This age group shows a small overall fall in numbers over the forecast period (-61; 0.5%);
- ◆ The 30-44 age groups, which are the main economically active group, show an overall decline. A small rise in numbers occurs up to 2006, followed by a decline up to 2011(-928; 4.3%);
- ◆ The most significant change occurs in the numbers of people aged 45 to 64, with an overall rise of 4,295 people. The main increase occurred between 2001 and 2006 (+1,573; 5.8%);
- ◆ There is also a significant growth in numbers in the over 65 age group overall of around 3,576. The greatest rise is due to happen between 2006 and 2011(+1,885; 9.8%);
- ◆ The "older" retirement group, those 80 and over grows by nearly 32%, 1,582 more people by 2011. This group represents 6,548 people in the area by 2011, who are much more likely to have care and support needs which should now be assessed in detail.

8 NEEDS ASSESSMENT MODEL, PLANNING & DELIVERY

8.1 Affordable Housing Needs Requirement

8.1.1 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.

8.1.2 Each category has been adjusted to ensure that proper account is taken of households who can access the owner occupied market without assistance (income >£23,500 / £43,000) and to eliminate any double counting between categories. The Private Rent Sector costs are estimated at an access cost of £380 / £625 per month for the vast majority of households in this sector, requiring an annual income of at least £13,500 / £16,000 per annum.

8.1.3 The model has been prepared in accordance with the ODPM Good Practice Guidance.

	The Backlog of existing housing need is as follows:-	
1.	Households living in unsuitable housing in Winchester who are planning to move in the next five years.	HNS 4.2.1
2.	RSL tenant households living in unsuitable housing are excluded because a move would release a unit of affordable housing and it is therefore assumed that there would be no overall net effect.	HNS
3.	Households in unsuitable housing who can have their need resolved in situ, including private tenants.	HNS
4.	Proportion of existing households unable to buy or rent (HNS income data) i.e. income <£13,500 / £16,000 depending on location and need to move.	HNS 3.9.5
5.	Priority homeless in temporary accommodation.	WCC HIP 2002
6.	Total Backlog need.	
7.	Quota to progressively eliminate backlog over a 5-year period (20%) as recommended in guidance.	ODPM Guidance
8.	Total net annual need.	
	Newly Arising Need is as follows:-	
9.	Concealed households identified in the survey, annualised at the average level of those forming in the first two years.	HNS Table 5-14
10.	Percentage of households forming with a partner living elsewhere in the District	HNS 5.3.5
11.	Percentage of households registered on Waiting List	HNS 5.3.16
12.	Proportion unable to buy (i.e. income < £23,500 / £43,000)	HNS 3.6.2
13.	Ex-institutional population moving into community p.a.	WCC
14.	Housing Register new applications 2001-2002 less cancellations from the register.	WCC
15.	In-migrant households over the last year who live in social housing.	HNS
16.	Total newly arising need.	
	Supply of Affordable Units is as follows:-	
17.	Existing social stock relets from RSL's and the local authority net of transfers. (HIP 2002)	WCC
18.	Increased vacancies and units taken out of management.	WCC
19.	Future new supply each year based on average level over next three years.	WCC HIP 2002
20.	Total affordable supply per annum.	HIP 2002
21.	Total affordable need per annum.	
22.	Overall annual shortfall.	

AFFORDABLE HOUSING NEEDS ASSESSMENT MODEL

Backlog of Need		
1. Households in unsuitable housing		4,829
MINUS		
2. Council / RSL tenants	1,626	
3. Cases where in-situ solution most appropriate	<u>1,430</u>	
	3,056	<u>3,056</u>
		<u>1,773</u>
TIMES		
4. Proportion unable to afford to buy or rent	(24%)	426
PLUS		
5. Backlog (non-households)		<u>49</u>
6. TOTAL BACKLOG NEED		475
TIMES		
7. Quota to progressively reduce backlog *	(20%)	
8. ANNUAL NEED TO REDUCE BACKLOG		<u>95</u>
Newly Arising Need:		
9. New household formation (gross p.a.)	599	
MINUS		
10. Two person formation (20%) x 0.5	<u>60</u>	
	539	
MINUS		
11. Households registered on waiting list (33%)	<u>178</u>	
	361	
TIMES		
12. Proportion unable to buy in market (94%)	339	339
PLUS		
13. Ex-institutional population moving into community	(no data)	0
14. Existing households falling into priority need		588
15. In-migrant households unable to afford market housing		<u>237</u>
16. TOTAL NEWLY ARISING NEED		<u>1,164</u>
Supply of Affordable Units:		
17. Supply of social relets p.a.		491
MINUS		
18. Increased vacancies (if applicable) and units taken out of management.		<u>11</u>
	(120 x 8.9%)	480
PLUS		
19. Committed units of new affordable supply		<u>0</u>
20. AFFORDABLE SUPPLY		<u>480</u>
Annual need to reduce backlog	95	
Newly arising need	<u>1,164</u>	
21. TOTAL AFFORDABLE NEED	1,259	1,259
MINUS		
Affordable supply		<u>480</u>
22. OVERALL ANNUAL SHORTFALL		<u>779</u>

* 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.

