

**BRENTWOOD
BOROUGH COUNCIL**

**STRATEGIC HOUSING
MARKET ASSESSMENT**

FINAL REPORT



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1 EXECUTIVE SUMMARY

1.1 Introduction

- 1.1.1 In April 2013 Brentwood Borough Council along with Braintree District Council, Chelmsford City Council, Colchester Borough Council and Maldon District Council commissioned DCA to carry out a Strategic Housing Market Assessment (SHMA) and a Housing Needs Survey (HNS) for each of the Partner Authorities. This included a postal survey sent to 5,000 households in Brentwood Borough.
- 1.1.2 The five Councils have joined together to procure and adopt a common methodology for the commissioning of their new SHMA. Although all five Councils are working together and are adjacent to one another the group does not regard itself as a defined sub region. Each Partner Authority will receive a separate SHMA report which contains both primary and secondary data. However within the SHMA consortium housing market areas do exist. Further information is provided in individual SHMA Reports.
- 1.1.3 Guidance on producing a SHMA can be found in the national planning framework, 2012, the SHMA practice Guide 2007 and more recently the Planning Practice Guidance published March 2014.
- 1.1.4 The key objective of the SHMA is to enable Brentwood Borough Council to understand the nature and level of housing demand and need within the Borough and provide a robust and credible assessment of the local housing market which can be used to inform key policies and strategies.
- 1.1.5 The use of both key secondary data, the primary data from the household survey and stakeholder consultation provide a valid and robust assessment of the housing need and housing markets within the Borough.

1.2 The Brentwood Housing Market Area

- 1.2.1 An important element of the SHMA is to consider the relationship between Brentwood and other local authorities, and the extent to which there are overlaps and links with other housing market areas.
- 1.2.2 CLG Strategic Housing Market Assessments Practice Guidance (August 2007) defines housing market areas as 'geographical areas defined by household demand and preferences for housing'. They reflect key functional links between the places where people live and work.
- 1.2.3 A housing market is defined in the Guidance Advice note as typically comprising an area in which around 70% of moves are contained and the market is likely to cover the administrative areas of a number of local authorities. It would be expected that there would be a close relationship between the housing market and travel to work areas.
- 1.2.4 In identifying the housing market area we look at the key data such as, migration and travel to work patterns, housing stock data and Census 2001 and 2011 data.

- 1.2.5 2001 Census revealed that self-containment is 82.4% in Brentwood when analysing household movements. The Brentwood travel to work patterns suggests a relatively high level of self-containment, with 59.6% of residents working within the local authority area.
- 1.2.6 The data would suggest that Brentwood can be considered to be a single housing market area. Within the SHMA Consortium, data suggest that Brentwood shares a housing market area with Chelmsford and Basildon and to a smaller extent Epping.

1.3 The Demographic Context & Future Projections

- 1.3.1 Analysis of changes in population and household profiles are essential in enabling an understanding of the level of housing need and demand within an area. Demographic change creates the need for different levels and types of housing provision and is a key factor influencing the requirements for market and affordable housing.
- 1.3.2 According to the 2010 ONS SNPP Brentwood's population will increase by 14.5% to **2030**.
- 1.3.3 The most significant feature is the growth of the population in the over 65 age groups with the most significant growth seen in those aged over 90. This group will impact on demand for supported housing, support services and need for adaptations.
- 1.3.4 There are predicted to be 3,000 (9.7%) more households in the Borough in 2021 than in 2011 and the household size will stay the same at 2.38 in 2021 from 2.38 in 2011.
- 1.3.5 The population projection analysis carried out by Edge Analytics suggests that the dwellings projection figure for Brentwood is **362** per annum over the Plan period 2015 to 2030.

1.4 The Economic Drivers of Demand

- 1.4.1 The economic development of an area can be of equal importance in driving change in housing markets, especially due to the effect of migration. It is important to highlight the reciprocal relationship between economic development and the provision of housing.
- 1.4.2 Whilst there is an obvious and established link between economic development and the requirement for new housing, or economic decline and problems of low demand, the type of housing provided within an area can also play a central role in addressing and facilitating economic development and achieving regeneration objectives.
- 1.4.3 It is important to understand the extent to which the working age population is engaged with the labour market. In 2012, Brentwood had an employment rate of 76.3% and an unemployment rate of 4.7%.
- 1.4.4 An alternative measure of unemployment is to review the proportion of people claiming Job Seekers Allowance (JSA). In Brentwood in 2013, 2.0% of people claimed JSA, and 6.4% claimed out of work benefits.

- 1.4.5 Census 2011 recorded that 14.9% of households in Brentwood are currently retired. High levels of retirement can impact on the economy of an area with lower levels of economically active households. It also indicates an elderly population who will in the future require suitable accommodation to meet their needs.
- 1.4.6 Although incomes are similar to the national average and 20.8% of existing households receive financial support there is also a relatively high level of wealth, based on equity held in owner occupation. Many retired people will have their own resources for housing and care.
- 1.4.7 The needs of concealed households need to be addressed. Incomes in this group are lower than in the population as a whole, and their housing choices are consequently more limited. 44.5% of concealed households been unable to afford to buy in the owner occupied market.

1.5 The Active Housing Market

- 1.5.1 The housing market is the context against which all the housing needs of the area are set. In particular, house price information is the basis on which the “affordability” of housing is measured for low-income households. In essence the study is seeking to establish who cannot afford to enter into the market.
- 1.5.2 House price data for the land Borough (*Land Registry*) showed an increase over the five years from 2007 and 2012 of 5.6%. The majority of property types in the Borough have seen an increase in prices.
- 1.5.3 The number of property sales in Brentwood decreased by 45.1% over the same five year period (2007-2012) compared to 49.8% in Essex (*Land Registry*).
- 1.5.4 Flats are considered to be the entry level stock in the Borough, and the price for a 1 bedroom flat starts at £127,995. This would require an income of £34,700 and 65.8% of newly forming household earn below this amount.
- 1.5.5 The need for a significant deposit is also a major factor in preventing access to the market in Brentwood, 82.6% of new forming households had less than £20,000 in savings. Therefore unless significant support is available these households will find it very difficult to access the market and will be limited to the rental or intermediate market.
- 1.5.6 The main requirement for property size in the intermediate housing market is mainly one and two bedroom units to meet the needs for new households forming and unable to access the market sector as a First Time Buyer.
- 1.5.7 Access to the private rented sector is restricted by cost. Almost half of all new forming households can afford to pay no more than £500 per calendar month in rent. Private rental costs start at around £600 pcm (the lowest rental bracket available).

1.6 The Current Housing Stock

- 1.6.1 The scale and nature of the existing housing stock by tenure, type, turnover and location is vital to meeting future housing need and demand.
- 1.6.2 The property type in the Borough is detached and semi-detached houses, which at 62.9% of the stock is higher than the national level of 53.0%.

- 1.6.3 The tenure profile for Brentwood is mainly skewed towards owner occupation 76.7%, around 13.0% higher than the regional level. 11.7% of households lived in social rent and 11.3% in private rent.
- 1.6.4 The main property size of stock in Brentwood is 3 bedrooms (34.6%), with 2 bedrooms accounting for 24.7% and 22.5% containing 4 bedrooms.
- 1.6.5 In terms of adequacy, 88.0% of existing households said their current property was adequate for their needs. Of those who said their current property was inadequate, the highest proportion lived in the private rented sector.
- 1.6.6 The 2013 survey data showed that the overall under-occupation figure was 42.9% slightly higher than the average found in DCA surveys (around 40%). It was the highest in the owner occupation sector, particularly those with no mortgage.
- 1.6.7 The overall over-occupation level of 2.6% is slightly lower than the average UK level indicated by the Survey of English Housing 2010/11 at 3.0%. The highest level was found in the registered provider rented sector at 12%.

1.7 Migration Patterns

- 1.7.1 In-migration can impact on the local housing market, depending on the type, size and tenure required by in-migrants. The main reason for a move to the Borough within the last three years was 'needed more space', therefore increasing the demand for larger family homes in the area.
- 1.7.2 3,446 households in-migrated to Brentwood from outside the Borough over the last three years. The highest proportion had moved from Greater London (16.1%), followed by Elsewhere in Essex 12.4% and 10.0% from Elsewhere in the UK. Only 4.1% had in-migrated from abroad.
- 1.7.3 Out-migration from the Borough was mainly to elsewhere in the UK followed by elsewhere in Essex for existing households and Greater London for concealed households. The main reason for leaving the Borough was 'unable to afford to buy a home'.
- 1.7.4 In terms of migration patterns from Census 2001 and ONS 2011 data, the main in-migration to the Borough was from Greater London, elsewhere in Essex and elsewhere in the UK. The main out-migration was to Maldon.

1.8 Future Housing Requirements

Market housing

- 1.8.1 According to the 2013 survey data, the majority of both existing and concealed households plan to move to owner occupied housing and the balance to private rented housing.
- 1.8.2 Broken down even further the survey data showed that the main requirement for type of property from existing moving households was for detached properties, where as for concealed households the main requirement was for a flat.
- 1.8.3 Existing households moving mainly need a 3 bedroom property in the market sector where as concealed households opted for a 1 bedroom property.

- 1.8.4 In terms of location, the most popular choice for both existing and concealed households was Brentwood, the main reasons for this choice included 'quality of neighbourhood', 'type of housing', 'nearness to family' and 'always lived here'.

Affordable Housing

- 1.8.5 The main requirement for affordable housing for existing households planning to move is for Council Rented and Registered Provider rented accommodation. Concealed households moving require Council Rented and Registered Provider shared ownership accommodation.
- 1.8.6 Existing households moving mainly need a 2 bedroom property in the affordable sector where as concealed households need a 1 bedroom property.
- 1.8.7 The most popular location for both existing and concealed households moving and requiring affordable housing was Brentwood. To be 'near to family' was the most common factor influencing choice of decision for both existing and concealed households

1.9 The Needs of Specific Household Groups

Black Minority Ethnic Households

- 1.9.1 In Brentwood, there were 2,676 implied BME households identified from the survey data (8.4%). The main BME group was 'Gypsy or Irish traveller' at 3.2% and 1.1% of residents were 'other Asian'.
- 1.9.2 The highest proportion of BME households currently lived in a flat (41.2%), much higher than the total Borough response of 19.4%. The main size of property occupied by BME households is 2 bedrooms at (36.7%).
- 1.9.3 Owner occupation was the main tenure for BME households at (52.4%), and 39.0% lived in private rented accommodation (total Borough response 11.3%).
- 1.9.4 775 existing BME households indicated they would be moving within Brentwood within the next 5 years, the majority requiring 3 bedroom accommodations in the owner occupied sector.
- 1.9.5 118 concealed BME households indicated they would be moving within the Brentwood within the next 2 years. The main type of housing required is a semi-detached property, the main tenure is Council rented and the main size is 3 bedrooms.

Households with Support Needs

- 1.9.6 Housing may need to be purpose built or adapted for households with specific support needs. Information about the characteristics of these households will inform housing and support strategies.
- 1.9.7 17.1% (5,466 implied) of households in the Borough contained a member with a disability / limiting long term illness. The largest group of people were those with a walking difficulty (51.2%).
- 1.9.8 17.0% (546 implied) of disabled households who require support said they were not receiving sufficient care / support. The main adaptation needed were, bathroom adaptations at 30.5% followed by Vertical lift / stair lift at 26.9%.

1.9.9 The highest preference by disabled households moving was for a bungalow. 71.7% of the requirement for bungalows came from those aged under 64. This potentially shows a need in the disability group of households without specific support needs but who require accommodation on one level.

1.9.10 The main location choice was Brentwood, followed by Ingatestone, Fryerning & Mountnessing.

Existing Younger Households (16-24)

1.9.11 The main tenure amongst younger households was private rent at 89.6%, significantly higher than the all household response (11.3%).

1.9.12 The main type of property occupied by households aged 16-24 was flats at 90.3%. 66.9% of younger households live in a 2 bedroom property, compared with 24.7% of all households.

1.9.13 100 implied 'younger' households said they were planning to move within the Borough in the next 5 years. The main type of accommodation chosen was semi-detached, the main size is 3 bedrooms and all said they require owner occupation.

The Housing Needs of Older People

1.9.14 651 implied households indicated that they had older relatives (over 60) who may need to move to Brentwood in the next 3 years. The main accommodation needed for their older relatives would be Council / Registered Provider sheltered housing (47.9%) followed by private sheltered housing.

1.9.15 134 implied older households in Brentwood wanting to move expressed an expectation for supported housing, the main tenure preference being Council / registered provider sheltered housing.

1.9.16 The data suggests a combined requirement for sheltered accommodation from older people currently living in Brentwood (526 households) and those who may in-migrate to be beside their family (256 households), a total of 782 units, 477 should be in the affordable sector and 305 in the private sector.

1.9.17 The level of need expressed for extra care accommodation by relatives of older people in-migrating was 172 units and 29 from existing households, a total of 201 extra care units.

1.10 The Key Findings of the SHMA

Balancing the Housing Market

- Ensure that future new development provides a mix of housing types and sizes to meet the needs of all households.
- Focus new delivery in market housing to address the impact of future demographic and household formation change, meeting the continuing need for small units, mainly 2 bedrooms, to improve the quality of the housing offer.
- Develop policies for market housing so that new stock meets local demand not addressed by existing stock turnover to provide a more balanced housing stock.
- Delivery strategy should be closely linked to meeting the growth in older people and enabling a better flow of the existing stock.

Overall Housing Targets

- The population projection analysis carried out by Edge Analytics suggests that the dwellings projection figure for Brentwood is **362** per annum over the Plan period 2015 to 2030.
- The SHMA stock flow analysis suggests a range of **288-384** dwellings per annum over a 5 year and 15 year period.

Market Housing Targets

- The 2013 housing needs survey identified a shortfall of **54** market units per annum, based on market demand and supply data. Further details can be found in section 11.6.

Affordable Housing Targets

- The 2013 Affordable Housing Assessment Model identified a shortfall of **234** units a year. Further details can be found in section 14.11.
- Based on the robust evidence found in this assessment, an **overall affordable housing target of 35%** can be justified to be negotiated from all suitable sites, subject to viability.
- Percentage scale and tenure mix target levels will require to be ratified by an Affordable Housing Viability Assessment.

Affordable Tenure Mix Targets

- The overall affordable tenure target balance set at **65% for social rent (including affordable rents) and 35% intermediate housing** supports the level of demand for intermediate housing.
- The Housing Need and Demand Assessment data will remain valid until 2018 at which stage it will need to be fully updated as required in Guidance. The assessment should be monitored and updated annually.

Property Size Targets

Market Sector

- Consider social rented housing property size targets of 70% small units to meet the needs of single, couple and small family households.
- **30% of social rented units should be three and four** bedroom houses to address the needs of larger families.
- **Intermediate market** housing should be **95% one and two and 5% three bedroom units**.
- Developers are expected to bring forward proposals which reflect demand in order to sustain mixed communities. It would be reasonable to provide policy guidance for future delivery in the market sector of **65% one and two** bedroom properties to meet the needs of single, couple and small family households.
- **35% of market units** should be three and four bedroom houses to address the needs of larger families and to provide a balanced market sector stock.

Housing Strategy

- Meeting the affordable accommodation requirements of families and those with priority needs should be as important as the larger scale numerical need for smaller units for single and couple households.
- Continue to develop housing strategies to make best use of the existing stock by providing positive incentives to improve the turnover of houses to address the needs of over-crowded and waiting list families and to address the under-occupation of over **315** social housing units across the Borough.
- New social sector delivery should be closely linked to the needs of older tenants and in resolving the under-occupation of family sized properties.

Older Persons' Housing Needs

- There is an inextricable link between ageing and frailty and the forecast rise in the retired population means that the housing and support needs of older and disabled households is important to consider at a strategic level.
- In line with the strategic priorities already established, resources should focus on the provision of home-based support services and adaptations for older people living at home in both social rented and owner occupied housing.
- Support services rely heavily on help provided by family and friends. Carer support networks should be recognised and used to complement rather than replace statutory provision.
- Although a high proportion of older people may have their own resources to meet their accommodation and care needs some may need financial support to enable them to access housing support services.
- As part of the on-going development of the Council Housing Strategy for Older People consider:-
 - ◆ The type and quality of existing sheltered stock in meeting today's housing standards and preferences and the scale of need and demand for 782 units by 2018.
 - ◆ The large future ongoing requirement for 'extra care' accommodation to meet the significant growth in the number of people over 85.

2 INTRODUCTION TO THE SHMA

2.1 Background and Context to the Brentwood SHMA

- 2.1.1 In April 2013 Brentwood Borough Council along with Braintree District Council, Chelmsford City Council, Colchester Borough Council and Maldon District Council commissioned DCA to carry out a Strategic Housing Market Assessment (SHMA) and a Housing Needs Survey (HNS) for each of the Partner Authorities. This included a postal survey sent to 5,000 households in Brentwood Borough.
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- 2.1.3 Guidance on producing a SHMA can be found in the national planning framework, 2012, the SHMA practice Guide 2007 and more recently the Planning Practice Guidance published March 2014.
- 2.1.4 The key objective of the SHMA is to enable Brentwood Borough Council to understand the nature and level of housing demand and need within the Borough and provide a robust and credible assessment of the local housing market which can be used to inform key policies and strategies.
- 2.1.5 The use of both key secondary data, the primary data from the household survey and stakeholder consultation provide a valid and robust assessment of the housing need and housing markets within the Borough.

2.2 Secondary Data Sources

- 2.2.1 The Guidance stresses the importance of using good quality data from a range of sources.
- 2.2.2 Extensive secondary data and primary data collected during the 2013 Housing Survey have been used. Throughout this Report, the 2013 primary household survey data has been used unless indicated otherwise.
- 2.2.3 It should be noted that we have used where possible the most up to date Census data (2011). However, there is still some data that is not yet available therefore we have used 2001 Census data instead.
- 2.2.4 All local, Region and national documents mentioned in the report are current at the time of report writing. However these documents are subject to change and may be superseded by revised policy and strategy over time.
- 2.2.5 The sources of data used within each section of the report are referenced where appropriate and **Appendix III** contains a list of the secondary data sources used in the report.

2.3 Primary Data Collection

- 2.3.1 The new National Planning Practice Guidance (NPPG / 06.03.14) states that SHMA's should predominately rely upon secondary data to inform their assessment and not to expend significant resources on primary data. However, the Guidance also states that no single approach will provide a definitive answer.
- 2.3.2 DCA was commissioned by each of the Partner Authorities to conduct a postal survey to provide local primary data. During May 2013 5,000 households in Brentwood were sent a postal questionnaire, a copy of which can be found at **Appendix I**.
- 2.3.3 The survey data has been structured into three sub-areas, North, Urban and South. DCA weighted the responses by tenure from the 2011 Census to ensure that respondents were representative of the whole population.

2.4 Methodology

- 2.4.1 The core objectives of this project were to identify a robust evidence base to support future targets to be set in the Local Development Plan, and local housing and planning policies for delivery at local level. The methodology adopted for this assessment utilises a mix of primary and secondary data from local and national sources.
- 2.4.2 **This SHMA report follows the 2007 CLG Practice Guidance**, the NPPG as above and the current national SHMA Practice Guidance as demonstrated in Table 2-4 below.
- 2.4.3 The survey consisted of the following elements:-
- A postal household survey completed by 1,081 households across the 3 sub-areas.
 - In depth analysis of the local housing market to assess affordability through an internet search of local estate agents in relation to the delivery, cost and supply of market access level properties and in the private rented sector.
 - Secondary data analysis, including a strategic review of the 2001 Census, 2011 Census, Borough Population Growth, Local Plan, Nomis, Land Registry, Housing Strategy, 2007 SHMA Report, LDF documents and the Housing Register and CORE/ELASH (HSSA) Returns.
- 2.4.4 3.1% of all households in Brentwood took part in the survey.

Table 2-1 Response Rate by Sub-area

SUB-AREA	2013 RESIDENT HOUSEHOLDS	SAMPLE	TOTAL RESPONSE	RESPONSE RATE %	CONFIDENCE INTERVAL ±%
North	7,428	1,000	223	22.3	6.70
Urban	19,184	3,000	640	21.3	3.95
South	5,875	1,000	218	21.8	6.77
TOTAL	32,487	5,000	1,081	21.6	3.04

Source: DCA Brentwood Housing Survey 2013

- 2.4.5 All areas reached response levels based on household numbers adequate to ensure statistical validity at the confidence level of 95%. The confidence interval ranged from $\pm 6.77\%$ to $\pm 3.95\%$ at sub-area level and was $\pm 3.04\%$ at Borough level.
- 2.4.6 A more detailed survey methodology used for this project can be found at **Appendix V**.

2.5 What is a Strategic Housing Market Assessment?

- 2.5.1 A Strategic Housing Market Assessment (SHMA) is a collection of data (both primary and / or secondary) detailing all aspects influencing housing markets in a particular area.
- 2.5.2 The Brentwood SHMA, along with other strategies and research is a crucial part of the evidence base for the Council to review local housing strategies and Local Development Plan. It can also inform business planning processes, as well as identify targets for investment.
- 2.5.3 The SHMA will provide an assessment of housing demand and need in the area, following the guidelines set out in the National Planning Policy Framework (NPPF) as outlined below:-

Local planning authorities should have a clear understanding of housing needs in their area. They should:-

- *Prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries. The Strategic Housing Market Assessment should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which:-*
 - *meets household and population projections, taking account of migration and demographic change;*
 - *addresses the need for all types of housing, including affordable housing and the needs of different groups in the community (such as, but not limited to, families with children, older people, people with disabilities, service families and people wishing to build their own homes); and*
 - *caters for housing demand and the scale of housing supply necessary to meet this demand.*

- 2.5.4 An assessment of housing demand and need is necessary from a spatial planning perspective to support affordable housing policies in development plans and to negotiate with developers, on tenure and property mix so that future developments will deliver affordable and specialist housing.

2.6 The SHMA Guidance

- 2.6.1 Communities and Local Government (CLG) published detailed guidance on SHMAs entitled 'Strategic Housing Market Assessments Practice Guidance Version 2 (August 2007)', referred to throughout the report hereafter as the 'SHMA Practice Guidance'.
- 2.6.2 More recently a new National Planning Practice Guidance (NPPG) has been published therefore this report follows the CLG Practice Guidance (2007) and the National Planning Practice Guidance (06.03.2014).
- 2.6.3 The SHMA Practice Guidance provides a step by step approach to assessing the housing market, housing demand and need. It sets out a framework that local authorities can follow to develop an in-depth understanding of how housing markets operate.
- 2.6.4 The key objectives of the current guidance are to:-
- Provide clear advice for practitioners on how to assess housing need and demand in their area;
 - Enable local authorities to gain an understanding of the characteristics of housing market areas and how they function.
- 2.6.5 The guidance brings together and builds upon the key elements of previous guidance on housing market and housing needs assessment, including:-
- Local Housing Needs Assessment: A Guide to Good Practice, DETR, 2000;
 - Housing Market Assessment Manual, ODPM, 2004.
- 2.6.6 The Guidance promotes an approach to assessing housing need and demand which can inform the development of local development documents and planning for housing policies as set out in the National Planning Policy Framework (NPPF). In addition it can help to inform decisions about the policies in housing strategies.
- 2.6.7 The Guidance will also encourage local authorities to assess housing need and demand in terms of housing market areas, which could involve working with other local authorities in a sub-regional housing market area, through a housing market partnership.
- 2.6.8 The process employed has utilised both primary and secondary data and has closely followed the Practice Guidance. DCA believe that this report provides a robust and credible evidence base and fully meets the requirements of the CLG Practice Guidance and the National Planning Practice Guidance (NPPG / 06.03.14).

2.7 Ensuring a Robust and Credible SHMA

- 2.7.1 The SHMA Practice Guidance specifies that in line with National Policy Framework (NPPF), a SHMA should be considered robust and credible if at a minimum it provides all the core outputs outlined in Table 2-2 below, which highlights the sources of each of the key estimates, and meets the requirements of all the process criteria as outlined in Table 2-3.

Table 2-2 Strategic Housing Market Assessment Core Outputs

	Description of Output	Location in the SHMA Report
1	Estimates of current dwellings in terms of size, type, condition, tenure.	Section 8 outlines the existing housing stock, specifically:- Sub-Section 8.2(Type Profile); Sub-Section 8.3(Tenure Profile) Sub-Section 8.4 (Property condition and Facilities)
2	Analysis of past and current housing market trends including the balance between supply and demand in different housing sectors and price / affordability†. Description of key drivers underpinning the housing market.	Throughout the SHMA, a range of information is provided about trends within the housing market, specifically within sections 5 and 6..
3	Estimate of total future number of households broken down by age and type where possible.	The ONS 2010 based sub-national population estimates and the Interim 2011 ONS based sub-national population estimates and projections have been utilised. These can be located in:- 4.6 (Population change, 2010-2030) 4.7 (Population age band projection), 2011-2030); 4.8.8 (Projected change in households, 2008-2033).
4	Estimate of current number of households in housing need.	Section 14 - CLG Needs Assessment Model
5	Estimate of future households that will require affordable housing.	Section 14 – CLG Needs Assessment Model
6	Estimate of future households requiring market housing.	Section 11 – Future Demand for Market Housing
7	Estimate of the size of affordable housing required.	Section 12.6 – Future size of Affordable Housing
8	Estimate of household groups who have particular housing requirements.	Section 13 – The Housing Requirements of Specific Households Groups:- Sub-section 13.2 (BME Households) Sub-section 13.4 (Younger households) Sub-section 13.5 (Students) Sub-section 13.6 (Housing Needs of Older People); Sub-section 13.7 (Households with support needs) Sub-section 13.8 (Gypsy and Traveller households)

Source: CLG Strategic Housing Market Assessments Practice Guidance Version 2 (August 2007)

Table 2-3 Strategic Housing Market Assessment Process Checklist

1	Approach to identifying housing market area(s) is consistent with other approaches to identifying housing market areas within the region.
2	Housing Market conditions are assessed within the context of the housing market area.
3	Involves key Stakeholders including house builders.
4	Contains a full technical explanation of the methods employed, with any limitations noted.
5	Assumptions, judgements and findings are fully justified and presented in an open and transparent manner.
6	Uses and reports upon effective quality control mechanisms.

- 2.7.2 DCA believe that this report provides a robust and credible evidence base and fully meets the requirements of the SHMA Practice Guidance.

2.8 Compliance with the National Planning Practice Guidance 2014

- 2.8.1 The new National Planning Practice Guidance has now been finalised and was published on the 6th March 2014.
- 2.8.2 Therefore this SHMA report follows the directive as set out in the National Planning Policy Framework (NPPF) per 2.5.4 above and the National Planning Practice Guidance published 6th March 2014.. The table below highlights the main points and also shows where we have covered this in the SHMA Report.

Table 2-4 New National Planning Practice Guidance 2014

Main Points	Location in the SHMA Report
1 What is the purpose of the assessment of housing and economic development needs guidance?	Throughout the SHMA, a range of information is provided about the assessment of housing needs. Section 1 details what the primary objective of the assessment is and duty to co-operate is covered in section 3.11
2 What areas should be assessed?	The section on defining a housing market area can be located in section 3.
3 What methodological approach should be used?	The methodology for establishing future housing need is mentioned through out the SHMA. Section 4 covers demographics and future projections. Section 5 covers economic trends, including employment. Section 6 covers the housing market including local house prices. Section 9 covers migration patterns and section 14 covers the affordable housing need calculation.
4 How should the current situation be assessed?	See point 3 above
5 What are the core outputs?	The monitoring and updating of housing needs is covered in section 17.

Source: National Planning Practice Guidance (NPPG) (pb.06.03.2014).

2.9 The Brentwood Housing Market Partnership

- 2.9.1 *CLG Strategic Housing Market Assessments Practice Guidance (August 2007)* encourages the formation of a Housing Market Partnership, consisting of a multi-disciplinary team including housing, planning, private sector, economic development and regeneration expertise.
- 2.9.2 The aim of the partnership is to involve key stakeholders in the assessment process in order to incorporate local knowledge and ensure that the SHMA reflects relevant local issues. Involvement of stakeholders also assists in minimising objections to policies proposed as partnership members have had the opportunity to express their concerns on all aspects of the assessment process.
- 2.9.3 This SHMA recognises the importance of stakeholders and through the process has engaged with a wide range of stakeholder representatives.

2.10 The Brentwood Project Team

- 2.10.1 DCA have conducted this assessment working closely with a project team from Brentwood Borough Council.
- 2.10.2 The project team took on the role of organising and co-ordinating the SHMA and providing secondary data held internally by the Council which was required for the SHMA.
- 2.10.3 The Essex Consortium worked together to ensure different stakeholder groups were able to verify, amend and influence into the SHMA.

2.11 The SHMA Report Structure

- 2.11.1 The report structure utilised in this SHMA is taken from the CLG Strategic Housing Market Assessments Practice Guidance (August 2007). The key report sections that form the Final SHMA Report are outlined below:-

Section 3 - Understanding the Brentwood Housing Market Area

- 2.11.2 In Section 3 the scope of the Brentwood Housing Market is established. This involves analysis of migration and travel to work patterns in order to assess the relationship between Brentwood and other local authorities in the East Region and Essex.

Section 4 - The Demographic Context & Future Projections

- 2.11.3 Following the identification of the local housing market boundary and the key policy drivers, the next step is to explain how local demographic conditions can influence the housing market.
- 2.11.4 Section 4 examines:-
- The current demographic structure;
 - Future population change projections;
 - Household characteristics.

Section 5 - Economic Drivers of Demand

- 2.11.5 Section 5 analyses the recent economic performance in Brentwood and how changes have influenced and interacted with demographic and socio-economic changes as analysed in section 4.
- 2.11.6 The analysis includes:-
- Employment levels and structure;
 - Labour force and income;
 - Skills and educational attainment.

Section 6 - The Active Market

- 2.11.7 Section 6 analyses indicators of housing market activity area. This section examines the following:-
- The cost of buying or renting a property;
 - Affordability of housing;
 - Vacant dwellings, stock turnover rates and available supply by tenure.

Section 7 - Welfare Reforms

- 2.11.8 Section 7 highlights the changes in the benefit system in terms of the new Welfare Reform Act and the impact it is having on the private rented sector, housing Associations and their tenants.

Section 8 - The Current Housing Stock

- 2.11.9 Section 8 examines the characteristics and structure of the current housing stock in the Borough. Analysis of the supply of housing entails an assessment of the range, quality and location of the existing housing stock.
- 2.11.10 More specifically, this section examines the following:-
- Number of dwellings in the area by size, type, location and tenure;
 - Stock condition;
 - Overcrowding and under-occupation;
 - Shared housing & communal establishments.

Section 9 – Migration

- 2.11.11 Section 9 looks at the migration patterns in and out of the Borough over the past and projects the next five years to 2018.

Section 10 – Households Intending to Move

- 2.11.12 Section 10 examines those households in the Borough who are intending to move home within the Borough within the next five years.

Sections 11 and 12 - Future Market/Affordable Housing Requirements

- 2.11.13 Sections 11 and 12 provide estimates of the scale of future housing demand and analyses the future demand and need for market and affordable housing by property size.

Section 13 - Specific Household Groups

- 2.11.14 Section 13 examines the housing needs of specific household groups. These include:-
- Households with support needs;
 - Older people;
 - Black Minority Ethnic (BME) households;

Section 14 - CLG Housing Needs Assessment Model

- 2.11.15 Section 14 consists of the CLG Needs Assessment Model for the authority. This provides a quantitative assessment of the future need for affordable housing.

Section 15– Bringing the Evidence Together

- 2.11.16 Section 15 provides a range of recommendations, for both planning policy and other strategies relating to housing and support services. The objective is to inform the Council to deliver a mix of housing by tenure, type and size to meet the current and future requirements of all household groups in the community. It includes recommendations for:-
- Overall Affordable Housing target levels by size;
 - Tenure mix targets;
 - Property type and size targets.

Section 16 - Stakeholder Consultation

- 2.11.17 Section 16 outlines the role of the Housing Market Partnership and the consultation process.

Section 17 - Updating the SHMA

- 2.11.18 Section 17 provides an outline of the mechanisms to monitor future change in the housing market drivers and update the SHMA.

2.12 Data Benchmarking

- 2.12.1 Throughout this study where possible, DCA have provided data at national (England), regional, Essex (the County) and the individual local authority scales (Brentwood). These will be referred to throughout the report as benchmark areas. The use of benchmark areas aims to provide an understanding of comparative performance between Brentwood and wider areas.

2.13 Glossary of Terms

- 2.13.1 A glossary of technical terms used throughout this report is provided at **Appendix IV**.

3 THE BRENTWOOD HOUSING MARKET

3.1 Introduction

- 3.1.1 An important element of the SHMA is to consider the relationship between Brentwood and other local authorities, and the extent to which there are overlaps and links with other housing market areas.
- 3.1.2 CLG Strategic Housing Market Assessments Practice Guidance (August 2007) defines housing market areas as 'geographical areas defined by household demand and preferences for housing'. They reflect key functional links between the places where people live and work.
- 3.1.3 A housing market area in line with The *2007 Strategic Housing Market Assessment Practice Guidance 'Identifying Sub-Regional Housing Market Areas Advice Note'* may also be comprised of smaller, local sub-markets and neighbourhoods which can be aggregated together to identify sub-regional housing market areas.
- 3.1.4 Data on migration and travel to work areas can be used to identify a sub-regional housing market area.
- 3.1.5 Specifically this section of the SHMA will explore:-
- the linkages between the Borough and other boroughs / districts in the Essex Consortium;
 - patterns of movement internally within the Borough.
- 3.1.6 Sources of data utilised are:-
- 2011 Census;
 - Office for National Statistics (ONS) (June 2010-June 2011);
 - Annual population Survey 2011;
 - Edge Analytics Demographic Projections;
 - 2013 Brentwood Housing Survey data.

3.2 The Profile of Brentwood

- 3.2.1 The Borough of Brentwood is situated in the southwest of Essex, conveniently situated for the surrounding countryside and villages and just 18 miles from London. Road and rail connections are excellent with the M25, A12, and A127 trunk roads within the Borough and convenient fast rail links with London and East Anglia.
- 3.2.2 Stansted, City and Southend airports are all 30 to 40 minutes drive away, with Heathrow and Gatwick airports not much more. The Dartford Tunnel/Queen Elizabeth II Bridge and Tilbury Docks are also within easy reach. To the east, Harwich and Felixstowe are 90 minutes away via the A12 road.
- 3.2.3 The Borough is located within the Metropolitan Green Belt and has a total of around 15,315 hectares and a population of around 70,000. Apart from its urban centre, the Borough has about 3,000 acres of woodland, country parks, a large amount of farmland and villages within its borders.

- 3.2.4 There are 15 wards within the Borough and some of the villages have many important and historic buildings. Within the Borough as a whole there are 510 buildings listed for their historical and architectural importance. Within the rural area of the Borough there are three sites of Special Scientific Interest.
- 3.2.5 Less than 20% of the Borough is built up and Brentwood itself has a well landscaped character, which reduces the impact of the urban environment. There are a number of important green wedges reaching into the built up area, two of which extend right into the centre of the town Hartswood/Shenfield Common, and Brentwood School/Merrymeade Park. Thriftwood is also an extensive woodland area within the Town.
- 3.2.6 Around 80% of Brentwood's housing is owner-occupied, the majority of which has been built since 1945. Much of the older housing has been renovated and there are few areas of poor quality housing in the Borough.
- 3.2.7 Employment within the Borough is very much concentrated in the service sector, which is mainly located in Brentwood Town Centre, Brentwood Station and Warley Business Park. There are however, seven industrial estates and numerous other smaller enterprises scattered throughout the Borough. Over 50% of the resident workforce commutes out of the Borough to work, particularly into London.
- 3.2.8 The Borough has a good mix of shops with the main shopping area being Brentwood Town Centre. There is also the historic shopping area of Crown Street and Ropers Yard. The Town centre is also an historic centre with a designated Conservation Area, incorporating several Listed Buildings and an Ancient Monument. Elsewhere in the Borough are eleven other Conservation Areas.
- 3.2.9 There is a variety of both public and private sports and recreational facilities in the Borough, including the multi-functional Brentwood Centre and International Hall at Pilgrims Hatch.

3.3 Identifying Housing Market Area Boundaries

- 3.3.1 A market is where buyers and sellers exchange goods or services for an agreed price. A housing market however is a complex market for a variety of reasons:-
- Housing is a high value commodity. The decision to purchase is of great importance to individuals due to the scale of the investment and the time required to pay off this investment;
 - Housing is built to last and because of this, only a fraction of the stock is for sale and available to purchase at any point in time;
 - The housing market is highly regulated and the location and volume of new development is controlled through planning policies and procedures;
 - Housing is a basic human requirement and resources are provided to ensure that those who cannot access market housing are adequately housed through either direct provision of housing or subsidy;
 - A housing market has a strong spatial dimension. Location matters to people. Most buyers seek to move within the same sub-region because they want to continue living in that area for reasons such as family, employment or access to particular services such as schools;

- Affordable housing and housing benefit add to the market complexities.

- 3.3.2 A housing market is defined in the Guidance Advice note as typically comprising an area in which around 70% of moves are contained.
- 3.3.3 It is recognised that local authorities face a variety of challenges in their housing markets. Patterns of housing demand and need, affordability, availability and tenure can all vary from the neighbourhood level upwards.
- 3.3.4 It is recommended in the Communities and Local Government (CLG) Strategic Housing Market Assessments Practice Guidance (August 2007) “Identifying Sub-regional Housing Market Areas” Advice Note¹ that local authorities should consider developing sophisticated approaches to identify the precise spatial boundaries of the local housing markets.
- 3.3.5 The Guidance also requires that the approach taken in this assessment to identifying the housing market area(s) is consistent with other approaches to identifying housing market areas within the region.

3.4 Household Migration

- 3.4.1 Migration patterns reflect a variety of economic, social and environmental factors including proximity to work and family. Migration is generally associated with the relative economic prosperity of an area, with people moving to areas where they have the best chance of finding employment. However, research has shown that migration can also be associated with lifestyle changes, such as retirement, or moving to an area with a higher quality of life.
- 3.4.2 Migration patterns can help to identify these relationships and can identify the extent to which people move house within an area and the areas within which a relatively high proportion of household moves are contained (typically 70%).
- 3.4.3 The 2011 Census Data is not yet available and the table below uses inflow and outflow data for moves within the UK and International movements from the Office of National Statistics (ONS) Migrations Statistics Unit for the year ending June 2012.

Table 3-1 Movements by Area (people) year ending June 2012

Area	Moves within the UK			International Migration		
	Inflow	Outflow	Change	Inflow	Outflow	Change
Brentwood	4,000	3,700	+ 300	200	300	- 100

Source: ONS Migration Statistics Unit year ending June 2012

- 3.4.4 The migration patterns in Table 3-1 above show that in the year ending June 2012 there was a net in-migration into Brentwood of 300 people from moves within the UK.
- 3.4.5 Of the inflow into Brentwood from overseas, there was a negative net-in migration of 100 people.

¹ Abolished in May 2010 by the Coalition Government).

3.4.6 Table 3-2 shows the net Borough migration balance, broken down by age group.

Table 3-2 Net Migration Balance by age groups year ending June 2012

Ages	Inflow	Outflow	Balance
All ages	4,000	3,700	+ 300
0 - 15	600	500	+ 100
16 - 24	700	900	- 200
25 - 44	1,700	1,400	+ 300
45 - 64	600	600	-
65+	400	300	+ 100

Source: ONS Migration Statistics Unit year ending June 2012

3.4.7 The data shows that at the end of June 2012 the largest inflow was in the 25 to 44 age range. The largest net outflow of people was in the younger age groups (16-24).

3.5 Cross Boundary Migration

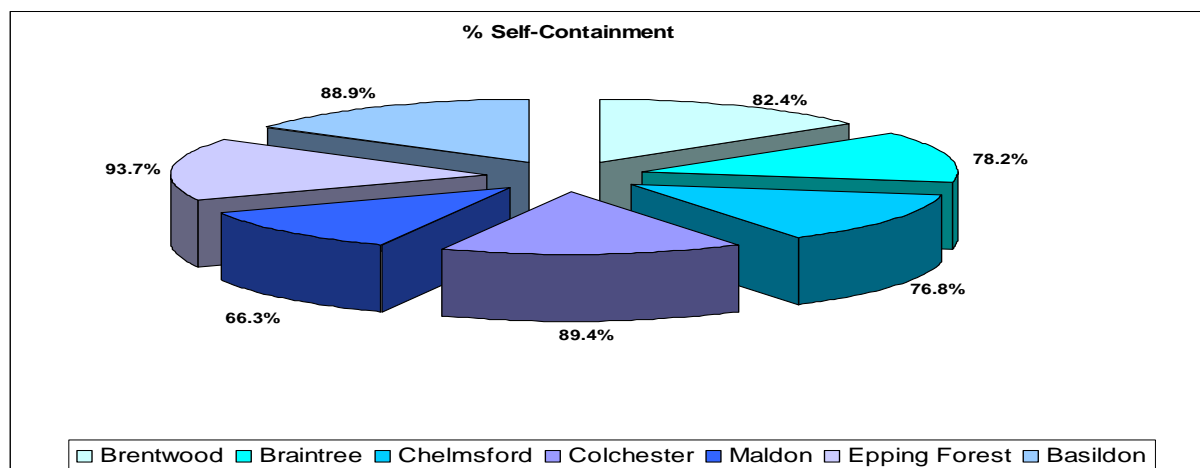
- 3.5.1 The pattern of household movement between authorities has been analysed by examining 2001 Census Origin-Destination Statistics, Office of National Statistics data for the year ending June 2011 and 2012 and the primary data from the 2013 local Housing Needs Survey.
- 3.5.2 The following table assesses the previous location of people currently living in Brentwood or one of the other adjacent local authority areas. The data is taken from the 2001 Census of all people resident in the UK whose address at Census day was different from that one year before.

Table 3-3 In-Migration (People)

Current Area of Residence	Place of Previous Residence							Row Total
	Brentwood	Braintree	Chelmsford	Colchester	Maldon	Epping Forest	Basildon	
Brentwood	2,676	37	173	33	40	82	205	3,246
Braintree	138	7,145	898	482	331	138	3	9,135
Chelmsford	420	629	8,306	166	472	172	657	10,822
Colchester	59	639	279	11,618	264	48	90	12,997
Maldon	59	230	640	109	2,544	33	222	3,837
Epping Forest	87	44	54	24	6	4,576	94	4,885
Basildon	437	60	455	38	71	77	9,163	10,301
Local Moves %*	82.4	78.2	76.8	89.4	66.3	93.7	88.9	

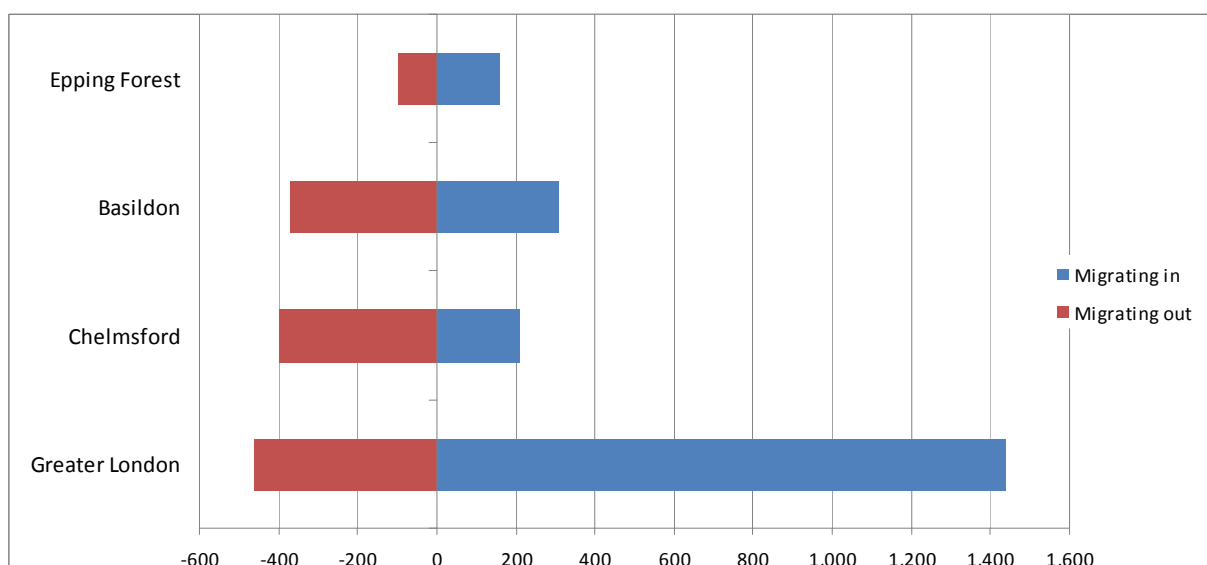
Source: © Crown Copyright Census 2001 - % of moves contained within local authority area from overall number of local moves

- 3.5.3 Brentwood experienced its largest in migration from Basildon (205) and Chelmsford (173). Of those households moving out of Brentwood in 2001, the main destinations were Basildon and Chelmsford. To understand the variations better the travel to work patterns have been examined.

Figure 3-1 Percentage of Self-containment within Brentwood Borough and surrounding areas

3.6 ONS Migration Data

- 3.6.1 The most recent migration data available is from the Office of National Statistics (Migration Statistics Unit) for the year ending June 2011 and this data was analysed to assess household movements between Brentwood and surrounding areas within the East Region and Greater London.
- 3.6.2 As there is no single system to record population movements within the UK, internal migration estimates must be derived from alternative sources. This data has been produced using a combination of three data sets; National Health Service Central Register (NHSCR), the Patient Register Data Service (PRDS) and the Higher Education Statistics Agency (HESA).
- 3.6.3 The chart below details in and out migration patterns to / from Brentwood in the year ending June 2011.

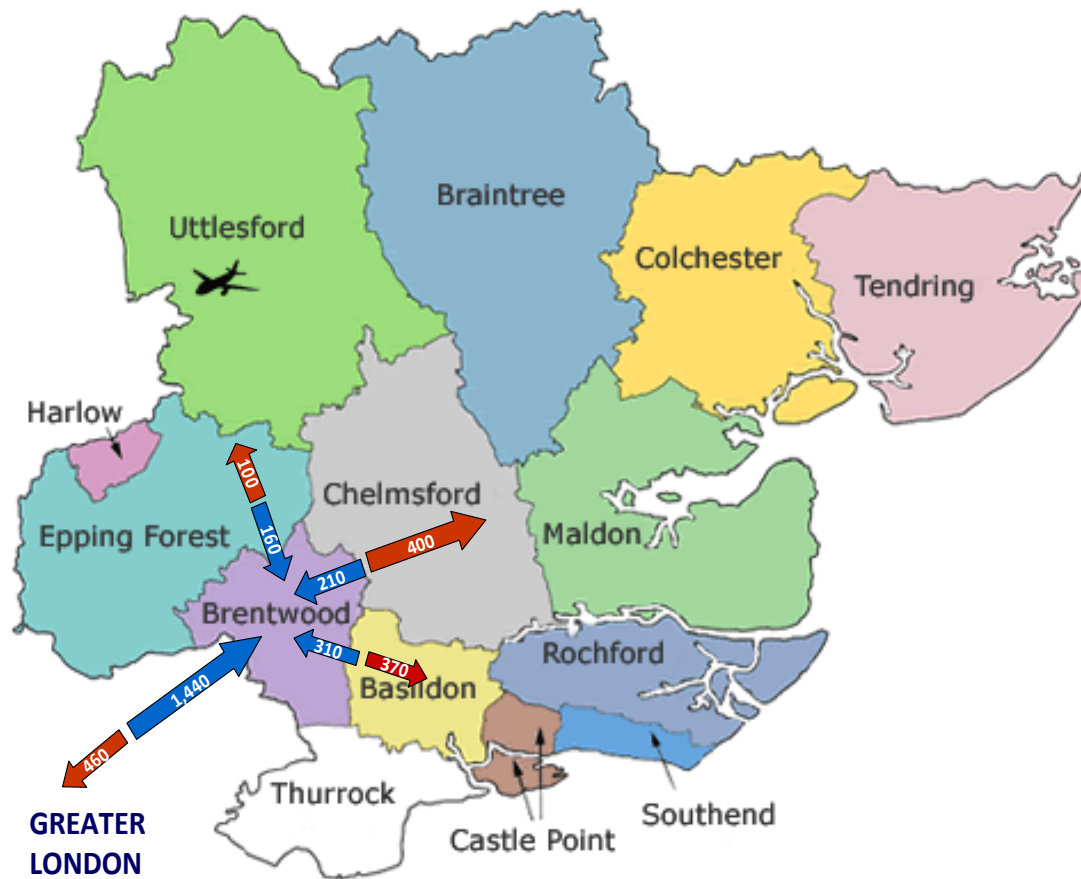
Figure 3-2 In and Out Migration flows to / from Braintree (June 2010-June 2011)

Source: ONS Migration Data Year Ending June 2011

- 3.6.4 The data shows that the main migration flow exists between Brentwood and Greater London, with 1,440 people moving into Brentwood from Greater London and 460 leaving Greater London for Brentwood.

- 3.6.5 Chelmsford and Basildon have similar migration patterns to and from Brentwood, whilst more people migrated into Brentwood from Epping Forest and Greater London, than migrated out.
- 3.6.6 The migration flow patterns to and from Brentwood are also highlighted in the following map.

Figure 3-3 Migration flow map

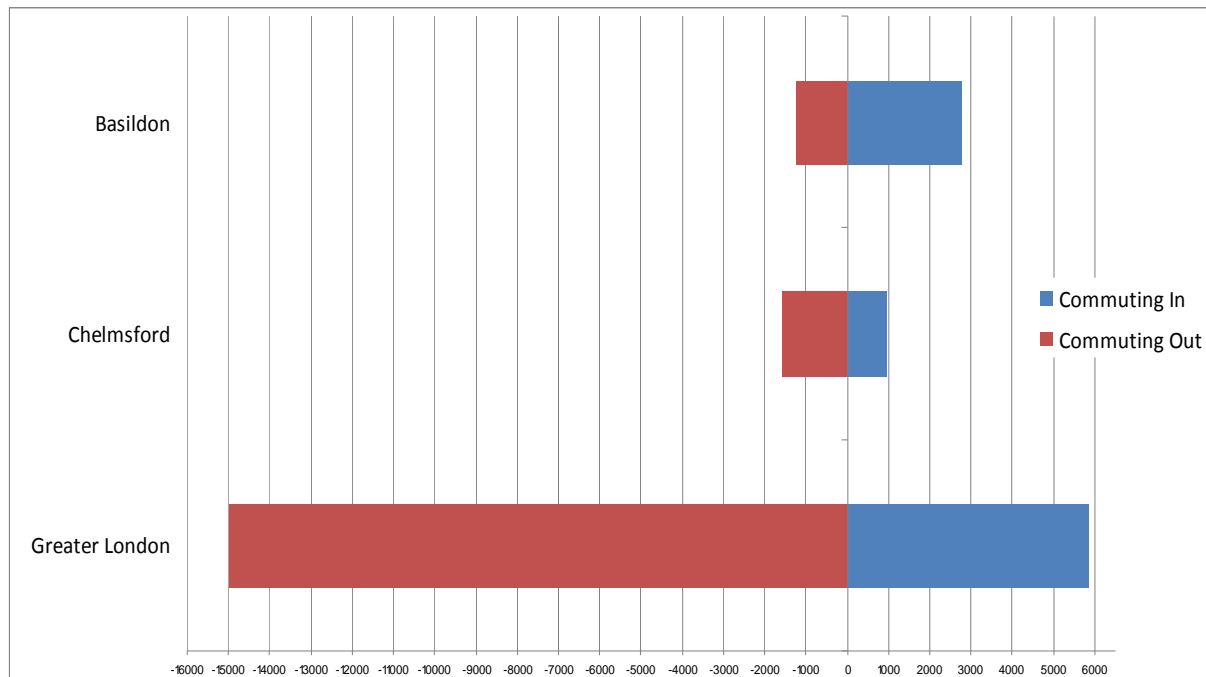


Source: ONS Migration Data Year Ending June 2011

3.7 Brentwood Travel to Work Patterns

3.7.1 In defining the spatial extent of housing markets, patterns of household migration are augmented by the analysis of travel to work patterns. The graph below shows the outward commuting flows for those living in Brentwood taken from the latest available data from the Annual Population Survey commuter flows 2011.

Figure 3-4 Inward and Outward Commuting Flows

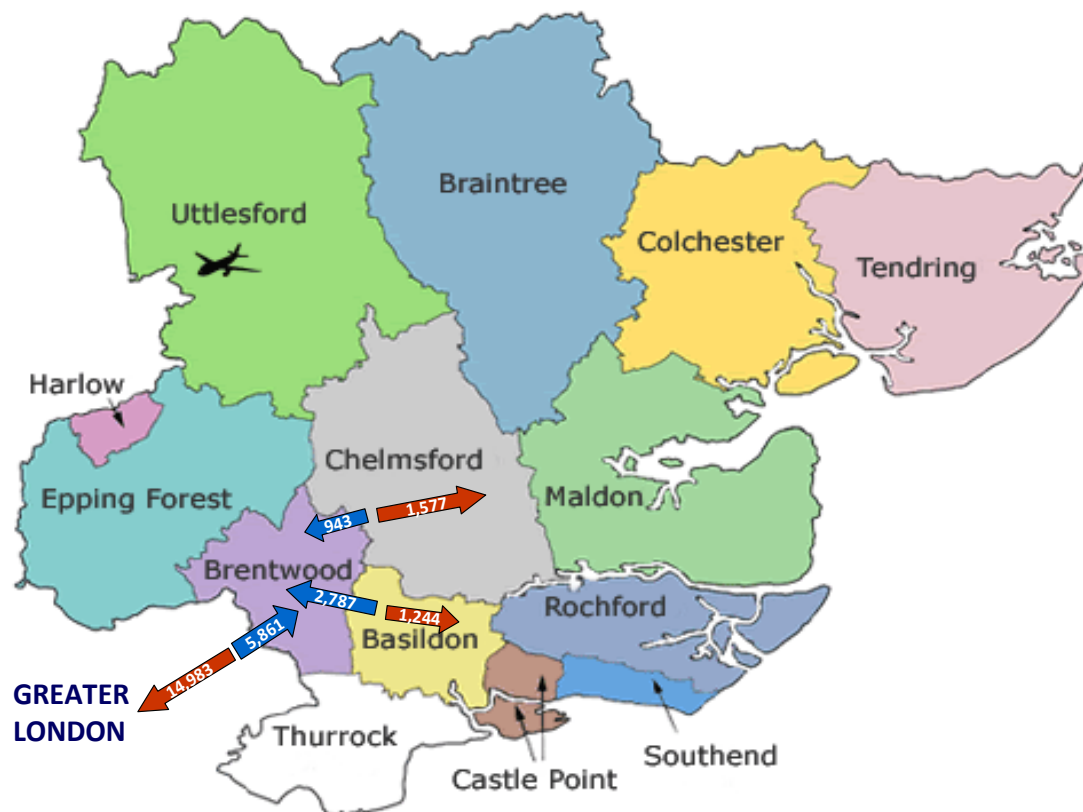


Source: Annual Population Survey commuter flows (2011)

- 3.7.2 In terms of people commuting out of Brentwood to work, the highest proportion by far was people commuting to Greater London (14,983) followed by Chelmsford (1,557) and then Basildon (1,224).
- 3.7.3 The data also shows that the highest proportion of people living elsewhere and commuting into Brentwood, lived in Greater London (5,861) and Basildon (2,787).
- 3.7.4 A smaller proportion also commuted to Brentwood from Chelmsford (943).
- 3.7.5 London has a significant impact on travel to work patterns for all authorities outside the M25, particularly for authorities with good transport links. This is particularly relevant for Brentwood.

- 3.7.6 The commuting flow patterns to and from Brentwood are also highlighted in the following map.

Figure 3-5 Commuting Flows Map



Source: Annual Population Survey commuter flows (2011)

3.8 Housing Stock

- 3.8.1 We have also looked at the similarities in housing stock between Brentwood and the adjoining authorities.
- 3.8.2 We examined the Census 2011 type and tenure data for Brentwood and the adjoining authorities and the data concluded that Brentwood shares a similar tenure pattern to Chelmsford.
- 3.8.3 In relation to the type of property, Brentwood, Chelmsford and Colchester shared similar levels of each stock type.

3.9 Average House Prices

- 3.9.1 As part of this housing market area exercise we also examined the overall average house price data from the Land Registry (Q1 2013). This data will show us where there are similarities in house prices for Braintree and the other local authority areas.
- 3.9.2 The overall average house price for Brentwood for Q1 2013 was £320,716. There were no other local authority areas that shared a similar house price level.

3.10 The Brentwood Housing Market Area

- 3.10.1 As mentioned in paragraph 3.3.2 a housing market area is identified as one within which 70% of moves are contained.

- 3.10.2 2001 Census has revealed that when analysing household movement's self-containment is 82.4% in Brentwood. In terms of commuting patterns, 59.6% of residents who live in Brentwood also work within the local authority area, suggests a relatively high level of employment self-containment for an authority area close to London with good transport links.
- 3.10.3 The data suggests that Brentwood can be considered to be a single market area. Within the SHMA Consortium, data suggest that Brentwood shares a housing market area with Chelmsford and Basildon and to a smaller extent Epping.
- 3.10.4 There is a suggested mechanism for tracking changes in market signals that may influence the current conclusion on the housing market area. This can be seen in more detail at 17.8.

3.11 Duty to Co-operate

- 3.11.1 The duty to co-operate was created in the Localism Act 2011. It places a legal duty on local planning authorities to engage actively to maximise the effectiveness of local plan preparation relating to strategic cross boundary matters.
- 3.11.2 The aim is to encourage positive, continual partnership working on issues that go beyond a single local planning authority area.
- 3.11.3 Local planning authorities must demonstrate how they have complied with the duty at the independent examination of their Local Plans.
- 3.11.4 If a local planning authority cannot demonstrate that it has complied with the duty then the Local Plan will not be able to proceed further in examination.
- 3.11.5 Housing market and travel to work areas to name but a few may represent a more effective basis on which to plan for housing, transport and infrastructure.
- 3.11.6 The following table shows the collection of results from each part of the Housing Market Area analysis above. The table highlights where there is a link between Brentwood and the adjoining local authority areas.

Table 3-4 Links with Brentwood

Local Authority Area	Migration (Census 2001)	Travel to Work (APS 2011)	House Types (2011 Census)	Tenure (2011 Census)
Chelmsford	✓	✓		✓
London	✓	✓		
Basildon	✓	✓		
Braintree				
Colchester			✓	

- 3.11.7 By entering into this Strategic Housing Market Assessment with the other Essex consortium members, Brentwood Borough Council have demonstrated that they are complying with the duty to co-operate.

4 THE DEMOGRAPHIC CONTEXT & FUTURE PROJECTIONS

4.1 Key Findings

- The population in Brentwood in 2011 (based on the Census data) was 73,600, an increase of 7.0% from the 2001 Census.
- The Interim 2011 ONS based sub-national population estimates of the age profile in Brentwood followed a similar pattern to Essex County and the other local authorities in the Essex Consortium.
- The Interim 2011 ONS based sub-national population estimates an increase of around 9.7% in Brentwood between 2011 and 2021. Using the 2010 ONS SNPP Brentwood's population would increase by 14.5% by **2030**.
- The largest proportionate increase is of 49.4% in the 90+ age bracket, over the period from 2011 to 2021.
- The average household size in Brentwood in 2011 is 2.38 and is predicted to remain the same in 2021.
- There is predicted to be 3,000 (+9.7%) more households in the Borough in 2021 than in 2011.
- The analysis carried out Edge Analytics analysis suggests that the dwellings projection figure for Brentwood is **362** per annum over the plan period 2015 to 2030.
- The SHMA stock flow analysis suggests a range of **288** to **384** dwellings per annum over a 5 year and 15 year period.

4.2 Introduction

- 4.2.1 Analyses of changes in population and household profiles are essential in enabling an understanding of the level of housing need and demand within an area. Monitoring population and household projections allows the Council to see if any significant changes are occurring that could affect the Brentwood housing market.
- 4.2.2 Demographic change creates the need for different levels and types of housing provision and is a key factor influencing the requirements for market and affordable housing. The aim of this section of the report is to highlight the issues which are relevant to the evaluation of housing needs in Brentwood.
- 4.2.3 In local area projections, new household formation is mainly due to responses to income and employment opportunities. However, new household formation is also affected by life cycle patterns and this demographic influence contributes to about 40% of the growth in the number of new households at any one time (Dicks, 1988; Ermisch, 1985).
- 4.2.4 The factors which combine to produce the population and household projections are:- age-sex structures (including those of migrants) headship rates, survival factors, infant mortality, fertility rates, base numbers of dwellings, vacancy rates, building / demolition programmes and net migration.

- 4.2.5 The key features of population change impacting on the housing market are migration of mainly younger and economically active households and an ageing population with increasing care and support needs.

4.3 The Historic Demographic Structure (2001-2011)

- 4.3.1 This sub-section analyses the demographic change over the last 10 years (2001-2011). The 2001 and 2011 Census data on population were used.
- 4.3.2 The 2011 Census recorded 73,600 people in Brentwood and 1,393,600 in Essex.
- 4.3.3 Since 2001, Brentwood has experienced an increase in population of around + 7.5% (+5,144 people). Essex has seen an increase in population of + 6.3% and the East region an increase of + 8.5%, compared to + 7.9% nationally.

Table 4-1 Population Change, 2001 / 2011

Area	Population 2001	Population 2011	Absolute Change	% Change
Brentwood	68,456	73,600	+ 5,144	+ 7.5
Essex	1,310,805	1,393,600	+ 82,795	+ 6.3
East Region	5,388,140	5,847,000	+ 458,860	+ 8.5
England	49,138,831	53,012,500	+ 3,873,669	+ 7.9

Source: ONS Census (2001 / 2011)

4.4 Population Estimates for 2011

- 4.4.1 The latest Interim 2011 ONS based sub-national population estimates have been derived from the 2011 Census population. To enable a direct comparison with previous mid-year population data, ONS has calculated a 'roll-forward' estimate for each local authority.
- 4.4.2 The 'roll-forward' data is based on the mid-2010 population estimates, plus the net effect of births, deaths and migration data between mid-2010 and Census day.

Table 4-2 2011 Population Comparisons

Area	'Rolled forward' mid 2011 population estimate	Interim 2011 mid-year population estimate	Difference (RF MYE – Interim MYE 2011)	% Difference
England	52,667,368	53,107,169	- 439,801	- 0.8
Essex	1,404,505	1,396,599	+ 7,906	+ 0.6
East of England	5,826,187	5,862,418	- 36,231	- 0.6
Brentwood	73,135	73,841	- 706	- 1.0
Braintree	145,932	147,514	- 1,582	- 1.1
Chelmsford	166,820	168,491	- 1,671	- 1.0
Colchester	176,697	173,614	+ 3,083	+ 1.8
Maldon	62,704	61,720	+ 984	+ 1.6

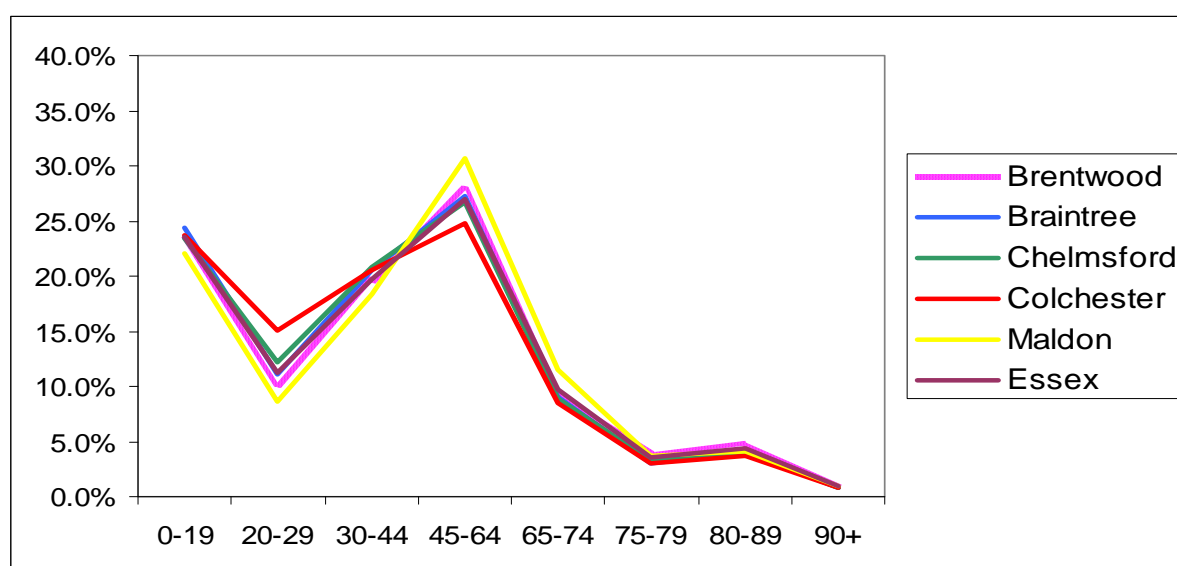
Source: Interim 2011 ONS based sub-national population estimates and 'Rolled-forward' mid 2011 ONS sub-national population estimates

- 4.4.3 Comparison of the latest population estimates shows a difference in Brentwood of -1.0%, suggesting the rolled-forward 2011 estimate is slightly lower than the Interim 2011 mid-year estimate.
- 4.4.4 In Essex the difference shows that the rolled-forward 2011 estimate is slightly higher than the Interim 2011 data (+ 0.6%).

4.5 Brentwood Population Age Profile 2011

- 4.5.1 The following data shows the age profile of the Borough using the Interim 2011 based sub-national mid-year population estimates. The graph below shows the percentage proportions of each age bracket in the Borough along with a comparison to the other local authorities in the Essex Consortium.

Figure 4-1 2011 Population Profile by Age (%)



Source: Interim 2011 ONS based sub-national population estimates

- 4.5.2 The age profile of the Brentwood population follows a similar pattern to the other local authorities in the Essex Consortium. The age groups that peak slightly above the other authorities in percentage terms are the older age groups 80-89 and over 90.
- 4.5.3 The following table shows the full breakdown in numbers for each age bracket.

Table 4-3 2011 Population Profile by Age (Numbers)

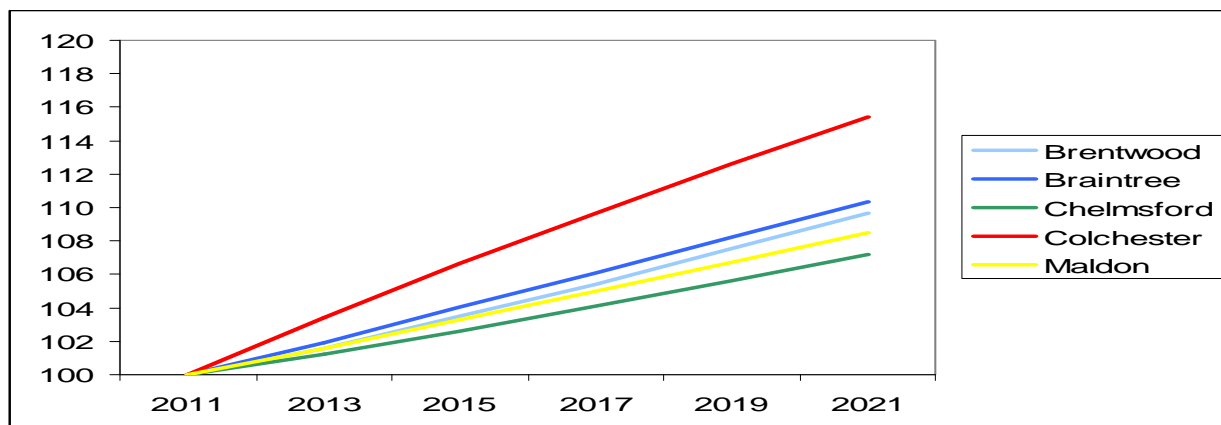
Area	0-19	20-29	30-44	45-64	65-74	75-79	80-89	90+	TOTAL
Brentwood	17,147	7,513	14,501	20,521	6,921	2,814	3,662	762	73,841
Braintree	35,951	16,286	30,336	40,189	13,286	4,392	5,786	1,288	147,514
Chelmsford	39,541	20,480	35,086	45,006	14,934	5,484	6,647	1,313	168,491
Colchester	41,215	26,192	35,639	42,983	14,668	5,228	6,359	1,330	173,614
Maldon	13,591	5,356	11,300	18,897	7,111	2,320	2,520	625	61,720
Essex	328,724	157,650	274,660	377,388	135,023	49,768	60,871	12,515	1,396,599

Source: Interim 2011 ONS based sub-national population estimates

4.6 Projected Population in Brentwood to 2021 and to 2030

- 4.6.1 The next set of data highlights the projected population in the Borough using two different data sources. The following graph and table shows the projected population in Brentwood over the next 10 years using the Interim 2011 based sub-national population projections, published in September 2012. We have compared the data with the other authorities in the Essex Consortium.

Figure 4-2 Population Change 2011 – 2021



Source: Interim 2011 based ONS sub-national population projection:
Change in Population (2011 Index = 100)

Table 4-4 Total Population Change 2011 – 2021

Area	2011	2013	2015	2017	2019	2021	Change N ^{os.} (%)
Brentwood	73,841	75,029	76,404	77,844	79,380	80,979	+ 7,138 (9.7)
Braintree	147,514	150,391	153,463	156,556	159,673	162,805	+ 15,291 (10.4)
Chelmsford	168,491	170,546	172,921	175,403	177,960	180,563	+ 12,072 (7.2)
Colchester	173,614	179,518	185,123	190,427	195,474	200,324	+ 26,710 (15.4)
Maldon	61,720	62,696	63,744	64,790	65,857	66,971	+ 5,251 (8.5)

Source: Interim 2011 based ONS sub-national population projection

- 4.6.2 The Interim 2011 based ONS SNPP (Office of National Statistics, sub-national population projections) data shows an increase in the population of Brentwood over the 10 years of 9.7% (7,138 people), a proportionally larger increase than Chelmsford and Maldon, but lower than Braintree and Colchester.
- 4.6.3 The new Local Plan for the Borough will cover a period of 2015 to 2030, so to work alongside this we have also added in the population projections up to 2030.

Table 4-5 Total Population Change in Brentwood 2015 – 2030

	2015	2018	2021	2024	2027	2030	Change N ^{os.} (%)
Total Population	76,000	78,000	80,000	83,000	85,000	87,000	
Change		+ 2,000	+ 2,000	+ 3,000	+ 2,000	+ 2,000	+ 11,000
% Change		+ 2.6	+ 2.6	+ 3.8	+ 2.4	+ 2.4	+ 14.5%

Source: 2010 based ONS sub-national population projection: Figures are rounded to the nearest 100

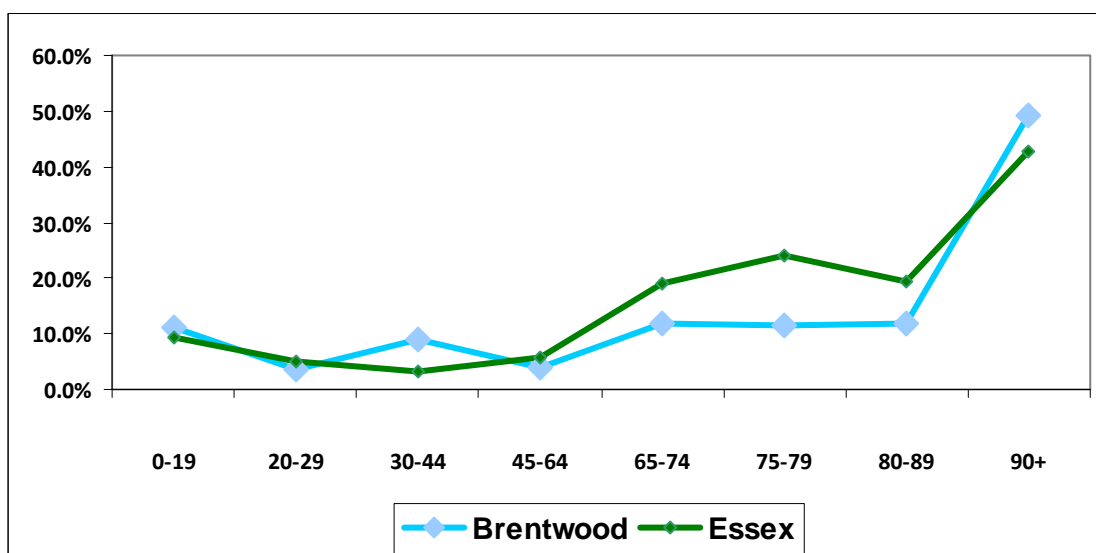
- 4.6.4 The total population in Brentwood is projected to grow by 14.5%, 11,000 more people by **2030**.

4.7 The Population Age Structure Projections to 2021 and 2030

4.7.1 The graph below shows the population change by age group between 2011 and 2021 using the Interim 2011 ONS based sub-national population projections.

4.7.2 The data shows the population change by age groups for Brentwood Borough and we have also included the data for the other local authorities in the Essex Consortium as a comparison.

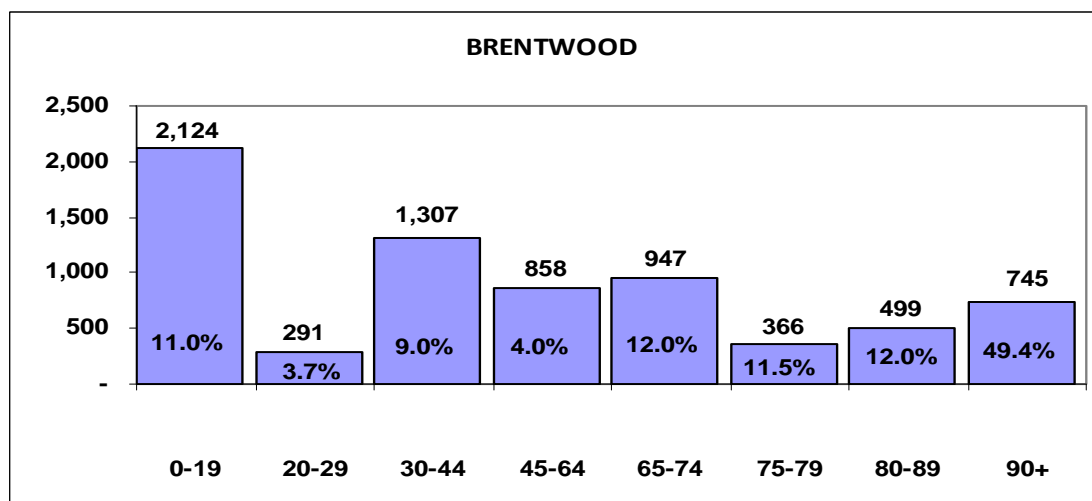
Figure 4-3 Population Change 2011-2021 by Age



Source: Interim 2011 ONS based sub-national population projections

4.7.3 There are increases in population across all age groups and there are some radical differences in changes in population age bands over the period to 2021. The following graph shows the change in more detail for the Borough.

Figure 4-4 Population change by age band in Brentwood 2011-2021



Source: Interim 2011 ONS based sub-national population projections

4.7.4 The 0-19 age group increases by around 11.0% (around 2,100 people), a fairly high level in comparison to the other benchmark areas.

- 4.7.5 The 20-29 age range comprises new households forming and will have implications for future affordable housing need both in the short and longer term. Overall this age group increases by 3.7% (around 300 people).
- 4.7.6 The 30-44 age group, the main economically active and household forming and moving group shows an overall increase of around 1,300 people (9.0%).
- 4.7.7 The 45-64 age group shows an overall increase by around 860 people between 2011 and 2021 (4.0%).

4.8 Older Population Growth Projections 2011-2021

- 4.8.1 The most significant feature is the growth of the population is in the over 65 age group.
- 4.8.2 The largest proportionate growth in percentage terms is in the 90+ age bracket, a 49.4% increase over the 10 year period, the largest increase across all the benchmark areas.
- 4.8.3 The 65-74 and 80-89 age groups both increase by 12% and the 75-79 age group increases by 11.5%.
- 4.8.4 Given the resource demands often associated with very elderly people, these are very significant figures.
- 4.8.5 Changes in the population structure will impact on demand for different house types and tenures. Local Development Documents will need to take account of the projected growth in demand in these sectors and the strategic implications of these projections:-
- Growth in the number of individuals in the 45 to 64 age group is most likely to increase the demand for higher quality market housing, whilst the increase in the number of people in the 65+ age group will impact on the demand for market and affordable sheltered and supported accommodation;
 - As older people tend to remain in their family home after children have left home or after the loss of a partner there is a growing trend of under-occupation in both sectors of the housing market;
 - The increase in older householders (i.e. 80+) will have implications for support services, options for housing with support, extra care housing, long term suitability of accommodation, equity release schemes, adaptations, and other age related care requirements.
- 4.8.6 The following table shows the population projections by age between 2015 and 2030, the same time period as the new Local Plan for the Borough.

Table 4-6 Population by Age Change in Brentwood 2015 – 2030

Age	2015	2018	2021	2024	2027	2030	Change N ^{OS} . (%)
0-19	18,000	18,000	19,000	20,000	21,000	21,000	+ 3,000 (16.7)
20-29	8,000	8,000	7,000	7,000	7,000	8,000	-
30-44	14,000	15,000	15,000	16,000	17,000	17,000	+ 3,000 (21.4)
45-64	20,000	21,000	21,000	21,000	22,000	22,000	+ 2,000 (10.0)
65+	15,000	16,000	16,000	17,000	18,000	19,000	+ 4,000 (26.7)

Source: 2010 based ONS sub-national population projection: Figures are rounded to the nearest 100

4.8.7 The age bracket that shows the highest increase over the 15 year period is the over 65 age group, an increase of 26.7%, 4,000 more people.

4.8.8 We also examined POPPI data (*Projecting Older People Population Information System*) to see what data they had recorded for the over 65's projections through to 2020. The following table shows the full breakdown for Brentwood, County, Regional and National projections.

Table 4-7 POPPI data for the over 65's from 2012 to 2020

Area	2012	2014	2016	2018	2020	Change%
Brentwood	14,700	15,400	15,700	16,100	16,500	12.2
Essex	270,600	287,900	300,100	311,900	323,300	19.5
East	1,079,000	1,142,900	1,192,400	1,238,400	1,284,500	19.0
England	9,055,900	9,536,400	9,911,700	10,256,600	10,603,000	17.1

Source: POPPI data

4.8.9 The older population in Brentwood (65+) according to the data sourced from POPPI will increase by 12.2% between 2012 and 2020. The ONS interim 2011 sub-national population projections showed an increase in the population of those aged 65 as around 15.3%, based on data between 2011 and 2021.

4.9 Projected Change in Households and Household Size

4.9.1 According to the 2011 Census there are 30,600 households in Brentwood.

4.9.2 However, there are other data sources available to look at the household size and projections for an area. In this section we examined the Interim 2011 based ONS household projections published in April 2013.

4.9.3 The Interim 2011 ONS data which is available at a national, County and District level shows that over the period **2011 to 2021**, the average number of households in Essex is projected to rise by 11.8%, 583,000 in 2011 to 652,000 in 2021.

4.9.4 In Brentwood that figure is 9.7%, an increase of 3,000 households from 31,000 in 2011 to 34,000 in 2021.

4.9.5 The table below outlines the projected change in households for Brentwood, Essex and the other authorities in the Essex Consortium from 2011 to 2021.

Table 4-8 Projected Change in Households 2011 – 2021

Area	2011	2013	2016	2019	2021	Change (N ^{OS}) %
Brentwood	31,000	31,000	32,000	33,000	34,000	(+ 3,000) 9.7%
Braintree	61,000	63,000	65,000	67,000	69,000	(+ 8,000) 13.1%
Chelmsford	70,000	71,000	73,000	75,000	76,000	(+ 6,000) 8.6%
Colchester	72,000	74,000	78,000	82,000	84,000	(+ 12,000) 16.7%
Maldon	26,000	26,000	27,000	28,000	29,000	(+ 3,000) 11.5%
Essex	583,000	596,000	617,000	638,000	652,000	(+ 69,000) 11.8%

Source: Interim 2011 ONS based sub-national household projections

- 4.9.6 The following table shows the average household size in the Borough, Essex and the other local authorities in the Essex Consortium. The data used is the interim 2011 ONS based population / household projections.

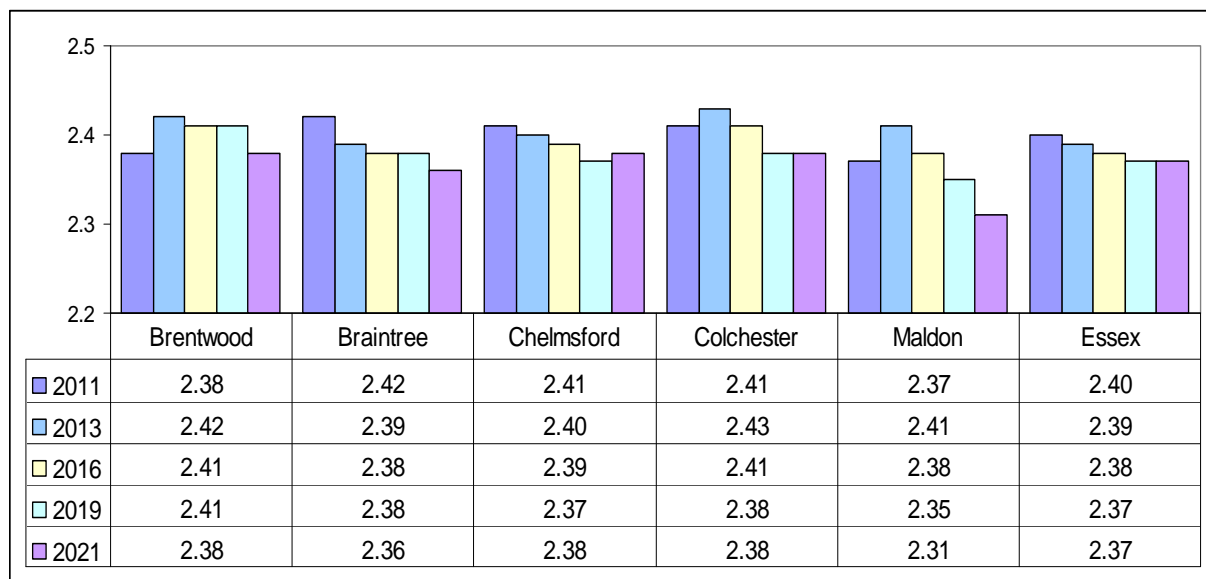
Table 4-9 Average Household Size 2011

Area	Population	Households	Average Household Size
Brentwood	73,841	31,000	2.38
Braintree	147,514	61,000	2.42
Chelmsford	168,491	70,000	2.41
Colchester	173,614	72,000	2.41
Maldon	61,720	26,000	2.37
Essex	1,396,599	583,000	2.40

Source: Interim 2011 ONS based sub-national household / population projections

- 4.9.7 The average household size in Brentwood according to the latest data available is 2.38, higher than Maldon but lower than all the other benchmark areas.
- 4.9.8 The following graph shows the change in household size from 2011 to 2021 in Brentwood, Essex and the other Essex Consortium authorities.

Figure 4-5 Household Size (2011-2021)



Source: Interim 2011 ONS based sub-national household / population projections

- 4.9.9 In Brentwood the household size overall remains the same. The data shows an increase in household size in 2013 but then declines steadily through to 2021.
- 4.9.10 A decline in household size to 2021 can be linked to the:-
- Significant predicted growth in the over 65 population;
 - Impact of relationship breakdown;
 - Increase in the number of single / couple households.

- 4.9.11 This pattern of declining average household size combined with a growing population is common to the vast majority of authorities and means there will be a requirement for additional housing throughout the Country.

4.10 Edge Analytics Demographic Forecasts

- 4.10.1 The responsibility for establishing the level of future housing provision in their area will in future rest solely with the individual local planning authorities as Regional authorities have now been abolished.
- 4.10.2 A key part of estimating this future provision will be an assessment of the likely future population of each authority's area and the implications for provision of housing, jobs, infrastructure, services and facilities.
- 4.10.3 Over recent years authorities generally made use of demographic projections commissioned by the former East of England Regional Assembly (EERA) for preparing and monitoring the Regional Spatial Strategy.
- 4.10.4 In the absence of EERA, the Essex Planning Officers Association (EPOA) considered it important for authorities to gain the best possible understanding of trends in population and household growth for the period 2010 to 2033.
- 4.10.5 The Edge Analytics Study was commissioned by the Essex Planning Officers Association (EPOA) to replace demographic services provided by the former East of England Regional Assembly (EERA). In addition to this it will be for each local planning authority to determine its use of the projections and other outputs from this project to inform its future spatial policy development plans.
- 4.10.6 Edge Analytics delivered the analysis by using the POPGROUP suite of demographic forecasting models. The POPGROUP models provide a desktop utility for the evaluation of alternative growth scenarios to support local planning.
- 4.10.7 The scenarios are defined by different parameters, including migration-led, dwelling-led and economic-led approaches to demographic forecasts. The study recommends that Essex Planning Officers Association (EPOA) continues to produce consistent and detailed evidence on local demographic statistics as new data becomes available..
- 4.10.8 It was not the intention of the Edge Analytics Study to produce a recommended or preferred demographic projection for any area. Rather, the approach was to encourage examination of the demography of each area from different perspectives.
- 4.10.9 The table below shows the SNPP 2010-R demographic scenario for Brentwood Borough Council highlighting the average dwellings per year as 362 intended to be used as a starting point to estimate future housing requirements.

Table 4-10 Edge Analytics Demographic Scenario

Local Authority	Demographic Scenarios	Change 2010 – 2033				Average per year		
		Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Jobs
Brentwood	SNPP 2010-R	16,242	22.4%	8,065	26.2%	577	362	189

4.11 SHMA Stock Flow Analysis

- 4.11.1 The NPPF requirements are for a local planning authority to objectively assess the scale of market demand and affordable housing need and to positively address the need for continuing economic growth in their housing market area.
- 4.11.2 The Strategic Housing Market Assessment carried out by DCA for Brentwood Borough Council therefore examined future housing need in more detail.
- 4.11.3 The SHMA analysis has utilised both primary survey data and secondary data from various sources including local authority records to assess housing demand and need.
- 4.11.4 The vast majority of housing requirements are normally met by the turnover of the existing stock and the stock flows analysis suggests a range between **288 and 384** dwellings per annum over a 5 year and 15 year period.
- 4.11.5 The stock flow analysis figures can be found in more detail at 11.6 and Table 14-10.
- 4.11.6 NPPF Planning Guidance states that neither secondary nor primary data are themselves more or less robust when trying to derive a robust assessment of housing need and demand.
- 4.11.7 In terms of household flow models, the data utilised is both from the primary household survey which identifies future housing forming and moving intentions and secondary data, particularly on social and affordable housing need and social stock re-let supply.
- 4.11.8 Future household plans and intentions are not always realised and are subject to fluctuations in the economic cycle, the housing market and affordability.
- 4.11.9 Additionally individual household circumstances can change although these caveats relating to national and local economic change can equally impact secondary data modelling of population and household formation projections.

5 ECONOMIC DRIVERS OF DEMAND

5.1 Key Findings

- In 2011, the total number of jobs in Brentwood was 35,000 (ONS Jobs Density, 2011).
- Within Brentwood, the largest occupation group in absolute terms are associate professional and technical occupations at 19.6%.
- Brentwood has the largest proportion of its workforce in occupation groups 1 to 3 (managers & senior officials, professional occupations and associate professional & technical occupations) at 48.1% and is higher than the County (44.1%), East Region (45.0%) and National (44.3%) averages.
- In 2008, the most important industry sectors within the Brentwood economy in absolute employment terms were Finance, IT and other business activities sector (31.1%) and distribution, hotels and restaurants (20.6%).
- At 2011 (ONS mid-year population estimates) there were estimated to be around 46,200 people in Brentwood of working age. This equates to 62.6% of the total population.
- In 2012, Brentwood had an employment rate of 76.3%, higher than the County, regional and national rates.
- The unemployment rate in 2012 was 4.7%, lower than the county, regional and national levels.
- In April 2013 Brentwood had a lower level of JSA claimant's rate at 2.0%, compared to Essex (3.0%), the East region (3.0%) and the national figure of 3.7%.
- Brentwood has a higher level of retired population than the region and nationally (14.9%), but lower than the level in Essex (15.4%).
- 56.5% of Brentwood residents travel to work by car, lower than all the other benchmark areas.
- In 2008, 47.6% of Brentwood residents also worked in the Borough compared with 48.3% in 2001.
- The average weekly residence pay in 2012 within Brentwood of £661.4 is much higher than in Essex, the East and nationally. Average workplace pay is also higher than the other benchmark averages.
- Both the average and the lowest quartile weekly earnings have decreased between 2007 and 2012, 9.9% and 11.1% respectively in Brentwood.
- In 2012 the majority of the NVQ qualification brackets (with the exception of NVQ4 and above) were higher in Brentwood than in the other benchmark areas.

5.2 Introduction

- 5.2.1 The economic development of an area can be of equal importance in driving change in housing markets, especially due to the effect of migration. This section analyses the recent economic performance in Brentwood and how changes have influenced and interacted with demographic changes as analysed in section 3.
- 5.2.2 It is important to highlight the reciprocal relationship between economic development and the provision of housing. Whilst there is an obvious and established link between economic development and the requirement for new housing, or economic decline and problems of low demand, the type of housing provided within an area can also play a central role in addressing and facilitating economic development and regeneration objectives.
- 5.2.3 It is a central factor in the need to create a more balanced housing market.
- 5.2.4 The data for this section has been sourced from:-
- Annual Business Inquiry Employee Analysis 2008;
 - ONS Annual Population Survey, 2011 –2012;
 - ONS Claimant Count 2012;
 - 2001 Census;
 - 2011 Census;
 - Annual Survey of Hours and Earnings, 2012;
 - CORE Local Authority New Lettings / Sales Data, 2011/2012;

5.3 The UK Economy

- 5.3.1 Local housing markets are sensitive to macro-economic policies. Interest rates, set by the Bank of England, are monitored by Central Government to achieve and maintain stable, low inflation rates. Higher interest rates can reduce the demand for housing by making it more expensive to borrow money, although households may still aspire to buy in the future.
- 5.3.2 In March 2010, the Bank of England's Monetary Policy Committee voted to maintain the official Bank Rate paid on commercial bank reserves at 0.5%. Interest rates at 2011 / 12 are at a very low level when compared to those over the last few decades when they averaged over 12%.
- 5.3.3 Historic rises in interest rates will have affected the affordability of housing and demand for mortgages. Interest rates can also affect employment levels by increasing the cost of investment.
- 5.3.4 After a long period of economic growth and low levels of unemployment, this assessment has been conducted during a period of major economic uncertainty, particularly in the finance and housing markets. The financial crisis in the mortgage markets has created a major fall in the availability of mortgages and has caused the fastest fall in the volume of property sales and new development for over 60 years.

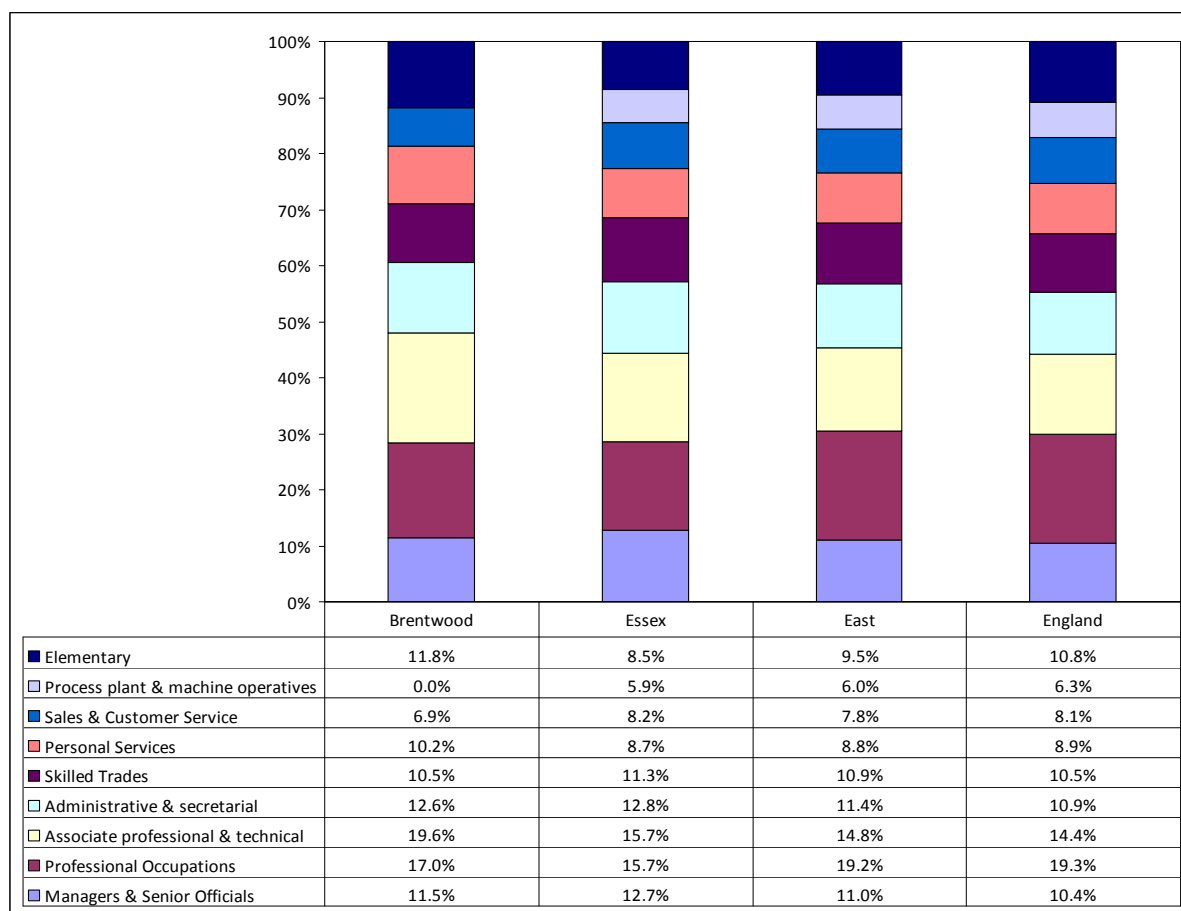
- 5.3.5 This has had a significant impact on land values and unemployment in the building industry, the supply chain of manufacturing companies and estate agency sectors. There is a difficulty in predicting how far the economic decline will go and how long the housing market will remain severely depressed, as forecasts and data on activity change virtually every month.
- 5.3.6 In the short term this could have a severe impact on the delivery of a wide range of market housing. Experience of the last recession suggests that developers will build only first time buyer units, more affordable housing and possibly only build to pre-sales. However, mortgage availability and terms have forced new development towards larger family units.
- 5.3.7 Access to regeneration budgets or to the Housing and Communities Agency (HCA) National Affordable Homes Programme (NAHP) can be an important influence on housing supply together with the availability of land. However, it should be borne in mind that new build is a small proportion of total stock (less than 2% per annum nationally).

5.4 Labour Demand

- 5.4.1 Labour demand consists of the jobs and vacancies available within an area.
- 5.4.2 It is important to look at the labour market of an area to try and measure what effect it may have on the housing market. The number of jobs available, the standard of jobs, benefit count, commuting distances and the household Income can all have an affect on the housing market in terms of choice of location, tenure and affordability.
- 5.4.3 In 2011, the total number of jobs in Brentwood was 35,000 (ONS Jobs Density, 2011). This includes employees, self employed, government supported trainees and HM forces.
- 5.4.4 The ONS Annual Business Inquiry employee analysis (2008) revealed that there were 31,100 total employee jobs in Brentwood (excluding self-employed, government supported trainees and HM forces). 21,400 jobs were full-time and 9,700 were part-time.
- 5.4.5 The occupational structure of a population can be used to assess the competitiveness of an economy.
- 5.4.6 Figure 5-1 below outlines the split by occupation of those who live in Brentwood and are in work, based on the Standard Occupational Classification System from the 2012 Annual Population Survey. The occupational structure of the workforce is linked with the types of industry prevalent within the economy.
- 5.4.7 Within Brentwood, the largest occupation group in absolute terms are associate professional and technical occupations at 19.6% and this is the highest level across all the benchmark areas.

- 5.4.8 The next largest group in the Borough is professional occupations (17.0%), followed by administrative and secretarial at 12.6%. There was no record for process plant and machine operatives.