8.2 Needs Assessment

- 8.2.1 The total affordable housing need annually is for 1,284 units. Re-lets of the existing social stock average 480 units and is the major means of addressing the scale of need identified. After allowing for this level of supply there will still be an annual affordable housing shortfall of 779 units which projected over the nine year period to 2011 is a total of 7,011 units.
- 8.2.2 It is not expected to be able to achieve this scale of supply in this timescale. This level of need significantly is almost eight times the number of units likely to be able to be delivered from new delivery or conversions, currently planned at around 100 units p.a. in the Housing Strategy, resulting in growing levels of unmet need each year.
- 8.2.3 Around 1,160 households intend to leave the District because of a lack of affordable housing over the next five years, 550 of them concealed households, and they are not included in our needs assessment calculation, although we could be justified in doing so.
- 8.2.4 This level of demand justifies the maximum target level of affordable housing from new delivery.

8.3 Land and Affordable Housing Delivery

- 8.3.1 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 and the Housing Corporation's emphasis on value for money. Therefore, local authority housing and planning strategies need to ascertain the availability of sites and propose ways of bringing sites forward.
- 8.3.2 The Housing Corporation is more likely to allocate funding for schemes developed on sites acquired at discounted value in its quest for value for money. The inter-relationship of the land and subsidy issues is important in the negotiation process provided for within planning guidance on affordable housing, even for authorities which are free of debt.

8.4 Private Landowners / Developers

- 8.4.1 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.
- 8.4.2 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 requirements.

8.5 Planning Policies for Affordable Housing

- 8.5.1 Planning Policy Guidance Note 3 on Housing gives the planning system a role in affordable housing provision in urban areas, recognised in Policy H.5 of the Winchester District Local Plan Review. Exceptions sites in small rural areas are addressed within Policy H.6 (Deposit 2001).

- 8.5.2 Such negotiation will depend on location, market, site conditions and evidence of local need. This is a material consideration in determining applications at or above the site thresholds as recommended in Circular 6/98.
- 8.5.3 The Council recognises that the basis of the agreed affordable housing, and any other provisions can be clearly drafted into a Section 106 Agreement so that delivery is controlled and guaranteed.
- 8.5.4 It is essential to continue to maintain a group of registered social landlords (RSL's) who can provide the skills to deliver and manage affordable housing for all sectors of the market including special needs.

8.6 Affordable Housing

- 8.6.1 Circular 6/98 emphasises the need for local authorities to provide a local definition of affordable housing. A basis for a definition of affordable housing, which would assist within the context of the Local Plan, is discussed in section 8.6.3 below.
- 8.6.2 The term affordable has gradually come to replace “social” in every day usage. It is interesting to note that affordable housing is defined by the ODPM as “the range of both subsidised and market housing designed for those whose incomes generally deny them the opportunity to purchase houses on the open market as a result of the local relationship between income and market price”. This bears a close resemblance to our definition below.
- 8.6.3 The Council needs to define affordable housing in setting future planning policy and we would suggest that as simple a definition as possible be provided. We have attempted to provide policy text, which identifies the requirement but leaves the percentage to be achieved as an issue for negotiation on a site by site basis. Our definition is:-

“Affordable housing is that provided, with subsidy, for people who are unable to resolve their housing requirements in the local housing sector market because of the relationship between housing costs and incomes”.

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

‘Units for rent (the main group), shared ownership with grant or 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 in perpetuity’.

- 8.6.5 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 assessment and the suitability of individual sites for affordable housing.

8.7 Low Cost Market Housing

- 8.7.1 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.

- 8.7.2 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.
- 8.7.3 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.
- 8.7.4 The increases in house prices over the last four years have excluded a large proportion of ‘first-time buyers’ from the owner occupied market. This impact is also revealed in the need to subsidise housing for ‘key workers’. 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 marginal element of affordable need.
- 8.7.5 It is however, also important to build balanced sustainable developments and a mix of subsidised units for sale and rent is needed where the overall level of up to 40% is negotiated.