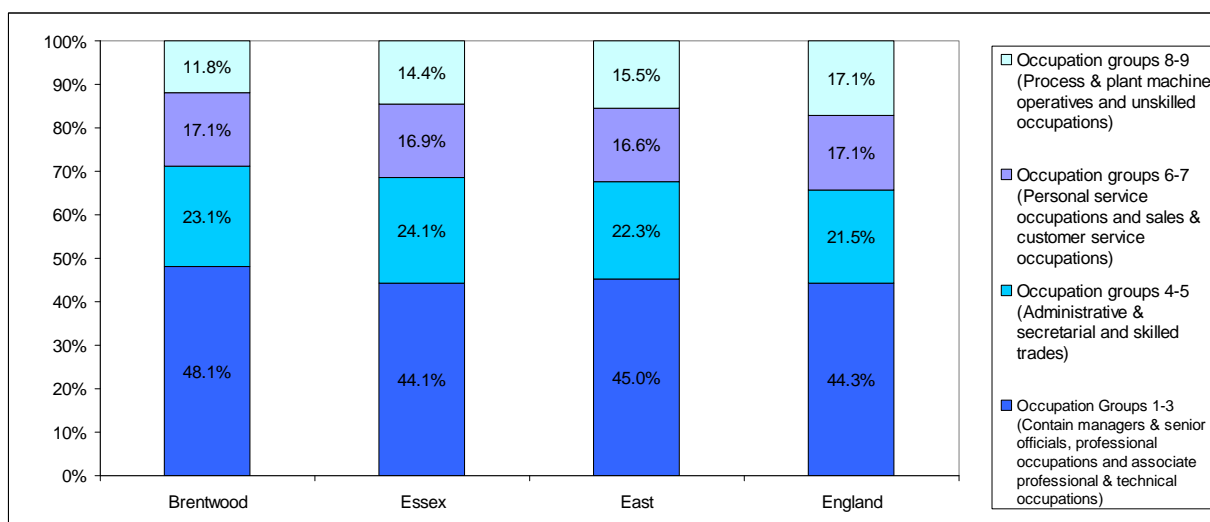
Figure 5-1 Occupational Structure, 2012



Source: Annual Population Survey January 2012 – December 2012

- 5.4.9 Figure 5-2 below details the proportions of workforce employed across the nine occupation groups.

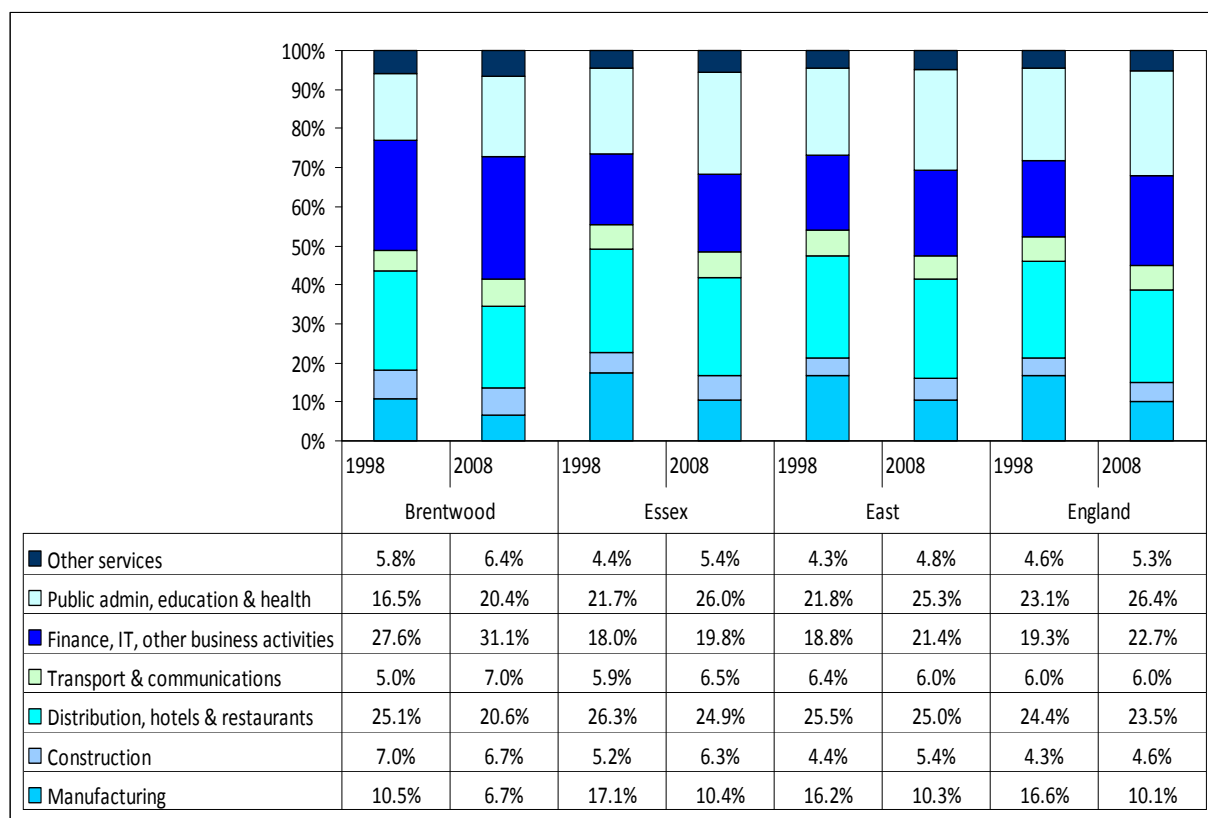
Figure 5-2 Levels of Population by Occupation Group (2012)



Source: Annual Population Survey January 2012 – December 2012

- 5.4.10 Brentwood has the largest proportion of its workforce in occupation groups 1 to 3 (managers & senior officials, professional occupations and associate professional & technical occupations) at 48.1% and this combined group is higher than the County (44.1%), East Region (45.0%) and National (44.3%) averages.
- 5.4.11 This suggests that Brentwood has a comparatively higher concentration of its labour force employed in higher wage sectors than the County and Nationally. This may indicate that there is a higher demand for larger executive housing in the Borough compared to these benchmark areas.
- 5.4.12 The breakdown of employment in Brentwood and the benchmark areas by broad sector, within the 10 year period from 1998 to 2008 is shown below.
- 5.4.13 The 2008 data, although quite old now is the most up to date available from the Annual Business Inquiry. The data used as a comparison is 1998, although it pre-dates the recession shows a good comparison basis.

Figure 5-3 ABI Employment by Industry Sector, 1998 – 2008



Source: Annual Business Inquiry Employee Analysis, 2008

- 5.4.14 In 2008, the most important industry sectors within the Brentwood economy in absolute employment terms were Finance, IT and other business activities sector (31.1%) and distribution, hotels and restaurants (20.6%).
- 5.4.15 Brentwood has experienced a decline in the manufacturing industry sector of 3.8% between 1998 and 2008, but a lower decline than that seen in Essex (6.7%) the East (5.9%) and nationally (6.5%).

5.5 Labour Supply

- 5.5.1 It is important to understand the extent to which the working age population is engaged with the labour market. The ONS defines the working age population as 16 to 64.
- 5.5.2 Labour supply consists of people who are employed as well as people defined as unemployed or economically inactive, who can be considered to be a potential labour supply. Information in this section relates to the characteristics of people living in an area.
- 5.5.3 At 2011 (ONS mid-year population estimates) there were estimated to be around 46,200 people in Brentwood of working age. This equates to 62.6% of the total population.
- 5.5.4 Data from the ONS Annual Population Survey (January 2012-December 2012) provides an indication of the number of people in employment (either as an employee or self employed). It also provides an insight into the level of unemployment within an area.

Table 5-1 Employment & Unemployment Rates, 2012 %

	Employment Rate*	Unemployment Rate**
Brentwood	76.3	4.7
Essex	73.9	7.0
East	74.6	6.6
England	70.9	7.8

Source: ONS Annual Population Survey (January 2012-December 2012).

* People who are either a paid employee or self employed and of working age (16-64).

Expressed as a percentage of all people in this group.

** People without a job that are available to start work

Note: Figures do not add up to 100% due to the exclusion of people unable to work due to reasons such as incapacity

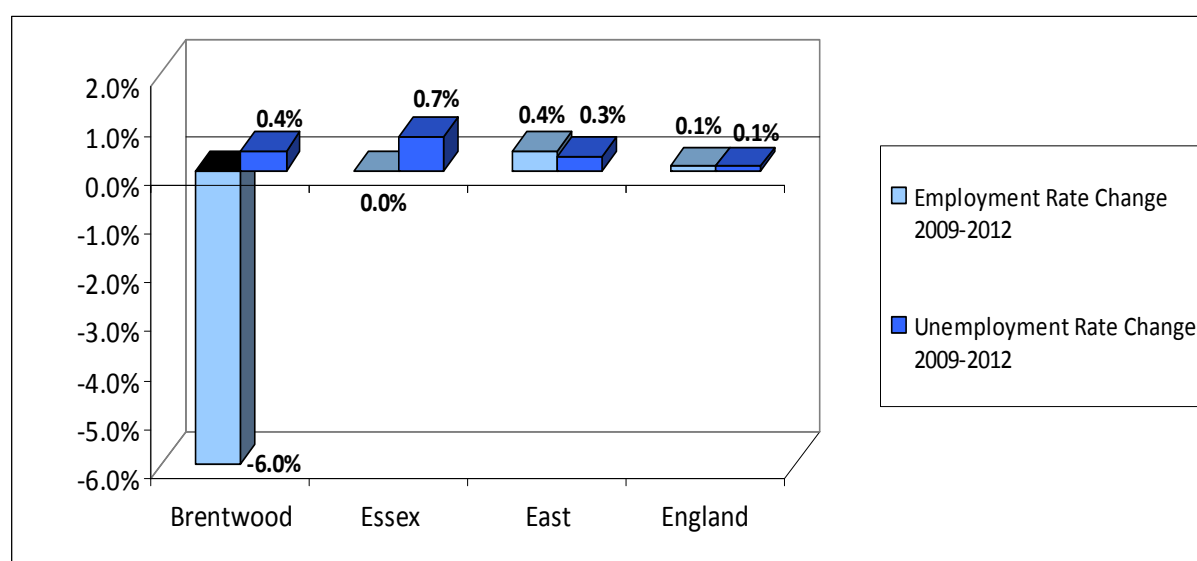
- 5.5.5 More up to date data from the Labour Market Statistics Release, January 2013 show the national unemployment rate for September to November 2012 was 7.7 per cent of the economically active population, down 0.1 from June to August 2012. There were 2.49 million unemployed people, down 37,000 from June to August 2012.
- 5.5.6 In 2012, Brentwood had an employment rate of 76.3%, higher than the County (73.9%), the Region (74.7%) and nationally (70.9%). The unemployment rate at 4.7% was lower than all the other benchmark areas.

5.5.7 The table and graph below show the differences in employment and unemployment rates from ONS data in January 2009 - December 2009 compared with the most up to date data January 2012 - December 2012.

Table 5-2 Employment & Unemployment Rate changes, 2009-2012

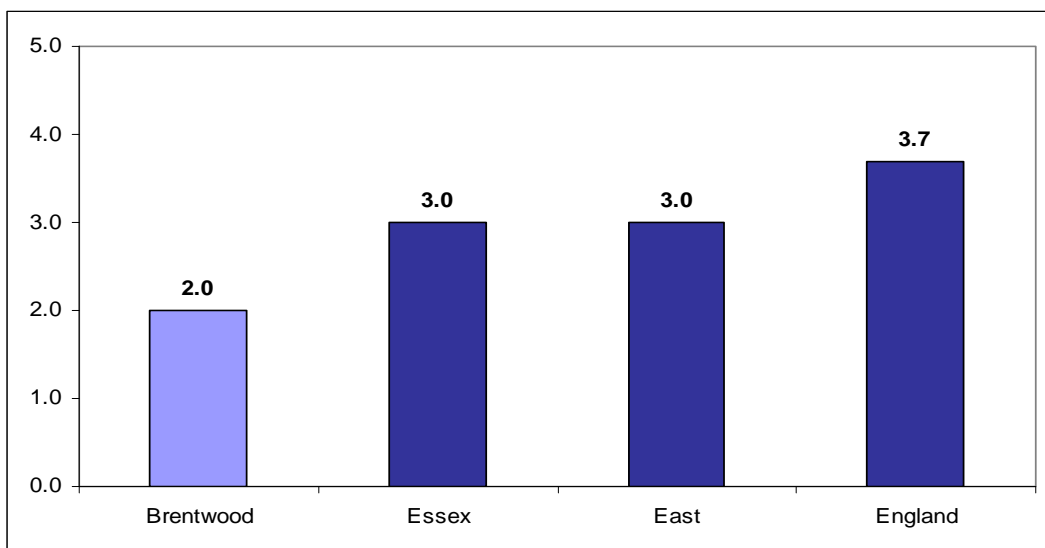
	Employment Rate (2009)	Employment Rate (2012)	Difference	Unemployment Rate (2009)	Unemployment Rate (2012)	Difference
Brentwood	82.3	76.3	- 6.0%	4.3	4.7	0.4%
Essex	73.9	73.9	-	6.3	7.0	0.7%
East	74.2	74.6	0.4%	6.3	6.6	0.3%
England	70.8	70.9	0.1%	7.7	7.8	0.1%

Figure 5-4 Employment & Unemployment Rate changes, 2009-2012 %



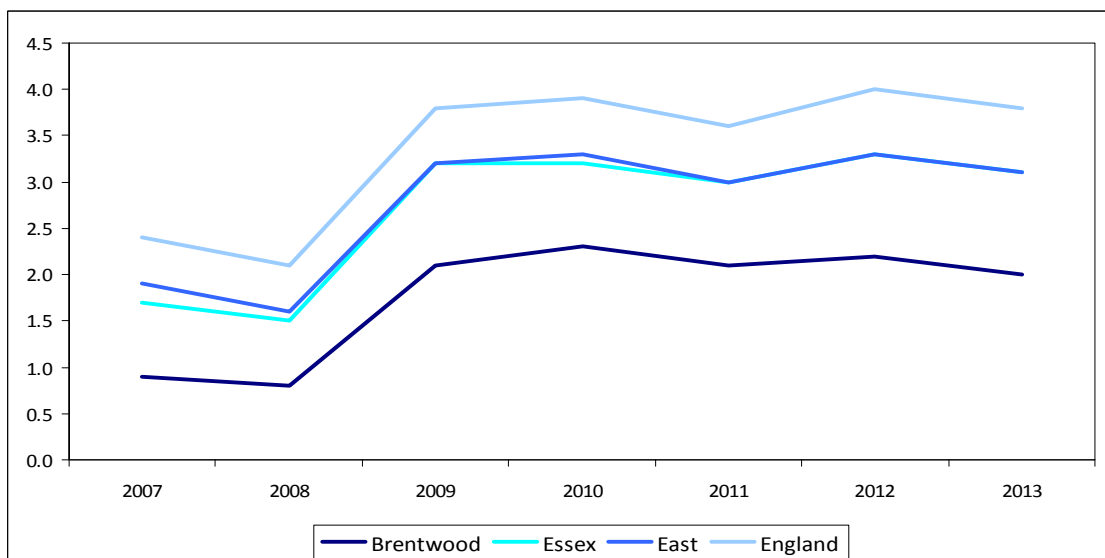
Source: ONS Annual Population Survey 2009-2012

- 5.5.8 Although Brentwood has the largest employment rate when compared with the other benchmark areas, it also shows the biggest change in employment rates over the 4 year period with a 6.0% decrease. All the other benchmark areas either remained the same or showed an increase in numbers.
- 5.5.9 In terms of unemployment in Brentwood there was a 0.4% increase compared with a 0.7% increase in Essex. There was a 0.3% increase in the East and a 0.1% rise nationally.
- 5.5.10 An alternative measure of unemployment is to review the proportion of people claiming Job Seekers Allowance (JSA) (previously known as Unemployment Benefit).
- 5.5.11 JSA is payable to people under pensionable age who are available for and actively seeking work. Due to restrictions in claiming JSA, this figure is likely to understate the true level of unemployment, as some unemployed people seeking work choose not to claim benefits or are in fact not eligible for benefits.
- 5.5.12 Figure 5-5 shows the proportion of working age residents in Brentwood and the wider benchmark areas claiming Job Seekers Allowance as at April 2013. Brentwood had a lower level of JSA claimant's rate at 2.0%, compared to Essex (3.0%), the East region (3.0%) and the national figure of 3.7%.

Figure 5-5 JSA Claimant % - April 2013

Source: ONS Claimant Count, April 2013

- 5.5.13 Figure 5-6 below outlines the rate of JSA claimants in the six year period from 2007 to 2013, for Brentwood and the benchmark areas, and shows how the claimant rate (as a proportion of working age population) has changed over the period.

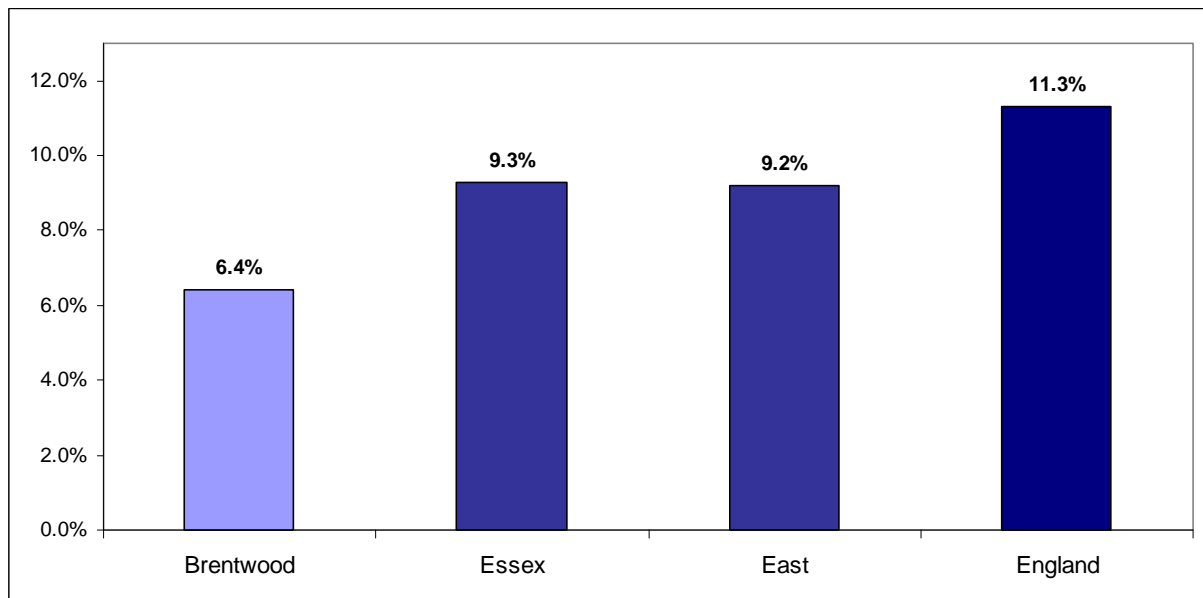
Figure 5-6 JSA Claimant Rate, 2007-2013

Source: Department for Work and Pensions (DWP) benefit claimants, March 2007-March 2013)

- 5.5.14 The data shows that the level of claimants in Brentwood changed from 0.9% in April 2007 to 2.0% in April 2013. The main increase was seen between 2008 and 2009 (0.8% to 2.1%).
- 5.5.15 In Essex the levels were fairly consistent between 2007 and 2008 then they started to climb in 2009 and have remained fairly consistent through to 2013. The East region follows a very similar pattern to that of the County.
- 5.5.16 The national level increased from 2.4% in 2007 to 3.8% in 2009. The levels have remained fairly stable since then.

- 5.5.17 The DWP also collect data on the proportion of working age people claiming key out of work benefits (consisting of job seekers allowance, incapacity benefits, lone parents and others on income related benefits).
- 5.5.18 Brentwood has an out of work benefit claimant level of 6.4%, lower than the County level of 9.3%, the regional level of 9.2% and the national level of 11.3%.

Figure 5-7 Key Out of Work Benefit Claimants (%), November 2012



Source: Department for Work and Pensions (DWP) benefit claimants, (November 2012)

- 5.5.19 Looking at the evidence below Brentwood has a higher level of retired population than the region and nationally but a slightly lower level than the County, according to the 2011 Census.

Figure 5-8 Level of Retired Population 2011 (%)



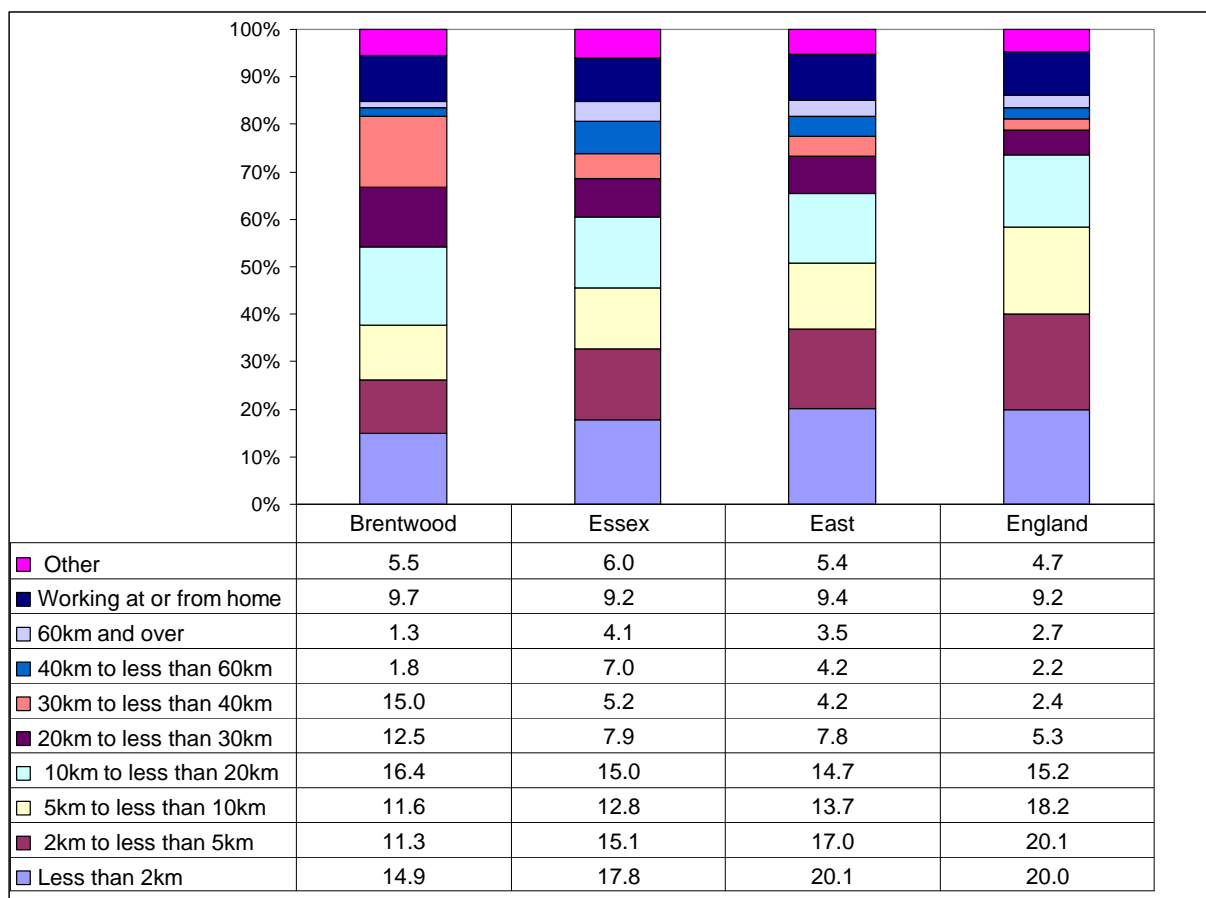
Source: Crown Copyright © Census 2011

- 5.5.20 High levels of retirement can impact on the economy of an area with lower levels of economically active households. However, it can also have a positive impact where the households in question are wealthy and spend locally.
- 5.5.21 High levels of retirement also indicates an elderly population who will in the future require suitable accommodation to meet their needs and housing may need to be purpose built or adapted for households with elderly residents.

5.6 Commuters

- 5.6.1 The SHMA Practice Guidance “*Identifying Sub-regional Housing Market Areas*” Advice Note (Annex to Strategic Housing Market Assessments Practice Guidance) states that it is important when analysing the dynamics of the housing market to assess travel to work patterns.
- 5.6.2 Travel to work data can provide information about commuting flow and the spatial structure of the labour market which will influence property price and location. It can also provide information about areas within which people move without changing other aspects of their lives.
- 5.6.3 The data below further examines commuting behaviour by assessing commuting distance and mode of transport.
- 5.6.4 Figure 5-9 below presents a breakdown of workers by the distance they commute to their workplace. 54.2% of households in Brentwood commute less than 20km to work. This compares with 60.7% of people commuting less than 20 km in Essex, 65.5% in the East region and 73.5% nationally.
- 5.6.5 In 2001, 9.7% of households in Brentwood work from home, higher than the level in all the other benchmark areas.

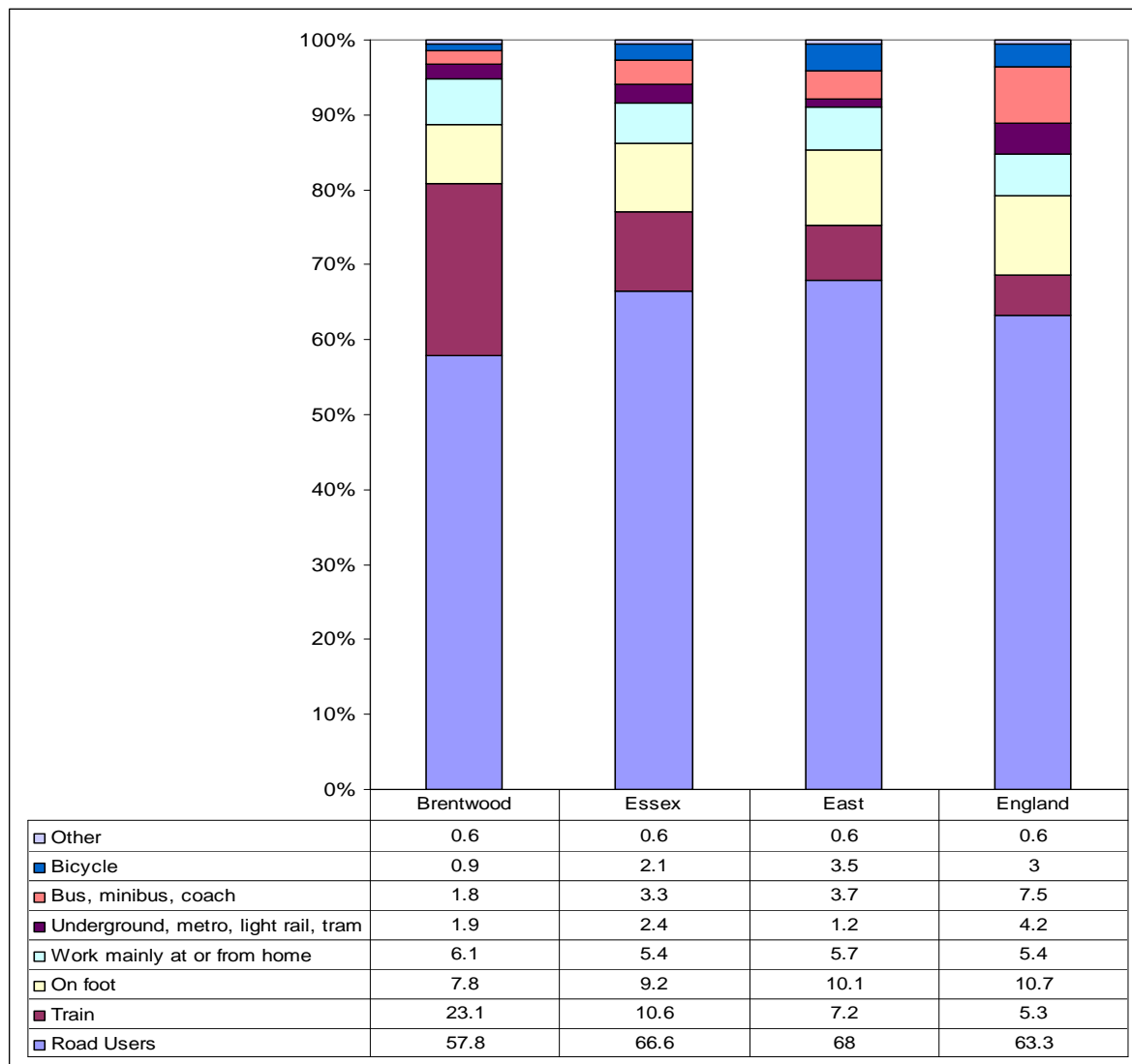
Figure 5-9 Commuting Distances of Residents, 2001



Source: Crown Copyright © Census 2001 (The 2011 census data on commuting distance is not yet available)

- 5.6.6 When looking at commuters' mode of transport across Brentwood using the Census 2011 data, it revealed that 57.8% of commuters are road users i.e. travel to work by car or van, either driving or as a passenger, by motorcycle or by taxi, lower than all the other benchmark areas.
- 5.6.7 23.1% of commuters travel to work via train, higher than all the other benchmark areas and more people in Brentwood work from home (6.1%) compared with the other areas.

Figure 5-10 Commuters Mode of Transport



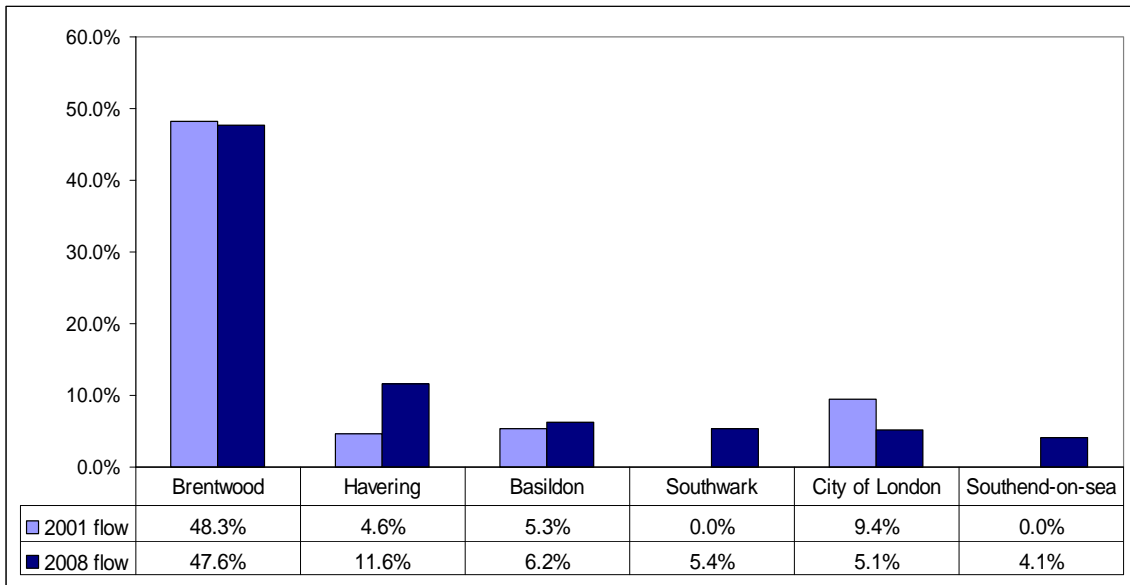
Source: Crown Copyright © Census 2011

- 5.6.8 Commuting distances are also driven by location and housing preferences. Married couples care more about quality of neighbourhoods, views and the property size. Families with children will be more particular about the location in relation to good schools and single households / single parents tend to want to be nearer to family members and friends.
- 5.6.9 This translates into difference commuting patterns amongst different household types, with married couples with and without children locating further away from jobs and having longer commutes compared to other household types.

5.6.10 The following graphs show more up to date data on commuting flows from the Office of National Statistics website utilising Annual Population Survey data (Jan- Dec 2008) against the Local Labour Force Survey 2001 data.

5.6.11 The graph shows the top six flows for local authority work for Brentwood residents.

Figure 5-11 Place of Work for Brentwood Residents 2001 and 2008

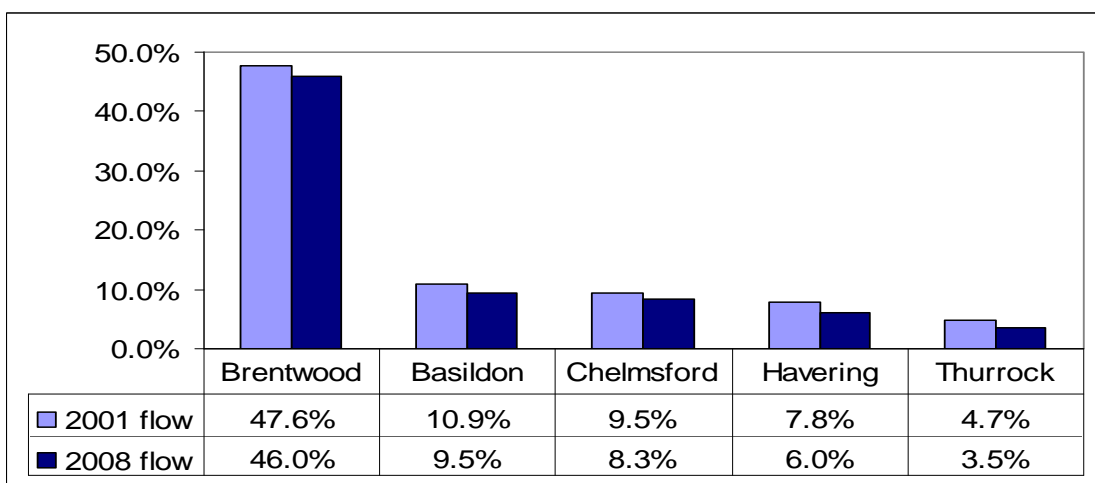


Source: ONS / APS 2008-LLF 2001

5.6.12 The 2008 data shows that 47.6% of Brentwood residents also work in Brentwood compared with 48.3% in 2001. The second highest place of work for Brentwood residents is Havering at 11.6% in 2008, compared with 4.6% in 2001.

5.6.13 The next graph shows details on the place of residence for those who work in Brentwood.

Figure 5-12 Place of Residence for Brentwood workers



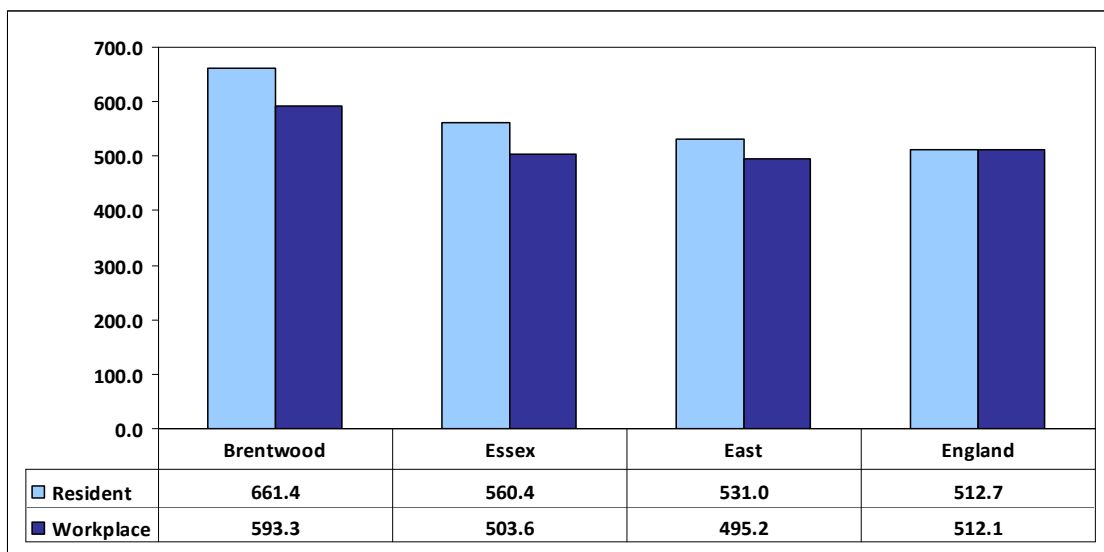
Source: ONS / APS 2008-LLF 2001

5.6.14 The main place of residence for those working in Brentwood is Brentwood at 46.0%, although this figure has decreased since 2001 by 1.6%. 9.5% live in Basildon, 8.3% in Chelmsford, 6.0% in Havering and 3.5% in Thurrock.

5.7 Income

- 5.7.1 Income, and particularly household income, is one of the fundamental determinants of the ability of households to access home ownership or the market rented sector.
- 5.7.2 Figure 5-13 shows the average gross weekly pay by workplace (people who work in the area) and residence (people who live in the area) from the 2012 Annual Survey of Hours and Earnings (ASHE). ASHE provides information about the levels, distribution and make-up of earnings and hours worked for full-time employees in all industries and occupations.

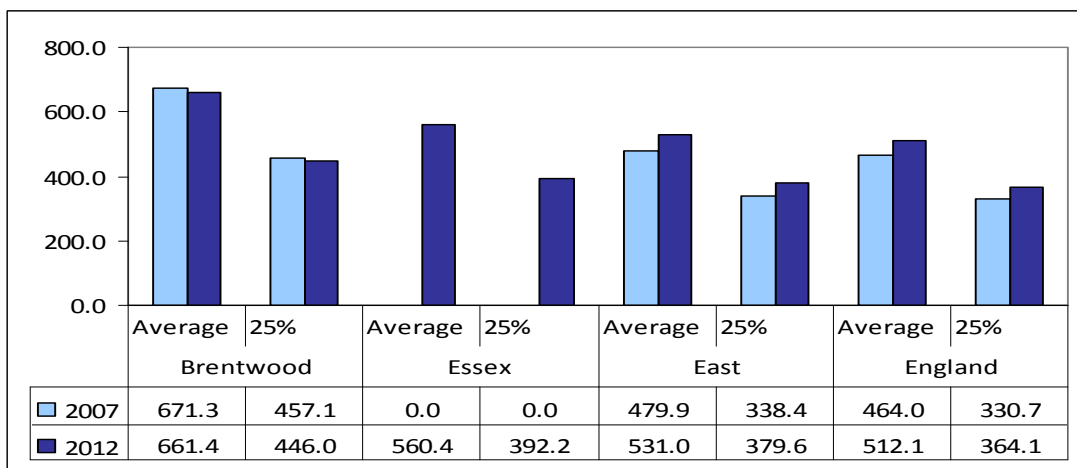
Figure 5-13 Average Gross Weekly Pay, 2012



Source: Annual Survey of Hours and Earnings (2012)

- 5.7.3 The average residence pay within Brentwood of £661.4 is much higher than the other benchmark areas. However, average workplace pay is also higher than the other benchmark areas. The fact that the wages of those living in Brentwood are higher for those working outside the Borough, suggests that a proportion of the local population need to commute out of the area to find higher paid work.

Figure 5-14 Average and Lower Quartile Earnings 2007-2012 per week



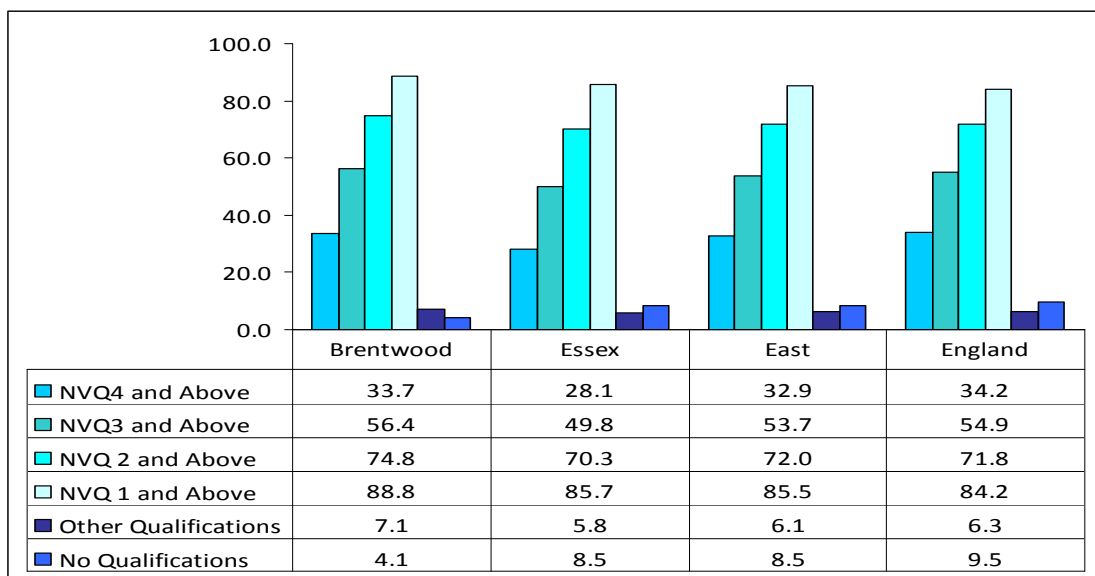
Source: Annual Survey of Hours and Earnings (2007/2012)

- 5.7.4 Figure 5-14 compares the average weekly residence earnings over a five year period from 2007 to 2012, to the lowest quartile weekly earnings (i.e. the bottom 25%). Both the average and the lowest quartile weekly earnings have decreased between 2007 and 2012, in Brentwood, but increased in the East region and nationally. There was no corresponding data in 2007 for Essex.
- 5.7.5 CORE (Continuous REcording) is a national information source funded by the Department for Communities and Local Government that provides an invaluable source of information about new lets, sales and tenants. As of April 2009 TNS Global are responsible for managing CORE.
- 5.7.6 The CORE data held on lettings to new tenants in Brentwood Borough Council for the year 2011 / 12 highlights the mean and median combined household incomes of tenant (or tenant and partner).
- 5.7.7 The median weekly income for new tenants in Brentwood was £213.70, lower than the mean income of £229.11.

5.8 Skills and Educational Attainment

- 5.8.1 Central to the long term growth and productivity of an economy is the level of workforce skills.
- 5.8.2 In 2012 the number of people of working age in Brentwood with no qualifications was 4.1%, lower than all the other benchmark areas.
- 5.8.3 Brentwood had the highest level of qualifications overall. The majority of the NVQ qualification brackets (with the exception of NVQ4 and above) were higher in Brentwood than in the other benchmark areas.
- 5.8.4 Figure 5-15 presents the latest qualifications data for the working age population compared to the benchmark areas.

Figure 5-15 Educational Attainment (NVQ) (Jan 2012- Dec 2012)



Source: Annual Population Survey (Jan 2012-Dec 2012)

NVQ: National Vocational Qualification

NVQ 1: Entry level or Pre-GCSE / NVQ2: GCSE or equivalent / NVQ 3: A-level or equivalent / NVQ 4: Degree or equivalent

5.9 Income and Housing Data from the 2013 Survey

- 5.9.1 The response rate on the income question 74.4% from existing households (24,174 implied) and 86.8% from concealed households (2,093 implied). This is a high response to the most sensitive question in a survey questionnaire.
- 5.9.2 The 2000 Good Practice Guidance (page 62) presents a conflict in that having said it is important for surveys to gather income data it then suggests *'it is difficult to estimate the incomes of future concealed households'*.
- 5.9.3 New households at this point may have circumstances which change quickly. It suggests therefore that the incomes of households who recently formed should be examined, although even this is not without difficulty.
- 5.9.4 Particularly in areas where there are shortages of affordable housing and with high house prices, households who accessed the market are only those with adequate income or financial support from parents or family.
- 5.9.5 As the guide states (page 25) 'these are likely to be more reliable, although even here care is needed. Some potential households may not have been able to form owing to lack of suitable, affordable accommodation.'
- 5.9.6 The incomes in this section are based on the total annual **household** gross income, i.e. head of household and their partner.

5.10 Existing Household Savings

- 5.10.1 The following group of tables relate to savings, equity and income of existing households, beginning with a question on savings held which was answered by around 82.0% of existing households (26,615 implied).

Table 5-3 Household Savings (existing households)

Question 16a

Savings	%	Cum %
No Savings	21.5	21.5
Under £5,000	17.6	39.1
£5,000 - £10,000	13.5	52.6
£10,001 - £20,000	8.3	60.9
£20,001 - £30,000	4.4	65.3
£30,001 - £40,000	4.3	69.6
£40,001 - £50,000	4.2	73.8
Above £50,000	26.2	100.0

Source: DCA Brentwood 2013 Housing Needs Survey

- 5.10.2 The data shows that 39.1% had less than £5,000 in savings. 34.7% had savings in excess of £30,000.

5.11 Equity

- 5.11.1 The next table relates to the level of equity ownership in their home and was answered by 79.0% of owner occupier respondents.

Table 5-4 Level of Equity in Present Accommodation

Question 16b

Level of Equity	%	Cum %
Negative Equity	3.3	3.3
Below - £25,000	4.4	7.7
£25,001 - £50,000	5.2	12.9
£50,001 - £75,000	4.0	16.9
£75,001 - £100,000	5.1	22.0
£100,001 - £150,000	9.3	31.3
£150,001 - £200,000	10.7	42.0
Above £200,000	58.0	100.0

Source: DCA Brentwood 2013 Housing Needs Survey

- 5.11.2 68.7% of respondents indicated equity ownership of over £150,000. Only 3.3% of owner occupiers were in negative equity.

5.12 Existing Household Incomes

Table 5-5 Gross Annual Income of all Existing Households

Question 16c

Annual income	All Existing Households	
	%	Cum %
None	3.4	3.4
Below £10,000	7.7	11.1
£10,000 - £15,000	7.8	18.9
£15,001 - £20,000	7.0	25.9
£20,001 - £25,000	8.4	34.3
£25,001 - £30,000	8.0	42.3
£30,001 - £40,000	10.3	52.6
£40,001 - £50,000	10.5	63.1
£50,001 - £60,000	6.3	69.4
Above £60,000	30.6	100.0

Note: Excluding benefits / allowances Source: DCA Brentwood 2013 Housing Needs Survey

- 5.12.1 The response rate to the income question from existing households was 74.4% (24,174 implied).
- 5.12.2 This gives a very good indication of the income levels in the Borough. The table shows that 11.1% of households had incomes below £10,000. The total proportion earning below the national average of £24,400 per annum (*assessed by the ONS Economic & Labour Market Review 2012, based on April 2012, the latest data available*) was 19.7%. 30.6% of households stated that they earned over £60,000.

- 5.12.3 20.8% of existing households were in receipt of financial support (6,749 implied cases), a lower level than found in recent DCA surveys (around 26%). The results from those responding to a multiple-choice question are set out in the Table below. On average, each respondent indicated around two forms of financial support.

Table 5-6 Financial Support
Question 16d

Support	Responses %	Households %	N ^{os} . Implied (all choices)
Council Tax Benefit	24.7	49.3	3,324
Housing Benefit / LHA	20.5	40.9	2,763
Disability Allowance	16.0	31.9	2,153
Pension Credits	12.4	24.9	1,678
Working Family Tax Credit	7.9	15.9	1,070
Job Seekers Allowance / ESA	4.3	4.3	586
Other	8.7	17.4	1,172
Income Support	5.5	11.0	745
Total	100.0		13,491

Source: DCA Brentwood 2013 Housing Needs Survey

- 5.12.4 The main Benefit received amongst the respondents was Council Tax Benefit at 49.3%. 40.9% of households receiving benefits were in receipt of Housing Benefit and 31.9% were in receipt of Disability Allowance.
- 5.12.5 24.9% of households responding were in receipt of Pension Credits and 15.9% were in receipt of Working Family Tax Credit.

5.13 Concealed Households

- 5.13.1 A concealed household is someone living within a household wanting to move to their own accommodation and form a separate household (e.g. adult children living with their parents).

5.14 Concealed Households Savings Levels

- 5.14.1 The level of savings held by concealed household is outlined in the table below.

Table 5-7 Concealed Household Savings
Question 38b

Savings	%	Cum %
Under £1,000	22.6	22.6
£1,000 - £5,000	27.5	50.1
£5,001 - £10,000	23.4	73.5
£10,001 - £20,000	9.2	82.7
£20,001 - £30,000	7.5	90.2
£30,001 - £40,000	1.4	91.6
Over £40,000	8.4	100.0

Source: Source: DCA Brentwood 2013 Housing Needs Survey

- 5.14.2 87.4% of concealed households moving responded to a question asking about the level of savings available to meet deposit, stamp duty and legal costs for those intending to buy on their new home.
- 5.14.3 9.8% have savings in excess of £30,000 and 16.7% between £10,000 and £30,000. However 73.5% have less than £10,000 in savings and unless significant support is available from parents they will be limited to the rental sector.

5.15 Concealed Household Incomes

- 5.15.1 A response to the income question was received from 86.8% of concealed households moving within the Borough. The proportion below the £10,000 income band was 13.9%.

Table 5-8 Gross Annual Income of Concealed Households Moving with the Borough
Question 38d

Annual Income	Response		
	%	Cum %	N ^{os.} implied
None	4.2	4.2	87
Below £10,000	9.7	13.9	204
£10,001 - £15,000	15.2	29.1	317
£15,001 - £20,000	25.9	55.0	542
£20,001 - £25,000	11.0	66.0	231
£25,001 - £30,000	11.9	77.9	250
£30,001 - £40,000	9.3	87.2	195
£40,001 - £50,000	6.2	93.4	129
£50,001 - £60,000	6.6	100.0	138

Note: No household earned in excess of £60,000

Source: DCA Brentwood 2013 Housing Needs Survey

- 5.15.2 64.5% of concealed households earned below the national average level of £24,400. Low incomes, coupled with a low level of savings will hinder access to the market for concealed households.
- 5.15.3 Concealed households were asked if they will receive help with a deposit from their parents or relatives; 37.4% said there was no need for help. Of those intending to buy who need help, 24.8% said there was no help available to them. 24.5% said they would get help in the form of a gift and 13.3% by means of a loan.

5.16 Rents and Mortgage Costs (Concealed Households)

- 5.16.1 The following table shows the levels of rent / mortgage new forming households would be willing to pay per month.

Table 5-9 Rent / Mortgage Able to be Paid for Accommodation

Question 38a

Rent / Mortgage	%	Cum %
Under £80pw / £350pcm	12.7	12.7
£81 - £115pw / £351 - £500pcm	31.9	44.6
£116 - £130pw / £501 - £560pcm	14.9	59.5
£131 - £150pw / £561 - £650pcm	14.9	74.4
£151 - £200pw / £651 - £860pcm	17.0	91.4
£201 - £250pw / £861 - £1080pcm	8.6	100.0

Source: DCA Brentwood 2013 Housing Needs Survey

- 5.16.2 44.6% of concealed households were willing to pay no more than £500 pcm and 74.4% no more than £650 per calendar month.
- 5.16.3 Only 7.1% of concealed households said they would be likely to claim Housing Benefit.

5.17 Incomes of Recently Formed Households

Table 5-10 Gross Annual Income of Recently Formed Households
Question 16c x 6a

Annual Income	New households formed – 2010 2013		
	%	Cum %	N ^{os} . implied
None	0.0	0.0	0
Below £ 10,000	0.0	0.0	0
£10,001 - £ 15,000	10.2	10.2	103
£15,001 - £ 20,000	3.5	13.7	35
£20,001 - £ 25,000	0.0	13.7	0
£25,001 - £ 30,000	6.3	20.0	63
£30,001 - £ 40,000	16.9	36.9	170
£40,001 - £ 50,000	20.5	57.4	206
£50,001 - £ 60,000	16.7	74.1	168
Above £ 60,000	25.9	100.0	259

Source: DCA Brentwood 2013 Housing Needs Survey

- 5.17.1 86.3% of households who have formed their first home in the past three years have incomes above £25,000. There were no recently formed households who earned less than £10,000, compared with 13.9% of concealed households earning below £10,000.

6 THE ACTIVE MARKET

6.1 Key Findings

- Hometrack predict average UK house prices to fall by a further 3% in 2012 and remain flat into 2013, rising by 2% in 2014.
- The Land Registry data for the Borough showed a increase over the five years from 2007-2012 of 5.6%. The smaller property types have seen a fall in prices. Detached properties show an increase of 2.5% and semi-detached properties, a 6.4% increase.
- The average house price in the Borough in Quarter 1 2013 was £320,716, ranging from £190,310 for a flat / maisonette to £514,616 for a detached property.
- The number of sales in the Borough has decreased by 45.1% over a five year period (2007-2012) compared to 49.8% in Essex.
- Entry level stock in the Borough is considered to be flats, as good levels of flat sales were evident. Property prices start at £127,995 for a 1 bedroom flat in the South of Brentwood.
- The private rented sector entry level rents start from £600 per month for a 1 bedroom flat and £795 per month for a 2 bedroom flat.

6.2 Introduction

- 6.2.1 This section provides an analysis of indicators of housing market activity to provide an understanding about changes in demand over time and to identify any pressure points within the Borough.
- 6.2.2 Sources of data utilised are:-
- HM Land Registry Data 2007 – 2012 annual;
 - HM Land Registry Data 2013 Quarterly;
 - The Bank of England Industry Wide Figures;
 - The Council of Mortgage Lenders (CML);
 - 2013 DCA Estate Agency Survey data;
- 6.2.3 Since 2007, the UK market has seen a crisis in economic terms starting with insecurity in the financial markets following the sub-prime mortgage crisis beginning in the American market. This led to a fall in house prices throughout the UK which has left recent purchasers, particularly first-time buyers and those on 100% mortgages with negative equity.
- 6.2.4 The information below sets the context for the key issue of the affordability of housing in the area, and in particular the analysis can be related to the problems of low income evaluated through the 2013 household postal survey.

6.3 The Current National Market Outlook

- 6.3.1 The latest monthly National Housing Survey published in May 2013 by Hometrack shows House prices grew by 0.4% in May, the highest increase in a single month since May 2007 (0.6%).
- 6.3.2 The drive in house prices is coming almost exclusively from London and the South East where prices grew at an above average rate (0.9% and 0.5% respectively). Elsewhere housing market conditions are improving gradually with prices trending slowly upwards, averaging just 0.1% over May.
- 6.3.3 Nationally the trend in prices is upwards with demand rising ahead of supply - albeit at a lesser extent than in London and the South East. Prices remained static in four regions (North East, North West, Wales and Yorkshire & Humberside) and grew in a further four (East Anglia, East Midlands, South West and West Midlands).

6.4 National Housing Supply and Turnover

- 6.4.1 The number of sales agreed is outstripping the number of new properties coming to the market. Nationally, new supply grew by 2.8% in May while sales agreed were up 8.2%.
- 6.4.2 A lack of housing for sale is a key feature of the market. For the last three months supply of new housing has failed to keep pace with demand. This supply/demand imbalance continues to put upward pressure on prices.
- 6.4.3 In an effort to secure instructions, a growing proportion of property is likely to come to the market at unrealistically high prices. This will lead to fewer sales and a period of price re-alignment.
- 6.4.4 The time on the market has reduced in the past few months and currently stands at 8.8 weeks, compared to 9.7 weeks in December 2012.
- 6.4.5 The proportion of the asking price achieved at national level has remained largely unchanged over the year tracking in the range of 92% - 93%. The level is around 93.9% as at May 2013.

6.5 Current National Prices

- 6.5.1 Average prices in the UK moved upwards by 0.4% over the year (May 2011-May 2012), this is the highest monthly increase since May 2010. While the growth in buyer numbers is following a similar pattern to recent years, it is a lack of housing for sale that is acting as the primary driver of price rises.
- 6.5.2 In May 2013 around 28.5% of postcodes registered a price increase in prices over the month, up from 23.9% in March 2013; whereas 4.4% registered a decrease in price over the month.
- 6.5.3 New buyer registrations in May 2013 show a decrease with the number of new buyers falling by 1.8% overall between March and May 2013.
- 6.5.4 There was a 3.9% decrease in the number of sales agreed in May compared with March 2013.

6.6 The UK Mortgage Market

- 6.6.1 The Council of Mortgage Lenders' (CML) members are banks, building societies and other lenders who together undertake around 94% of all residential mortgage lending in the UK. They produce statistics research and public commentary on the market and the issues facing lenders.
- 6.6.2 The CML forecasts for 2013-14 state "Activity levels in 2012 have been better than expected, with better than expected mortgage credit availability and a relatively strong end to 2011 which persisted into the early months of 2012.
- 6.6.3 The Funding for Lending Scheme (FLS) is likely to be a key factor in influencing short-term market developments. The FLS appears to be making an early positive contribution to mortgage pricing and credit availability and the view is it will improve lending activity through 2013.
- 6.6.4 Housing is now technically at its most affordable than it has been for the last 9 years. Mortgage payments at 27% of earnings are now the lowest since December 1999 and half the unsustainable peak of 48% in July 2007. However this ignores the major change in deposit requirements particularly from first time buyers (FTB's).
- 6.6.5 The typical first time buyer in February 2013 had a deposit of 20% and they borrowed 3.19 times their income.
- 6.6.6 Nationally the number of FTB's has fallen from 181,500 in the first 6 months of 2007 to 86,000 in the first half of 2011. The average FTB deposit in the first six months of 2011 was £27,719; this was more than double the average of £12,874 in 2001.
- 6.6.7 According to a new report commissioned by the Halifax more First Time Buyers are put off from applying for a mortgage through fear of rejection. 64% of non-homeowners believe they have no prospects whatsoever of buying a home therefore creating a generation of renters.
- 6.6.8 Essex County Council has supported a scheme to help First Time Buyers onto the property ladder. There are around 6,000 people across the County who cannot afford to take out a mortgage to fund the purchase of their first home.
- 6.6.9 The initiative agreed in May 2013 will support first time buyers by giving lenders a financial guarantee for up to 20 per cent of the 25 per cent deposit typically needed before they provide a mortgage.
- 6.6.10 This means that successful applicants under the Local Authority Mortgage Scheme would only need a 5 per cent deposit to be able to access mortgages on similar terms to higher deposit mortgage products.

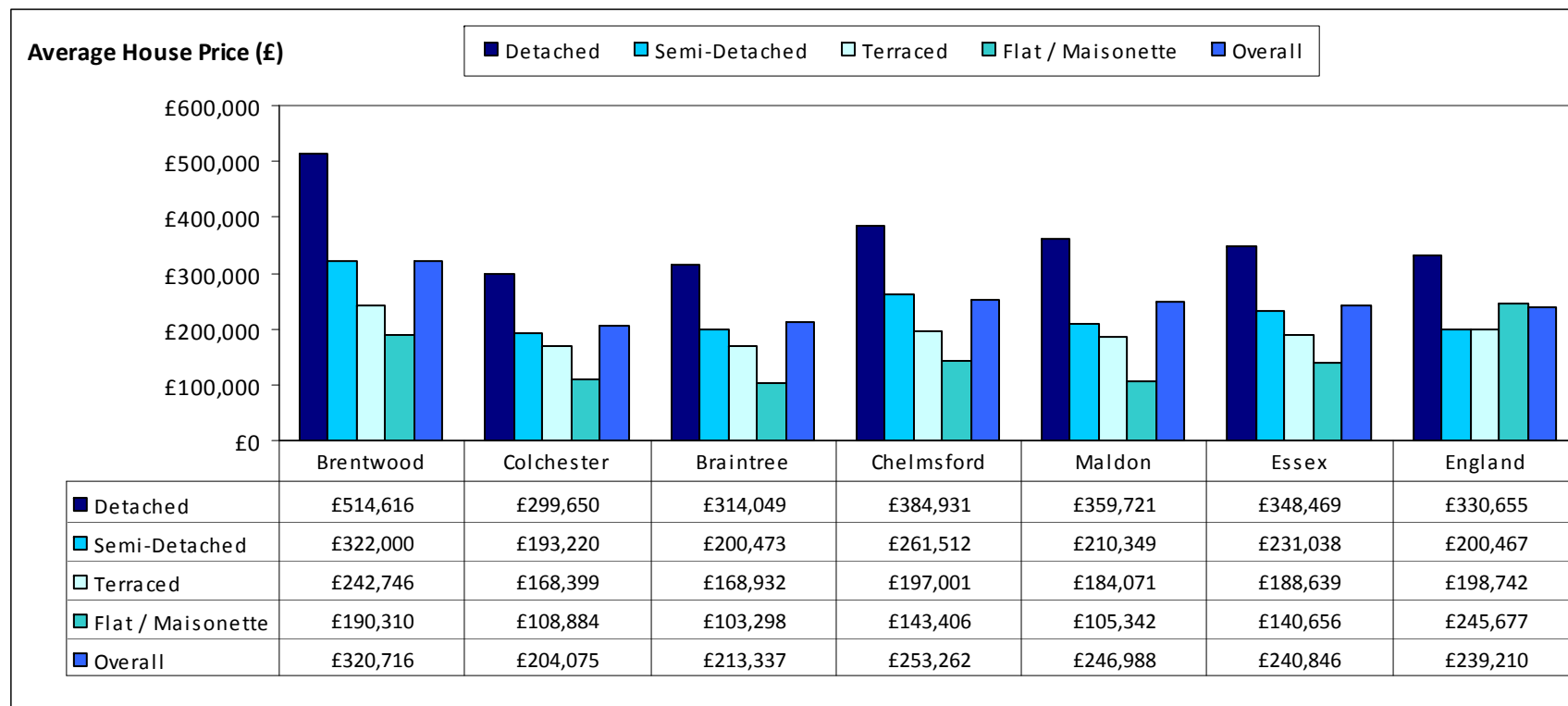
6.7 Average House Prices

- 6.7.1 The table below shows latest data on average house prices in Brentwood, the surrounding authorities and the County, during the 1st quarter of 2013 from Land Registry.
- 6.7.2 The average property price in Brentwood is higher than all the surrounding authorities, the County and England. This average is driven by much higher prices of detached houses than the surrounding areas.

- 6.7.3 The highest average price across all areas is in Brentwood (£320,716), followed by Chelmsford (£253,262). The lowest average price is in Colchester (£204,075).
- 6.7.4 The average price of a flat in Brentwood is £190,310, higher than all the surrounding authorities and the County. The cheapest average price of a flat is in Braintree (£103,298) followed by Maldon (£105,342) and Colchester (£108,884).
- 6.7.5 The average price of a terraced property is cheapest in Colchester (£168,399) followed by Braintree (£168,932) and Maldon (£184,071). The highest average price of a terraced house is in Brentwood (£242,746).
- 6.7.6 The differences in average prices of properties, particularly in the entry level stock of flats and terraced houses is assumed to have an effect on out-migration from Brentwood to the surrounding areas, where entry level properties are cheaper, particularly from concealed households looking for cheaper housing.

6.7.7 The latest data on average house prices during the 1st quarter of 2013 from Land Registry is summarised in Table 6-1 below.

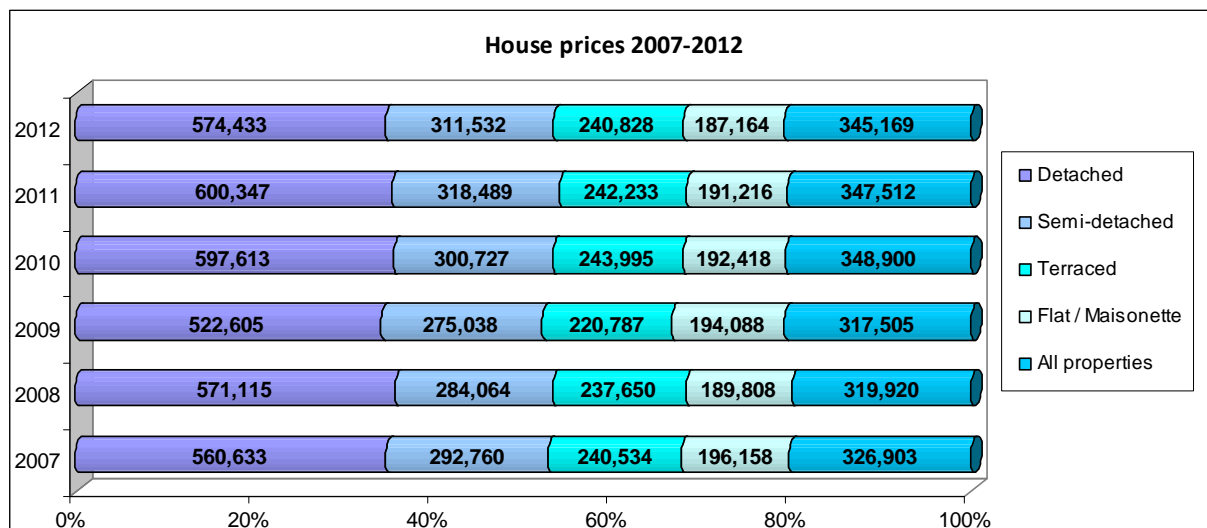
Figure 6-1 Average House Prices by Type, Q1 2013



Source: Land Registry Residential Property Price Report, Quarter 1 2013, © Crown Copyright

- 6.7.8 The graph below examines average house prices for Brentwood as recorded by the Land Registry annually from 2007 to 2012. The data is broken down by property type.

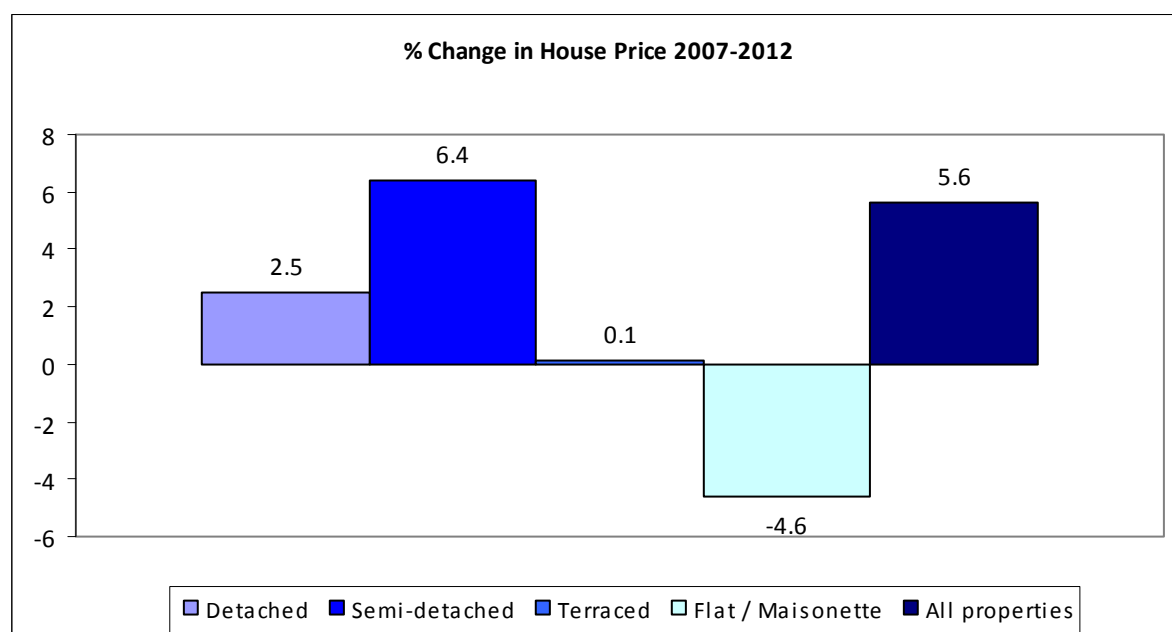
Figure 6-2 2007 -2012 Average Property Price by Type



Source: Land Registry Residential Property Price Report 2007 to 2012, © Crown Copyright

- 6.7.9 Over the five year period 2007 to 2012, the average property price in Brentwood has increased by around 5.6%.
- 6.7.10 The smaller property types have seen a fall in prices. Detached properties show an increase of 2.5% and semi-detached properties, a 6.4% increase.
- 6.7.11 The largest decrease seen is for flats / maisonette, 4.6% over the five year period. This is not surprising due to property prices being at their peak in 2006 and the gradual fall in property prices since the recession in 2007.

Figure 6-3 Change in House Prices between 2007 and 2012

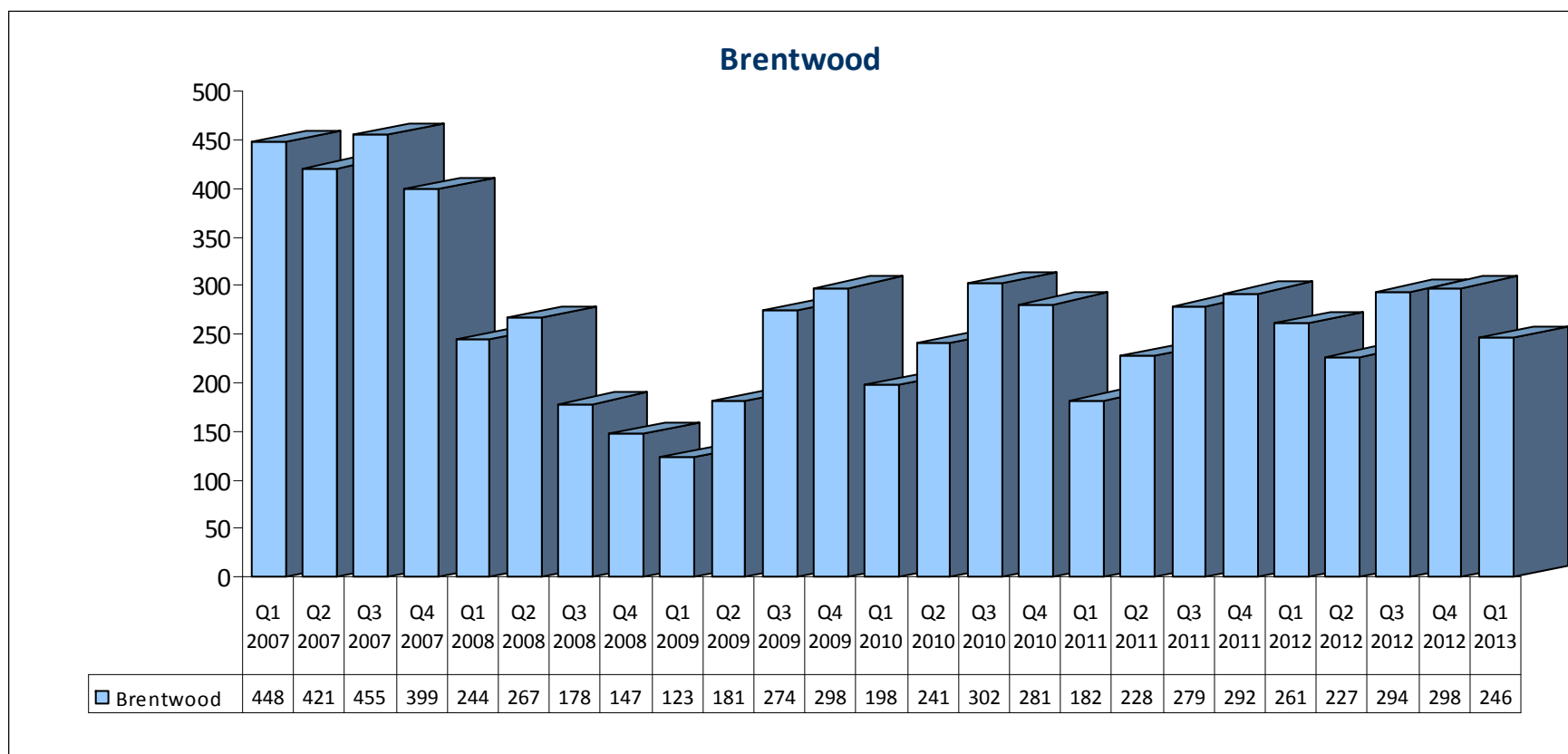


Source: Land Registry Residential Property Price Report 2007 to 2012, © Crown Copyright

6.8 Volume of Sales

- 6.8.1 The graphs below show the volume of sales of new and existing homes annually between 2007 and 2013 for Brentwood and Essex as a comparison. Overall volumes of sales have decreased over the five year period. Sales levels in Brentwood fell by 45.1% from 2007 and by 49.8% in Essex.

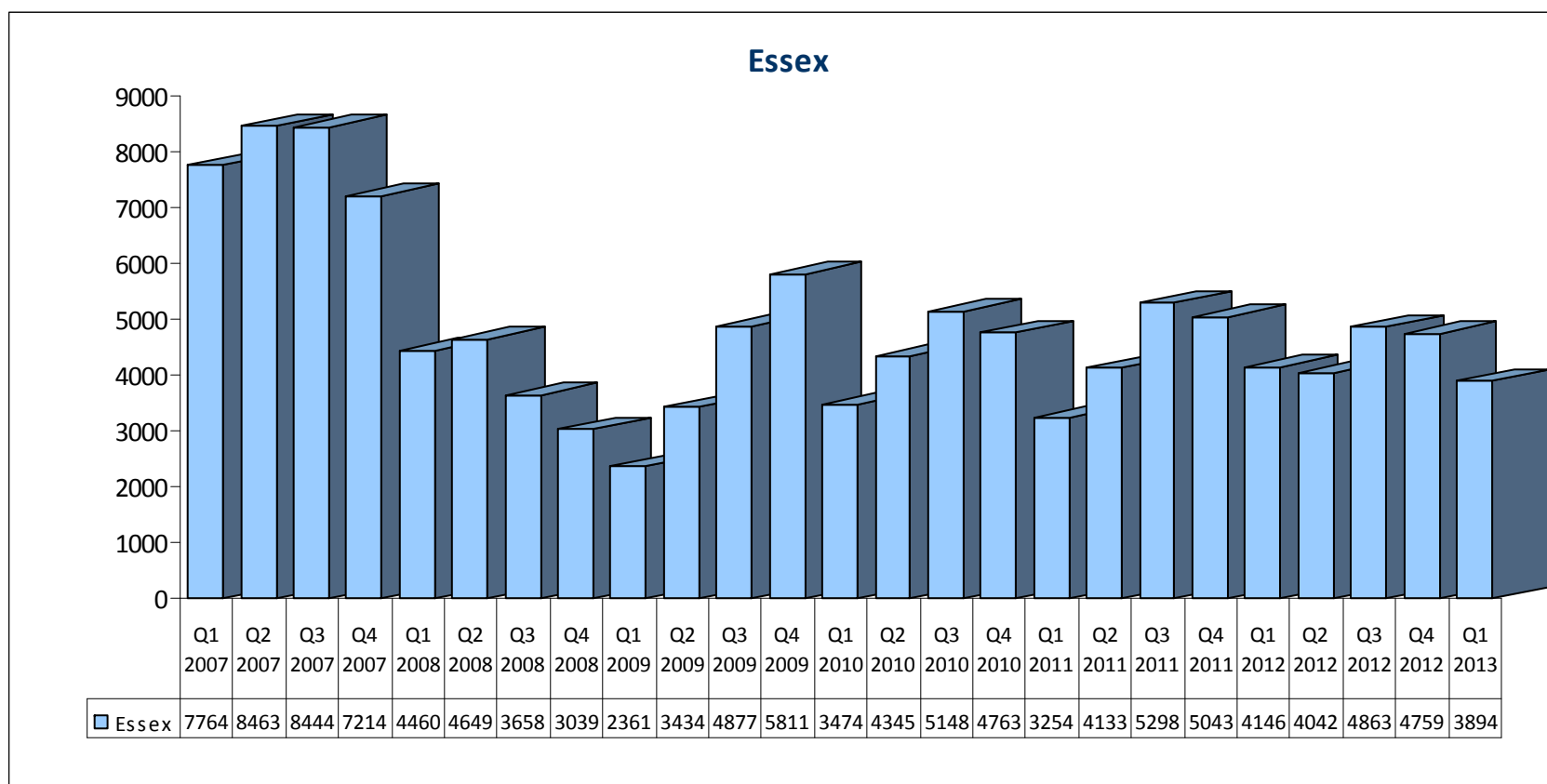
Figure 6-4 Volume of Sales (Brentwood) 2007-2013



Source: Land Registry Residential Property Price Report, 2007 to 2012, © Crown Copyright

- 6.8.2 The data shows that the volume of sales per annum in both the Borough and the County fluctuated between 2007 and 2013. Sales reached their lowest levels by the end of 2008 into Q1 2009 and whilst they have fluctuated since, very dependent upon the classic popular moving seasons, they are staying at fairly consistent levels.

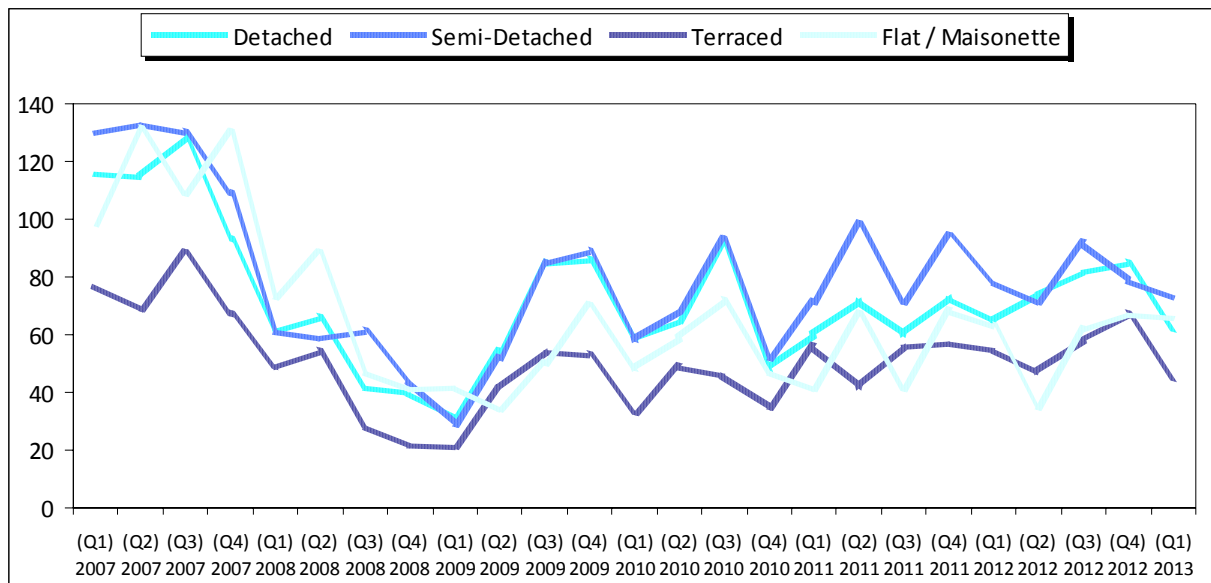
Figure 6-5 Volume of Sales (Essex) 2007-2013



Source: Land Registry Residential Property Price Report, 2007 to 2012, © Crown Copyright

6.8.3 The graph below shows the sales transactions in Brentwood by property type for the period 2007 – 2013.

Figure 6-6 Brentwood Sales by Type (2007-2013)



Source: Land Registry Residential Property Price Report 2007 to 2013, © Crown Copyright

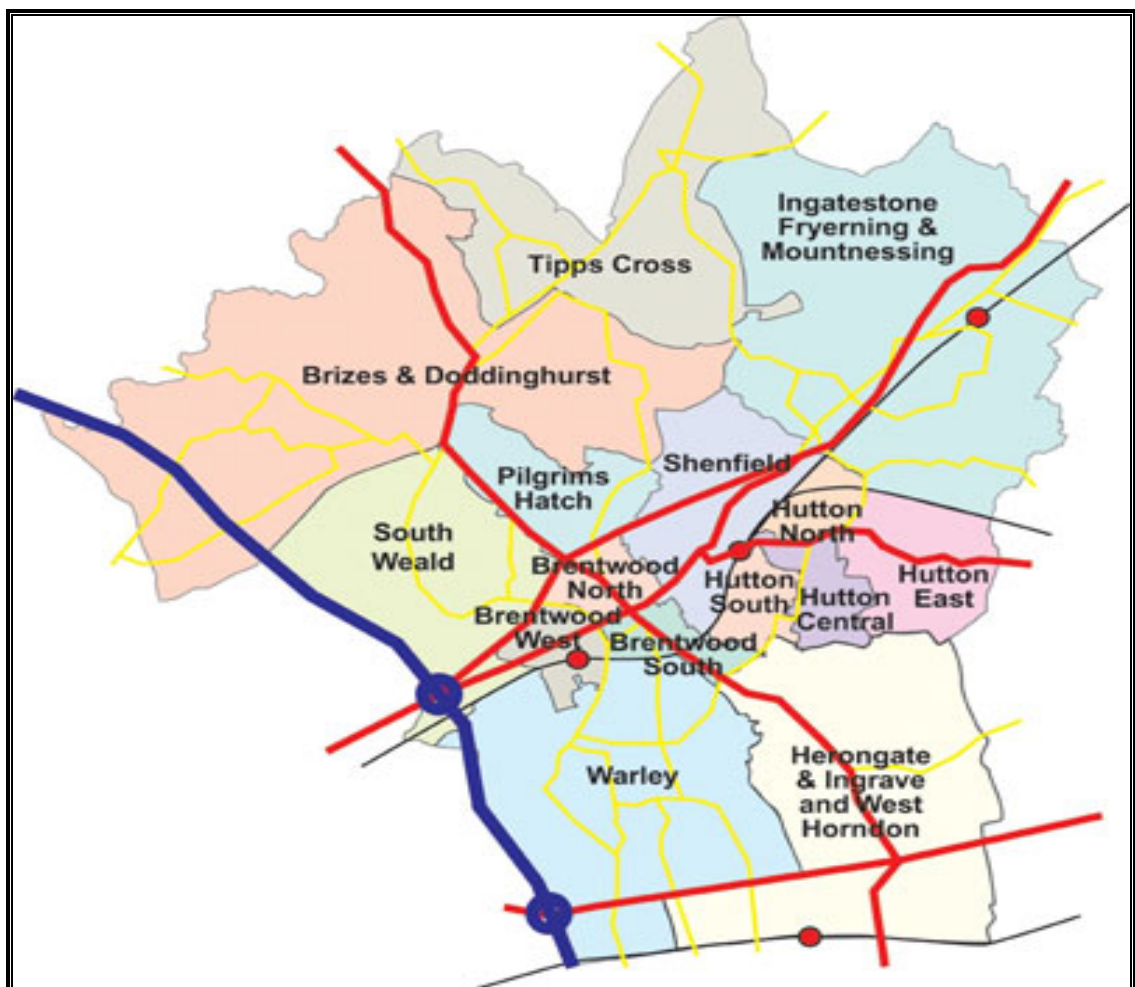
6.8.4 The largest decrease in terms of property type over the five year period was detached properties at 46.5%, followed by semi-detached properties at 43.8%. Flats and terraced properties reduced in sales volumes by 32.6%, and 41.5% respectively.

6.9 Brentwood Market Sub-Area Breakdown

- 6.9.1 The Borough has been divided into 4 sub-areas to analyse house prices and rental costs locally in the areas outlined below.

Sub-Areas	Wards contained within
Brentwood	<i>Brentwood North, Brentwood West, Brentwood South</i>
North	<i>Brizes and Doddinghurst, Tipps Cross, South Weald, Ingatestone, Fryerning and Mounnessing</i>
Urban	<i>Pilgrims Hatch, Shenfield, Hutton North, Hutton Central, Hutton South,</i>
South	<i>Warley, Hutton East, Herongate, Ingrave and West Hordon</i>

Figure 6-7 Ward Map of Brentwood Borough



Source: Brentwood Borough Council

6.10 Entry Sales Levels

- 6.10.1 Entry to the market is clearly dependent on availability, a factor which is particularly critical for low income households who can only enter the market in any numbers where there is an adequate supply of affordable homes.
- 6.10.2 First-time buyers as new entrants to the housing market do not purchase houses at average prices as they do not have average incomes. Although average prices are useful for comparisons in general they are not the purchase levels used in assessing the ability of households to enter local markets.
- 6.10.3 In broad terms new purchasers of either flats or terraced properties buy in the lowest quartile of prices i.e. the bottom 25%.
- 6.10.4 An internet search of the local estate agents was undertaken to ascertain the cost of the cheapest units available i.e. the lowest quartile stock costs in four sub-areas and sample size.
- 6.10.5 The entry level stock in the Borough is considered to be flats as they are the cheapest units with an adequate level of supply for sale to concealed households.

Table 6-1 Entry Sales Levels (£) in Brentwood– May 2013

	1 Bed Flat	2 Bed Flat	2 Bed Terraced	3 Bed Terraced	2 Bed Semi-Detached	3 Bed Semi-Detached
Brentwood	144,995	190,000	215,000	245,000	199,995	280,000
North	139,995	164,995	225,000*	249,995	nd	299,950
Urban	129,950	169,995	204,995	214,995	220,000	265,000
South	127,995	167,500	209,950	184,995	215,000	275,000
Borough-Wide	132,000	169,995	209,950	219,995	215,000	275,000

Source: DCA Housing Market Survey May 2013

* Caution Low Sample

nd No data found

- 6.10.6 Although the average price of flats in Brentwood according to the Land Registry survey is £190,310, entry sales levels vary across the Borough with the lowest entry prices, starting at around £127,995 for a 1-bed flat in the South, rising to £190,000 for a 2-bed flat in Central area of Brentwood.
- 6.10.7 2 bedroom terraced properties start at £204,950 in the Urban sub-area rising to £215,000 in the Brentwood sub-area. 3 bed terraced properties start at £184,995 in the South sub-area rising to £249,995 in the South sub-area.
- 6.10.8 2 bedroom semi-detached properties start from around £199,995 in the Brentwood sub-area rising to £220,000 in the Urban sub-area. 3-bedroom semi-detached properties start at £265,000 in the Urban sub-area rising to £299,950 in the North.

6.11 Purchase Single Income Thresholds

- 6.11.1 The cheapest entry levels (lowest quartile) of the smallest units were assessed to enable threshold income levels to be calculated. These are based on 95% mortgage availability and a 3.5 x gross income lending ratio for single earner households. These levels are recommended in the 2007 Strategic Housing Market Assessments – Practice Guidance (page 42).
- 6.11.2 However, in the current climate in reality there are few lenders that will grant a 95% mortgage with the majority requiring around 20% deposit. 65.8% of concealed households earn less than £25,000 and 82.6% have less than £20,000 in savings. They are unlikely to gain a mortgage and if they secured a mortgage they are likely to need help from parents / relatives to pay a deposit.
- 6.11.3 Table 6-2 below outlines the income ranges needed to enter the market in the 4 sub-areas for a single income households. The table also shows the proportion of concealed households who are unable to afford each property size in each sub-area.

Table 6-2 Single Income Thresholds (£)

Area	Income Thresholds (£) / (%) who cannot afford					
	1 bed Flat	(%) cannot afford	2 bed Flat	(%) cannot afford	2 bed Terraced	(%) cannot afford
Brentwood	39,400	86.6	51,600	94.5	58,400	98.9
South	34,700	82.3	45,500	90.6	57,000	98.0
North	38,000	85.3	44,800	90.2	61,100*	100.0
Urban	35,300	82.8	46,100	91.0	55,600	97.1

Caution low sample*

Source: DCA House Price Survey May 2013

- 6.11.4 The cheapest entry level property requires an income of £34,700 in the south sub-area.
- 6.11.5 82.1% of concealed households forming earn below this amount to access as a single income household. The ability of concealed households to access the market within the Borough is clearly very limited.

6.12 Intermediate Housing Costs

- 6.12.1 The Intermediate Housing definition in NPPF is “homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition. These can include shared equity (shared ownership and equity loans), other low cost homes for sale and intermediate rent, but not affordable rented housing.”
- 6.12.2 Generally new intermediate housing units are bought almost equally by people moving from private rented accommodation and new forming households with incomes inadequate to buy outright. As house prices have reduced it is important to assess whether households could gain access to the housing they require with minimum levels of subsidy compared to that of social rent.
- 6.12.3 This is also important in relation to the provision of a more balanced housing market. We have therefore attempted to analyse the cost of provision of intermediate housing in the area in an attempt to assess the proportion of households who may be able to be assisted by new provision of this type.

- 6.12.4 Shared-ownership gives residents the chance to buy a percentage share of a new build property, and you rent the remaining share from a housing association. This makes home ownership more affordable as it reduces the amount required for a deposit, and you only pay the mortgage on the share you own.
- 6.12.5 In England, Shared Ownership is a Help to Buy scheme, with the exception of London, in which it is a FIRST STEPS scheme. Help to Buy is the brand for the government funded initiative of affordable home ownership schemes designed to help people who cannot afford to buy a home that suits the needs of their household.
- 6.12.6 Over the years several scheme names have been used (i.e. part buy/part rent) but the current Help to Buy schemes are 'Equity Loans' and 'Shared Ownership'.
- 6.12.7 The Homes and Communities Agency (HCA) have appointed 15 Local Help to Buy Agents providing coverage across England. The Local Help to Buy Agent is there to guide you through the options available via Help to Buy and explain the eligibility and affordability criteria.
- 6.12.8 In Essex, the Help to Buy Agent is called Moat Housing and is accessed via the help to buy website which specifically deals with affordable housing in Essex, Kent and Sussex.
- 6.12.9 In London, the Help to Buy Agent is called FIRST STEPS and is managed in partnership between the Greater London Authority and online property portal Share to buy.

6.13 Eligibility for Shared Ownership

- 6.13.1 Shared ownership housing schemes are government funded, and as such there are specific criteria and eligibility rules which govern who can purchase these homes. The scheme is open to all those that meet the eligibility criteria and can afford to purchase a shared ownership home.
- 6.13.2 To be eligible to purchase a Help to Buy shared ownership home you must meet the following criteria:-
- Your household income must be under £60,000 per year (in London £66,000 for 1 to 2 bedroom and £80,000 for a 3+ bedroom property);
 - You must also be able to demonstrate that you do not have adverse credit history and can afford to sustain the costs involved in buying or renting a home;
 - You must show that you are not in mortgage or rent arrears, or in breach of your current tenancy agreement at the time of application;
 - You must not already own a home in the UK or abroad.
- 6.13.3 There is high demand for Help to Buy - shared ownership options which means that applicants must be prioritised. Priority is given in the following order:
- Existing social tenants and serving military personnel;
 - Local authorities are able to choose priority applicant groups for affordable home ownership according to the specific needs of their locality;
 - Other first time buyers who fit all other qualifying criteria detailed above.
- 6.13.4 However, housing providers do not often receive enough applications from social housing tenants and military personnel to fill their available developments and purchasers are more likely to come from priorities 2 and 3.

- 6.13.5 There are also shared ownership schemes targeted at specific groups, such as shared ownership for disabled people and for those over 55 years old.
- 6.13.6 The following tables utilise data from the 'Share to Buy' and Rightmove websites.
- 6.13.7 In Brentwood only one shared ownership property for sale was found and this was a resale. An income of almost £29,000 was needed to be able to afford this property. If a 5% deposit was made they would need £4,500 to cover that.
- 6.13.8 The cost of the legal fees would be on top of these deposit payments.

6.14 Shared Equity Schemes

- 6.14.1 Shared equity is not 'shared ownership' as the buyer owns 100% of the property and does therefore not pay rent, but receives an equity loan as a Government incentive to help first time buyers.
- 6.14.2 There are two shared equity schemes; FirstBuy and HomeBuy Direct but not everyone is eligible and applicants must meet certain criteria regarding income, residency and other measures.
- 6.14.3 Under these schemes the buyer has to find a mortgage of 70% or 80% of the full market value. For the first 5 years, equity loan will be interest free. After five years a charge is payable typically 1.75% per annum on the outstanding equity loan. This fee will rise on an annual basis by the Retail Price Index (RPI) plus 1%.
- 6.14.4 After 25 years the loan will need to be paid back in full. As it is an 'equity loan', it is proportionate to the property value rather than being a fixed figure. Because of this, the amount that will have to be repaid will depend on the value of the property at the time.
- 6.14.5 There were five 2 bedroom properties for sale in Brentwood under the FirstBuy or shared equity schemes.
- 6.14.6 All these properties are new build and the service charge has not been calculated. The monthly charge is therefore only the estimated monthly mortgage and is likely to be more with service charges. The income needed to buy these ranged from almost £39,000 to just over £44,000. A 5% deposit would be between £8,344 and £9,440.

6.14.7 The table below shows examples of Shared Ownership costs, incomes required and concealed households able to afford. Examples were found in all five Essex authorities, although there was only one in Brentwood.

Table 6-3 Shared Ownership Costs, Incomes Required and Concealed Households able to afford

Area	Property Type	Full Sale Price	Share Price	Monthly Cost*						
				Rent	Mortgage	Service / Estate Charge	Total Monthly Cost	5% Deposit	Income Required	Concealed Households able to afford (%)
Brentwood	2 Bed Terrace House - Resale	£180,000	£90,000 - 50%	£205	£577	£13	£795	£4,500	£28,900	24.7
Braintree	2 Bed Terrace House - Resale	£185,000	£55,500 - 30%	£332	£324	£17	£673	£2,775	£24,500	30.7
Braintree	2 Bed Terrace House - Resale	£175,000	£87,500 - 50%	£197	£562	£45	£804	£4,375	£29,250	17.7
Chelmsford	1 Bed Apartment - Resale	£120,000	£90,000 - 75%	£69	£577	£144	£790	£4,500	£28,700	
Chelmsford	1 Bed House - Resale	£130,000	£65,000 - 50%	£111	£417	£20	£548	£3,250	£19,950	
Chelmsford	2 Bed Apartment - Resale	£205,000	£67,650 - 33%	£257	£434	£150	£841	£3,382	£30,600	
Chelmsford	1 Bed Apartment - Resale	£120,000	£90,000 - 75%	£69	£577	-nd-	£646 Excl SC	£4,500	£23,500 Excl SC	
Chelmsford	2 Bed Apartment - Resale	£220,000	£110,000 - 50%	£397	£706	£150	£1,253	£5,500	£45,550	
Chelmsford	1 Bed Apartment - New	£120,000	£90,000 - 75%	£69	£577	£145	£791	£4,500	£28,750	
Colchester	1 Bed Apartment - Resale	£135,000	£94,500 - 70%	£93	£606	£110	£726	£4,725	£26,400	
Colchester	1 Bed Apartment - Resale	£122,850	£85,995 - 70%	£84	£552	£90	£637	£4,300	£23,170	
Colchester	2 Bed Apartment - Resale	£125,000	£50,000 - 40%	£220	£321	£96	£637	£2,500	£23,170	
Colchester	1 Bed Apartment - Resale	£78,500	£39,250 - 50%	£69	£252	£115	£436	£1,962	£15,850	
Colchester	1 Bed Apartment - Resale	£93,333	£70,000 - 75%	£53	£449	£34	£536	£3,500	£19,500	
Maldon	2 Bed House - New	£240,000	£60,000 - 25%	£420	£384	£58	£862	£3,000	£31,350	15.8
Maldon	3 Bed House - New	£280,000	£70,000 - 25%	£525	£449	£59	£1,033	£3,500	£37,550	13.2

Note: Income required based on monthly housing costs not exceeding 33% of gross income and a 5% deposit. Monthly costs based on 6.5% mortgage rate over 25 years. New S/O based on 2.75% rent. % of Concealed Households able to afford each property based on the incomes in the DCA Housing Survey 2013.

6.14.8 The table below shows examples of FirstBuy and Shared Equity costs, incomes required and percentage of households able to afford these costs. Examples were found in four of the Essex authorities, there were no properties found in Maldon.

Table 6-4 FirstBuy / Shared Equity, Incomes Required and % of Households wishing to buy able to afford

Area	Property Type	Full Sale Price	Share Price	Monthly Cost*					
				Mortgage	Service / Estate Charge (SC)	Monthly Cost Excl SC	5% Deposit	Income Required Excl SC	Households able to afford (%)
Brentwood	2 Bed Apartment	£236,000	£188,800 - 80%	£1,211	-nd-	£1,211	£9,440	£44,050	10.3
Brentwood	2 Bed Apartment x 3	£225,500	£169,125 - 75%	£1,085	-nd-	£1,085	£8,456	£39,450	13.3
Brentwood	2 Bed Apartment	£222,500	£166,875 - 75%	£1,070	-nd-	£1,070	£8,344	£38,900	13.8
Braintree	3 Bed Terrace House	£220,000	£176,000 - 80%	£1,129	-nd-	£1,129	£8,800	£41,090	0.0
Braintree	2 Bed Apartment	£145,000	£116,000 - 80%	£744	-nd-	£744	£5,800	£27,090	23.9
Chelmsford	2 Bed Apartment	£179,500	£143,600 - 80%	£921	-nd-	£921	£7,180	£33,500	
Colchester	3 Bed Terrace House	£199,995	£159,996 - 80%	£1,026	-nd-	£1,026	£8,000	£37,300	12.3
Colchester	3 Bed Semi-Detached	£225,000	£180,000 - 80%	£1,155	-nd-	£1,155	£9,000	£42,000	8.7
Colchester	2 Bed Apartment	£133,950	£107,160 - 80%	£651	-nd-	£651	£5,358	£23,675	27.2
Colchester	2 Bed Apartment	£130,995	£104,796 - 80%	£672	-nd-	£672	£5,240	£24,440	25.4
Colchester	3 Bed Terrace House	£189,995	£151,996 - 80%	£975	-nd-	£975	£7,600	£35,450	14.4
Colchester	3 Bed Terrace House	£182,995	£146,396 - 80%	£939	-nd-	£939	£7,320	£34,150	15.1
Colchester	3 Bed House	£250,000	£200,000 - 80%	£1,283	-nd-	£1,283	£10,000	£46,655	9.9
Colchester	3 Bed House	£235,000	£188,000 - 80%	£1,206	-nd-	£1,206	£9,400	£43,855	7.6
Colchester	3 Bed Terrace House	£194,995	£155,996 - 80%	£1,001	-nd-	£1,001	£7,800	£36,400	4.2

Note: Income required based on monthly housing costs not exceeding 33% of gross income. Minimum deposit of 5% has been calculated. Monthly costs based on 6.5% mortgage rate over 25 years. % of Households wanting to buy and able to afford each property based on the incomes in the DCA Housing Survey 2013.

6.15 The Private Rented Sector

- 6.15.1 DCA undertook a survey of the main estate / letting agents in each area to gather data on the entry rent levels for each sub-area, set out below. Some property types had low levels of supply and the data should be treated with caution. The total sample was around 350 properties.