8.8 Site Thresholds

- 8.8.1 The urban site threshold level in Circular 6/98 is 25 units or one hectare or 15 units or 0.5 hectare where there are exceptional local constraints, but a lack of sites above this size would have a severe impact on delivery of affordable housing if this level is to be applied. In all areas across the District we believe that the significant level of need identified is unlikely to be met unless the number of opportunities for provision is maximised.
- 8.8.2 The adopted Local Plan 1998 applies, in the larger settlements, the lower threshold allowed for in Circular 6/98. Outside those settlements, where the Circular allows authorities to adopt appropriate thresholds, it uses a site threshold for affordable housing of 5 units or 0.2 hectares. It is proposed in the Local Plan Review to apply a threshold of 5 units or a site size of 0.17 hectares or more in the larger settlements. This is required to be able to make any impression on the scale of need for affordable units in the 1999 survey, let alone the increased level now identified in the 2003 survey following significant house price inflation. We would support this threshold level for affordable housing negotiation in areas of over 3,000 population.
- 8.8.3 The Council may set a lower threshold in smaller settlements with a population lower than 3,000. In view of the scale of need we would support the proposal to adopt a threshold of 2 units and seek a higher proportion of affordable housing in line with the recommendations in the Rural White Paper.
- 8.8.4 There is a major development area (MDA) proposed at the West of Waterlooville which will meet some of Winchester’s needs but has a closer relationship to the South East Hampshire authorities. In achieving an overall target total of 900 units or up to 40% of new units on all suitable sites, there will be variation in the potential of large sites such as the MDA to deliver affordable housing as opposed to very small sites.
- 8.8.5 The target on an MDA may therefore generally be set at 40% affordable units which we would support, subject to the ability to deliver a balanced and sustainable development and bearing in mind our comments at 8.7.5 above. In view of the contribution of the West of Waterlooville MDA to wider housing needs, there is a need for a specific assessment of the affordable housing requirements for this MDA. The Winchester City (North) MDA is a reserve site (as is part of West of Waterlooville) and there may be a need for updated survey work if or when the site is triggered.

8.9 Perpetuity

- 8.9.1 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 is required.
- 8.9.2 To ensure the delivery and long term occupation of the affordable housing, it will be preferable for a specialist organisation such as an RSL 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.

8.10 Overall Target Levels

- 8.10.1 The annual level of outstanding affordable need of 779 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 new forming 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.
- 8.10.2 Essentially planning should be providing for balanced communities, which acknowledge the need for social compatibility if the problems of housing in the past are not to be repeated. Our significant experience of affordable subsidised housing in mixed developments leads us to recommend that up to 40% of new units negotiated in this way should be the target level applied from the total of all suitable sites negotiated. This proportion includes both affordable housing for rent and subsidised low cost market housing.
- 8.10.3 In view of the scale of need and the inability of an adequate number of sites to address it particularly in the period to 2007, 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 planning sustainability and economic factors.

8.11 Needs Distribution by Sub Area

- 8.11.1 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.
- 8.11.2 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 ward by cross-tabulation.
- 8.11.3 The data tables provided give a ward 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.

8.12 Location Demand Analysis

8.12.1 The locational preferences (up to two) expressed by new households forming in each area to 2007 are listed below:-

Table 8-1 Locational Preferences

Location	Net Households*	Net Affordable Need	
		%	N ^{OS} implied**
Winchester	1,179	100.0	1,179
Bishops Waltham	414	92.9	385
Alresford	348	100.0	348
Wickham	244	100.0	244
Denmead	149	88.6	132
West of Waterlooville New Community	64	100.0	64
Colden Common	47	93.0	44
Kingsworthy	26	93.0	24
Total	2,471	98.9	2,420

* Numbers after elimination of multiple choices

** Net actual affordable need by area to 2007.

8.12.2 We have run a number of cross-tabulations to check on the actual income capacity of households expressing preference to live in the areas outlined in the table above. Local access level prices in each area were assessed against the incomes of new households expressing preference to live in that specific area to calculate the numbers of households unable to purchase.

8.12.3 In all locations the proportion earning below the required income threshold is between 89% and 100% of new households. Generally, around 99% of all concealed households by location need affordable housing.

8.13 Supported and Adapted Housing Needs

8.13.1 There will be future provision requirements to address the changing needs from "Community Care" policies, but at this stage we believe that these are likely to be specific small developments.

8.13.2 The nature of planning policies to address special needs requirement relate principally to mobility housing. The issue of percentages does not apply in this area. A small proportion of residents who are wheelchair users would require the provision of housing built to standards to accommodate internal wheelchair use. Additionally the economics of accessible standards are marginal in new build compared to the cost of future adaptation.

8.13.3 Whilst the numbers identified in the survey are small it is clear that there is always likely to be a mismatch between adapted property and wheelchair occupants and that there is a need to provide an excess of adapted dwellings over wheelchair user households.

8.13.4 It is however, important to recognise that over 3,100 households have someone with a mobility problem and particularly in the light of the fact that 89% of wheelchair users do not live in an adapted dwelling. There is therefore a significant issue to address through extensions and adaptation of the existing stock. In relation to new dwellings these matters are now an issue dealt with by Part M of the Building Regulations.