Table 6-5 Average and Entry Rent Levels, May 2013 (£ p/m)

Property Type	Brentwood		South		North		Urban		Borough-wide	
	Average	Entry	Average	Entry	Average	Entry	Average	Entry	Average	Entry
1-Bed Flat	774	700	747	600	754*	no data	667	600	746	675
2-Bed Flat	1,055	850	1,182	850	848*	795*	985	825	1,078	825
2-Bed Terraced	976	900	916	845	1,009*	950*	992	895	973	985
3-Bed Terraced	1,244	1,100	1,226	1,100	995*	995*	1,093	975	1,182	1,000
2-Bed Semi-detached	1,099	995	1,053	895	1,150*	no data	1,024	890	1,064	895
3-Bed Semi-detached	1,299	1,100	1,174	1,050	1,423*	1,250*	1,314	1,150	1,267	1,100

* Low level of data

Source: DCA House Price Survey May 2013

- 6.15.2 Entry rental costs (the lowest quartile averages) in the private rented sector vary by location within the Borough.
- 6.15.3 The private rented sector entry level rents start from £600 per month in the Urban sub-area, rising to £700 in the Brentwood sub-area for a one bedroom flat, the smallest unit. A 2-bedroom flat ranges from £795 per month in the North sub-area rising to £850 in the Brentwood and South sub-areas.
- 6.15.4 In the case of 2-bedroom terraced houses, entry rent levels range from £845 per month in the South sub-area, rising to £950 in the North. 3-bedroom terraced rents start from £890 month in the Urban sub-area, rising to £1,100 in Brentwood and South.
- 6.15.5 Entry level rents for 2-bedroom semi-detached homes range from £890 in the Urban sub-area rising to £995 in the Brentwood sub-area. 3 bedroom semi-detached properties start from around £1,050 in the South and rise to £1,250 per month in the North sub-area.

6.16 Rental Income Thresholds

- 6.16.1 The cheapest rental prices of the smallest units in the Borough were assessed in order to calculate the rental income threshold levels. These are based on rent at 25% of gross income (equivalent to 30% of net income). The table below shows the income levels needed to access the private rented market in each sub-area.

Table 6-6 Rental Income Thresholds – May 2013

Area	Income Thresholds (£)		
	1 bedroom Flat	2 bedroom Flat	2 bedroom Terraced
Brentwood	33,600	40,800	43,200
South	28,800	40,800	40,600
North	no data	38,200*	45,600*
Urban	28,800	39,600	43,000

Source: DCA House Price Survey May 2013

NB Figures rounded to nearest hundred.

*low sample

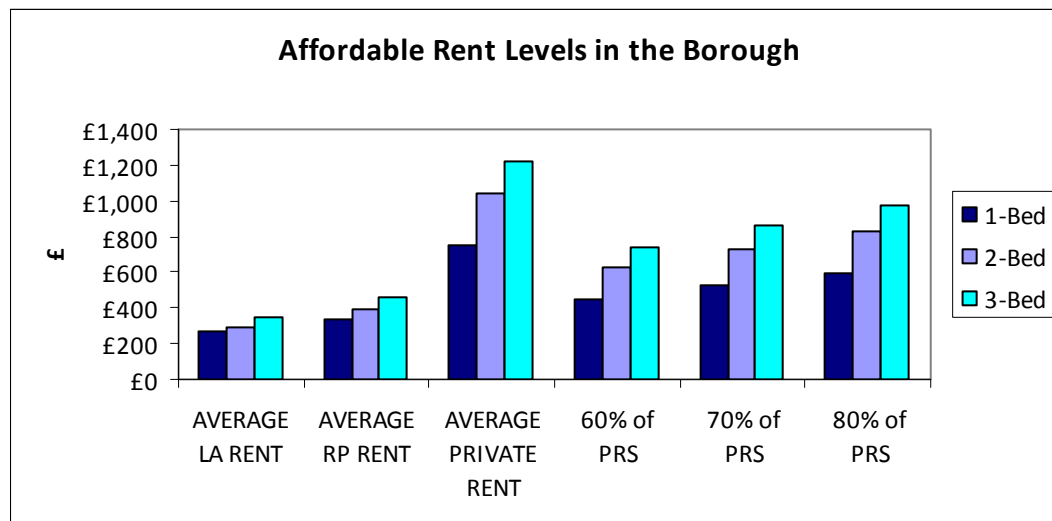
- 6.16.2 The cheapest rental property in the Borough was in the South and Urban sub-areas and requires an income of £28,800 for a 1 bedroom flat.
- 6.16.3 Depending on the household's personal circumstances they may be classed as in need by the Local Authority and placed on the housing register. Therefore there is a possibility that some of the market rent shortfall could be met through Affordable Rent.
- 6.16.4 Affordable Rent is owned and managed by Registered Providers who rent properties at a lower rental cost than private landlords. This is usually at up to 80% of the market rental value and is examined further in section 6.17 below.

6.17 Affordable Rents

- 6.17.1 In April 2011 The Coalition Government introduced Affordable Rents up to 80% of market value for new social rented stock. This decision is to encourage Registered Providers to be less reliant on grant aid for new build schemes and self-finance the schemes by charging a greater amount of rent.
- 6.17.2 The requirement for property size in the intermediate housing market is mainly one and two bedroom units to meet the needs of concealed households, unable to access the market sector as a FTB.
- 6.17.3 However, the decision to introduce Affordable Rents at up to 80% of market value for new social rented stock has had an impact on discounted market rent as an intermediate housing option.
- 6.17.4 60% is marginal for one bedroom properties in the Borough. However, introducing Affordable Rents at 60%, 70% or 80% for all other sizes is a viable option in all sub-areas of the Borough. For example, the average 'headroom' between the 80% level and the RP rent level is £264 pcm for 1 bedroom and £442 pcm for 2 and £519 for 3 bedrooms.
- 6.17.5 The table and graph below shows from the analysis of private sector and social rents that there is a large enough headroom to introduce Affordable Rents across the whole Borough.

Table 6-7 Average Social Rent up to 80% of Average Private Sector Rent

Borough-Wide	Average LA Rent	Average RP Rent	Average Private Rent	60% of PRS	70% of PRS	80% of PRS	Headroom at 80%
1-Bedroom	£268	£333	£746	£448	£522	£597	£264
2-Bedrooms	£296	£389	£1,038	£623	£727	£831	£442
3-Bedrooms	£345	£464	£1,224	£735	£857	£980	£519

Figure 6-8 Affordable Rent Levels in the Borough

Source: Council Data, CORE Data and DCA House Price Search Data May 2013

6.18 Local Housing Allowance for Single People

- 6.18.1 The Local Housing Allowance (LHA) is a way of calculating Housing Benefit for people who live in privately rented accommodation. LHA is a flat rate allowance based on the size of the household (not the size of the property) and the area in which a person lives.
- 6.18.2 Previously a single person aged under 25 years, who does not have a dependant or a non-dependant person living with them, will be entitled to the standard rate of Local Housing Allowance for a room in shared accommodation.
- 6.18.3 From January 2012 the shared room rate restriction has applied to single people aged under 35 years. Exemptions, for example for those in receipt of severe disability premium and living in certain types of supported accommodation, have continued to apply.
- 6.18.4 However when considering housing needs, the SHMA Practice Guidance 2007 states that we must include anyone over the age of 25 years sharing facilities. Therefore until new guidance is published anyone over the age of 25 years will be included in the calculation for future housing need.

Table 6-8 Shared Accommodation Maximum Local Housing Allowance / Lower Quartile PRS Monthly Rents at May 2013

Area	Number of PRS Shared Properties Found	Shared	
		LHA	PRS Rent
Brentwood	4	£282	£400
Braintree	5	£325	£350
Chelmsford	19	£325	£425
Colchester	36	£275	£350
Maldon	no data	£325	no data
Outer NE London)	26	£310	£377

Source: DCA house price search 2013/ www.voa.gov.uk

6.18.5 There are not a large number of shared accommodation properties available.

6.18.6 The Council and Registered Housing Providers should investigate how many single person households may be affected by these changes and offer them housing options and benefit advice.

6.19 Affordability for Local Householders

6.19.1 Earlier in this section we highlighted the costs of various types and tenures of properties, including social rent, intermediate rent, average private rent costs and average house prices.

6.19.2 We have also detailed the incomes of newly forming and existing households in section 5.

6.19.3 These findings are brought together to create a tenure cost analysis table by dwelling size and the results can be found in the table below.

Table 6-9 Tenure Cost Analysis

	Tenure				
	Social Rent	Intermediate	Private Rent	Owner Occupation	New Build
1 bedroom	£333	£435	£675	£830	£1,181
2 bedroom	£389	£811	£825	£1,214	£1,423
3 bedrooms	£464	-nd-	£1,000	£1,400	£2,021

Source: Social Rent – Data provided by Brentwood Borough Council

Intermediate – ‘Sharetobuy’ and ‘Helptobuy’ websites (lowest monthly cost used)

Private Rent – DCA house price survey (Average level rents used)

Owner Occupation – DCA house price survey (Average costs used) based on 10% deposit

New Build – Rightmove website (Average costs used) based on a 10% deposit

-nd- no data available for this type / size

6.19.4 Section 5 Table 5-9 shows the monthly amount new forming households are able / willing to pay in rent / mortgage costs for their new home.

6.19.5 44.6% of new forming households are able and willing to pay no more than £500 per month. Therefore based on the tenure cost analysis in the table above, the only option available to these households would be social rent or a 1 bedroom property in the intermediate sector.

7 WELFARE REFORMS

7.1 Introduction

- 7.1.1 The Government is implementing a number of changes to the benefit system. The Welfare Reform Act of 2012 introduces a range of changes that will have an impact on the private rented sector, housing associations and their tenants.
- 7.1.2 The majority of the changes will only affect those residents of working age, although retired households where one person is of working age may be affected when universal credit is introduced.
- 7.1.3 A number of the changes have already been implemented in the private rented sector such as:-
- A cap on the amount of local housing allowance paid depending on the size of the house;
 - Under-occupancy criteria;
 - Single under-35 year olds only eligible for shared accommodation housing benefit.
- 7.1.4 The main changes are now affecting the social rented sector, including the size criteria for social housing and the household benefit cap. These were introduced from April 2013 and the new Universal Credit is due to be phased in between April 2013 and 2017.
- 7.1.5 The primary component of the Welfare Reform Act is the introduction of Universal Credit from April 2013 in certain areas which will result in a single benefit payment being made directly to social housing tenants.
- 7.1.6 It will also introduce size criteria (often referred to as the bedroom tax) for the calculation of housing benefit in the social rented sector as well as caps on total benefits introduced in 2013.
- 7.1.7 These reforms are likely to have financial impacts on housing associations and tenants and, in turn, will lead to the adoption of coping strategies with important consequences.
- 7.1.8 From April 2013 the Government has introduced a weekly limit on the total amount of benefit that most people aged 16 to 64 can get. This is called a 'benefit cap'. A benefit cap was introduced in all council areas between 15 July and 30 September 2013.
- 7.1.9 The benefit cap was introduced on 15 April 2013 to the following 4 council areas:
- Bromley
 - Croydon
 - Enfield
 - Haringey
- 7.1.10 The benefit cap was introduced in all other council areas between 15 July and 30 September 2013.

- 7.1.11 The cap will apply to the total amount that the people get from the following benefits:-
- Bereavement Allowance;
 - Carer's Allowance;
 - Child Benefit;
 - Child Tax Credit;
 - Employment and Support Allowance (unless it includes the support component);
 - Guardian's Allowance;
 - Housing Benefit;
 - Incapacity Benefit;
 - Income Support;
 - Jobseeker's Allowance;
 - Maternity Allowance;
 - Severe Disablement Allowance;
 - Widowed Parent's Allowance (or Widowed Mother's Allowance or Widows Pension that started before 9 April 2001).
- 7.1.12 The level of the cap will be:-
- £500 a week for couples (with or without children living with them);
 - £500 a week for single parents whose children live with them;
 - £350 a week for single adults who don't have children, or whose children don't live with them.
- 7.1.13 Local authorities should ensure that residents receive the necessary advice and assistance in dealing with the changes to their benefits. This may include:
- Housing option advice; and
 - Benefit advice.

7.2 Housing Benefit and Under-Occupancy

- 7.2.1 In April 2013 the Government introduced a new 'size criteria' (bedroom tax) for tenants renting the social sector. As a result, any working age household deemed to be under-occupying their property will see a reduction in their housing benefit.
- 7.2.2 The new size criteria will only apply to working age households in any social sector housing. It does not apply to pensioner households who are specifically excluded from this legislation or those living in private rented accommodation as they are covered under new Local Housing Allowance (LHA) regulations.
- 7.2.3 Since April 2013, the number of bedrooms a working age household is deemed to require is based on the following criteria for a 1 bedroom property:-
- A couple;
 - Adult aged 16+.

- 7.2.4 The number of bedrooms a working age household is deemed to require is based on the following criteria for a 2 bedroom property:-
- One child;
 - Two children aged 0-16 years of the same sex;
 - Any 2 children under the age of 10.
- 7.2.5 There will be discretionary help for disabled tenants who require an extra bedroom for an overnight carer and for those households with foster children. For any household deemed to have more bedrooms than they require their housing benefit will be reduced by:-
- 14% for 1 'extra' bedroom;
 - 25% for 2 or more 'extra' bedrooms.

Housing Benefit Changes

- 7.2.6 The amount of housing benefit paid for a private rented property is usually based on the LHA in the area, household income and personal circumstances.
- 7.2.7 From the 15th April 2013 the maximum amount of housing benefit that can be received is shown in the table below.

Table 7-1 Maximum Housing Benefit Payable

Property	Weekly amount
1 bedroom (or shared accommodation)	Up to £250
2 bedrooms	Up to £290
3 bedrooms	Up to £340
4 bedrooms	Up to £400

- 7.2.8 The benefit cap has been in place in Brentwood since October 2013. Council officers should contact the affected households to discuss their housing options.
- 7.2.9 Table 7-2 shows the maximum Local Housing Allowance payable since April 2013 for Brentwood and surrounding local authority areas.
- 7.2.10 The allowance varies quite considerably from area to area. The table below shows the lower quartile private sector rent for the same areas.

- 7.2.11 In Brentwood the local housing allowance will not meet the full amount of private sector rent.

Table 7-2 Maximum Local Housing Allowance / Lower Quartile PRS Monthly Rents at May 2013 (rounded)

Area	Shared		1 Bedroom		2 Bedrooms		3-Bedrooms	
	LHA	PRS Rent	LHA	PRS Rent	LHA	PRS Rent	LHA	PRS Rent
Brentwood	£282	£400	£550	£675	£ 685	£825	£801	£1,000
Braintree	£325	£350	£525	£450	£650	£575	£792	£695
Chelmsford	£325	£425	£525	£550	£650	£675	£792	£795
Colchester	£275	£350	£445	£495	£562	£615	£700	£700
Maldon	£325	no data	£525	£425	£650	£550	£792	£700
Outer NE London	£310	£377	£664	£700	£819	£897	£1,000	£995

- 7.2.12 Brentwood is one of the most expensive authorities in the Region. It is therefore unlikely that residents currently living in London Boroughs or surrounding areas will move to Brentwood for more affordable housing.
- 7.2.13 In fact those living in unaffordable housing in Brentwood may choose to leave the Borough to a more affordable area. It is therefore difficult to predict the effect on need for additional private rented properties in Brentwood.
- 7.2.14 It is impossible to predict how the changes will affect Brentwood or any other Local Authority, as cost is not the major factor which drives housing markets. There is speculation that residents affected by the housing benefit changes will move to areas that offer cheaper housing however this cannot be quantified.
- 7.2.15 Once the changes have been in place for a year more information may be available on the pattern of migration.
- 7.2.16 Social housing providers will need to take these new regulations into account when allocating housing as well as when deciding on property sizes on new developments.
- 7.2.17 Under-occupancy of large family homes is already being prioritised by many housing providers.
- 7.2.18 The changes will heighten the **need to address under-occupancy** to ensure that residents on low incomes do not fall into arrears due to reduced housing benefit being paid towards their rent.

8 CURRENT HOUSING IN BRENTWOOD

8.1 Key Findings

- Survey data revealed that 62.9% of the property type profile is made up of detached and semi-detached houses and the average number of bedrooms by property across the Borough is 2.9.
- 69.2% of properties in the market sector are 3 bedrooms or more, compared to 30.8% of properties in the social sector.
- The overall over-occupation level of 2.6% (839 implied households), is lower than the average UK level indicated by the Survey of English Housing 2010/11 at 3.0%.
- The highest level of over-occupation is in the Registered Provider rented accommodation at 12.0%.
- The overall under-occupation figure of 42.9% was higher than the average found in recent DCA surveys (around 40%). Under-occupation was highest at 64.2% of owner occupiers with no mortgage.
- In the social rented sector the levels are lower but suggest around 351 properties are under-occupied by two spare bedrooms.
- 88% of respondents said their home was adequate for their needs; 12% considered their home inadequate for their needs.
- The lowest adequacy by tenure was found in the private rented sector at 66.6% and similarly in the RP sector at 67.2%.
- The main reason for inadequacy was that the property was too small (43.1% of households).

8.2 Type Profile

- 8.2.1 This section sets the scene for later examination of the housing market and outlines current housing circumstances of households in Brentwood.
- 8.2.2 The current supply of housing by tenure and property types will have to be taken into account when assessing the future need for houses and affordability in the area.

- 8.2.3 Table 8-1 below indicates the type of accommodation occupied by existing households responding to the question.

Table 8-1 Type of Accommodation 2013

Question 2

Type	2013 Survey %	N ^{OS} implied	2011 Census %
Detached House	28.9	9,378	31.0
Detached Bungalow	5.0	1,626	
Semi-detached House	25.7	8,341	31.9
Semi-detached Bungalow	5.2	1,686	
Terraced House	13.8	4,460	15.7
Terraced Bungalow	1.1	363	
Flat	19.4	6,292	21.1
Bedsit/Studio/Room Only	0.9	288	
Houseboat/Caravan/Mobile Home	0.0	0	0.3
Total	100.0	32,434	100.0

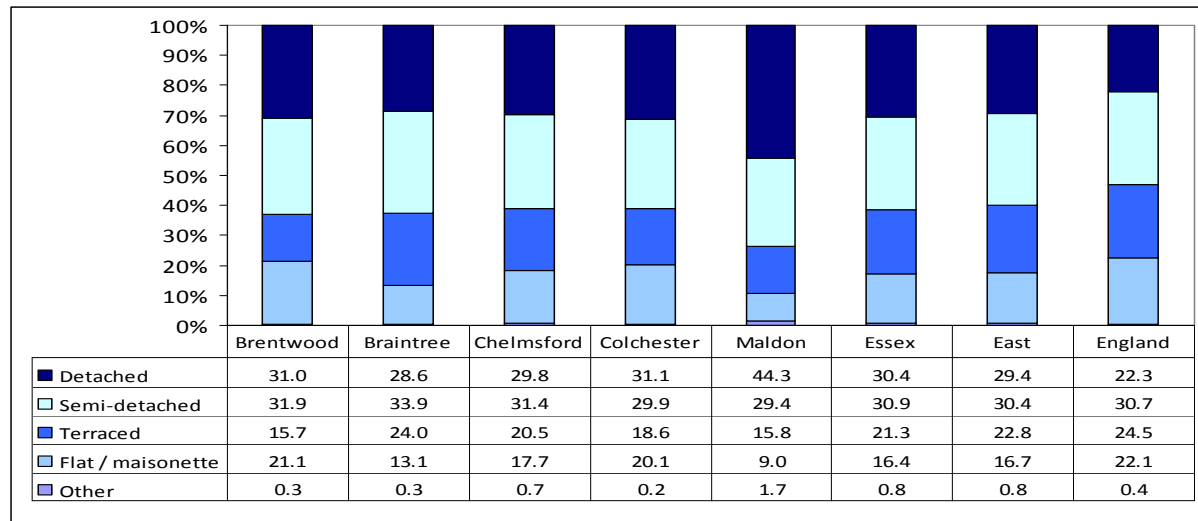
Source: Crown Copyright © Census 2011

Source: DCA Brentwood 2013 Housing Needs Survey

- 8.2.4 64.8% of households in Brentwood live in a detached or semi-detached house (33.9% / 30.9%) and only 14.9% live in a terraced house. The level of flats in the Borough at 19.4% is very close to the national average level of 20%.

- 8.2.5 The following graph shows the type profile in the 2011 Census.

Figure 8-1 Type of Accommodation 2011



Source: Crown Copyright © Census 2011

- 8.2.6 Brentwood has a higher level of detached properties at 31.0% compared to the regional and national benchmark areas and the proportion of semi-detached properties was also higher at 31.9%.

8.3 Tenure Profile

8.3.1 This section examines the tenure profile in Brentwood, from the 2011 Census data and the 2013 housing survey data which uses the current social stock level.

8.3.2 The table below shows the tenure profile of existing households in the Borough from the 2013 housing needs survey data.

Table 8-2 Tenure Profile 2013

Question 1

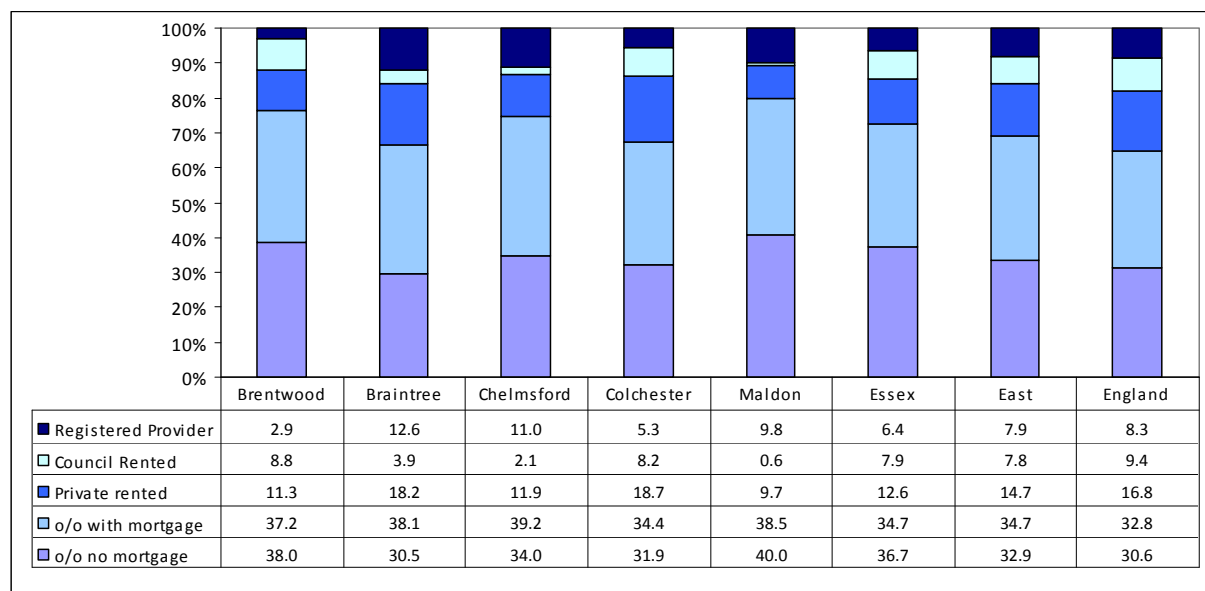
Tenure	2013 Survey %	N ^{OS} implied	2011 Census
Owner Occupied with Mortgage	38.3	12,441	37.2
Owner Occupied no Mortgage	38.4	12,490	38.0
Private rented	11.3	3,675	11.3
Council Rented	7.8	2,524	8.8
RP rented	2.7	883	2.9
Shared Ownership	0.0	16	0.6
Tied to employ / living rent free	1.5	457	1.2
Total	100.0	32,486	100.0

Source: DCA Brentwood 2013 Housing Needs Survey and Crown Copyright © Census 2011

8.3.3 Owner occupation accounts for 76.7% of the Borough, a slight increase from the 2011 Census data where 75.2% were owner occupiers.

8.3.4 19.1% were in Social Rented accommodation and 11.3% were in private rented accommodation. The following graph shows the tenure profile as was in the 2011 Census.

Figure 8-2 Tenure Profile 2011



Source: Crown Copyright © Census 2011

- 8.3.5 The 2011 Census recorded a level of owner-occupation of 75.2% in Brentwood, higher than in Essex (71.4%) and nationally (63.4%).
- 8.3.6 The 2011 Census recorded that Brentwood has lower levels of social stock (11.7%), compared to Essex (14.3%), the East Region (15.7%) and nationally (17.7%).
- 8.3.7 The level of private rented accommodation was 11.3% in Brentwood, lower than the region at (14.7%) and national benchmarks (16.8%).
- 8.3.8 The following table shows the results from a cross tabulation of property type by tenure.

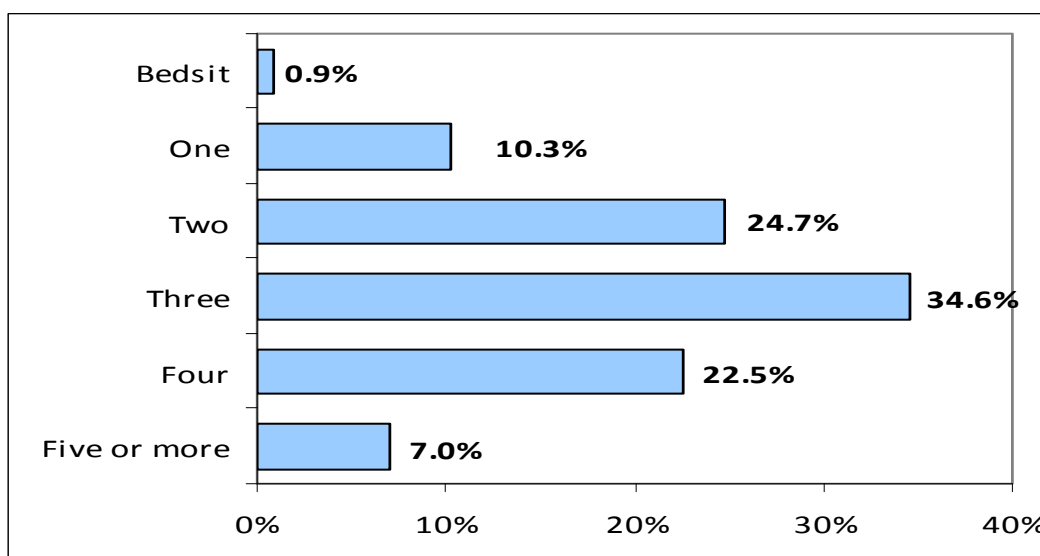
Table 8-3 **Property Type by Tenure (%)**

Question 2 by Question 1

Tenure Type	Detached House	Semi-Detached House	2011

- 8.3.10 The figure below shows the proportion of properties by the number of bedrooms in the Borough.

Figure 8-3 **Number of Bedrooms 2013**
Question 3



Source: DCA Brentwood 2013 Housing Needs Survey

- 8.3.11 The average number of bedrooms across the stock was 2.9, which is slightly higher than the average found in other recent DCA surveys (2.8).
- 8.3.12 The following table shows the breakdown for the number of bedrooms by sub-area for social stock only.
- 8.3.13 The majority of stock (around 72%) is either one or two bedroom accommodation. The larger concentrations of stock are in the Urban area.

Table 8-4 **Number of bedrooms per sub-area (Social Stock)**

Type	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms
North	153	126	195	0
South	118	108	91	0
Urban	629	675	416	13
Total	900	909	702	13

Source: Brentwood Council Data

8 units could not be allocated due to no area marker so total is 2,516 rather than 2,524
(Does not include sheltered accommodation or hostels)

- 8.3.14 In the social stock the main size of property was 2 bedrooms, followed by 1 bedroom accommodation. The highest proportion of 2 bedroom properties was found in the Urban sub-area (74.3%).
- 8.3.15 The highest proportion of 1 bed properties was found in the Urban sub-area (around 69.9%) where the main property type was flats.
- 8.3.16 The breakdown of size by number of bedrooms in percentage terms between the ownership and rental sectors was assessed with the following results.

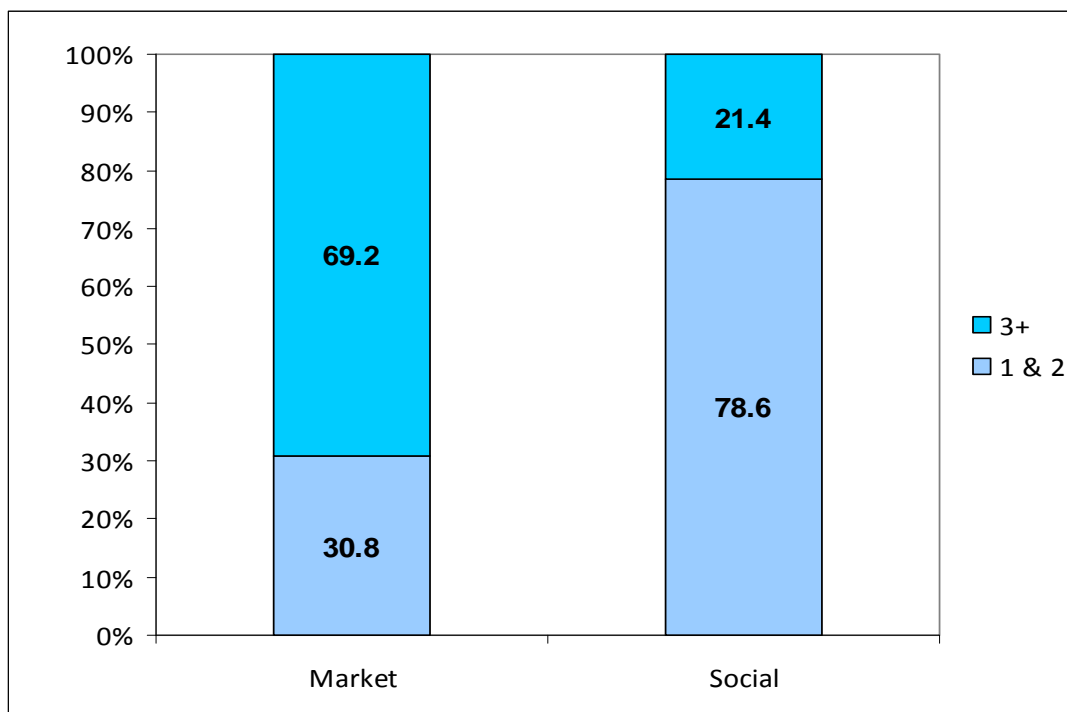
Table 8-5 Number of Bedrooms by Tenure

Question 3 by Question 1

Tenure	Bedsit	One	Two	Three	Four	Five+	Total
Owner Occupied (With Mortgage)	0.0	3.9	17.0	40.4	27.8	10.9	100.0
Owner Occupied (No Mortgage)	0.0	5.0	19.8	38.0	30.0	7.1	100.0
Private rented	2.0	22.5	55.5	17.2	2.8	0.0	100.0
Council Rented	4.8	37.3	36.1	21.8	0.0	0.0	100.0
RP rented	10.7	47.8	22.8	18.7	0.0	0.0	100.0
Shared Ownership*	0.0	0.0	0.0	100.0	0.0	0.0	100.0
Tied to employment*	0.0	0.0	71.1	19.3	0.0	9.6	100.0

*Low volume of data Source: DCA Brentwood 2013 Housing Needs Survey

- 8.3.17 The proportion of small units, bedsit / 1 and 2-bedroom properties, is high in the social rented sector at 78.6% of social rented stock.
- 8.3.18 Larger units are more predominant in the owner occupied and private rented sector at 69.2% and only 30.8% one and two bedroom properties.

Figure 8-4 Market and Social Stock by Number of Bedrooms

Source: DCA Brentwood 2013 Housing Needs Survey

8.4 Property Condition and Facilities

- 8.4.1 As well as the number of properties in Brentwood, overall supply is influenced by property condition and investment in maintenance. A residential property is only fit for purpose if it addresses the requirements of those that live in it by meeting minimum quality standards.
- 8.4.2 It is Government policy that everyone should have the opportunity of living in a “decent home”. The Decent Homes Standard contains four broad criteria that a property should have. These are outlined below:-
- A - be above the legal minimum standard for housing;
 - B - be in a reasonable state of repair;
 - C - have reasonably modern facilities (such as kitchens and bathrooms) and services;
 - D - provide a reasonable degree of thermal comfort (effective insulation and efficient heating).
- 8.4.3 If a dwelling fails any one of these criteria it is considered to be ‘non decent’.
- 8.4.4 Whilst the changes under the revised definition and guidance for the decent homes standard apply, there has been a change in criterion A of the standard from April 2006. Prior to this change criterion A used the Housing Fitness Standard as the measure of whether a dwelling meets the minimum legal standard.
- 8.4.5 From April 2006 the new Housing Health and Safety Rating System (HHSRS) under Part 1 of the Housing Act 2004 replaced the existing statutory fitness standard and set new standards for acceptable accommodation.
- 8.4.6 The new system assesses “hazards” within dwellings and categorises them into Category 1 and Category 2 hazards. Local Authorities have a duty to take action to deal with Category one Hazards. The HHSRS also applies to the Decent Homes Standard – if there is a Category 1 Hazard at the property it will fail Criterion A of the standard.
- 8.4.7 Mandatory duties to deal with Category 1 Hazards include improvement notices, prohibition orders, hazard awareness notices, emergency remedial action, emergency prohibition orders, demolition orders or slum clearance declarations.
- 8.4.8 Since the new Housing Health and Safety Rating System replaced the Fitness Standard, the proportion of dwellings with a Category 1 Hazard has become the more significant figure utilised when assessing stock condition.
- 8.4.9 Brentwood Borough Council had a house condition survey carried out in 2004 which highlighted that the level of non-decent homes was around 15.9% of private sector dwellings (4,461).

8.4.10 The following table shows the results for the question on households heating / energy saving facilities in their home.

Table 8-6 Energy Facilities by Type
Question 7a by question 2

	Detached		Semi Detached		Terraced		Bungalows		Flat		Bedsit / Studio / Room Only		All Types	
	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}
Central Heating (All rooms)	98.2	9,178	93.4	7,657	89.8	3,922	93.5	3,436	84.1	5,242	86.1	218	92.5	29,653
Central Heating (Partial)	2.3	213	4.6	373	5.4	236	4.1	151	7.2	447	13.9	35	4.5	1,455
Double Glazing (All rooms)	83.2	7,777	84.4	6,920	81.1	3,541	84.6	3,109	73.6	4,590	60.4	153	81.3	26,090
Double Glazing (Partial)	8.4	782	6.6	538	8.8	386	9.3	342	5.9	368	11.8	30	7.6	2,446
Cavity Wall Insulation	49.3	4,609	44.1	3,614	42.8	1,871	34.9	1,283	17.4	1,086	0.0	0	38.9	12,463
Loft Insulation	86.2	8,055	79.7	6,528	78.0	3,406	83.8	3,078	17.4	1,082	25.0	63	69.3	22,212
Water pipes insulated	57.3	5,352	42.7	3,502	33.8	1,477	54.2	1,991	17.4	1,086	25.0	63	42.0	13,471
Room Heaters	7.0	654	6.8	556	10.0	438	8.5	311	13.0	811	0.0	0	8.6	2,770
TOTAL		36,620		29,688		15,277		13,701		14,712		562		110,560

Source: 2013 Brentwood Housing Needs Survey Data

8.4.11 The proportion of all types of households with some form of central heating was 97.0%.

- 8.4.12 Cross tabulation of energy facilities by type revealed the lowest level of central heating (all rooms) was in a flat / maisonette. The type of housing with the highest level of central heating was detached properties.
- 8.4.13 88.9% of households had some form of double glazing, the highest level was found in bungalow accommodation.

Table 8-7 Main source of heating
Question 7b

	%	Nos. Implied
Gas	91.0	29,254
Electric	7.4	2,361
Oil	0.9	277
Wood Burner / Open Fire	0.5	172
Other	0.2	68
Total	100.0	32,132

Source: 2013 Brentwood Housing Needs Survey Data

- 8.4.14 The main source of heating was gas at 91.0%. Respondents were also asked how much money they spent on their home fuel bills. Payments were quite well spread between £800 and £1,600, however the largest proportions appear to spend between £1000 - £1,400 per annum.

Table 8-8 Total Annual spend on fuel bills
Question 7b

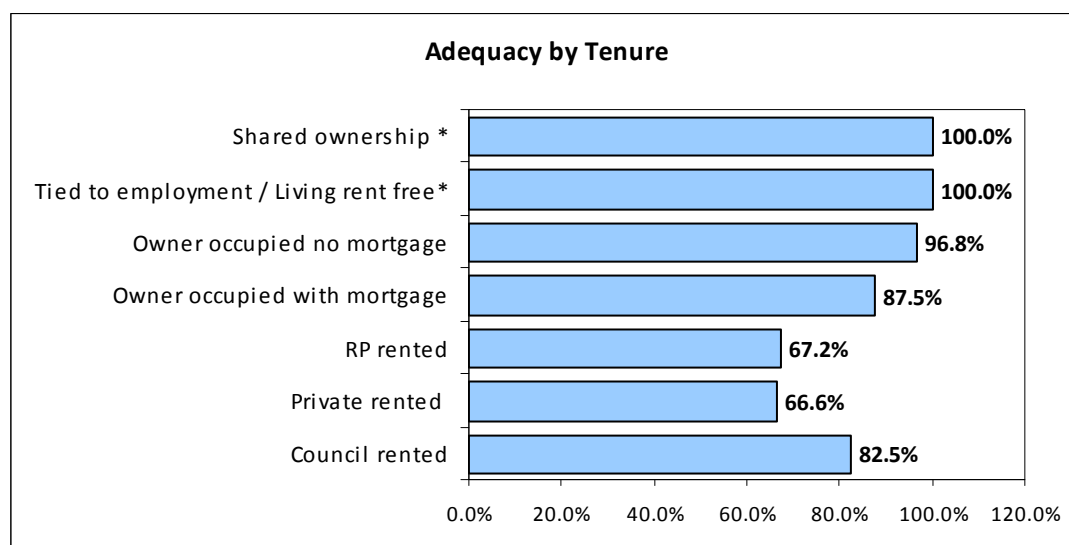
	%	Nos. Implied
Less than £800	11.8	3,645
£801 - £1,000	18.1	5,622
£1,001 - £1,200	19.6	6,090
£1,201 - £1,400	21.0	6,507
£1,401 - £1,600	11.2	3,466
Above £1,600	18.3	5,672
Total	100.0	31,002

Source: 2013 Brentwood Housing Needs Survey Data

8.5 Adequacy of Present Dwelling / Improvement Required

- 8.5.1 88% of respondents indicated that their accommodation was adequate for their needs. A similar level in the region of 89% has been a typical result in recent DCA surveys.
- 8.5.2 12.0% of households in Brentwood (3,793 implied) stated that their accommodation was inadequate. The Guidance test of inadequacy causing a housing need is based on those households in this situation actually needing to move to another dwelling. Some households may technically need to move but decide not to do so.
- 8.5.3 Some variation was evident in adequacy by tenure. The satisfaction level of 82.5% for Council rented was similar to the average found for socially rented accommodation in recent DCA surveys (around 82%).

Figure 8-5 Adequacy by Tenure
Question 8 by Question 1



Source: DCA Brentwood 2013 Housing Needs Survey * Low volume of data

- 8.5.4 The lowest level of adequacy was for the private rented sector at 66.6%, an expected level for a sector with the highest levels of disrepair.
- 8.5.5 The next question in relation to inadequacy was the reason why respondents felt their home was inadequate. This is a multiple choice question and respondents made an average of 2.0 choices each.

Table 8-9 Reason For Inadequacy
Question 8b

Reasons (in Situ)	% responses	% households	N ^{os} . implied (all choices)
Needs improvements / repairs	19.8	40.6	1,802
Too costly to heat	13.9	28.3	1,259
No heating	0.0	0.0	0
Reasons (Require a move)	% responses	% households	N ^{os} . implied (all choices)
Too small	21.1	43.1	1,913
Insufficient number of bedrooms	12.6	25.7	1,140
Rent / Mortgage too expensive	9.8	20.0	886
Housing affecting health of any household member	4.8	9.9	438
Garden too small	6.9	14.1	624
Too large	3.7	7.5	335
Short-term Tenancy	3.1	6.4	285
Suffering harassment	2.4	4.9	217
Garden too big	1.9	3.9	174
Overall Total	100.0		9,073

Source: DCA Brentwood 2013 Housing Needs Survey

- 8.5.6 33.7% of responses identified an 'in house' solution relating to repairs, improvements and heating. 40.6% of households (1,802 implied) selected the need for improvement or repairs as one of their choices.

- 8.5.7 66.3% of responses indicated a solution requiring a move. The largest single issue in this group was that the home was too small, referred to by 43.1% of households as one of their choices, implying 1,913 cases.
- 8.5.8 25.7% said they had an insufficient number of bedrooms and 20.0% said that their rent / mortgage were too expensive.
- 8.5.9 These households were tested on whether they are actually over-occupied by the national bedroom standard and the data showed there were around 839 households in this situation, lower than the level who stated that their home was too small.
- 8.5.10 This suggests that around 1,074 households (1,913 households that said their accommodation was too small minus 839 implied households that were calculated as being over-crowded) may well be expecting additional children or perhaps have an elderly parent coming to live with them which would make their house too small in their view, but equally it could be a desire for more space in general.
- 8.5.11 Although some of them could become over-occupied they have been eliminated from the calculations of those needing to move for this reason in the CLG model later in the report.
- 8.5.12 The table below shows the results for inadequacy by the three sub-areas.

Table 8-10 Reason For Inadequacy by Sub-Area
Question 8b by Sub-Area

Reasons	North % household	Urban % household	South % household
Needs improvements / repairs	36.4	40.6	46.5
Too costly to heat	27.6	29.8	23.5
Too large	23.1	5.0	0.0
Too small	36.9	45.4	41.1
Insufficient number of bedrooms	8.0	30.5	27.5
Rent / Mortgage too expensive	18.8	23.0	10.3
Short-term Tenancy	6.4	5.0	11.3
Suffering harassment	0.0	5.9	6.6
House affecting health of household member	3.7	10.3	14.7
Garden too big	10.2	3.1	0.0
Garden too small	16.6	12.7	16.2

Source: DCA Brentwood 2013 Housing Needs Survey
No data for 'no heating'

- 8.5.13 In the Northern sub-area the main three reasons for inadequacy were property too small (36.9%), needs improvements / repairs (36.4%), and too costly to heat the property at 27.6%.
- 8.5.14 In the Urban sub-area the main three reasons for inadequacy were property too small (45.4%), needs improvements / repairs at 40.6% and insufficient number of bedrooms (30.5%).
- 8.5.15 The highest in the South sub-area were needs improvements / repairs at 46.5%, property too small at 41.1% and an insufficient number of bedrooms at 27.5%.

- 8.5.16 Overall 3,100 households (58.1%) said that a move was necessary to resolve any inadequacy and of those households 32.0% (1,104) indicated that they could afford a home of suitable size in the Borough.
- 8.5.17 The largest proportion of households who said that a move was necessary to resolve any inadequacy are residents in the private rented sector (40.5%) followed by owner occupiers (paying mortgage) at 32.0%.

8.6 Under and Over-Occupation

- 8.6.1 A broad assessment of 'under-occupation' and 'over-occupation' was conducted based on a detailed analysis of the family composition data. The number of bedrooms required in each household was established allowing for age and gender of occupants as defined by the 'bedroom standard'.
- 8.6.2 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 more than one 'spare' bedroom above requirement has been categorised as under-occupied. This is perhaps better described as "two or more spare bedrooms".
- 8.6.3 The assessment of under and over-occupation by tenure revealed some disparity between tenure types as indicated below.

Table 8-11 Under / Over-Occupation by Tenure
Question 16a by Question 3 & Question 1

Tenure	% under occupied	% over- occupied
Owner occupied with mortgage	41.6	2.2
Owner occupied no mortgage	64.2	0.0
Private rented	7.6	5.8
Council Rented	7.7	10.2
RP rented	13.7	12.0
All stock	42.9	2.6

No data for other tenures

Source: DCA Brentwood 2013 Housing Needs Survey

Over-Occupation

- 8.6.4 The overall over-occupation level of 2.6% (839 implied households), is just lower than the average UK level in the Survey of English Housing 2010/11 (SEH) at 3.0%. The highest levels of over-occupation are in the social rented sector, 12% in RP and 10.8% in the Council stock, higher than the average in the Survey of English Housing 2010/11 for the social sector at 7.3%.

Under-Occupation

- 8.6.5 The overall under-occupation figure of 42.9% was slightly higher than the average found in recent DCA surveys (around 40%). This is a factor of the population demographics and the property size profile in the Borough, which has above national levels of detached and semi-detached properties.
- 8.6.6 Under-occupation within the owner occupied no mortgage sector, which will include a higher proportion of elderly households, was at 64.2% higher than the level of around 61.0% found in recent DCA surveys. However, the level in the owner occupied with mortgage sector is still high at around 41.6%.
- 8.6.7 The under-occupation level in the Council rented (7.7%) and RP rented sector (13.7%) is low in comparison to the all tenure average and the owner occupied forms of tenure, as might be expected.
- 8.6.8 The Housing Survey data estimated that there are around 315 social rented properties under-occupied by two or more bedrooms, of which 194 are in the Council rented stock.
- 8.6.9 Tackling under-occupation of family houses to make best use of the existing stock would make a positive contribution to addressing the over-occupation in the stock and meeting need for family units through better re-let supply. In practice it is recognised that this is difficult to achieve.

8.7 Shared Housing and Communal Establishments

- 8.7.1 Shared housing and communal establishments are an important type of accommodation for people vulnerable to homelessness as well as for students. The most reliable data is from the Census.
- 8.7.2 In 2011, 812 residents in Brentwood lived in 46 communal establishments. The three major types of medical and care establishments are nursing homes, residential care homes and other medical and care establishments.
- 8.7.3 The numbers of communal establishments and residents in each of the benchmark areas are shown in Table 8-12.

Table 8-12 Communal Establishments by Area

Area	No. of Communal Establishments	No. of Residents
Brentwood	46	812
Braintree	124	1,621
Colchester	193	5,994
Chelmsford	195	2,128
Maldon	52	532
Essex	1,193	18,147
East Region	5,682	98,360
England	54,596	952,525

Source: Crown Copyright © Census 2011

9 MIGRATION

9.1 Key Findings

- 3,446 implied households had in-migrated to Brentwood over the last three years from outside the Borough, 16.1% had moved from Greater London.
- The main reason for the move within the Borough in the last three years was needed more space at 32.6%.
- 19.2% of in-migrating households moved into the Borough to form their first household.
- Over the next 5 years 34.8% of existing households and 42.5% of concealed households are expected to move out of the Borough.
- In the case of both existing and concealed households the main single interest was in moving to 'elsewhere in the UK'.
- The main reason for the out-migration for both existing and concealed households was unable to afford to buy a home.
- The main net in-migration was from Greater London at +915, followed by elsewhere in Essex at +439. The highest level of net out-migration was to Maldon at – 68 households.
- Over the past 3 years there was a net in-migration of 1,475 households into the Borough.

9.2 Introduction

- 9.2.1 This section looks at the patterns of migration for the Borough. In the first part of the section, the 6,461 implied households (19.9% of the sample) who had moved in the last 3 years were asked where they had moved from.
- 9.2.2 46.7% had previously lived within the Borough; 53.3% had moved in from outside the Borough (3,445 implied households).

9.3 In-Migration to the Borough

- 9.3.1 3,446 households had in-migrated to Brentwood over the last three years from outside the Borough. 16.1% had moved from Greater London, 12.4% from elsewhere in Essex and around 10.0% from elsewhere in the UK.

Table 9-1 Location of Previous Dwelling (In-migrants)
Question 5

Location	%	N ^{os.}
Greater London	16.1	1,039
Elsewhere in Essex	12.4	802
Elsewhere in the UK	10.0	647
Abroad	4.1	265
Chelmsford	3.8	247
Thurrock	3.0	193
Colchester	1.5	97
Basildon	1.0	63
Braintree	0.5	32
Maldon	0.5	35
Epping Forest	0.4	26
Total		3,446

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 9.3.2 19.2% of all those who had in-migrated into the Borough said that it was their first independent home as an adult.
- 9.3.3 Those who had moved into the Borough within the last 3 years were then asked what the three most important reasons were for moving home.

Table 9-2 Reason for Moving for those Moving within or to the Borough
Question 6b

Reason	% Households moved within the Borough	% households in-migrated to the Borough
Needed more space	32.6	21.2
Wanted own home	15.4	11.3
Closer / easier to commute	8.6	7.0
Wanted to buy	8.2	3.0
Relationship / family breakdown	7.9	10.3
To move to a cheaper home	6.8	3.0
Rent arrears / repossession	5.4	0.0
Health reasons	5.2	0.9
Education	3.5	10.1
Needs more parking	2.1	0.0
To be near a relative	2.1	16.5
New Job	1.2	11.2
Needed less space	1.0	2.6
Retirement	0.0	2.9

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 9.3.4 The main reason for a move within the Borough was needed more space at 32.6%, followed by wanted own home and closer / easier to commute.
- 9.3.5 The main reason for in-migrating to the Borough was 'needed more space' at 21.2%. Nearer to a relative, new job and wanted own home were also popular choices.

9.4 Out - Migration from the Borough

- 9.4.1 Out-migration is expected to account for 34.8% of all moves for existing moving households (2,041 implied) and 42.5% of concealed households over the next 5 years (1,295 moves implied).
- 9.4.2 Those moving out of the area were asked where they were thinking of relocating. This was a multiple choice question therefore more than one option was chosen. 1,971 implied existing households (63.2%) responded giving an average of 1.5 choices per household.
- 9.4.3 In the case of concealed households, 1,234 implied households (39.6%) responded to this question giving an average of 1.7 choices per household.
- 9.4.4 In the case of both existing and concealed households moving, the main single interest was in moving elsewhere in the UK at 54.6% and 42.4% respectively.
- 9.4.5 The second most popular choice for existing households was elsewhere in Essex at 28.2%, followed by Chelmsford at 16.0%.
- 9.4.6 In the case of concealed households moving, the second most popular choice was Greater London at 35.0%, then elsewhere in Essex at 31.1%.

Table 9-3 Location of Move for those Moving Outside the Borough
Question 17c

Location	Existing households		Concealed households	
	%	N ^{os.} implied	%	N ^{os.} implied
Braintree	4.6	91	2.6	32
Chelmsford	16.0	315	19.6	242
Colchester	4.5	89	7.6	93
Maldon	8.0	158	2.6	32
Basildon	6.9	137	10.9	134
Epping Forest	1.8	35	2.6	32
Thurrock	3.3	65	2.6	32
Elsewhere in Essex	28.2	556	31.1	383
Greater London	9.6	190	35.0	432
Elsewhere in the UK	54.6	1,077	42.4	524
Abroad	15.5	305	10.4	128
Total		3,018		2,064

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 9.4.7 Those moving out of the area were asked their reasons for moving away. This question was a multiple choice question and each household made an average of 1.5 choices.
- 9.4.8 In the case of both existing and concealed households the main reason was unable to afford to buy a home at 33.8% and 43.2% respectively.
- 9.4.9 The next most popular choices for existing households were family reasons at 33.7% and retirement at 30.4%.
- 9.4.10 In the case of concealed households moving, the next most popular choices were more focused on employment / access to work (34.6%), followed by education at 28.5%, as might be expected from a group likely to have a younger profile.
- 9.4.11 Table 9-4 below shows the full breakdown of reasons for moving out of the Borough for both existing and concealed households.

Table 9-4 Reason for Moving Out of the Borough
Question 17d

Reason	Existing Households		Concealed households	
	% households	N ^{os} . implied	% households	N ^{os} . implied
Unable to afford to buy a home	33.8	660	43.2	530
Family Reasons	33.7	658	7.1	87
Retirement	30.4	593	10.4	128
Quality of neighbourhood	18.7	366	2.6	32
Employment / access to work	18.3	357	34.6	425
Lack of affordable rented housing	6.8	133	20.1	246
Education	4.5	89	28.5	350
Rent arrears / repossession	1.8	35	2.9	35
Total		2,891		1,833

Source: DCA Brentwood 2013 Housing Needs Survey Data

9.5 Migration Summary

- 9.5.1 The tables below show the number of existing households who have moved over the past 5 years in total. This data comes from out-migration showing the pattern over 5 years and in-migration showing the pattern over 3 years. However, the majority of existing households (over 70%) want to move within a 2 year time period so the data below ideally reflects the net migration patterns for existing households over the past 3 years.

Table 9-5 Net Migration Patterns

Migration Areas	Braintree	Chelmsford	Colchester	Maldon
Moving into the Borough	32	247	97	35
Moving out of the Borough	59	206	58	103
Net Migration	- 27	+ 41	+ 39	- 68

Migration Areas	Basildon	Epping Forest	Thurrock	Elsewhere in Essex
Moving into the Borough	63	26	193	802
Moving out of the Borough	90	23	42	363
Net Migration	- 27	+ 3	+ 151	+ 439

Migration Areas	Greater London	Elsewhere in the UK	Abroad	Total
Moving into the Borough	1,039	647	265	3,446
Moving out of the Borough	124	704	199	1,971
Net Migration	+ 915	- 57	+ 66	+ 1,475

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 9.5.2 Over the past 3 years the total net migration for the whole Borough was +1,475 households. This has been calculated by taking the total out-migration figure (1,971) from the total in-migration into the Borough (3,446), leaving a net in-migration total of 1,475 households.
- 9.5.3 The main net in-migration to the Borough was from Greater London at +915, (i.e. 1,039 households moving to the Borough from Greater London minus 124 households moving out of the Borough to Greater London). The next highest level was from elsewhere in Essex at +439. The lowest in-migration was from Epping Forest at +3.
- 9.5.4 The highest level of net out-migration from Brentwood was to Maldon at -68. There were smaller levels of net out-migration to Elsewhere in the UK (-57), Basildon (-27) and Braintree (-27).

10 HOUSEHOLDS MOVING WITHIN THE BOROUGH

10.1 Key Findings

- 25.7% of all households planned a move within the Borough in the next 5 years.
- **2,743** existing households require market housing and **1,014** need affordable housing.
- **1,610** concealed households need market housing and **693** need affordable housing.
- The main tenure requirement for both existing and concealed households was owner occupation.
- There is expressed demand for 190 shared ownership units from existing and concealed households forming.

10.2 Introduction

- 10.2.1 This section examines the responses from the household survey in relation to the future intentions and plans of both existing and concealed households within Brentwood over the next five years. The data from this section is then further analysed in Section 11 focusing on those households specifically requiring market housing and Section 12 looking at those households requiring affordable housing.

10.3 Households Moving

- 10.3.1 Moving intentions were tested in the survey questionnaire with an emphasis on future plans to move within the Borough for existing households and also a more focused study on concealed households who represent pent up demand for housing.
- 10.3.2 Respondents were asked to say whether they or any members of the household were currently seeking to move or will do so in the next five years. 25.7% of all households responding (8,154 implied) planned a move, implying an average of 5.1% per annum.

Table 10-1 **Households Moving by Current Tenure**
Question 17a x Q1

	%	N ^{os} . implied
Owner occupation with mortgage	43.2	3,526
Owner occupation no mortgage	20.4	1,668
Private rent	27.7	2,263
Council Rent	4.1	332
Registered Provider rent	3.2	257
Tied to employment / Living Rent Free	1.4	108
Total	100.0	8,154

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 10.3.3 This is a low level and probably reflects forecasting in the current economy where house sales levels have been half of the levels in 2005 to 2007.
- 10.3.4 The scale of movement is nearly all from market housing with around 63.7% of current movers moving from owner occupation and 27.8% from private rent. The combined moves from social rent were only 7.3%.

10.4 Demand for Existing Moving Households

- 10.4.1 The table below shows the preferred tenure for existing households moving in the next five years by their current tenure.

Table 10-2 **Current Tenure / Tenure Preferred (Existing Households)**
Question 1 / 22

Preferred Tenure	Current Tenure												Total
	O/O with mortgage		O/O no mortgage		Private rent		Council Rent		RP Rented		Tied to Employment / Living Rent Free		
	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	N ^{os.}
Owner occupation	95.5	1,347	86.5	332	49.2	744	0.0	0	0.0	0	0.0	0	2,423
Private rent	2.3	32	13.5	52	15.6	236	0.0	0	0.0	0	0.0	0	320
Council Rented	0.0	0	0.0	0	28.2	427	100.0	181	81.2	152	100.0	82	841
RP rent	0.0	0	0.0	0	4.7	71	0.0	0	18.8	35	0.0	0	106
Shared Ownership	2.2	32	0.0	0	2.3	35	0.0	0	0.0	0	0.0	0	67
Total	100.0	1,411	100.0	384	100.0	1,513	100.0	181	100.0	187	100.0	82	3,757

Note: no preference for Tied to Employment or current data from Shared Ownership

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 10.4.2 In total **2,743** existing households require market housing, this group is analysed in detail in Section 11. A further **1,014** existing households require affordable housing, this group is analysed in detail in Section 12.
- 10.4.3 There is some cross tenure movement to social rent with 32.9% of movers from the private rented sector. No social rented tenants expect to move into the private sector.

10.5 Demand for Concealed Moving Households

- 10.5.1 This section examines in detail those people living in an existing household but who are described as a 'concealed' household. This is taken as a proxy for the extent of 'concealment' of housing need within the Borough because these households represent a pent up and unmet demand for housing.
- 10.5.2 The questionnaire allowed for up to two concealed households to be identified within each existing household, each intending to form a new home within the Borough in the next five years.
- 10.5.3 A total of around **2,410** concealed households planning to form in the next five years were identified from an average of 1st (1,883) and 2nd (529) concealed households. The figures in this section may vary slightly from the control total figure. Some questions offer a multiple choice and not every household answers every question therefore there will be some variances.
- 10.5.4 The majority (85.7%) of concealed households consisted of people described as children of the household. A further 6.1% was a partner / spouse (reflecting a relationship breakdown and 4.4% was a parent / grandparent.

Table 10-3 Concealed Household Formation in the Next Five Years

Question 27

Concealed households	%	N ^{os} . implied
Parent / Grandparent	4.4	112
Child (16+)	85.7	2,177
Partner / Spouse	6.1	154
Lodger	1.3	32
Friend	0.0	0
Other Relative	2.5	64
Total	100.0	2,539

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 10.5.5 The table below shows the results for the age of each new household.

Table 10-4 Age of Concealed Households

Question 28c

Age Groups	%	N ^{os} . implied
18 - 24	53.3	1,969
25 - 34	31.1	1,147
35 - 49	7.6	282
50 - 64	5.0	181
65 +	3.0	112
Total	100.0	3,691

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 10.5.6 The main two age groups forming are the 18 - 24 at 53.3% and the 25 - 34 age group at 31.1%.

- 10.5.7 The survey found that children (under the age of 16) were present (or due) in around 6.1% of all households planning to form (141 implied).

Table 10-5 Number of Children

Question 28d

Children	%	N ^{os} . implied
Child due	1.4	32
One	3.0	70
Two or more	1.7	39
None	93.9	2,174
Total	100.0	2,315

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 10.5.8 New households were asked whether they were being formed as a single or couple household, 54.5% indicated formation as a single household, 45.4% as a couple.
- 10.5.9 Households indicating a couple household were also asked where their partner was currently living. In 34% of cases the partner was living elsewhere within Brentwood resulting in a potential double count which is addressed in the CLG Assessment Model Calculation. In 31.9% of cases the partner was already living in the existing household.
- 10.5.10 Concealed households were also asked if they would consider sharing accommodation with a friend. 2,452 households responded to this question with just under half (40.7%) saying they would consider sharing accommodation with a friend.

Table 10-6 Time of Move - Concealed Households

Question 31

When required	%	N ^{os} . implied
Within 1 year	18.6	540
1 - 2 years	32.6	952
2 - 3 years	25.9	755
3 - 5 years	22.9	669
Total	100.0	2,916

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 10.5.11 18.6% of concealed households required a move within a year, around 32.6% required a move a year later, a total of 51.2% within two years.

- 10.5.12 The table below shows the tenure most needed and preferred for concealed moving households in the next five years within Brentwood.

Table 10-7 Tenure Needed / Preferred (concealed households)

Question 29a / Question 29b

	Tenure	Needed		Preferred	
		%	N ^{os} . implied	%	N ^{os} . implied
MARKET	Owner occupation	49.5	1,141	66.1	953
	Private rent	20.4	469	13.0	188
AFFORDABLE	Council Rent	23.3	537	16.7	241
	RP rent	1.4	32	2.4	34
	RP Shared Ownership	5.4	124	1.8	26
Total		100.0	2,303	100.0	1,442

- 10.5.13 In terms of the tenure needs of concealed households forming in the Borough, the largest proportion needed owner occupation (49.5%) followed by council rent (23.3%) and private rent (20.4%).
- 10.5.14 The most preferred tenure is also owner occupation (66.1%), with more concealed households preferring this tenure than saying they actually needed it (49.5% v 66.1%).
- 10.5.15 There is also an interest in preference for shared ownership reflecting the desire for some form of purchase rather than rent.
- 10.5.16 Our analysis is however based only on the needs data as a preference is only a guide but need is an actual requirement. The market housing sector data for this group is analysed in detail in section 11 and the affordable housing sector in section 12.

11 FUTURE MARKET HOUSING REQUIREMENTS

11.1 Key Findings

Existing Households

- **2,423** households are planning a move to owner occupied housing and **320** are to private rented housing.
- 30.2% plan to move within one year and 36.6% in 1 to 2 years.
- The main type of property required is detached and 41.9% of movers require a 3 bedroom unit.
- The most popular choice in terms of location was Brentwood (65.1%) followed by Shenfield (33.1%).
- The main reason for choice of location was 'quality of neighbourhood' followed by 'type of housing'.

Concealed Households

- **1,141** concealed households are planning a move to owner occupied housing and **469** to private rent.
- 20.6% plan to move within a year and 33.0% within 1 to 2 years.
- 46.6% need a flat but only 22.6% prefer a flat.
- 45.7% need a one bedroom unit, but only 14.9% prefer a one bedroom. 50.3% need a 2-bedroom property.
- The highest demand for location choice was for Brentwood at 58.8% followed by Shenfield at 41.6%.
- The most popular reasons for choice of location were nearness to family and always lived here.

11.2 Introduction

- 11.2.1 The distinction between housing demand and need is fundamentally economic. If a household can satisfy its own requirement for housing in the private market it is termed 'demand' but if some form of subsidy is required it is termed to be 'need'.
- 11.2.2 This section analyses the needs of existing and concealed households who are planning to move into market housing within Brentwood over the next 5 years. Analysis of existing households is at 11.3 and for concealed households at 11.4.

11.3 Demand for Market Housing for Existing Moving Households

- 11.3.1 As seen in section 10 at Table 10-2, **2,423** existing households are planning to move into owner occupied housing and **320** are planning to move into private rented housing, giving a total demand of **2,743** for market housing within the Borough in the next five years.

- 11.3.2 Some totals in the following tables may be slightly different to the total of **2,743** as mentioned above due to the different number of responses received for each individual question. Not all respondents answer every question.
- 11.3.3 Some tables in this section include a column showing figures for “all tenures” i.e. including those existing households needing affordable housing, as a comparison.

Table 11-1 When is the Accommodation Required for Existing Households

Question 18

Time	Market Housing %	N ^{os} . implied	All Tenures %
Within 1 year	30.2	821	34.8
1 - 2 years	36.6	993	35.8
2 - 3 years	11.8	320	9.7
3 - 5 years	21.4	580	19.7
Total	100.0	2,714	100.0

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.3.4 The table above shows that 30.2% of potential movers to market housing sought to do so within one year and 36.6% 1 to 2 years, similar to the all tenure levels.

Table 11-2 Type of Accommodation Required for Existing Households

Question 19

Type	Market Housing %	N ^{os} . implied	All Tenures %
Detached	43.8	1,202	35.2
Semi-detached	29.4	805	26.8
Bungalow	8.5	234	13.0
Terraced	8.4	230	10.5
Flat	5.8	160	9.7
Supported Housing	2.9	80	3.2
Self Build	1.2	32	1.6
Total	100.0	2,743	100.0

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.3.5 43.8% of existing households moving to market housing stated that they required a detached property, higher than the proportion of all existing households moving (35.2%). Interest in flats / maisonettes was low at 5.8% compared with the all tenure response of 9.7%.

Table 11-3 Number of Bedrooms Required for Existing Households

Question 21

Bedrooms	Market Housing %	N ^{os} . Implied	All Tenures %
One	0.9	26	6.0
Two	29.0	796	31.2
Three	41.9	1,149	39.2
Four	22.5	617	18.9
Five or more	5.7	155	4.7
Total	100.0	2,743	100.0

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.3.6 The highest demand of those moving to market housing was for 3-bedroom properties at 41.9%, similar when compared with the all tenure demand of 39.2%.

- 11.3.7 The demand for smaller units i.e. 1 and 2 bedrooms was lower than the all tenure demand (29.9% v 37.2%).
- 11.3.8 Cross-tabulation relating type of property required to size required for market housing showed the following results.

Table 11-4 Type Required by Size Required for Existing Households
Question 19 by Question 21

Type	One bedroom		Two bedroom		Three bedroom		Four beds		Five + beds		Total
	N ^{os} .	%	N ^{os} .	%	N ^{os} .	%	N ^{os} .	%	N ^{os} .	%	N ^{os} .
Detached	0	0.0	59	7.4	525	45.7	463	75.0	155	100.0	1,202
Semi-detached	0	0.0	282	35.4	401	34.9	123	19.9	0	0.0	805
Terraced	0	0.0	164	20.6	66	5.7	0	0.0	0	0.0	230
Flat	26	100.0	105	13.2	30	2.6	0	0.0	0	0.0	160
Bungalow	0	0.0	106	13.4	128	11.1	0	0.0	0	0.0	234
Supported Housing	0	0.0	80	100.0	0	0.0	0	0.0	0	0.0	80
Self Build	0	0.0	0	0.0	0	0.0	32	100.0	0	0.0	32
Total	26		796		1,150		618		155		2,743

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.3.9 Households requiring a smaller size unit i.e. (2 bedrooms) leaned towards a semi-detached or a terraced property. There was also some demand for flats and bungalows for households requiring a 2 bedroom property.
- 11.3.10 80.6% of households requiring 3-bedrooms and all requiring 4-bedrooms stated a requirement for a detached or semi-detached property, all demand for Self Build was for a 4 bedroom property.
- 11.3.11 All of the demand for 5 bedrooms was for a detached property.
- 11.3.12 The following table shows a cross-tabulation of data for the type of property required by tenure of property needed.

Table 11-5 Type Required by Tenure Needed for Existing Households
Question 19 by Question 22

Type	Owner occupation		Private rented		Total
	%	N ^{os} .	%	N ^{os} .	N ^{os} .
Detached	45.5	1,101	31.4	100	1,202
Semi- detached	30.3	735	22.2	71	805
Terraced	7.0	169	19.2	61	230
Flat	4.2	103	18.0	58	160
Bungalow	9.7	234	0.0	0	234
Supported Housing	2.1	50	9.2	30	80
Self Build	1.3	32	0.0	0	32
Total	100.0	2,424	100.0	320	2,743

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.3.13 45.5% of demand in the owner occupied sector was for detached properties; 30.3% for semi-detached and 9.7% for bungalow accommodation.

- 11.3.14 31.4% of demand in the private rented sector was for detached properties and 22.2% was for semi-detached accommodation.
- 11.3.15 Existing households moving were asked where accommodation was required. 2,478 households' responded to this question. Up to 2 choices were offered but on average only 1.6 choices were made.

Table 11-6 Existing Households - Which location do you wish to live in?
Question 25

Location	Market Housing %	N ^{os.} Implied	All Tenures %
Brentwood	65.1	1,614	72.3
Shenfield	33.1	821	27.8
Ingatstone, Fryerning and Mountnessing	21.6	536	21.0
Warley	18.5	458	20.4
Brizes and Doddinghurst	15.4	382	12.7
Hutton	14.8	368	14.3
Herongate, Ingrave and West Horndon	6.5	162	6.0
South Weald	6.3	156	6.7
Pilgrims Hatch	3.9	96	21.0
Tipps Cross	3.0	74	2.7
Total		4,667	

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.3.16 The most popular location choices for existing households moving to market housing was Brentwood (65.1%) followed by Shenfield at 33.1%. Brentwood was also the most popular location choice for all tenures.
- 11.3.17 Existing households moving were also asked the reasons for their choice of location. 2,452 households' responded to this multiple choice question and 2.6 choices were made on average.

Table 11-7 Reason for Preferred Location for Existing Households
Question 26

Reason	% responses	% households	N ^{os.} implied (all choices)	All tenures %
Quality of neighbourhood	23.6	61.0	1,496	59.2
Type of housing	13.9	36.0	882	32.2
Employment /closer to work	12.7	32.8	805	31.7
Always lived here	10.4	26.9	659	30.0
Nearer family	10.3	26.7	654	25.6
Better / nearer schools and college	10.3	26.6	652	31.0
Better public transport	9.8	25.4	623	26.1
Nearer / better shopping and leisure facilities	6.2	15.9	391	15.2
Greater availability of affordable housing	2.8	7.6	185	7.8
Total	100.0		6,347	

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.3.18 Quality of neighbourhood (61.0%) was the most common choice, followed by the type of housing (36.0%) and employment / closer to work (32.8%).
- 11.3.19 The lowest chosen reason was greater availability of affordable housing at just 7.6%.

11.4 Demand for Market Housing for Concealed Households

- 11.4.1 As seen in Table 10-7, **1,141** concealed households are planning to move into owner occupied housing and **469** into private rented housing giving a total demand of **1,610** for market housing within the Borough in the next five years.
- 11.4.2 Some totals in the following tables may be slightly different to the total of 1,610 mentioned above due to the different number of responses received for each individual question. Not all respondents answer every question.

Table 11-8 When is the Accommodation Required for Concealed Households
Question 31

Time	Market Housing %	N ^{os.} implied	All Tenures %
Within 1 year	20.6	325	34.8
1 - 2 years	33.0	520	35.8
2 - 3 years	12.5	197	9.7
3 - 5 years	33.9	535	19.7
Total	100.0	1,577	100.0

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.4.3 20.6% of concealed households moving to market housing are moving within 1 year, with a further 33.0% within 1 - 2 years. 46.4% are moving in the longer term 2 - 5 years.
- 11.4.4 The data for “preference” as well as need is included as a comparison, to show the gap between needs and aspirations for this group.

Table 11-9 Type of Accommodation Needed / Preferred for Concealed Households
Question 32a/b

Type	Needed		Preferred	
	%	N ^{os.} implied	%	N ^{os.} implied
Semi-detached	11.7	184	39.3	373
Detached	8.7	138	13.3	126
Terraced	28.9	456	18.5	177
Flat	46.6	735	22.6	215
Bedsit/Studio/Room only	1.6	26	0.0	0
Bungalow	2.5	39	4.1	39
Self Build	0.0	0	2.2	21
Total	100.0	1,578	100.0	951

Source: DCA Brentwood 2013 Housing Needs Survey Data

Note: No data for other types

11.4.5 The results from the survey showed a different profile from existing households moving, as might be expected for a generally younger group. 46.6% of concealed households moving to market housing needed flats compared with 5.8% of existing households.

11.4.6 The following table shows the data for the number of bedrooms needed compared with the preferred number of bedrooms.

Table 11-10 Number of Bedrooms Needed / Preferred for Concealed Households

Question 33a/b

Bedrooms	Needed		Preferred	
	%	N ^{os.} implied	%	N ^{os.} implied
One	45.7	736	14.9	153
Two	50.3	809	52.4	537
Three	2.4	39	30.2	308
Four +	1.6	26	2.5	26
Total	100.0	1,610	100.0	1,024

Source: DCA Brentwood 2013 Housing Needs Survey Data

11.4.7 45.7% of concealed households needed one bedroom whilst there was only a very small preference for a one bedroom property (14.9%). 2.4% of concealed households actually needed a 3 bedroom property but 30.2% would prefer 3 bedrooms.

11.4.8 The data was analysed regarding concealed households moving, relating to the type of property needed by both the size needed and the tenure needed. The results are shown in the tables below.

Table 11-11 Type Needed by Size Needed for Concealed Households

Question 32a by Question 33a

Type	1-bedroom		2-bedroom		3-bedroom		4-bedroom		Total
	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	N ^{os.}
Semi-Detached	0.0	0	18.7	145	100.0	39	0.0	0	184
Detached	5.3	39	9.4	73	0.0	0	100.0	26	138
Terraced	9.9	73	49.3	383	0.0	0	0.0	0	456
Flat	84.8	624	14.3	111	0.0	0	0.0	0	735
Bedsit/Studio/Room only	0.0	0	3.3	26	0.0	0	0.0	0	26
Bungalow	0.0	0	5.0	39	0.0	0	0.0	0	39
Total	100.0	736	100.0	777	100.0	39	100.0	26	1,578

Source: DCA Brentwood 2013 Housing Needs Survey Data

Note: No data for other types

- 11.4.9 84.8% of demand for a 1-bedroom and 14.3% of demand for a 2 bedroom property was for a flat.
- 11.4.10 All respondents who need 3 bedrooms require a semi-detached property and 100% of concealed households who need 4 bedrooms needed a detached property.
- 11.4.11 The table below shows the demand from concealed households for the property type needed by market housing tenure.

Table 11-12 Type Needed by Tenure Needed for Concealed Households
Question 32a by Question 29a

Type	Owner Occupation		Private rented		Total
	%	N ^{os} .	%	N ^{os} .	N ^{os} .
Semi-detached	16.1	184	0.0	0	184
Detached	12.1	138	0.0	0	138
Terraced	37.7	430	5.9	26	456
Flat	30.7	350	88.2	385	735
Bedsit/Studio/Room only	0.0	0	5.9	26	26
Bungalow	3.4	39	0.0	0	39
Total	100.0	1,141	100.0	437	1,578

Source: DCA Brentwood 2013 Housing Needs Survey Data No data for other house types

- 11.4.12 37.7% of demand in the owner occupied sector was for terraced housing and 12.1% was for detached housing.
- 11.4.13 88.1% of demand in the private rented sector was for flats and 5.9% was for terraced housing.
- 11.4.14 Concealed households were asked the same questions on location as existing households moving. 1,475 concealed households responded to the location question giving an average of 1.9 choices each.

Table 11-13 Concealed Households - Which location do you wish to live in?
Question 34

Location	Market Housing%	N ^{os} . Implied	All Tenures %
Brentwood	73.6	1,085	77.6
Brizes and Doddinghurst	9.6	142	5.6
Herongate, Ingrave and West Horndon	7.1	104	7.6
Hutton	21.8	322	20.1
Ingatestone, Fryering and Mountnessing	14.0	207	10.5
Pilgrims Hatch	0.0	0	3.4
Shenfield	41.5	612	32.2
South Weald	4.5	67	2.7
Tipps Cross	2.4	35	1.4
Warley	10.9	161	18.8
Total		2,735	

Source: DCA Brentwood 2013 Housing Needs Survey Data
No preference for other areas

- 11.4.15 The most popular location choice amongst concealed households moving to market housing was Brentwood at 73.6%, this was also the most popular location choice for existing households moving to market housing.

- 11.4.16 Shenfield was the next most popular choice of location at 41.5%, followed by Hutton (21.8%) and then Ingatestone, Fryering and Mountnessing at 14.0%.
- 11.4.17 The final question in this section asked respondents why they preferred a particular location. The average number of choices was around 3.6.

Table 11-14 Reason for Preferred Location
Question 35

Reason	Concealed households moving to Market Housing		
	% responses	% households	N ^{os} . implied (all choices)
Nearer family	22.0	78.9	1,095
Always lived here	20.4	73.1	1,015
Employment /closer to work	18.1	64.8	900
Better public transport	11.3	40.4	561
Quality of Neighbourhood	10.6	37.9	526
Nearer / better shopping and leisure facilities	7.0	25.1	348
Greater availability of smaller houses	6.1	21.8	302
Greater availability of more affordable housing	3.1	11.1	154
Better / nearer schools and colleges	1.4	5.0	70
Total	100.0		4,971

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 11.4.18 The most popular reason was nearness to family (78.9%). Always lived here (73.1%) and Employment / closer to work (64.8%) also featured quite highly.
- 11.4.19 Concealed households were also asked if they would consider sharing their accommodation with a friend. 43.5% (687 implied) said they would consider sharing, 56.5% (891 implied) would not consider sharing.

11.5 Total Demand for Market Housing in the Borough

11.5.1 Table 11-15 below shows total demand for market housing by property type and size.

Table 11-15 Demand for Market Housing 2013 to 2018

		Semi-Detached	Detached	Terraced	Flat / Bedsit	Bungalow	Supported Housing	Self Build	Total
EXISTING H/H	1-BEDROOM	0	0	0	26	0	0	0	26
	2-BEDROOM	282	59	164	105	106	80	0	796
	3-BEDROOM	401	525	66	30	128	0	0	1,150
	4+ BEDROOM	123	618	0	0	0	0	32	773
CONCEALED H/H	1-BEDROOM	0	39	73	624	0	0	0	736
	2-BEDROOM	145	73	383	137	39	0	0	777
	3-BEDROOM	39	0	0	0	0	0	0	39
	4+ BEDROOM	0	26	0	0	0	0	0	26
IN-MIGRANT H/H	1-BEDROOM	0	0	34	409	55	0	0	498
	2-BEDROOM	182	0	122	942	81	0	0	1,327
	3-BEDROOM	228	87	293	0	120	0	0	728
	4+ BEDROOM	302	163	63	0	32	0	0	560
	TOTAL	1,702	1,590	1,198	2,273	561	80	32	7,436

Source: DCA Brentwood 2013 Housing Needs Survey Data

11.5.2 The survey data incorporates existing, concealed and in-migrant household demand for market housing, based on the profile of recent in-migrants to the Borough over the last five years.

11.5.3 It is assumed that the in-migrant market demand will be similar over the next five year period to 2018.

11.6 Current and Future Demand for Market Housing

- 11.6.1 The recently published NPPF identifies the core Government objectives to provide a variety of high quality market housing including addressing any shortfalls that apply in market housing. Authorities are required to plan for a full range of market housing to meet the needs of the whole community, so that provision is made for family, single person, and multi-person households.
- 11.6.2 Local planning authorities should identify the size, type, tenure and range of housing required in particular locations, reflecting local demand. Policies should give indications of the type or size of dwellings to be delivered to meet household demand and create sustainable inclusive and mixed communities.
- 11.6.3 Practice Guidance states that neither secondary nor primary data are themselves more or less robust when trying to derive a robust assessment of housing need and demand.
- 11.6.4 In terms of household flow models, the data utilised is both from the primary household survey which identifies future housing forming and moving intentions and secondary data particularly on social and affordable housing need and stock re-let supply in the Model in Section 14.
- 11.6.5 The analysis of the demand for market housing and the supply from existing stock turnover has been undertaken using data is from the 2013 HNS.
- 11.6.6 The following table identifies the data over 5 years and the future average **annual demand and supply** of market properties by bedrooms from:-
- **Demand** from both local existing and concealed households moving and forming within the Borough and from in-migrating households;
 - **Supply** from the turnover of the existing stock created by out-migrants leaving and existing households moving within the Borough.

Table 11-16 Total Demand for Market Housing by Size

Households	Bed-sit / 1-bed		2-bedrooms		3-bedrooms		4+ bedrooms		All Sizes	
	Supply	Demand	Supply	Demand	Supply	Demand	Supply	Demand	Supply	Demand
Existing		13		225		370		300		908
Concealed		188		203		20		13		424
In-migration		249		428		301		164		1,142
Total Demand		450		856		691		477		2,474
Moving within	131		617		340		251		1,339	
Out-migration	135		313		239		304		991	
Total Supply	266		930		579		555		2,330	
Net Shortfall/ (Surplus)		184		(74)		112		(78)		144

Source: DCA Brentwood 2013 Housing Needs Survey

- 11.6.7 The major market housing demand from existing, concealed and in-migrating households is for three bedroom properties but the demand is mainly met by the turnover of these properties in the existing stock.
- 11.6.8 There is an annual surplus of 78 four bedroom units despite a relatively high level of demand from recent in-migrants.

- 11.6.9 Turnover of two bedroom properties is also high and there is estimated to be a net annual surplus of 74 units based on existing stock flow. However the demand from in-migrants exceeds supply from out-migrating households by 115 units.
- 11.6.10 Demand and supply of one bedroom units is low reflecting the small stock supply in this sector. Over half of the total one bedroom demand is from in-migrating households which may be even stronger in the private rented sector.
- 11.6.11 In total, there is a total net market sector shortfall of **144** units a year. However, there is a need to take account of dissolutions in the market sector. Council data for 2012/13 suggests that 90 properties became available and taking this additional supply into account, there would be **a net shortfall of 54** market units each year.

12 FUTURE AFFORDABLE HOUSING REQUIREMENTS

12.1 Key Findings

- Demand for affordable housing from existing moving households to 2018 was **1,014** units. **841** implied for Council Rented accommodation, **106** for RP rented accommodation and **67** for RP shared ownership accommodation.
- **693** concealed households are looking for affordable housing. **537** intend to move to Council Rent, **32** to RP rented and **124** to RP shared ownership.
- 44.4% of existing households and 21.8% of concealed households moving to affordable housing plan to move within 1 year.
- The main property type required amongst existing households moving to affordable housing was a bungalow at 28.1% and 39.6% require 2 bedrooms.
- For concealed households moving to affordable housing the main type of property required was a flat at 76% and 68.4% need 1 bedroom.
- Brentwood was the most popular location for existing households moving within the Borough both for existing and concealed households.
- Quality of neighbourhood and better schools / colleges was the most common reason for choice of location for existing households. For concealed households, the main reasons were nearer family, better public transport and employment / closer to work.

12.2 Introduction

- 12.2.1 Determining the net shortfall or surplus of affordable housing, in order to meet existing and predicted housing need is a key part of the Housing Need Assessment. This section examines the need for affordable housing and how this is broken down by size of property (i.e. number of bedrooms) and tenure of affordable housing (i.e. intermediate and social rented housing).
- 12.2.2 The CLG Needs Assessment Model in Section 14 of this report sets out the final figures for housing need across the Borough.
- 12.2.3 This section is divided into elements exploring the housing needs of existing and concealed households who require affordable housing.

12.3 Housing Benefit and Under-Occupancy

- 12.3.1 From 1 April 2013 the Government introduced size criteria for working-age Housing Benefit claimants living in the social rented sector.
- 12.3.2 The size criteria are the same as for private rented sector claimants whose claims are assessed using the local housing allowance rules.
- 12.3.3 The maximum rent is reduced by a national percentage rate depending on how many bedrooms the household is considered not to need.

- 12.3.4 A bedroom for a non-resident carer is also taken into account in determining the relevant size criteria where that carer provides necessary overnight care for the claimant or their partner.
- 12.3.5 Social housing providers will need to take these new regulations into account when allocating housing as well as when deciding on property sizes on new developments.
- 12.3.6 Under-occupancy of large family homes is already being prioritised by many housing providers.
- 12.3.7 The changes will heighten the **need to address under-occupancy** to ensure that residents on low incomes do not fall into arrears due to reduced housing benefit being paid towards their rent.

12.4 Affordable Housing Need of Existing Households

- 12.4.1 There is a total demand of **1,014** affordable units for existing households moving within the Borough over the five years to 2015.
- 12.4.2 **841** of existing households moving needed Council Rent, **106** needed RP rented and **67** needed RP shared ownership.
- 12.4.3 Some totals in the following tables may be slightly different to the total of **1,014** mentioned above due to the different number of responses received for each individual question. Not all respondents answer every question.
- 12.4.4 Some tables in this section include a column showing “% all tenures” i.e. including those existing households needing market housing as a comparison.

Table 12-1 When is the Accommodation Required (existing households)

Question 18

Time	Affordable Housing %	N ^{os} . implied	% All Tenures
Within 1 year	44.5	383	34.8
1 - 2 years	37.3	322	35.8
2 - 3 years	4.1	35	9.7
3 - 5 years	14.1	122	19.7
Total	100.0	862	100.0

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 12.4.5 The data shows that 44.4% of potential movers to affordable housing sought to do so within one year, a slightly higher level for all movers (34.8%).
- 12.4.6 The main property type required amongst existing households moving to affordable housing was a bungalow at 28.1%. 21.0% of respondents felt that they required a terraced house and interest in a semi-detached property was 22.8%. Interest in flats was lower at 12.2% and only 6.8% were interested in detached properties and 5.5% in supported housing.
- 12.4.7 22.1% of existing households needing affordable housing indicated that they required one bedroom, 39.6% need two bedrooms, 34.9% three bedrooms. There was no requirement for four bedrooms but 3.5% require five bedroom units.

- 12.4.8 Analysis of the type of property and number of bedrooms required showed the following results.

Table 12-2 Type by Size Required

Question 19 by Question 21

Type	One bedroom		Two bedrooms		Three bedrooms		Four+ bedrooms		Total
	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	N ^{OS.}
Detached	0.0	0	7.9	32	11.0	35	0.0	0	67
Semi- detached	0.0	0	16.2	65	49.4	160	0.0	0	225
Terraced	0.0	0	25.0	100	21.8	71	100.0	35	206
Flat	11.9	27	17.7	71	6.8	22	0.0	0	120
Bungalow	72.3	162	19.7	79	11.0	35	0.0	0	276
Bedsit/studio/room only	15.8	35	0.0	0	0.0	0	0.0	0	35
Supported Housing	0.0	0	13.5	55	0.0	0	0.0	0	55
Total	100.0	224	100.0	402	100.0	323	100.0	35	984

Source: DCA Brentwood 2013 Housing Needs Survey Data

No data for other house types

- 12.4.9 The cross tabulation of data shows that 72.3% of the total one bedroom demand was for bungalows. The demand for two bedrooms was fairly well spread across all house types. The main demand for three bedroom was also for semi-detached accommodation (49.4%). All households who require a four-bedroom property also require a terraced house.
- 12.4.10 Analysis of the type of property required with type of tenure required showed the following results.

Table 12-3 Type Required by Tenure Required

Question 19 by Question 23

	Council Rent		RP rented		RP Shared Ownership		Total
	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	N ^{OS.}
Semi-detached	27.7	225	0.0	0	0.0	0	225
Detached	0.0	0	33.4	35	47.2	32	67
Terraced	16.8	136	66.6	71	0.0	0	206
Flat	10.4	84	0.0	0	52.8	35	120
Bedsit/Studio/Room Only	4.3	35	0.0	0	0.0	0	35
Bungalow	34.1	276	0.0	0	0.0	0	276
Supported Housing	6.7	55	0.0	0	0.0	0	55
Total	100.0	811	100.0	106	100.0	67	984

Source: DCA Brentwood 2013 Housing Needs Survey Data

No data for other types

- 12.4.11 34.1% of existing households who need Council Rent need a bungalow, 27.7% a semi-detached property and 10.4% a flat.

- 12.4.12 66.6% of existing households needing RP rent need a terraced property and 33.4% a semi-detached.
- 12.4.13 52.8% of shared ownership demand was for a flat and 47.2% a detached property.
- 12.4.14 Analysis of the size of property required with type of tenure required showed the following results.

Table 12-4 Property Size Required by Required Tenure

Question 21 by Question 23

	Council Rent		RP rented		RP Shared Ownership		Total
	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	N ^{os.}
One Bedroom	26.6	224	0.0	0	0.0	0	224
Two Bedrooms	35.6	299	33.3	35	100.0	67	402
Three Bedrooms	37.8	318	33.3	35	0.0	0	354
Four or more Bedrooms	0.0	0	33.4	35	0.0	0	35
Total	100.0	841	100.0	105	100.0	67	1015

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 12.4.15 The majority of all affordable tenures require 2 or 3 bedrooms.
- 12.4.16 73.3% of existing households moving to affordable housing (743 implied) were registered on a housing waiting list.
- 12.4.17 Existing households moving to affordable housing were asked where accommodation was required. 982 households responded to this question and gave an average of 2.0 choices each, therefore the actual number of responses received was 1,967.

Table 12-5 Where is accommodation required?

Question 25

Location	Affordable Housing %	N ^{os.} Implied	All Tenures %
Brentwood	93.4	917	72.3
Warley	26.3	259	20.4
Ingatestone, Fryerning and Mounthnessing	18.5	181	21.0
Pilgrims Hatch	15.2	149	21.0
Shenfield	13.8	136	27.8
Hutton	9.7	95	14.3
South Weald	9.1	90	6.7
Herongate, Ingrave and West Horndon	6.2	61	6.0
Brizes and Doddingtonhurst	5.5	54	12.7
Tipps Cross	2.5	25	2.7
Total		1,967	

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 12.4.18 By far the most popular location for existing households moving and requiring affordable was Brentwood (93.4%), followed by Warley at 26.3%. Brentwood was also the main choice for all households moving to market housing.

- 12.4.19 The final question in this section asked respondents why they preferred a particular location. 982 households' responded to this question. This was a multiple choice question and 2.6 choices were made on average.

Table 12-6 Reason for Preferred Location
Question 26

Reason	% responses	% households	N ^{os.} implied (all choices)	All tenures %
Quality of neighbourhood	20.1	52.1	512	59.2
Better / nearer schools and college	14.0	36.5	358	31.0
Always lived here	13.6	35.3	347	30.0
Employment /closer to work	12.5	32.6	320	31.7
Better public transport	10.4	27.1	266	26.1
Nearer family	9.8	25.4	249	25.6
Type of housing	9.1	23.6	232	32.2
Nearer / better shopping and leisure facilities	6.5	16.9	166	15.2
Greater availability of affordable housing	4.0	10.2	100	7.8
Total	100.0		2,550	

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 12.4.20 Quality of neighbourhood was the largest single choice at 52.1% followed closely by better /nearer schools and colleges (42.6%) and always lived here at 35.3%.

12.5 Needs of Concealed Households Moving Within Brentwood

- 12.5.1 Table 10-7 showed that **537** concealed households intend to move to Council Rented accommodation, **32** to Registered Provider rented housing and **124** to RP shared ownership. In total, **693** concealed households over the next five years require affordable housing in Brentwood.
- 12.5.2 Some totals in the following tables may be slightly different to the total of **693** mentioned above due to the different number of responses received for each individual question. Not all respondents answer every question.
- 12.5.3 A column is included in some tables for "all concealed households %", i.e. including those needing market housing, as a comparison.

Table 12-7 When is the Accommodation Required
Question 31

Time	Affordable Housing %	N ^{os.} implied	All Tenures %
Within 1 year	21.8	151	34.8
1 - 2 years	53.2	368	35.8
2 - 3 years	15.5	107	9.7
3 - 5 years	9.5	66	19.7
Total	100.0	692	100.0

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 12.5.4 21.8% of concealed households needing affordable housing require their accommodation within 1 year. 53.2% are moving in 1-2 years and 25.0% in 2-5 years.
- 12.5.5 76.0% of concealed households moving to affordable housing require a flat and 14.8% a terraced property. 9.2% require a semi-detached property but there was no demand for other house types.
- 12.5.6 The highest demand in relation to the size of the accommodation needed was for 1-bedroom properties at 68.4% (473 implied). However preference for 1-bedroom was only 22.5% (60 implied).
- 12.5.7 23.0% (160 implied) need a 2-bedroom property and 8.6% (60 implied) need 3 bedrooms. There was no demand for a 4-bedroom property. Compared to need, 43.5% preferred a 2-bedroom property and 34.0% a 3-bedroom.
- 12.5.8 Analysis of the type of property needed by the size of property needed for concealed households moving showed the following results.

Table 12-8 Type Needed by Size Needed

Question 32a by Question 33a

Type	1-bed		2-bed		3-bed		Total
	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	N ^{os.}
Semi- detached	7.2	34	0.0	0	50.0	30	64
Terraced	9.1	43	37.5	60	0.0	0	103
Flat	83.7	396	62.5	100	50.0	30	526
Total	100.0	473	100.0	160	100.0	60	693

Source: DCA Brentwood 2013 Housing Needs Survey Data

No data for other types / sizes

- 12.5.9 Around 84% of 1 bedroom demand was for flats.
- 12.5.10 62.5% of the demand for a 2 - bedroom property and 50.0% of demand for a 3 - bedroom property was also for flats.

Table 12-9 Type Needed by Tenure Needed

Question 32a by Question 29a

	Council Rent		RP rented		Shared Ownership		Total
	%	N ^{os.}	%	N ^{os.}	%	N ^{os.}	N ^{os.}
Semi- detached	5.6	30	0.0	0	27.6	34	64
Terraced	15.1	81	0.0	0	17.0	21	103
Flat	79.3	426	100.0	32	55.4	68	526
Total	100.0	537	100.0	32	100.0	123	693

Source: DCA Brentwood 2013 Housing Needs Survey Data

No data for other types

- 12.5.11 The main interest from concealed households forming in the Council Rented sector was for flats at 79.3%; terraced properties at 15.1% and semi-detached at 5.6%. All interest for the RP rented sector was for flats.
- 12.5.12 The majority of interest from concealed households needing shared ownership was for flats at 55.4%.
- 12.5.13 Analysis of the type of property required with type of tenure required showed the following results.

Table 12-10 **Size Needed by Tenure Needed**
Question 33a by Question 29a

	Council Rent		RP rented		Shared Ownership		Total
	%	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	N ^{OS.}
One Bed	71.7	385	100.0	32	45.2	56	473
Two Bed	17.1	92	0.0	0	54.8	68	160
Three Bed	11.2	60	0.0	0	0.0	0	60
Total	100.0	537	100.0	32	100.0	124	693

Source: DCA Brentwood 2013 Housing Needs Survey Data

No data for other sizes

- 12.5.14 The majority of households moving to affordable housing tenures require one and two bedrooms.
- 12.5.15 Only 25.3% of concealed households moving to social housing (175 implied) responded to the question on whether they were registered on a housing waiting list. The majority of concealed households who wanted to move to affordable housing were registered on the Brentwood Borough Council waiting list. There was no registration with a Housing Association, but 18.3% were registered with another Council.
- 12.5.16 Concealed households were asked if they would consider sharing their accommodation, 41.3 % (286 implied) would consider sharing accommodation, 58.7% (406 implied) would not consider sharing accommodation.
- 12.5.17 Concealed households moving to affordable housing were asked where accommodation was required. 692 households' responded to this question. Up to 2 choices were offered but on average only 1.8 choices were made.

Table 12-11 **Where is accommodation required?**
Question 34

Location	Affordable Housing %	N ^{OS.} implied	All Tenures %
Brentwood	74.9	518	72.3
Herongate, Ingrave and West Horndon	7.7	53	6.0
Hutton	27.0	187	14.3
Ingatestone, Fryerning and Mountnessing	4.6	32	21.0
Pilgrims Hatch	8.7	60	21.0
Shenfield	20.5	142	27.8
Warley	32.1	222	20.4
Total		1,214	

Source: DCA Brentwood 2013 Housing Needs Survey Data

No preference for other areas

- 12.5.18 The single most popular choice for concealed households moving to affordable housing was for Brentwood (74.9%) followed by Warley at 32.1%. 27.0% opted for Hutton as their preferred location.

- 12.5.19 The following table showed the results for the reasons for their preferred location. This was a multiple choice question and 2.3 choices were made on average per concealed household.

Table 12-12 Reason for Preferred Location
Question 35

Reason	% responses	% households	N ^{os.} implied (all choices)
Nearer family	29.2	66.2	458
Better public transport	21.0	47.7	330
Employment / closer to work	18.3	41.3	286
Quality of neighbourhood	10.7	24.3	168
Always lived here	10.4	23.6	163
Greater availability of smaller houses	6.3	14.2	98
Greater availability of more affordable housing	2.2	4.9	34
Nearer / better shopping and leisure facilities	1.9	4.3	30
Total	100.0		1,567

Source: DCA Brentwood 2013 Housing Needs Survey Data

- 12.5.20 Core sustainability factors such as near family and friends, better public transport and employment / closer to work allow people to live and work in the same area. Reducing travel time and being near family members to provide support creates a more sustainable community.
- 12.5.21 The main reason for concealed households moving to their choice of location was to be near family (66.2%, 458 implied), followed by better public transport at 47.7%.

12.6 Future Size of Affordable Housing

- 12.6.1 Stock balance, turnover and waiting list demand analysis are vital to identify the gaps in the stock and inform the proportions by type and size required in future to address current and future need.
- 12.6.2 Affordable housing should mainly be in locations with good public transport, accessibility to town centres, employment destinations and other key services.
- 12.6.3 The following table provides a detailed analysis of the social stock the levels of registered need and actual supply from turnover by bedroom size taken from Local Authority records. The 2011 Census data suggest that there are 2,703 Council properties but this figure is considered to be incorrect and the Council data has therefore been used for analysis.
- 12.6.4 To provide a clear justification for the balance of property sizes in the Local Development Documents and housing delivery strategy, need and supply of the Registered Provider stock has been analysed.
- 12.6.5 The ratio of waiting list demand to supply is the number of years it would take for the waiting list for individual property sizes to be met through the turnover of the existing stock.

- 12.6.6 This also makes the extreme assumption that there was no future need other than the current backlog, which clearly will not be the case.

Table 12-13 Council Stock, Waiting List Need and Turnover

Stock Size	Total Council Stock		Waiting List (Council Data)		Social Stock Turnover		Demand vs. Supply
	N ^{OS.}	%	N ^{OS.}	%	N ^{OS.}	%	Years
Studio / 1-bedroom	900	35.6	750	53.2	57	30.8	13.2:1
2-bedrooms	909	36.0	389	27.5	88	47.6	4.4:1
3-bedrooms	702	27.8	266	18.8	40	21.6	6.7:1
4 + bedrooms	13	0.6	7	0.5	0	0.0	0:1
Total	2,524	100.0	1,412	100.0	185	100.0	7.6:1

Brentwood Borough Council data– CORE data 2012

- 12.6.7 In the Borough, even if no new need arose, it would take:-
- Over **13** years to meet the requirements for 1-bed properties;
 - Over **4** years to address the 2-bedroom requirement;
 - Nearly **7** years to address the 3-bedroom stock requirement;
 - The need for larger 4+ bedroom family units would never be met.

12.7 Small Units

- 12.7.1 Generally, 78.4% of stock turnover is from 1 and 2 bedroom units, around the same level as the waiting list need of 80.7%.
- 12.7.2 **One bedroom** units are 35.6% of the total social stock, but these units are 53% of the total waiting list.
- 12.7.3 Although these are significantly the highest need in terms of unit numbers, a number of factors need to be considered in determining targets by size which clearly also influence property type.
- 12.7.4 Small units turn over more regularly in the existing stock than family units.
- 12.7.5 The waiting list, in particular for one bedroom properties, contains a large number of households who have low priority and older households registering for sheltered housing as insurance for a future potential need.
- 12.7.6 These factors are important in judging future delivery to meet priorities rather than arithmetic scale of recorded need. The important factor is to meet priority needs, but there is still a requirement for one bedroom units to meet the needs of young, single, homeless households in the Borough.
- 12.7.7 In view of the current stock balance, the scale of likely annual new provision and the requirement to address priority household needs, a level of **70%** of future delivery in the affordable rented sector should be **40% one and 30% two bedroom units**, lower than current need levels of 80.7%.

12.8 Family sized Units

- 12.8.1 28.4% of the social stock is **three bedroom** family units but they provide only 21.6% of all re-let supply.
- 12.8.2 However, as is highlighted in Section 8.6.8, there are estimated to be **315** social rented properties which are under-occupied by two or more bedrooms. This is nearly **45%** of all the three bedroom social rented properties in the Borough.
- 12.8.3 **Four bedroom** units are the smallest in terms of stock numbers (13), but the Waiting List need is nearly half of this stock level.
- 12.8.4 These households are likely to be over-crowded in their current housing and are therefore a priority need group. With no units becoming available last year, despite the lower scale their needs are the most difficult to resolve.
- 12.8.5 In view of the increasing older population, it is now even more important to achieve a better flow of the under-occupied, family sized social rented stock as a means to help address the scale of need for family units.
- 12.8.6 Initiatives to link the occupation of future new housing for older people to those under-occupying family units should be a priority for the housing strategy.
- 12.8.7 Achieving a better flow of family units should also have a cascade effect, increasing turnover of all smaller unit sizes as households are able to transfer to larger units to meet their need. **In effect up to three or four household moves could result from one new older persons unit.**
- 12.8.8 The relatively extreme but small scale problem of access to **four bedroom** stock should be addressed through better stock turnover.
- 12.8.9 Given the limited scale of new affordable units relative to need, the balance of **30%** of new units a year could all be **three bedroom** units.
- 12.8.10 There will be an increasing impact on the scale of under-occupation of three bedroom properties from demographic change, but welfare reform may increase turnover of those younger households affected financially from the changes.

13 HOUSING NEEDS OF SPECIFIC HOUSEHOLD GROUPS

13.1 Introduction

- 13.1.1 The Housing Act (2004) specified that specific consideration must be given to the differing needs of households. In addition, the SHMA Practice Guidance indicates that housing market partnerships should consider gathering information about the housing requirements of specific groups and that doing so will improve planning and housing policy.
- 13.1.2 This chapter investigates the needs of specific household groups that may have specific housing requirements which differ from the general population. Certain groups may exert influences within the housing market area which need to be understood and planned for.
- 13.1.3 The housing requirements of the following household groups have been analysed:-
- Black Minority Ethnic Households;
 - Young Households (16-24 yrs);
 - Older people;
 - Households with support needs
- 13.1.4 The data on the needs of households was gained from using primary data from the Housing Survey.

13.2 Key Findings

Black Minority Ethnic Households

- 2,676 implied BME households were identified from the survey data (8.4%). The highest category of BME households was 'Gypsy or Irish traveller' at 3.2%, followed by 'other Asian' at 1.1%.
- 775 existing BME households indicated they would be moving within Brentwood within the next 5 years, the majority requiring 3 bedroom properties in the owner occupied sector.
- 118 concealed BME households indicated they would be moving within Brentwood in the next 5 years. The main type of housing required is a 3 bedroom semi-detached in the council rented sector.

Younger Households (16-24)

- The main tenure amongst younger households was private rent at 89.6%, significantly higher than the all household response (11.3%).
- The main type of property occupied by households aged 16-24 was flats at 90.3%, much higher than the all household response (19.4%).
- Around 100 implied existing 'younger' households said they were planning to move within the Borough in the next 5 years. The main type of accommodation chosen was semi-detached, the main size is 3 bedrooms and all say they require owner occupation.
- 531 implied concealed 'younger' households said they would be moving within the Borough within the next 5 years. The main property type needed by this group is a 2 bedroom flat, and the main tenure is Brentwood Homes.

The Housing Needs of Older People

- 651 implied households indicated that they had older relatives (over 60) who may need to move to Brentwood in the next 3 years.
- The main need for older relatives would be private sheltered housing (28.1%) followed by private housing (25.4%).
- 682 implied households in Brentwood expressed an expectation for supported housing, the main tenure preference being Council / Registered provider sheltered housing.
- The data suggests a combined requirement for sheltered accommodation from older people currently living in Brentwood (526 households) and those who may in-migrate to be beside their family (256 households), a total of 782 units, 477 in the affordable sector and 305 in the private sector.
- The level of need expressed for extra care accommodation by relatives of older people in-migrating was 172 units and 58 units from existing households.

Households with Support Needs

- 17.1% (5,466 implied) of households contained a member with a disability / limiting long term illness.
- 54.7% of all disabled household members were aged 65+ including 21.9% over 80.
- 17% (546 implied) of those who require support said they were currently not receiving sufficient care / support.
- The main facility needed for disabled residents was bathroom adaptations at 30.5% followed by a handrails / grabrails at 27.3%.
- The main type of supported housing required was Council / Registered Provider sheltered housing.

13.3 Black and Minority Ethnic (BME) Households

- 13.3.1 This section draws together the weighted findings of the current household profile and the future demand for BME households in the Borough.
- 13.3.2 The data showed that 8.4% (2,676 implied) of households in the Borough were of a different Ethnic Origin to British White. The highest category in the BME households was 'Gypsy or Irish traveller' at 3.2%, followed by 'other Asian' at 1.1%.

Table 13-1 Current Tenure (BME households)

Question 1 by Question 15b

Tenure	All households %	BME households %	N ^{os} . Implied (BME)
Owner occupied with mortgage	38.3	31.3	834
Owner occupied without mortgage	38.4	21.2	568
Private rented	11.3	39.0	1,044
Council rented	7.8	3.3	90
Registered Provider rented	2.7	3.9	105
Shared ownership*	0.0	0.0	0
Living rent free/ Tied to employment*	1.5	1.3	35
Total	100.0	100.0	2,676

No data for shared ownership *Low level of data

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.3.3 The main tenure amongst BME households was owner occupation at 52.4%, much lower than the all household response (76.7%). Private rent at 39% was high for BME households when compared with all the household response of just 11.3%.

Table 13-2 Current Type (BME households)

Question 2 by Question 15b

Type	All households %	BME households %	N ^{os} . Implied (BME)
Detached	28.9	20.1	537
Semi-detached	25.7	15.1	405
Terraced	13.8	14.4	389
Bungalow	11.3	7.9	210
Flat	19.4	41.2	1,110
Bedsit / Studio / Room only	0.9	1.3	35
Total	100.0	100.0	2,686

*Low level of data

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.3.4 The main type of property occupied by BME households was flats at 41.2%, which was much higher than the all household response of 19.4%. A higher quantity of flats, bedsits and terraced properties were occupied by BME households compared with all households.

Table 13-3 Current Size (BME households)

Question 3 by Question 15b

Size	All households %	BME households %	N ^{os} . Implied (BME)
Bedsit	0.9	1.3	35
1 bedroom	10.3	13.2	353
2 bedroom	24.7	36.7	982
3 bedroom	34.6	29.3	784
4 bedroom	22.5	15.2	405
Five or more	7.0	4.3	116
Total	100.0	100.0	2,675

*Low level of data

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.3.5 The main size of property occupied by BME households was two bedrooms at 36.7%, higher than the all household response (24.7%). The data showed that BME households occupied smaller properties compared to all general households.
- 13.3.6 The assessment of under and over-occupation by tenure revealed some disparity between tenure types as indicated below.

Table 13-4 Under / Over-Occupation by Tenure

Question 16a by Question 3 & Question 1

Tenure	% under occupied		% over- occupied	
	All h/hds	BME h/hds	All h/hds	BME h/hds
Owner occupied with mortgage	41.6	25.8	2.2	4.1
Owner occupied no mortgage	64.2	66.1	0.0	0.0
Private rented	7.6	5.8	5.8	14.9
Council rented	7.7	33.3	10.2	33.3
RP rented	13.7	50.0	12.0	50.0
All stock	42.9	27.9	2.6	9.6

No data for other tenures

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.3.7 There were higher levels of over-occupied housing in BME households (9.6%) than in all general households (2.6%).

- 13.3.8 The following table shows the results to the main questions in relation to future need of BME Households moving within the Borough.

Table 13-5 BME Households

Key data	% responses	N ^{OS.} Implied
Existing household moving within the Borough		
<u>When are you planning to move?</u>		
Within 1 year	33.8	262
1 - 2 years	54.3	421
2 - 3 years	2.8	21
3 - 5 years	9.1	71
<u>Accommodation required?</u>		
Semi-detached	29.6	230
Detached	44.5	345
Terraced	4.5	35
Flat	8.2	63
Bedsit/Studio/Room only	4.6	35
Bungalow	4.6	35
<u>Supported Accommodation Required?</u>		
Independent accommodation with external support	37.9	65
Residential / Nursing home	17.2	30
Council / RP sheltered housing	62.1	106
<u>Number of bedrooms required?</u>		
1 - bedroom	4.6	35
2 - bedroom	20.4	158
3 - bedroom	53.7	416
4 - bedroom	16.8	130
5+ bedroom	4.5	35
<u>Tenure required?</u>		
Owner occupation	44.8	304
Private rent	24.7	168
Council rented	20.1	136
RP Rented	10.4	71
<u>Location Required?</u>		
Brentwood	77.3	535
Brizes & Doddinghurst	7.9	55
Hutton	17.6	122
Ingatestone, Fryerning & Mountnessing	21.7	151
Pilgrims Hatch	9.4	65
Shenfield	37.6	260
South Weald	12.9	90
Warley	30.4	210

Concealed household moving within the Borough*		
<u>When are you planning to move?</u>		
1 - 2 years	100.0	118
<u>Accommodation needed?</u>		
Flat	39.5	59
Semi-detached house	60.5	89
<u>Number of bedrooms needed?</u>		
1 - bedroom	19.7	29
2 - bedroom	20.4	30
3 - bedroom	60.5	89
<u>Tenure needed?</u>		
Owner – occupation	32.6	30
Council rented	67.4	60
<u>Location preferred?</u>		
Brentwood	49.7	30
Pilgrims Hatch	50.3	30

*1st and 2nd household member combined

Source: DCA Brentwood 2013 Housing Needs Survey

13.4 Younger Households (16-24)

13.4.1 This section draws together the weighted findings of the current household profile and the future demand of younger households in the Borough.

13.4.2 The data showed that 1.0% (303 implied) head of households in the Borough were aged 16-24. This is the age group we have focused on for this section.

Table 13-6 Current Tenure (Households aged 16-24)

Question 1 by Question 15b

Tenure	All households %	Households (16-24) %	N ^{os} . Implied (16-24)
Owner occupied with mortgage	38.3	10.4	32
Private rented	11.3	89.6	272
Total		100.0	304

No data for other tenures

Source: DCA Brentwood 2013 Housing Needs Survey

13.4.3 The main tenure amongst younger households was private rent at 89.6%, significantly higher than the all household response (11.3%).

Table 13-7 Current Type (Households aged 16-24)

Question 2 by Question 15b

Type	All households %	Households (16-24) %	N ^{os} . Implied (16-24)
Semi- detached	25.7	9.7	30
Flat	19.4	90.3	274
Total		100.0	304

No data for other types

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.4.4 The main type of property occupied by households aged 16-24 was flats at 90.3%, much higher than the all household response (19.4%).

Table 13-8 Current Size (16-24 households)

Question 3 by Question 15b

Size	All households %	Households (16-24) %	N ^{os} . Implied (16-24)
One	10.3	33.1	100
Two	24.7	66.9	203
Total		100.0	303

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.4.5 The main size of property occupied by households aged 16-24 was two bedrooms at 66.9%, significantly higher than the all household response (24.7%). The data showed that households aged 16-24 occupied smaller properties compared to all general households.
- 13.4.6 Households moving were asked whether they were only moving due to their benefit being reduced. No existing households aged 16-24 years said this was the case.
- 13.4.7 The following table shows the results to the main questions in relation to future need of Younger Households moving within the Borough.

Table 13-9 Households aged 16-24

Key data	% responses	N ^{os} . Implied
Existing households moving within the Borough		
<u>When are you planning to move?</u>		
Within 1 year	35.3	35
3 - 5 years	64.7	65
<u>Accommodation required?</u>		
Semi- detached	70.6	71
Flat	29.4	30
<u>Number of bedrooms required?</u>		
2 - bedroom	35.3	35
3 - bedroom	64.7	65
<u>Tenure required?</u>		
Owner occupation	100.0	100
<u>Location Required?</u>		
Brentwood	100.0	71
Warley	50.0	35

Concealed households moving within the Borough*		
<u>When are you planning to move?</u>		
Within 1 year	23.0	122
1 - 2 years	42.0	223
2 - 3 years	6.0	32
3 - 5 years	29.0	154
<u>Accommodation needed?</u>		
Flat	43.0	228
Terraced	38.6	205
Detached	7.4	39
Semi- detached	11.0	59
<u>Number of bedrooms needed?</u>		
1 - bedroom	24.9	132
2 - bedroom	64.0	339
3 - bedroom	11.1	60
<u>Tenure needed?</u>		
Brentwood Homes	49.6	563
Private rent	21.9	249
Owner-occupation	13.6	154
RP rent	13.5	153
RP Shared Ownership	1.4	16
<u>Location Required?</u>		
Brentwood	70.0	160
Hutton	28.8	66
Ingatestone, Fryerning and Mountnessing	16.9	39
Pilgrims Hatch	13.0	30
Shenfield	43.2	99
Warley	14.9	34

*1st and 2nd household member combined for concealed households aged **18-24** years only

Source: DCA Brentwood 2013 Housing Needs Survey

13.5 Students

- 13.5.1 The student population in Brentwood is not significant, as there is no major University and is made up from Further Education colleges and sixth form colleges.
- 13.5.2 The largest nearby college is Havering College, which provides further education and covers Brentwood, Romford and Rainham.
- 13.5.3 The college has approximately 3,800 students aged 16-18 years and a further 4,800 Adult students covering a wide variety of subject areas, the college also provides apprenticeships and links to employers in the wider community.
- 13.5.4 As the further education colleges provide no specific student housing, it is likely that some students will have an impact on the private rented sector.

13.6 Housing Needs of Older People

- 13.6.1 651 implied households indicated that they had older relatives (over 60) who may need to move to the Borough in the next three years. The breakdown of the type of accommodation required is shown in the table below.

Table 13-10 Accommodation Required by Older Relatives in Next 3 Years
Question 13b

	% households	N ^{os} . implied
Private sheltered housing	28.1	190
Private housing	25.4	172
Private Retirement Village	24.6	166
Live with respondent (need extension / adaptation)	23.0	156
Live with respondent (existing home adequate)	17.5	119
Residential care / nursing home	14.0	95
Council / RP sheltered housing	9.7	66
Council / RP Property	4.7	32
Extra Care housing	4.7	32
Total		1,028

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.6.2 Demand for this group was predicted by the children of older people and, as would be expected, it shows a different pattern to that normally seen among older respondents in DCA surveys where you find a lower number of older people admitting they need to move home.
- 13.6.3 Of the 651 implied households who indicated that they had older relatives who may need to move to the Borough in the next three years, 80.9% (526 implied) said their relative would have equity from the sale of their current home.
- 13.6.4 A further question was asked, if any member of the household was aged 60+ would they consider downsizing to a smaller property? The results are shown in the table below.

Table 13-11 Would you consider moving to a smaller property
Question 14

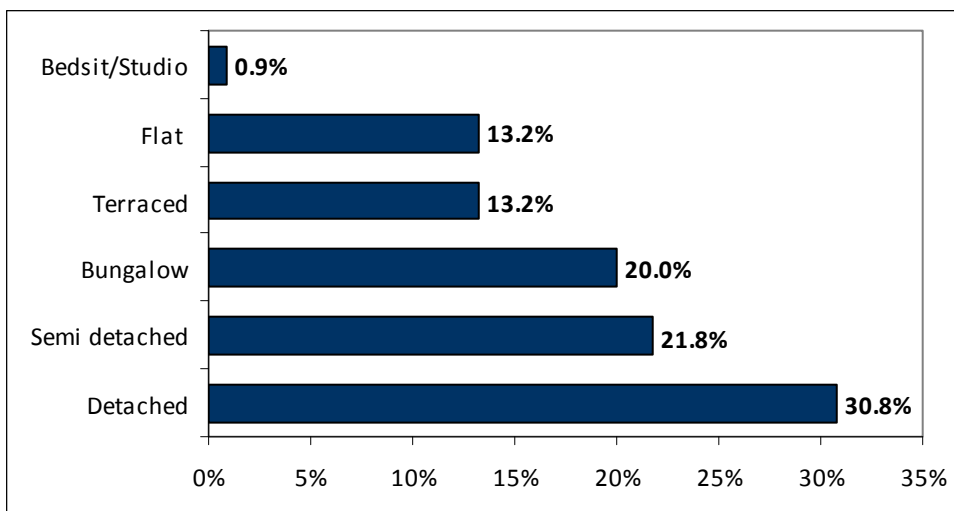
	% households	N ^{os} . implied
Yes	14.5	3,038
No	85.5	17,937
Total	100.0	20,975

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.6.5 Only 14.5% (3,038 implied households) would consider downsizing their current property.

- 13.6.6 The following graphs show the tenure, type and size of accommodation currently occupied by the 65+ age group.

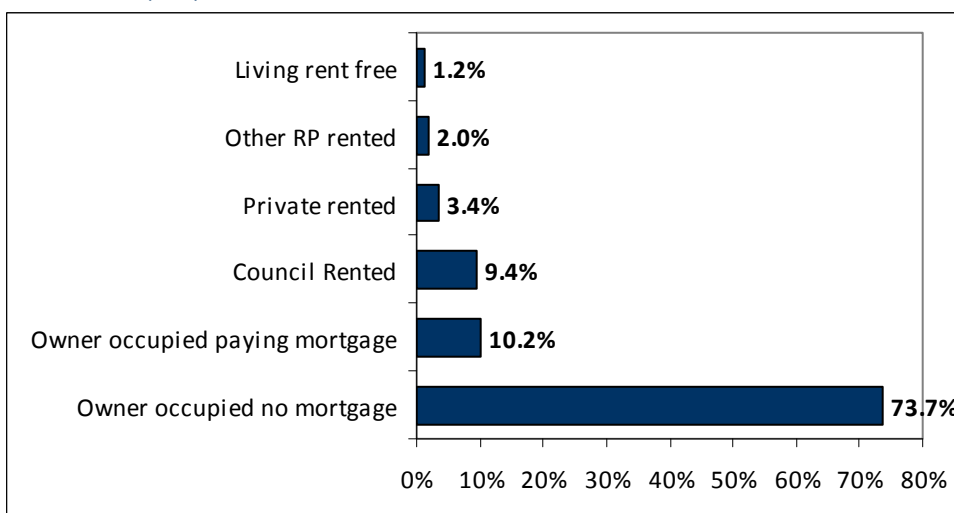
Figure 13-1 Type of General Stock Occupied by Older People (%)
Q2 x Q15da (65+)



DCA Brentwood 2013 Housing Needs Survey

- 13.6.7 The main property type occupied by older households was a detached property at 30.8% followed by 21.8% of households living in a semi-detached house and 20.0% in a bungalow.

Figure 13-2 Tenure of General Stock Occupied by Older People (%)
Q1 x Q15da (65+)

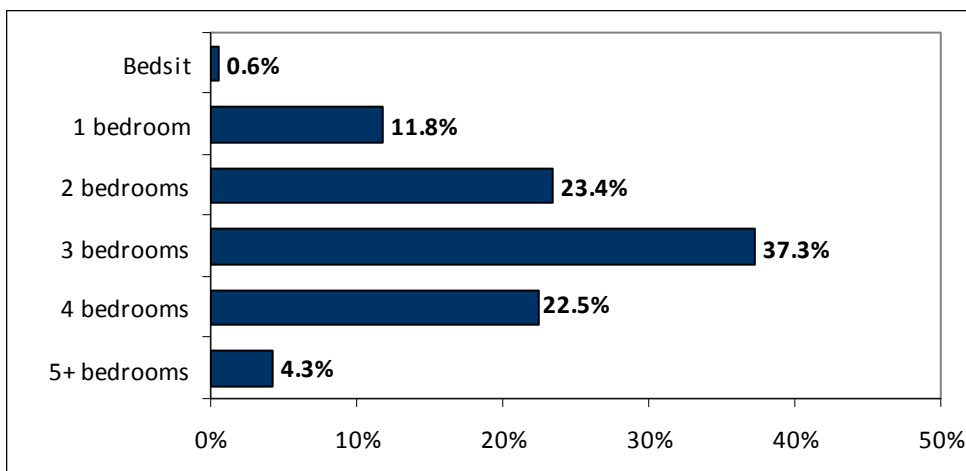


Source: DCA Brentwood 2013 Housing Needs Survey

- 13.6.8 The main tenure type occupied by older households was owner occupied (no mortgage) at 73.7% as would be expected amongst the older population.
- 13.6.9 Nationally it is acknowledged that older people on fixed incomes may have difficulty maintaining their homes.

- 13.6.10 This may be an issue in the Borough due to the properties occupied by older people and also the high number of owner occupied (no mortgage) properties.

Figure 13-3 Size of Accommodation Currently Occupied by Older People
Q3 x Q15da (65+)



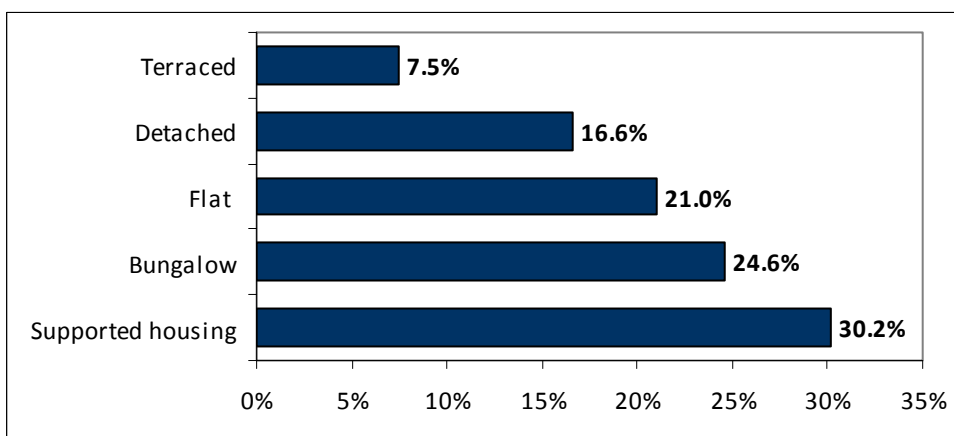
Source: DCA Brentwood 2013 Housing Needs Survey

- 13.6.11 The majority of older households live in 3-bedroom properties (37.3%).

The Future Needs of Older People

- 13.6.12 674 implied existing households aged 65+ are planning a move within the Borough in the next 5 years and they were asked a series of questions about their future housing requirements.

Figure 13-4 What Type Of Accommodation is required (65+)
Q15da (65+) x Q19

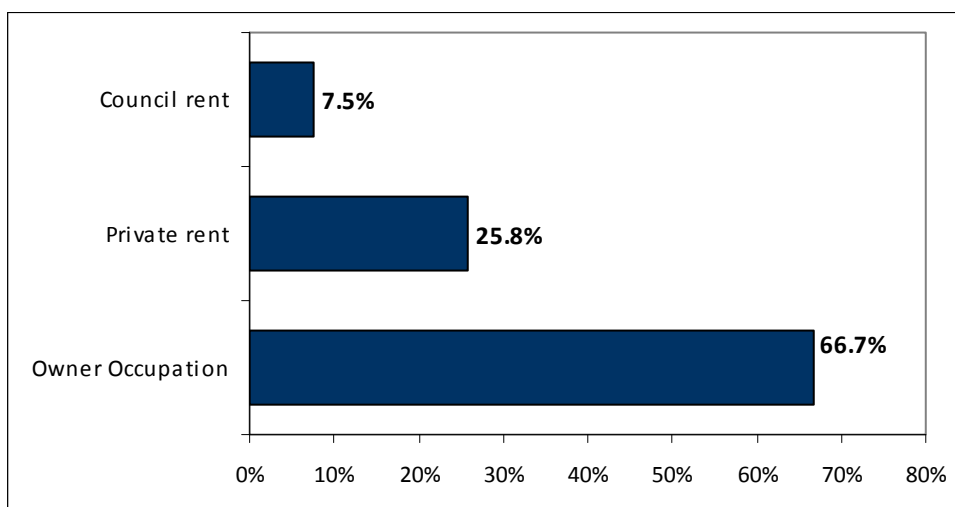


Source: DCA Brentwood 2013 Housing Needs Survey

No response for other types

- 13.6.13 The main type of accommodation that is preferred by older people when they move within the next five years is interest in Supported Housing (inc sheltered) at 30.2%, followed by a bungalow at around 24.6% of households.
- 13.6.14 21.0% preferred a flat and 16.6% a detached property.

Figure 13-5 What Tenure is preferred (65+)
Q15da (65+) x Q23



Source: DCA Brentwood 2013 Housing Needs Survey

- 13.6.15 66.7% would prefer to owner occupy and 25.8% would prefer private rent. 7.5% would prefer to rent from the Council when they move within the Borough in the next five years.
- 13.6.16 We also ran a cross-tabulation of the above data to show the future need of house type by tenure for those households aged 65 and over. The results can be seen in the table below.

Table 13-12 Type by Tenure for Households aged 65+
Q15da (65+) x Q23 x Q19

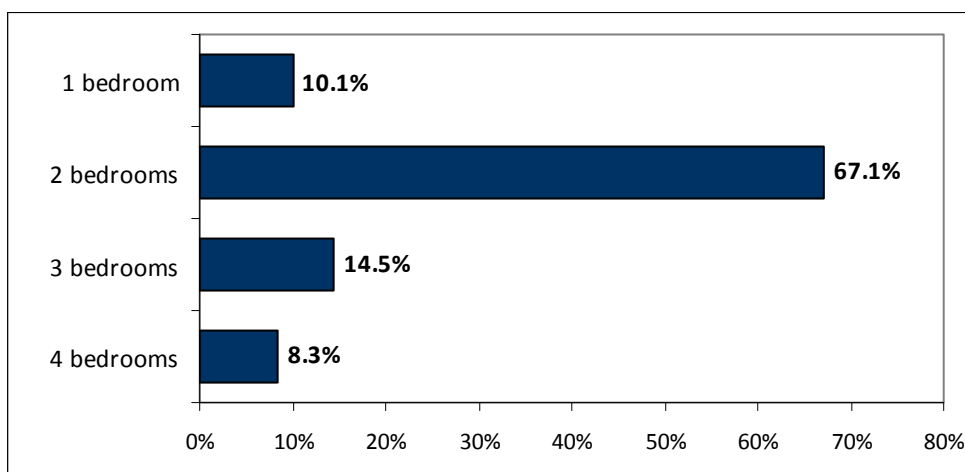
Type	Owner Occupied	Private Rented	Council Rented	Total
Detached House	100.0	0.0	0.0	100.0
Terraced House	0.0	100.0	0.0	100.0
Flat / maisonette	100.0	0.0	0.0	100.0
Bungalow	58.9	0.0	41.1	100.0
Supported Housing	47.9	0.0	52.1	100.0

Source: DCA Brentwood 2013 Housing Needs Survey

No response to other types or tenures

- 13.6.17 The majority of households aged over 65 who preferred to live in detached and flat accommodation also preferred owner occupation.
- 13.6.18 Those expressing an interest in supported housing (including sheltered accommodation) were fairly evenly spread across the market and social tenures.

Figure 13-6 Size of Housing Required by Existing Moving Households aged 65+
Q15da (65+) x Q21



Source: DCA Brentwood 2013 Housing Needs Survey

- 13.6.19 The size requirements of existing households who were planning a move revealed that the main requirement was for 2-bedrooms at 67.1%.

Savings / Equity of Older Households

- 13.6.20 The percentage breakdown of savings for households aged over 65 across the five main tenures was as follows:-

Table 13-13 Savings by Tenure Q16a x Q1 (Q15da 65+)

Savings	Owner Occupied (with mortgage)	Owner Occupied (no mortgage)	Private Rent	Council Rented	RP Rented
No Savings	9.4	6.5	27.1	31.9	66.7
Under £5,000	25.6	7.1	34.4	35.6	0.0
£5,000 - £10,000	10.0	11.3	24.9	25.1	33.3
£10,001 - £20,000	9.4	11.5	13.6	3.7	0.0
£20,001 - £30,000	4.9	7.1	0.0	0.0	0.0
£30,001 - £40,000	4.8	4.0	0.0	3.7	0.0
£40,001 - £50,000	11.0	7.7	0.0	0.0	0.0
Above £50,000	24.9	44.8	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.6.21 Generally, the breakdown produced the results which might be expected with 44.8% of those in owner occupation (no mortgage) having savings above £50,000. A fairly high proportion of retired owner occupier households will have capital to support their housing and care needs.
- 13.6.22 27.1% of households living in private rental, 31.9% in Council rented and 66.7% of RP rented tenants had no savings.

- 13.6.23 The next table relates to the level of equity ownership in their home and was answered by 64.8% (5,815 implied) of owner occupiers aged over 65.

Table 13-14 Level of Equity in Present Accommodation
Question 16b (Q15da 65+)

Level of Equity	%	Cum %
Negative Equity	4.4	4.4
Below - £25,000	0.4	4.8
£25,001 - £50,000	1.5	6.3
£50,001 - £75,000	0.8	7.1
£75,000 - £100,000	0.4	7.5
£100,001 - £150,000	6.5	14.0
£150,001 - £200,000	9.0	23.0
Above £200,000	77.0	100.0

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.6.24 92.5% of respondents indicated equity ownership of over £100,000. Cross-tabulation indicated that 94.8% of owner occupiers without a mortgage had an equity holding of over £100,000 as compared with 86.1% of owner occupiers with a mortgage.

Supported Accommodation

- 13.6.25 Existing households moving were asked if they were interested in supported housing and what type of supported housing they required, in the next five years to 2018.
- 13.6.26 682 households responded, giving a total of 824 responses, an average of 1.2 choices per household.

Table 13-15 Type of Supported Accommodation Required
Question 20

	% responses	N ^{os} . implied
Council / RP Sheltered Housing	60.4	411
Independent accommodation with external support	31.0	211
Private Sheltered Housing	16.8	115
Residential Care / Nursing Home	8.6	58
Extra Care Housing	4.2	29
Total		824

Source: DCA Brentwood 2013 Housing Needs Survey

No response for independent with live in carer

- 13.6.27 Over the next five years, demand for supported accommodation is predominantly for sheltered housing.
- 13.6.28 51.0% of all supported respondents said they would be looking for 2-bedroom accommodation, 30.3% required 3 bedroom and 18.6% chose 1-bedroom.

Sheltered Housing Demand

- 13.6.29 DCA survey experience shows that older people seek to remain in their own homes and prefer to receive support at home. In contrast, the children of older parents tend to predict the need for supported housing.
- 13.6.30 The greatest demand expressed by the family of in-migrating parents or relatives was for Council / RP rented property at 28.1% followed by Extra care housing at 25.4%. Private sheltered housing interest was 4.7%.

- 13.6.31 17.5% (119 households implied) indicated that their relative could live with them and their home was adequate without an adaptation, a further 9.7% (66 households) indicated that their relative could live with them but their home would need extension or adaptation.
- 13.6.32 The sheltered housing needs of older people were captured within the question for all movers within the Borough on supported housing. The combined requirement for sheltered housing in both sectors from existing households living in Brentwood and in-migrating parents / relatives are shown in the table below.

Table 13-16 Sheltered Housing Demand

	Private Market	Affordable Sector	All Sectors
Existing Households	115	411	526
In-migrant Households	190	66	256
Total	305	477	782

N.B. Figures taken from Table 13-10 and Table 13-15

- 13.6.33 There was a higher level of demand for accommodation from existing households than the need from older people moving into Brentwood, where generally, the forecast is being made by their children who assist in the moving process.
- 13.6.34 Conversely, the indigenous older population prefer to continue in the area / surroundings they know and within their own home as long as possible and often will not acknowledge or predict the need to move.
- 13.6.35 This relatively new trend is borne out in sales of new build private sector sheltered housing and extra care projects where a significant proportion of purchasers are moving over 100 miles to be close to their mature children who have settled in the Borough.
- 13.6.36 The 'baby boomer' age group who are now in their 60's were the first major group to be a more mobile workforce economy, particularly professional personnel. The combined impact of the number of these people and where they now live and work, are significant factors in the growth in the number of parents moving to join their family in old age.
- 13.6.37 Conversely, the indigenous older population prefer to continue in the area / surroundings they know and within their own home as long as possible and often will not acknowledge or predict the need to move. Need and demand levels from local older residents are normally relatively low in household surveys.
- 13.6.38 In total, the data suggests a combined requirement for sheltered accommodation from older people currently living in the Borough (526 households) and those who may in-migrate to be beside their family (256 households) of 782 units, 477 in the affordable sector and 305 in the private sector.
- 13.6.39 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.

Extra Care Accommodation

- 13.6.40 Extra Care accommodation is housing which offers self-contained accommodation together with communal facilities and where care, as well as support, services are provided from a team based on a site.
- 13.6.41 There was a need expressed for extra care accommodation from both older people moving into the Borough (172 units) and existing households (58 units).
- 13.6.42 The issue of potential delivery through shared equity also applies to the extra care sector. Although we do not have information on the current tenure of in-migrating parents it would be reasonable to conclude that the majority would be owner-occupiers with no mortgage.
- 13.6.43 This sector of the older persons housing market is relatively new and the growth forecast in the population projections over the next decade to 2021 of those aged 75+ years may well increase the need for this type of accommodation; demand may also increase as understanding of this sector of supported housing increases.
- 13.6.44 The demographic data shows that the issues which will have to be addressed are happening now and will have an impact in both the market and social housing sectors.
- 13.6.45 The scale of under-occupation is very high representing around 13,951 households in the Borough with around 315 in the social rented sector.
- 13.6.46 Addressing this need in policy and development terms will help the flow of family homes as well as freeing up lower level supported housing in both market and social housing.

Making Best use of the Existing Stock

- 13.6.47 Making the best use of the existing stock is a core Government objective and is a key aspect of sustainable development. The significant under-occupation of existing housing stock in both sectors is a key element in future strategy to provide a more balanced stock to meet the requirements of future households.
- 13.6.48 New development should meet gaps in the current stock and create secondary gains in improving stock flow in both sectors.
- 13.6.49 Over two-thirds of households within the owner occupied no mortgage sector have two or more spare bedrooms, slightly higher than the level of around 61% found in recent DCA surveys. This sector will include a high proportion of older households.
- 13.6.50 Additionally over two thirds of current owner-occupier households also under-occupy and as these households grow older, the scale of social stock under-occupation will increase year on year if the existing stock turnover is not improved.

Housing and Planning Strategy

- 13.6.51 The policy requirement for the future to make best use of the housing stock must involve addressing under-occupation to assist in improving the rate of turnover of family units, and provide specialist accommodation to meet the changing requirements of the increasing older population.

13.7 Households with Support Needs

- 13.7.1 This section examines the results for those households in the Borough who have a member with a disability / limiting long term illness.
- 13.7.2 Housing may need to be purpose built or adapted for households with specific support needs. Information about the characteristics of these households will inform housing and support strategies.
- 13.7.3 Types of disability / limiting long-term illness identified within the survey included:-
- Wheelchair user;
 - Walking difficulty;
 - Learning disability / mental health problem;
 - Drug / alcohol abuse;
 - Visual / hearing impairment;
 - Asthmatic / respiratory problem;
 - Other physical disability;
 - Limiting long-term illness.
- 13.7.4 Issues relating to households with one or more members who are affected by a physical or mental health disability or long-term illness were addressed through a series of questions. This section draws together the findings covering property adaptation and support provision and outstanding needs.
- 13.7.5 17.1% of households in the area contain somebody with a disability, suggesting 5,466 households in the Borough were affected in some way.
- 13.7.6 Assessment of the UK average for the proportion 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 households. The Department for Work and Pensions Family Resources Survey 2006 suggests as many as 10 million disabled people in the UK - around 19.7% of the population.
- 13.7.7 46% of households who contain someone with a disability stated that they had a support need (2,775 implied households).
- 13.7.8 The comparative figures for the various tenures were as per Table 13-17 below. The level in the social rented sector (20.2%) was higher than the proportion of total stock represented by social rented accommodation (10.5%). The level in the owner occupied sector was 66.4% compared to the stock level of 76.7%.

Table 13-17 Disability by Tenure
Question 1 by Question 9

Tenure	Sample Tenure %	Tenure of those with disability %	N ^{os} . Implied (Disability)
Owner occupied with mortgage	38.3	24.7	1,352
Owner occupied without mortgage	38.4	41.7	2,281
Private rented	11.3	11.0	604
Council rented	7.8	16.1	880
RP rented	2.7	4.1	223
Living rent free*	0.6	2.4	125
Total		100.0	5,465

*Low level of data No data for some tenures Source: DCA Brentwood 2013 Housing Needs Survey

- 13.7.9 When asked how many members of the household had a disability, 91% of cases said only one household member had a disability and 9% said two members had a disability suggesting 6,020 people in total. The age profile and nature of disability data suggest slightly higher totals than this.
- 13.7.10 6,150 responses were received to the age of disabled members. Data for the age groups of all disabled household members is shown in the table below.

Table 13-18 Age of Disabled Household Members (Question 10b)

Age	%	N ^{os.} implied
0 - 10	3.3	206
11 - 15	2.0	126
16 - 24	3.2	199
25 - 34	6.7	414
35 - 49	11.0	674
50 - 64	19.1	1,175
65 - 79	32.8	2,014
80+	21.9	1,342
Total	100.0	6,150

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.7.11 54.7% of all disabled household members were over the age of 65 including 21.9% over 80; 26.2% were aged under 49 years.
- 13.7.12 The next table shows the nature of the disability of members of the household. Responses were received to a multiple response question, giving an average of 1.5 responses.

Table 13-19 Nature of Disability
Question 10c

Disability	% responses	% households	N ^{os.} implied (all choices)
Wheelchair user	5.7	8.5	497
Walking difficulty (not in wheelchair)	34.8	51.2	3,008
Learning disability / Mental health problem	11.3	16.7	982
Drug & Alcohol misuse	0.3	0.4	26
Visual / hearing impairment	10.6	15.7	922
Other physical disability	13.2	19.4	1,139
Limiting long-term illness	24.1	35.5	2,090
Total	100.0		8,664

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.7.13 The largest group of people were those with a walking difficulty (51.2%). 35.5% had a limiting long term illness and 19.4% of households contained someone who had an 'other' physical disability.
- 13.7.14 Further data analysis showed that 34.7% (183 of the 528 at Table 13-21 below) of properties, in which people using a wheelchair lived, had been adapted, a similar proportion compared with recent DCA survey experience (around 32.0%) suggesting some mismatch between houses adapted and those where wheelchair users lived.

- 13.7.15 By extension, it would appear that 314 households with a wheelchair user (63.2%) did not live in suitably adapted premises.

Support Needs

- 13.7.16 6,042 implied household members responded to the question on need for care or support. 45.9% indicated a need for care or support (2,775 implied).
- 13.7.17 83.0% of those with a care or support need felt they were getting enough support, the data implying 17% (546 implied) with an outstanding support need.

Adaptation

- 13.7.18 Three questions sought information from all households in the Borough on the degree to which the home had been built or adapted to meet the needs of a disabled person.
- 13.7.19 8.0% of properties (2,500 implied) had been adapted, lower than the level found in DCA surveys (around 11%). The split by tenure is set out in the table below.

Table 13-20 Adaptations by Tenure

Question 11a by Question 1

Tenure	%	N ^{os.} implied
Owner occupied no mortgage	35.7	892
Owner occupied with mortgage	20.0	500
Private rented	12.3	307
Council rented	24.1	603
RP rented	7.9	198
Total	100.0	2,500

Source: DCA Brentwood 2013 Housing Needs Survey

* - low sample

- 13.7.20 Out of the 2,500 properties that had been adapted, adaptation in the owner occupied sector was the highest at 55.7%. 24.1% of Council rented properties have been adapted and 7.9% in the RP rented sector.
- 13.7.21 2,809 households responded to the question on which adaptations had been provided, suggesting level of around 9% (rather than 8% in 13.7.19 above).

Table 13-21 Types of Adaptations Provided / Needed to Current Home

Question 11b and Question 12

Adaptations	Provided		Needed	
	% households	N ^{os.} implied (all choices)	% households	N ^{os.} implied (all choices)
Wheelchair adaptations	18.8	528	13.9	753
Access to property	35.7	1,002	14.6	794
Vertical lift / stair lift	26.5	745	26.9	1,465
Bathroom adaptations	48.4	1,358	30.5	1,660
Extension	1.0	29	20.2	1,100
Ground floor toilet	26.0	731	19.2	1,042
Handrails / grabrails	57.6	1,617	27.3	1,483
Other	8.6	242	21.8	1,187
Total		6,252		9,484

Source: DCA Brentwood 2013 Housing Needs Survey

- 13.7.22 57.6% had handrails / grabrails and 48.4% had bathroom adaptations. 35.7% had access to property adaptations and 26.0% had a ground floor toilet.
- 13.7.23 Most of the main adaptations referred to as provided, featured less prominently in the list of adaptations still needed. Extension and other adaptations had a more significant need than provided.
- 13.7.24 Wheelchair adaptations at 18.8% (528 implied) were higher than the average level found in DCA surveys (around 15%). The data taken in conjunction with 13.7.14 above suggests that 345 wheelchair adapted premises are no longer occupied by a wheelchair user.

Future Demand

- 13.7.25 The following table shows the results to the main questions in relation to future need of disabled households moving within the Borough within the next five years (660 implied households).

Table 13-22 Disabled Households

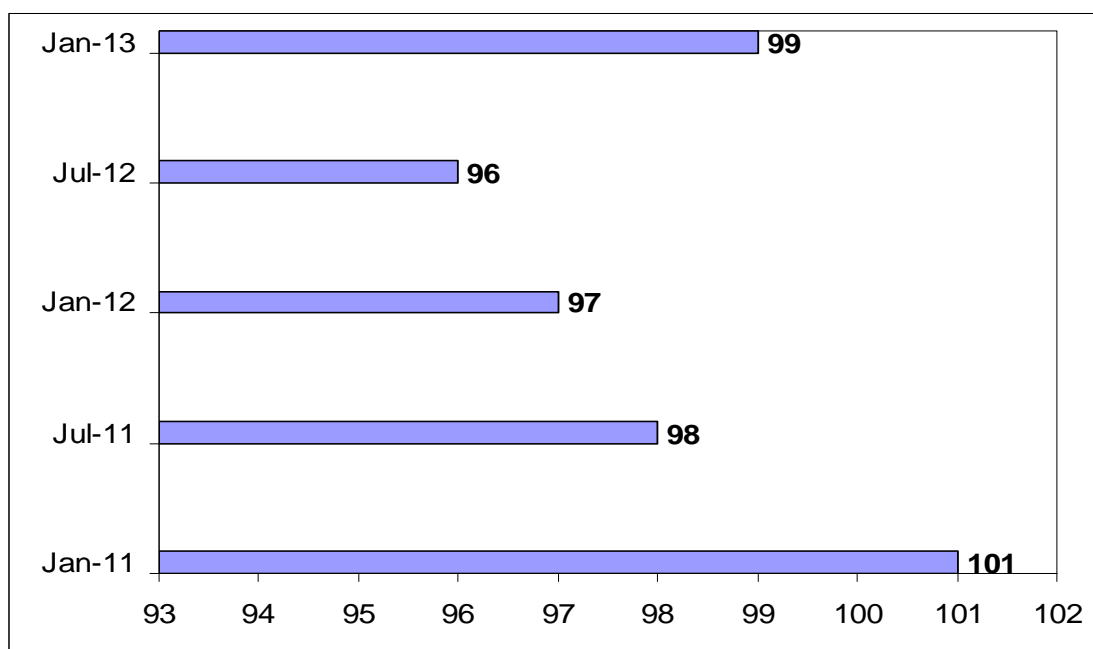
Key data	% responses	N ^{os.} Implied
Existing household moving within the Borough		
<u>When are you planning to move?</u>		
Within 1 year	34.0	184
1 - 2 years	35.3	194
2 - 3 years	13.7	74
3 - 5 years	17.0	92
<u>Accommodation preferred?</u>		
Bungalow	35.6	226
Semi- detached	10.6	67
Flat	29.7	188
Terraced	5.6	35
Detached	5.4	34
Supported Housing	13.2	83
<u>Supported Accommodation Required?</u>		
Independent accommodation with external support	26.2	65
Private sheltered housing	37.6	93
Council / RP Sheltered housing	47.9	119
Residential / Nursing Home	11.6	29
Extra Care Housing	11.6	29
<u>Number of bedrooms preferred?</u>		
1 - bedroom	28.2	188
2 - bedroom	43.3	288
3 - bedroom	28.4	189
<u>Tenure preferred?</u>		
Council rented	51.0	339
Owner occupation	29.6	197
Private rent	19.4	129
<u>Location preferred?</u>		
Brentwood	67.0	380
Ingatestone, Fryerning & Mountnessing	37.4	212
Shenfield	24.0	136
Hutton	23.3	132
Warley	21.4	122

- 13.7.26 The highest preference by disabled households moving was for a bungalow. A further cross reference showed that (162 implied); 71.7% of the requirement for bungalows came from those aged 0 - 64 years, i.e. the 'younger' disabled group. This potentially shows a need in the disability group of households without specific support needs but who require accommodation on one level.
- 13.7.27 We then did a further cross-tabulation of this data which showed that of the younger disabled households (0-64 years) who preferred a bungalow, around 77% would prefer to live within the Brentwood. The balance was split evenly between Brizes and Doddinghurst, Ingatestone, Fryerning and Mountnessing and Warley.
- 13.7.28 Bungalows are not as readily available in the general housing stock and are often more expensive due to their limited availability.

13.8 Gypsy and Traveller Households

- 13.8.1 Brentwood Borough Council took part in a joint Gypsy and Traveller Accommodation Assessment during 2008 with 12 Districts in Essex (with the exception of Thurrock) and Essex County Council, which was completed in July 2009. A new GTAA has been commissioned in 2013 but the findings are not available at the time of this report.

Figure 13-7 Brentwood Caravan Count July 2011 to July 2013



Source: CLG July 2013

- 13.8.2 In the 2009 study it was stated that Brentwood Borough needed to provide 15 pitches (RSS requirement) to 2013.
- 13.8.3 In the 2013 commission Brentwood should consider the information set out in the CLG's 'Planning for Traveller Sites March 2012' document that sets out the Government's planning policy for traveller sites. This should be read in conjunction with the National Planning Policy Framework.
- 13.8.4 The Government's overarching aim is to ensure fair and equal treatment for travellers, in a way that facilitates the traditional and nomadic way of life of travellers while respecting the interests of the settled community.

13.8.5 To help achieve this, Government's aims in respect of traveller sites are:

- That local planning authorities should make their own assessment of need for the purposes of planning;
- To ensure that local planning authorities, working collaboratively, develop fair and effective strategies to meet need through the identification of land for sites;
- To encourage local planning authorities to plan for sites over a reasonable timescale;
- That plan-making and decision-taking should protect Green Belt from inappropriate development;
- To promote more private traveller site provision while recognising that there will always be those travellers who cannot provide their own sites;
- That plan-making and decision-taking should aim to reduce the number of unauthorised developments and encampments and make enforcement more effective;
- For local planning authorities to ensure that their Local Plan includes fair, realistic and inclusive policies;
- To increase the number of traveller sites in appropriate locations with planning permission, to address under provision and maintain an appropriate level of supply;
- To reduce tensions between settled and traveller communities in plan-making and planning decisions;
- To enable provision of suitable accommodation from which travellers can access education, health, welfare and employment infrastructure;
- For local planning authorities to have due regard to the protection of local amenity and local environment.

14 CLG ASSESSMENT MODEL

14.1 Introduction

14.1.1 The SHMA Guidance indicates that housing authorities and partnerships should estimate the number of households who lack their own housing or live in unsuitable housing and who cannot afford to meet their housing needs in the market and therefore will require some form of affordable housing.

14.1.2 Table 14-1 outlines the types of housing considered unsuitable.

Table 14-1 **Types of Housing Deemed Unsuitable**

Unsuitable Housing	
Homeless households or insecure tenure	Homeless households.
	Households with tenure under notice, real threat of notice or lease coming to an end; housing that is too expensive for households in receipt of housing benefit or in arrears due to expense.
Mismatch of housing need and dwellings	Overcrowded according to the 'bedroom standard'.
	Too difficult to maintain (e.g. too large) even with equity release.
	Couples, people with children and single adults over 25 sharing a kitchen, bathroom or WC with another household.
Dwelling amenities and condition	Households containing people with mobility impairment or other specific needs living in unsuitable dwelling (e.g. accessed via steps), which cannot be made suitable in-situ.
	Lacks a bathroom, kitchen or inside WC and household does not have the resources to make fit (e.g. through equity release or grants).
	Subject to major disrepair or unfitness and household does not have the resources to make fit (e.g. through equity release or grants).
Social Needs	Harassment from others living in the vicinity which cannot be resolved except through a move.

Source: Strategic Housing Market Assessments Practice Guide, CLG 2007,

14.2 The CLG Needs Assessment Model Structure

- 14.2.1 There are three 'Stages' in the needs assessment model, combined into three distinct sections assessing current and future housing need and supply.

STAGE 1 CURRENT HOUSING NEED

- 1.1 Homeless households and those in temporary accommodation
Plus
- 1.2 Overcrowded (households who failed the CLG 'bedroom standard') and concealed households (those over 25 who share facilities with another household)
Plus
- 1.3 Other groups
- 1.4 ***Equals - Total Current Housing Need***



STAGE 2 FUTURE HOUSING NEED (GROSS)

- 2.1 New household formation (gross per year)
Times
- 2.2 Proportion of new households unable to rent in the market
Plus
- 2.3 Existing households falling into need
- 2.4 ***Equals - Total Newly Arising Need***



STAGE 3 AFFORDABLE HOUSING SUPPLY

- 3.1 Affordable dwellings occupied by households in need
Plus
- 3.2 Surplus stock
Plus
- 3.3 Committed supply of new affordable housing
Minus
- 3.4 Units to be taken out of management
- 3.5 ***Equals - Total Affordable Housing Stock Available***
- 3.6 Annual supply of social re-lets (net)
Plus
- 3.7 Annual supply of intermediate affordable housing available for re-let or re-sale at sub-market levels.
- 3.8 ***Equals - Annual Supply of Affordable Housing***

14.3 Model Structure

- 14.3.1 The Housing Needs Assessment Model is based on the 2007 Strategic Housing Market Assessment Practice Guidance, and is designed to estimate the number of households who lack their own housing or live in unsuitable housing and who cannot afford to meet their housing needs in the market. It provides essential evidence for housing targets in Local Development Plans.
- 14.3.2 The model is structured on a 'flows' basis, taking account of recent experience over the previous three years and examining projections over the next two years. It has to be assumed that this 'annualised' data will occur each year to 2018. The primary data has a five year 'life' and will need to be gathered again before 2018. Major changes in house prices and incomes could cause significant variation in the overall situation.
- 14.3.3 In this section the assessment of affordable housing need has been conducted using both primary data from the 2013 Housing Survey and secondary data from CORE, HSSA, and ELASH and from local authority records.

14.4 Brentwood CLG Needs Assessment Model

- 14.4.1 The first element of this Stage of the model estimates the number of homeless households including those in temporary accommodation.
- 14.4.2 The latest data available, the P1(E) return at 31st March 2013 identified 14 homeless households.
- 14.4.3 Care must be taken in the assessment to avoid double counting those households who are "homeless at home" or in other general stock as they would potentially have been captured in the survey data, which is used to determine housing need at different stages.
- 14.4.4 Twelve households were in a hostel or refuge which would not have been surveyed and a total of **12** is therefore the figure applied at **Stage 1.1** in the model.
- 14.4.5 The second element in Stage 1 of the model estimates the number of households in over-crowded conditions (i.e. those who fail the 'bedroom standard'), and concealed households (couples, people with children and single adults aged over 25 who share facilities with another household).

Table 14-2 Over-crowded and Concealed Households

Over-crowded Households		839
MINUS Concealed Solution or Leaving Borough	264	575
PLUS Concealed Households		0
Overcrowded + Concealed Group		575
MINUS Duplication		0
Net Overcrowded + Concealed Group		575
Proportion unable to afford market housing	90%	
Stage 1.2 – Over-crowding and concealed households		517

- 14.4.6 There are 839 households in Brentwood who are over-crowded by the 'bedroom standard'.
- 14.4.7 However 264 of these will be resolved by a newly forming household moving or by the households leaving Brentwood, leaving a net group of 575. There are no concealed households, or duplication leaving a total of 575 over-crowded and concealed households.
- 14.4.8 A test of affordability for these households shows that all of them cannot afford to resolve their housing difficulties through market housing in Brentwood and **517 households** have been applied in the model at **Stage 1.2**.
- 14.4.9 The third element in Stage 1 of the model examines households living in unsuitable accommodation whose problem cannot be solved 'in-situ' and who therefore require to move home in order to resolve their difficulty.
- 14.4.10 SHMA Practice Guidance identifies that households who are overcrowded, were suffering harassment, those whose rent / mortgage was too expensive, housing was affecting their health, whose tenancy was insecure or whose home was too large are all in unsuitable housing and are assessed to need to move home.
- 14.4.11 The survey identified 1,441 households with one or more inadequacies, 87 of whom were already counted in Stage 1.2 and are removed to avoid double-counting.
- 14.4.12 This leaves a net group of 1,354 households, 70.6% of whom are unable to afford to resolve their housing difficulties through market housing in the area, leaving **956 households** to be applied in the model at **Stage 1.3**.
- 14.4.13 The final element of Stage 1 of the model is a sum of steps 1.1, 1.2 and 1.3, a total of **1,485 households** applied at **Stage 1.4**.

Table 14-3 **Current Housing Need (Gross)**

STAGE 1 – CURRENT HOUSING NEED (GROSS)	
1.1 Homeless households in temporary accommodation	12
1.2 Overcrowding and concealed households	517
1.3 Other groups	956
1.4 TOTAL CURRENT HOUSING NEED (GROSS) 1.1 + 1.2 + 1.3	1,485

14.5 Stage 2 – Future Need (Gross per year)

- 14.5.1 The first element of Stage 2 of the model estimates the annual number of newly forming households in Brentwood.
- 14.5.2 The concealed households identified in the survey forming over the next three years are annualised at an average level of 749 households forming a year, although levels are reasonably consistent over the period.

Table 14-4 Time of Move – Concealed Households

Time of Move	Nos. implied	Annual Average
Within 1 year	540	749
1 to 2 years	952	
2 to 3 years	756	

- 14.5.3 In order to avoid double counting due to two-person household formation, duplication is removed.
- 14.5.4 Virtually half (45.5%) of concealed households forming over the next three years specified formation as a couple, with 34.0% of these having a partner who lived separately elsewhere in Brentwood, which would cause a double count. The 45.5% is applied to this level in the table below ($45.5\% \times 34.0\% = 15.5\%$).

Table 14-5 Double Counting Removal

New household formation (gross p.a.)	749
MINUS - Two person formation ($749 \times 15.5\%$) x 0.5	58
Total	691

- 14.5.5 This results in an annual average formation level of **691 new households each year**, used at **Stage 2.1** of the model.
- 14.5.6 The income of recently formed households who formed their first home over the last three years has been used to test the ability to purchase in the lower quartile stock and access the private market (to buy or rent) of one, two and in some cases three bedroom units suitable for their requirements.
- 14.5.7 On this basis 30.7% of concealed households are considered to be unable to rent in the private market, with 44.5% unable to buy. The rental proportion of **30.7%** is therefore used at **Stage 2.2** of the model.
- 14.5.8 Some recently formed households had quite high incomes and using these levels may significantly under-represent the numbers of new forming households because those who were unable to access even the rental market are excluded.
- 14.5.9 If the incomes of those planning to form were used 84% could not afford private rent and 89% are unable to buy.
- 14.5.10 The final element of Stage 2 of the model estimates the number of households in Brentwood who fall into housing need.

- 14.5.11 The calculation of existing households falling into need used data from Brentwood Council's Housing Register for new applicants at June 2013.
- 14.5.12 There were 714 households registered of which 109 are assessed as in priority need, including homelessness acceptances, applied at **Stage 2.3** of the model.
- 14.5.13 The final element of Stage 2 of the model is a sum of step 2.1 multiplied by step 2.2, added to step 2.3 above, giving a total of 321 applied at **Stage 2.4**.

Table 14-6 Future Need (Gross per Year)

STAGE 2 – FUTURE NEED (GROSS PER YEAR)		
2.1	New household formation (gross per year)	691
2.2	Proportion of new households unable to buy (44.5%) or rent (30.7%) in the market	30.7%
2.3	Existing households falling into need	109
2.4	TOTAL ANNUAL NEWLY ARISING NEED (2.1 x 2.2) + 2.3 (691 x 30.7% = 212 + 109 = 321)	321

14.6 Stage 3 – Affordable Housing Supply

- 14.6.1 The first element of Stage 3 of the model determines the number of households analysed in Stages 1.2 and 1.3 who currently occupy social rented or shared ownership dwellings.
- 14.6.2 It is assumed that any move by these households would release a unit of affordable housing, and it is therefore assumed that there would be no overall net effect on the annual flow model.
- 14.6.3 The survey data shows that of the **1,473 households** at Stages 1.2 and 1.3 of the model, **767** already live in affordable units, and this total is applied at **Stage 3.1**.

14.7 Vacant Stock

- 14.7.1 The second element of Stage 3 of the model assesses the level of surplus affordable stock in Brentwood. There were 11 vacant affordable units in the 2012 ELASH. Guidance states that where the level is below 3% there is no surplus vacant stock. **A total of zero is therefore applied at Stage 3.2** of the model.
- 14.7.2 The third element of Stage 3 of the model forecasts the number of new affordable units to be built in Brentwood on an annual basis. In 2011/12 132 new affordable units were built.
- 14.7.3 The impact of the recession on new delivery could reduce new affordable delivery through planning obligations.
- 14.7.4 The Borough has delivered a relatively low level of new affordable housing over the past three years and the future is less predictable.
- 14.7.5 There is more benefit in having no future delivery in the model so that the net need is calculated after the supply from the existing stock only. It is therefore recommended that **zero** unit delivery is used at **Stage 3.3**.

- 14.7.6 The next element of the model estimates the number of units to be taken out of management in Brentwood through stock demolition and Right to Buy (RTB) on an annual basis.
- 14.7.7 The table below shows the RTB levels from Council data for the three years to 31/03/2013. There have been no demolitions of stock.

Table 14-7 2010 to 2012 Right to Buy

	2010 / 11	2011 / 12	2012 / 13	Average
Right to Buy	2	5	11	6

- 14.7.8 The average loss of units through RTB is 6 units per annum. If the average stock re-let rate of 5.5% per annum is applied to the average figure of 6 units lost for future re-letting, this would be less than 1 unit and a figure of **zero is applied at Stage 3.4** of the model.
- 14.7.9 **Stage 3.5** of the model is the sum of Stages 3.1 (767), less 3.2 (0), and 3.3 (0), a net total of **767** units.

14.8 Annual Re-let Supply

- 14.8.1 The average annual re-let supply of affordable units over the last 3 years is normally used in the model as a prediction for the future annual affordable housing supply from general needs re-lets (i.e. excluding transfers and new unit delivery) likely to arise each year.
- 14.8.2 CORE data for the 3 years to 31/03/2012 shows the following:-

Table 14-8 RP Social Rent Re-let Supply (CORE 2010 to 2012)

	2009 / 10	2010 / 11	2011/12	Average
Social Re-lets	109	116	150	125

- 14.8.3 The overall average net re-let figure for the RP stock for the three year period to 2011/12 of **125 re-lets a year, a turnover rate of 5%**, is applied at **Stage 3.6**.

14.9 Shared Ownership Re-sales

- 14.9.1 There were 194 shared ownership units at the March 2011 Census and assuming a re-sale rate of 5%, **10 units** would become available each year and this number is incorporated at **Stage 3.7**.

- 14.9.2 The final element of Stage 3 of the model is a sum of Stages 3.6 and 3.7, a total of **141** applied at **Stage 3.8**.

Table 14-9 Affordable Housing Supply

STAGE 3 – AFFORDABLE HOUSING SUPPLY	
3.1 Affordable dwellings occupied by households in need	767
3.2 Surplus stock	0
3.3 Committed supply of new affordable housing	0
3.4 less Units to be taken out of management	0
3.5 TOTAL AFFORDABLE HOUSING STOCK AVAILABLE 3.1 + 3.2 + 3.3 – 3.4	767
3.6 Annual supply of social re-lets (net)	125
3.7 Annual supply of intermediate affordable housing available for re-let or resale at sub market levels	10
3.8 ANNUAL SUPPLY OF AFFORDABLE HOUSING (3.6 + 3.7)	135

14.10 Affordable Housing Needs Model

STAGE 1 – CURRENT HOUSING NEED (GROSS)		
1.1	Homeless households in temporary accommodation	12
1.2	Overcrowding and concealed households	517
1.3	Other groups	956
1.4	TOTAL CURRENT HOUSING NEED (GROSS) (1.1 + 1.2 + 1.3)	1,485
STAGE 2 – FUTURE NEED (GROSS PER YEAR)		
2.1	New household formation (gross per year)	691
2.2	Proportion of new households unable to buy (44.5%) or rent (30.7%) in the market	30.7%
2.3	Existing households falling into need	109
2.4	TOTAL ANNUAL NEWLY ARISING NEED (2.1 x 2.2) + 2.3 (691 x 30.7% = 212 + 109 = 321)	321
STAGE 3 – AFFORDABLE HOUSING SUPPLY		
STAGE 3 – AFFORDABLE HOUSING SUPPLY		
3.1	Affordable dwellings occupied by households in need	767
3.2	Surplus stock	0
3.3	Committed supply of new affordable housing	0
3.4	less Units to be taken out of management	0
3.5	TOTAL AFFORDABLE HOUSING STOCK AVAILABLE (3.1 + 3.2 + 3.3 – 3.4)	767
3.6	Annual supply of social re-lets (net)	125
3.7	Annual supply of intermediate affordable housing available for re-let or resale at sub market levels	10
3.8	ANNUAL SUPPLY OF AFFORDABLE HOUSING (3.6 + 3.7)	135
A	TOTAL NET CURRENT NEED 1.4 – 3.5 (1,485 – 767 = 718)	718
B	QUOTA TO ADDRESS NEED OVER 5 YEARS	20%
C	ANNUAL CURRENT NEED (A x B)	144
D	TOTAL ANNUAL NEWLY ARISING NEED (2.4)	321
E	TOTAL AFFORDABLE NEED PER YEAR (C + D)	465
F	ANNUAL SUPPLY OF AFFORDABLE HOUSING (3.8)	135
	OVERALL ANNUAL SHORTFALL (E – F)	330

14.11 Affordable Needs Assessment

- 14.11.1 Elimination of the backlog over a five year period is recommended in the SHMA Guidance for model purposes but the Council could make a Policy decision to do so over a longer period (e.g. 10 years or the number of years to the end of the Local Plan period). These are more often used where the scale of the backlog clearly cannot be addressed.
- 14.11.2 The 5 and 15 year periods are used for further analysis below. The 15 year calculation uses 6.66% as the quota to address need, instead of 20% which is the quota for 5 years applied at Section B of the Housing Needs Model.
- 14.11.3 Net re-lets of 125 units of the existing social stock are the major means of addressing the scale of need identified.
- 14.11.4 After allowing for this level of existing social stock net re-let supply and 10 estimated shared ownership re-sales, there will still be a total net annual need, prior to new delivery, of either 330 units dealing with the backlog over 5 years, or 234 over the 15 year life of the Local Plan.
- 14.11.5 The table below outlines the calculation.

Table 14-10 Annual Affordable Need and Supply

		5 Years	15 Years
Total Net Current Need		718	718
Backlog rate	20%	144	48
Newly arising Need		321	321
Annual Affordable Need		465	369
Less Annual Supply		135	135
Net annual need		330	234
Plus Assumed new units of supply		0	0
Total Need after existing stock turnover		330	234

- 14.11.6 If it is not possible to deliver on the five year basis, the 15 year level of need of **234 a year** after re-let supply **but before** any new unit delivery could be used when setting targets.

15 BRINGING THE EVIDENCE TOGETHER

- 15.1.1 The findings of this section directly relate to a number of the core outputs set out in the DCLG Guidance. Key findings bringing the evidence and analysis together to determine future target recommendations are presented below.

15.2 Market Housing

- 15.2.1 Creating a more balanced stock can only be achieved over the long term but fundamentally it has to address imbalances in the structure of the current stock.
- 15.2.2 Brentwood has a higher than average proportion of owner occupation at 76.7%, almost 10% above the national level.
- 15.2.3 The stock is dominated by larger properties with around 40% of all owner occupied properties have 3 bedrooms and almost 38% have 4 or more bedrooms, a very high level compared to less than 22% which are 1 and 2 bedroom units.
- 15.2.4 There is a need for a higher proportion of two bedroom units to create better housing offer and address the increasing need for smaller properties due to demographic and household formation change.
- 15.2.5 Broadly we recommend a **65% small and 35% large unit** split and we have given a dwelling unit size in the table below which could be subject to greater variation at site level.

15.3 Low Cost Market Housing

- 15.3.1 Low cost market housing is likely to be smaller one and two bedroom units which are provided to meet the needs of households with income levels just adequate to access the housing market.
- 15.3.2 Given that household growth in the Borough will be mostly from smaller households, it is considered that smaller units will play a key role in meeting future market housing requirements.
- 15.3.3 The delivery of these smaller units within the market sector will be important in addressing a more balanced type and size stock mix.
- 15.3.4 Low cost market housing does not however, represent affordable housing within the planning definition, specifically confirmed in the NPPF. **These are 'starter' homes and are part of the general market.**
- 15.3.5 The major difficulty and challenge for this sector is affordability within the Borough for concealed households forming their own household. It is this factor which is creating the need for shared ownership and other forms of subsidised intermediate housing.

15.4 Future Affordable Housing Delivery

Affordable Housing Target Levels

- 15.4.1 The assessment of affordable housing need has been based on the definitions in the NPPF which are detailed in Appendix VI.
- 15.4.2 The annual level of outstanding affordable need of **330 units**, based on addressing the backlog over 5 years to 2018 is around 91% of the potential **362** unit annual average housing delivery. If the backlog is dealt with over 20 years, the need level of **234 units** is 64.6% of the full potential annual housing delivery.
- 15.4.3 Targets should be set based on what is sustainable, viable and deliverable, and importantly support other corporate strategies, especially for economic growth and regeneration. These should be major factors in determining the scale and tenure mix of any affordable housing.
- 15.4.4 80% of the Borough is in the Green Belt and infrastructure constraints limit the scale of housing delivery. In our extensive experience of housing assessments over the last 20 years, the Borough is not unique in being unable to deliver the levels of housing need that are evident through local housing needs assessments.
- 15.4.5 Based on the robust evidence found in this assessment, a proposed **overall affordable housing target recommendation of 35%** in the Local Plan can be justified to be negotiated from all suitable sites, subject to viability and the critical balance of tenure mix.
- 15.4.6 Meeting the total need for affordable housing however also involves a range of initiatives in addition to new unit delivery through the planning system:-
 - freeing up under-occupied social rented units to increase turnover and make best use of the existing stock;
 - by bringing empty properties back into use;
 - bringing social sector stock up to Decent Homes Standard;
 - conversion of existing buildings.
- 15.4.7 Local planning authorities are not expected to simply translate housing demand into actual housing targets that need to be met. They are only part of the evidence and need to be considered against other strategic factors, including cross-boundary issues.

15.5 Tenure Mix Targets

- 15.5.1 The increases in house prices over the last decade have excluded many 'first-time buyers' from the owner occupied market especially in high priced market areas like Brentwood.
- 15.5.2 Despite the relatively small falls in price over the last five years affordability remains a difficulty for many existing and new forming households.
- 15.5.3 Social rented housing is 10.5% of the stock in the Borough in 2013 but does not provide adequate turnover to meet the scale of need identified.

- 15.5.4 The supply through re-lets is low relative to the expectation that stock turnover should address 90% of all need.
- 15.5.5 However, in availability from turnover, the social rented sector provided 125 units compared to an estimated re-sale supply from shared ownership properties of 10 units in the last year to March 2012.
- 15.5.6 The tenure mix balance recommended here is **65% social and affordable rent and 35% intermediate housing**. The tenure mix target of 35% intermediate housing from affordable delivery helps to support the scale of interest expressed in the survey of 190 units over the next five years, around 40 a year on average.
- 15.5.7 The recent funding initiative between lenders and developers for shared equity appears to be having a have a very strong short term influence for intermediate housing for sale.

15.6 Land and Affordable Housing Delivery

- 15.6.1 Land supply is crucial to the provision of housing. Land available free or at a discount is often the key to making a social housing scheme viable, particularly given the limited funding available.
- 15.6.2 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.
- 15.6.3 The survey data provides identified need levels in each housing area, and the Council must apply their own judgement as to the suitability of sites for affordable housing for low income families and concealed households unable to enter the private market.
- 15.6.4 Therefore, local authority housing and planning strategies need to ascertain the availability of sites and propose ways of bringing sites forward.
- 15.6.5 The Brentwood Strategic Housing Land Availability Assessment Report (SHLAA) (*October 2011*) identified 66 sites, with a total potential dwelling contribution of 4,167 units, 87% of which are on Greenfield sites.

15.7 Property Size Targets

- 15.7.1 In view of the current stock balance and longer term demographic and household formation change, all future development should address the imbalance of stock type and size, both by tenure and location to create a more sustainable and balanced housing market.
- 15.7.2 The overall affordable housing target and the need for different types and sizes in the affordable and market sectors have been provided to assist Planning and Housing Officers to support targets and give direction to the types, and particularly size of housing to be delivered to assist in creating a better balance in the local stock over the life of the Local Plan.

15.8 Social and Affordable Rented Housing

- 15.8.1 Development Plan Documents need to provide a clear guide on the size of future affordable housing units required.

- 15.8.2 Stock balance, turnover and waiting list demand analysis are vital to identify the gaps in the stock and the proportions by type and size required to address current and future need. These have been analysed in detail in Sections 12.6 and 12.7.
- 15.8.3 Turnover of the stock through re-lets should normally meet the majority of new need but the stock at 11.7% (*source: Census 2011*) is lower than the regional average and does not generate adequate re-lets to address the levels of need across all property sizes.
- 15.8.4 In summary, even if no new need arose and excluding any new supply, it would take:-
- Over **13** years to meet the requirements for 1-bedroom properties;
 - Over **4** years to address the 2-bedroom requirement;
 - Nearly **7** years to address the 3-bedroom stock requirement;
 - The small need for larger 4+ bedroom family units would never be met.
- 15.8.5 In view of the nature of need for small units, principally flats and terraced houses for single and couple households including older people, it would be reasonable overall to consider a property size target of **70%** for small units (including those at Affordable Rents).
- 15.8.6 In view of the projected future increases in the older population, it is now even more important that initiatives to address under-occupation should play an important role in meeting the need for family sized properties.
- 15.8.7 The level of under-occupation by two spare bedrooms is estimated at 315 properties, around 45% of the total social rented 3 and 4 bedroom stock. This is around 49 units more than the total three bedroom waiting list.
- 15.8.8 Three bedroom family units are 21.8% of the Council and 18.7% of the Registered Provider social stock in the Borough.
- 15.8.9 The 4 bedroom need is very small, although the seven households on the waiting list will almost certainly be over-crowded. This need is probably most effectively addressed through under-occupation initiatives rather than new build.
- 15.8.10 The impact of welfare reform could be very significant and the success of initiatives to improve the flow of three and four bedroom units both need to be closely monitored to assess the on-going requirement for additional new larger 3 and 4 bedroom units.
- 15.8.11 New delivery of older persons housing should be closely linked to under-occupiers in the social sector.
- 15.8.12 Achieving a better flow of family units should also have a cascade effect, increasing turnover of all smaller unit sizes as households are able to transfer to larger units to meet their need. In effect up to three household moves could result from the delivery of one new unit.
- 15.8.13 The combined impact of demographic change and welfare reform will create increased requirement for small units.
- 15.8.14 Almost 81% of the general needs waiting list is for one and two bedrooms but they have the highest turnover rate.

- 15.8.15 In view of the nature of priority need for small units and the scale of likely annual new provision of social rented units, it would be reasonable at Borough level overall to consider a property size target of **40% one and 30% two bedrooms**, for small units for new social rented properties (including those at Affordable Rents).
- 15.8.16 The **30% balance of new social/affordable rented** delivery should target three bedroom houses to address the needs of larger families, especially those over-crowded.

Table 15-1 Social and Affordable Rented need by bedroom size

Bedroom Size (%)			
1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms +
40	30	30	0

15.9 Intermediate Rented Housing

- 15.9.1 In theory, discounted market rent should be an option for new unit delivery without grant support for households whose only alternative is intermediate housing for sale, especially those at the early stages of their careers or on limited employment contracts who are looking for flexibility in their housing arrangements.
- 15.9.2 However, discounted market rented housing can only be delivered provided that there is an adequate cost margin between social rent and market rent.
- 15.9.3 The Coalition Government decision to introduce Affordable Rents at 80% of market value for new social rented stock makes new intermediate rent as an intermediate housing option difficult to deliver because there is very limited headroom between 80% and 100% of average private market rents in the Borough.

15.10 Intermediate Affordable Housing for Sale

- 15.10.1 Intermediate affordable housing can include shared ownership, shared equity or discounted market housing and initiatives such as FirstBuy.
- 15.10.2 The requirement for property size in the intermediate housing market is usually mainly 1 and 2 bedroom units to meet the needs of concealed households forming and unable to access the market sector as a first time buyer. The 2013 survey identified 190 existing and concealed house holds forming who stated a demand for intermediate housing over the next 5 years, around 40 units a year.
- 15.10.3 A third of the expressed interest in shared ownership is from existing households, mainly those leaving the private rented sector and in some cases, owner occupation and requiring two and a small number of three bedroom properties.
- 15.10.4 A property size target of 25% one, 70% two bedrooms and 5% for three bedroom properties could be set to meet the requirements of all households.

Table 15-2 Intermediate Affordable Housing by bedroom size

Bedroom Size (%)			
1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms +
25	70	5	0

15.11 All Tenure Target Summary

15.11.1 A summary of the property size requirements for all tenures is shown in the table below.

Table 15-3 Future Housing Delivery by Tenure / Size

Tenure	Bedroom Size (%)			
	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms +
Market	65		35	
Intermediate	25	70	5	0
Social & Affordable Rented	40	30	30	

16 STAKEHOLDER CONSULTATION

16.1 The Housing Partnership

- 16.1.1 The Strategic Housing Market Assessments Practice Guidance (2007) encourages the formation of a Housing Partnership, consisting of a multi-disciplinary team including housing, planning, economic development and regeneration expertise.
- 16.1.2 The aim is to involve stakeholders in the assessment process in order to provide key stakeholders with the opportunity to make a contribution to the process and to test the key findings and conclusions.
- 16.1.3 The responsibilities of partnership includes to:-
- share and pool information and intelligence, including relevant contextual intelligence and policy information;
 - support the housing market partnership core members in the analysis and interpretation of housing market intelligence;
 - assist with the development of a project plan for undertaking the Strategic Housing Market Assessment and ensuring their findings are regularly reviewed;
 - consider the implications of the assessment, including signing off its outputs and agreeing follow-up actions.

16.2 Consultation with the Housing Partnership

- 16.2.1 The Essex Consortium sent out a brief to various groups to inform them of the new Strategic Housing Market Assessment and to invite them to become a part of the Housing Market Partnership to oversee the SHMA. The Local Housing Partnership members are listed at **Appendix VII**.
- 16.2.2 The first Housing partnership meeting was held on the 13th June 2013 in Colchester. All the Essex Consortium authorities attended the presentation along with the Local Housing Partnership members listed in **Appendix VII**.
- 16.2.3 The purpose of this meeting was to present the key findings from the Interim SHMA report for all the authorities in the Essex Consortium.
- 16.2.4 Feedback forms were provided at the meeting for all attendees to provide their views on the presentation and also to provide comments on what they would like to see at the next Housing Market partnership meeting.

- 16.2.5 The seminar presentation carried out by David Couttie covered:-
- The aims and objectives of the SHMA;
 - The methodology of the SHMA;
 - The study outputs;
 - Key market drivers (Demographics, Migration and Economy);
 - The Active Market.
- 16.2.6 The second Housing Partnership meeting was held following the finalisation of the Draft report on the 15th July 2014. The purpose of the meeting was to present the findings from the Draft report. The seminar presentation covered:-
- Current Housing Stock;
 - The Needs of Specific groups;
 - The future demand for affordable housing;
 - The future demand for market housing;
 - Scale of affordable need;
 - Future delivery targets.
- 16.2.7 There was a sizeable attendance to the second stakeholder meeting of around 70 delegates including people from local authorities, housing associations, developers and planners. The list of delegates can be found at Appendix VIII.

17 UPDATING THE STRATEGIC HOUSING MARKET ASSESSMENT

17.1 Introduction

- 17.1.1 Following finalisation of the Brentwood SHMA, the data will be subject to regular updating in the coming months and years.
- 17.1.2 According to CLG, Strategic Housing Market Assessment Practice Guidance, Housing Partnerships will need to consider developing comprehensive strategies for monitoring housing market areas and updating their Strategic Housing Market Assessments.
- 17.1.3 This section provides guidelines as to how the findings of the SHMA should be monitored and updated on a regular basis, as CLG Strategic Housing Market Assessments Practice Guidance, version 2 (August 2007).
- 17.1.4 The NPFF also expects that regular monitoring through the Annual Monitoring Report (AMR) will take place and that where market conditions change there may be a need to reassess demand and need. The SHMA will provide tools to allow regular monitoring and updating to take place, to satisfy requirements of AMR and also keep a watching brief on any changes within the market.
- 17.1.5 This assessment is easily and readily updated annually. It is important to recognise that there is a difference between monitoring and updating the assessment. Updating requires tracking short-term changes in the housing market conditions, to ensure policies and strategies are responsive to changes in local demands and pressures.
- 17.1.6 DCA commissions to undertake SHMA updates will initially focus on the three main variables identified in the 2007 Strategic Housing Market Assessment Practice Guidance as shown below.

Variable	Data source
External impacts on the market	Mid-year population and households estimates Labour market changes Interest rates Income and earnings surveys
Housing stock changes	New build completions Affordable housing delivered through S106 agreements Demolitions Remodelling Outstanding planning permissions
Affordability changes	House prices Private sector rents Changes in household incomes Shared ownership initiatives etc

- 17.1.7 The set of core indicators above will be used, which DCA have developed during the course of the study. These could be integrated into the new monitoring framework for Local Development Plan (Annual Monitoring Report) or as a joint housing and planning task.
- 17.1.8 The following section outlines the processes of updating the various elements of the SHMA.
- 17.1.9 This is followed by a guideline for when a full revised Strategic Housing Market Assessment is due and details of any market triggers which may affect this timescale and cause the projected timescale to be brought forward.

17.2 Updating the CLG Needs Assessment Model

- 17.2.1 The Client Data CD provided upon completion of the SHMA contains a Needs Assessment Model Calculator in Excel.
- 17.2.2 The purpose of the calculator is to allow annual updating of all the secondary data utilised in the Model and to enable this to be done in-house.
- 17.2.3 A detailed description of the secondary data required, where it can be sourced from and how it is applied to each element of the Assessment Model calculation is included in the introduction to the calculator.
- 17.2.4 It is recommended that this updating to the Model is carried out at the same time as completion of the annual ELASH in July each year.

17.3 Updating Other Secondary Data

- 17.3.1 There are a wide range of secondary sources utilised in the SHMA which are updated on a quarterly or an annual basis.
- 17.3.2 **Appendix III** of this SHMA outlines the sources of secondary data utilised in this assessment. This document details:-
- The source location i.e. where the data can be accessed from;
 - The year or quarter of the data utilised in the SHMA;
 - Frequency of release of the various data sets. e.g. quarterly or annually;
 - The next release date of each data set used.

- 17.3.3 This document can be used as a guide as to when each data set is available and can be updated in the SHMA.
- 17.3.4 In addition, Annex B of the Strategic Housing Market Assessment Practice Guidance (August 2007) provides a comprehensive list of data sources which may be used in an SHMA.

17.4 Core Sustainability Indicators

- 17.4.1 It will be necessary for the Council to have detailed data on an annual basis to record actual new development by tenure, type, size and by location within the Borough each year.
- 17.4.2 This data is essential to be able to measure performance against targets for sustainable development set in the Local Development Plan both for market and all forms of affordable housing.
- 17.4.3 Data on social stock re-lets and changes to the waiting list and new unit delivery need to be able to be analysed by property type and size and location. This structure should already be in place to support completion of the ELASH.
- 17.4.4 Monitoring of new delivery in the market sector and data on conversions will also be required by property, type, size and location to measure delivery against planned targets to improve the balance of the housing stock.

17.5 Updating the Primary Survey Data

- 17.5.1 The primary data file requires a complex weighting process to ensure that it is representative of the whole population.
- 17.5.2 DCA would normally provide within their support service a process which would re-run the survey data to the current household population at the time of update. This is normally two years after the initial study has been undertaken. This has the effect of making a minor change to the data to reflect the study results as if they had been assessed in the current population.
- 17.5.3 It is recommended that this is undertaken by the original survey specialist company or at least with their assistance.

17.6 Monitoring and Communicating Changes to the SHMA

- 17.6.1 Partnership working would be of paramount importance to ensure that updating of the SHMA is done with the consent and knowledge of all involved.
- 17.6.2 The continuation of a key project officer team to oversee the updating and to ensure access to the most recent versions of the SHMA report sections would be essential.
- 17.6.3 There are various ways in which the wider partnership can be made aware of changes to the SHMA and how it can be ensured that the reader is accessing the most recent version of the SHMA.
- 17.6.4 One way that this could be done is through the Council website where the most up to date versions of each chapter can be made available. If people wish to access a previous version, these could be accessed through an archive.

- 17.6.5 A 'log' of updated changes made to the data could be devised which would be ongoing. This could be displayed as a document on the website and would detail:
- The section that has been changed;
 - The date it was updated;
 - A brief note of the change(s) made;
 - A note of any other sections affected.

17.7 Plans to Fully Revise the Brentwood SHMA

- 17.7.1 Strategic Housing Market Assessments provide a robust basis for developing housing and planning policies by considering current and future need and demand over a period of around 20 years. As a result partnerships should not need to undertake a full comprehensive assessment more frequently than every five years.
- 17.7.2 The next full Brentwood SHMA will be due in 2018 / 2019.

17.8 Market Triggers

- 17.8.1 During the course of updating the SHMA and accessing revised data, Housing partnerships should work together to review the data. From this an assessment can be made of how radically new data or changes in the housing market affect the assessment and can also suggest whether the new information trigger a re-assessment of the SHMA is needed earlier than 2018.
- 17.8.2 Possible triggers for a revised assessment are:-
- Re-weighting utilising the 2011 Census data when fully published;
 - A significant local economic change, e.g. downturn or upturn in the market;
 - Significant stock delivery changes;
 - Major house price change;
 - Change in Government Policy or Guidance.

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POSTAL QUESTIONNAIRE

BRENTWOOD BOROUGH HOUSING SURVEY



**BRENTWOOD
BOROUGH COUNCIL**

Dear Householder

I am writing to ask for your help with an important survey which is being carried out in Brentwood. Households are being asked to take part in this survey which will help the Borough Council develop its housing and planning policies to meet the housing and support needs of local people in the coming years. It will also help provide evidence to back the Council's bids for government funding.

The Council have appointed independent consultants, **DCA**, to carry out the study. 5,000 randomly selected residents have been sent the attached questionnaire and we would be grateful if you could spare a few moments to fill it in. Whether you own or rent your home, live in a large or a small property, **we need your views**. Even if you are not planning to move or change your personal circumstances, **please reply**.

I would like to assure you that the survey **is confidential** and no name or address is required, although the form is coded to identify your area of residency. None of the completed questionnaires will be seen by Brentwood Borough Council. The data will be seen by the Council only in generalised statistical form and will be used for research and planning purposes on an area basis.

You can also complete the questionnaire online using the unique six digit access code at the bottom of this letter. If you wish to use this facility please log on to:-

www.dcauk.co/survey/Brentwood/OnlineSurvey.php

If you have any queries or need help or advice in completing the form, please contact Kate Gordon, Principal Planning Officer on 01277 312765 at **Brentwood Borough Council**. Alternatively contact the **DCA Research Team free on 0800 169 7865**.

We would be most grateful for your assistance and a pre-paid envelope is provided for your reply. **PLEASE RETURN THE COMPLETED FORM BY 5th June 2013.**

Yours sincerely

Jennifer Candler
Head of Planning



DATA PROTECTION

The information you provide on this form will be kept strictly confidential and will not be used to identify you or your household. DCA are independent consultants, registered as a Data Controller with the Information Commissioner's Office (Registration Number Z4683342). For more information please visit www.dcauk.com/dataprotection, or contact us free on 0800 169 7865



2746515583

TO BE COMPLETED BY THE HOUSEHOLDER

4706515581

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

Cross one box only for each question unless instructed otherwise, using a black pen.

e.g. ☒**A: ABOUT YOUR EXISTING HOUSING****1 Is your present home :-**Owner occupied
(paying mortgage) ☐ ₁Owner occupied
(no mortgage) ☐ ₂Private rented ☐ ₃Council rented ☐ ₄Housing
Association rented ☐ ₅Shared Ownership
(part rent / part buy) ☐ ₆Tied to your
employment ☐ ₇Living rent free ☐ ₈**2 What type of property is your home?**Detached house ☐ ₁Semi - Detached house ☐ ₂Terraced house ☐ ₃Detached bungalow ☐ ₄Semi - Detached
bungalow ☐ ₅Terraced bungalow ☐ ₆Flat ☐ ₇Bedsit / studio /
room only ☐ ₈Houseboat / Caravan
/ Mobile home ☐ ₉**3 How many bedrooms are in your current home?**Bedsit ☐ ₁One ☐ ₂Two ☐ ₃Three ☐ ₄Four ☐ ₅Five or more ☐ ₆**4 How long have you lived at your present address?**Less than
1 year ☐ ₁Between
1 and 2 years ☐ ₂Between
2 and 3 years ☐ ₃Between
3 and 5 years ☐ ₄Between
5 and 10 years ☐ ₅Over
10 years ☐ ₆**GO TO 7****GO TO 7****GO TO 7****5 If you have moved in the last three years, where did you previously live?**(please cross **one** box)Within Brentwood
Borough ☐ ₁Braintree ☐ ₂Chelmsford ☐ ₃Colchester ☐ ₄Maldon ☐ ₅Basildon ☐ ₆Epping Forest ☐ ₇Thurrock ☐ ₈Elsewhere in
Essex ☐ ₉Greater
London ☐ ₁₀Elsewhere in
the UK ☐ ₁₁Abroad ☐ ₁₂**6a If you have moved in the last three years, was this your first home of your own as an adult?**Yes ☐ ₁No ☐ ₂**6b If you have moved in the last three years, what was the most important reason for moving?**(please cross **one** box)New job ☐ ₁Closer / easier
to commute ☐ ₂To be near
a relative ☐ ₃Education ☐ ₄Needed
more space ☐ ₅Needed less
space ☐ ₆Retirement ☐ ₇Needs more
parking ☐ ₈Rent arrears /
repossession ☐ ₉Relationship /
family break
down ☐ ₁₀Wanted
own home ☐ ₁₁To move to a
cheaper home ☐ ₁₂Wanted
to buy ☐ ₁₃Health
reasons ☐ ₁₄**7a Does your home have any of the following? Please cross all that apply**Central heating
(all rooms) ☐ ₁Central heating
(partial) ☐ ₂Double glazing
(all rooms) ☐ ₃Double glazing
(partial) ☐ ₄Cavity wall insulation ☐ ₅Loft insulation ☐ ₆Water pipes insulated ☐ ₇Room heaters ☐ ₈**7b What is your main source of fuel for heating?**(please cross **one** box)Gas ☐ ₁Electric ☐ ₂Oil ☐ ₃Wood burner / Open Fire ☐ ₄Other ☐ ₅**7c How much do you spend annually on your total home fuel bills?**(please cross **one** box)Less than £800 ☐ ₁£801 - £1,000 ☐ ₂£1,001 - £1,200 ☐ ₃£1,201 - £1,400 ☐ ₄£1,401 - £1,600 ☐ ₅Above £1,600 ☐ ₆**8a In your opinion, is your present accommodation adequate for your household's needs?**Yes ☐ ₁No ☐ ₂**GO TO 9****GO TO 8b****8b If in your opinion, your present accommodation is not adequate for your needs, what are the reasons? Please cross all that apply**Needs improvements
/ repairs ☐ ₁Too costly to heat ☐ ₂Too large ☐ ₃Too small ☐ ₄Insufficient no.
of bedrooms ☐ ₅Rent / mortgage too
expensive ☐ ₆Short term tenancy ☐ ₇No heating ☐ ₈Suffering harassment ☐ ₉Housing affecting
health of any
household
member ☐ ₁₀Garden too big ☐ ₁₁Garden too small ☐ ₁₂

8c If your present accommodation is not adequate for your needs, do you need to move to resolve the difficulty?

Yes ☐ ¹ No ☐ ²
 **GO TO 8d**  **GO TO 9**

8d If yes, could you afford a suitable home in the Borough?

Yes ☐ ¹ No ☐ ²

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

Yes ☐ ¹ No ☐ ²
 **GO TO 10a**  **GO TO 11a**

The shaded boxes are provided for a second household member, if required

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

One ☐ ¹ Two ☐ ²

10b What age groups are they?

Member 1	0 - 10	11 - 15	16-24	25 - 34	35 - 49	50 - 64	65 - 79	80+
Member 2								

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

Please cross **all** that apply

Member 1	Member 2	Member 1	Member 2	Member 1	Member 2	Member 1	Member 2
Wheelchair User <input type="checkbox"/> ¹	<input type="checkbox"/> ¹	Walking difficulty (not in wheelchair) <input type="checkbox"/> ²	<input type="checkbox"/> ²	Learning Disability / Mental health problem <input type="checkbox"/> ³	<input type="checkbox"/> ³	Drug & Alcohol abuse <input type="checkbox"/> ⁴	<input type="checkbox"/> ⁴
Visual / hearing impairment <input type="checkbox"/> ⁵	<input type="checkbox"/> ⁵	Other physical disability <input type="checkbox"/> ⁶	<input type="checkbox"/> ⁶	Limiting long-term illness <input type="checkbox"/> ⁷	<input type="checkbox"/> ⁷		

10d Do any members of the household require care / support?

Yes ☐ ¹ ☐ ¹ No ☐ ² ☐ ²
 **GO TO 11a**

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

Yes ☐ ¹ ☐ ¹ No ☐ ² ☐ ²

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

Yes ☐ ¹  **GO TO 11b** No ☐ ²  **GO TO 12**

11b If yes, what facilities have been provided?

Please cross **all** that apply

Wheelchair adaptations <input type="checkbox"/> ¹	Access to property <input type="checkbox"/> ²	Vertical lift /stair lift <input type="checkbox"/> ³	Bathroom adaptations <input type="checkbox"/> ⁴
Extension <input type="checkbox"/> ⁵	Ground floor toilet <input type="checkbox"/> ⁶	Handrails / grabrails <input type="checkbox"/> ⁷	Other <input type="checkbox"/> ⁸

12 What facilities, if any, need to be provided to ensure **current** members of your household can remain in your property, now or in the next three years? Please cross **all** that apply

Wheelchair adaptations <input type="checkbox"/> ¹	Access to property <input type="checkbox"/> ²	Vertical lift /stair lift <input type="checkbox"/> ³	Bathroom adaptations <input type="checkbox"/> ⁴
Extension <input type="checkbox"/> ⁵	Ground floor toilet <input type="checkbox"/> ⁶	Handrails / grabrails <input type="checkbox"/> ⁷	Other <input type="checkbox"/> ⁸

13a Do you have elderly relatives who are planning to move into the Borough within the next three years?

Yes ☐ ¹  **GO TO 13b** No ☐ ²  **GO TO 14**

13b If yes, what kind of accommodation are they seeking ?

Please cross **all** that apply

Live with you (existing home adequate) <input type="checkbox"/> ¹	Live with you (need extension / adaptation) <input type="checkbox"/> ⁴	Private sheltered housing <input type="checkbox"/> ⁷
Council / Housing Association sheltered housing <input type="checkbox"/> ²	Residential care / nursing home <input type="checkbox"/> ⁵	Private housing <input type="checkbox"/> ⁸
Council / Housing Association property <input type="checkbox"/> ³	Extra Care housing (self contained units with facilities and 24hr support) <input type="checkbox"/> ⁶	Private Retirement Village <input type="checkbox"/> ⁹

13c Do they have equity from the sale of their current home?

Yes ☐ ¹ No ☐ ²

14 If you or any member of your household are aged 60 years or above, would you consider moving to a smaller property?

Yes ☐ ¹ No ☐ ²

e.g. 03

15a How many people live in your home (including yourself)? Please put the number.

15b Which of these categories best describes the ethnic origin of your head of household? (Please cross the appropriate box)

White		Mixed		Asian or Asian British		Black or Black British		Other Ethnic	
British <input type="checkbox"/>	1	White & Black Caribbean <input type="checkbox"/>	5	Indian <input type="checkbox"/>	9	Caribbean <input type="checkbox"/>	14	Arab <input type="checkbox"/>	17
Irish <input type="checkbox"/>	2	White & Black African <input type="checkbox"/>	6	Pakistani <input type="checkbox"/>	10	African <input type="checkbox"/>	15	Any other ethnic group - please state <input type="checkbox"/>	18
Gypsy or Irish Traveller <input type="checkbox"/>	3	White & Asian <input type="checkbox"/>	7	Bangladeshi <input type="checkbox"/>	11	Other Black / Caribbean / African background <input type="checkbox"/>	16		
Any other White background please state <input type="checkbox"/>	4	Other Mixed Race Background <input type="checkbox"/>	8	Chinese <input type="checkbox"/>	12				
				Other Asian background <input type="checkbox"/>	13				

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

Column C (Gender) Please cross the appropriate box

Column D (Age) Please cross the appropriate box

Column E (Employment) Please write the number which best describes each member's employment type from the following list

- | | | | | | |
|---|-----------|--------------------------------|-----------|--|-----------|
| Working as an employee | 01 | Self-employed or freelance | 02 | Doing any other kind of paid work | 03 |
| Working paid or unpaid for your own or your family's business | 04 | On a sponsored training scheme | 05 | Away from work ill, on maternity leave, on holiday or temporarily laid off | 06 |
| Full / part time carer | 07 | Wholly retired from work | 08 | Looking after the home | 09 |
| Long-term sick or disabled | 10 | Full time education (age 16+) | 11 | Armed Services | 12 |

Column F (Occupation) Please write the number which best describes each member's occupation type from the following list

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

Column G (Location Of Place Of Work) Please write the number which best describes each member's place of work from the following list

- | | | | | | | | | | | | |
|--------------------------|-----------|--------------------|-----------|----------------|-----------|---------------------|-----------|--------|-----------|---------------|-----------|
| Within Brentwood Borough | 01 | Braintree | 02 | Colchester | 03 | Chelmsford | 04 | Maldon | 05 | Epping Forest | 06 |
| Basildon | 07 | Elsewhere in Essex | 08 | Greater London | 09 | Elsewhere in the UK | 10 | Abroad | 11 | | |

Column H (Travel to Work) Please write the number which best describes how each member of the household travels to work / college from the following list

- | | | | | | | | | | |
|----------------------------|-----------|---------------------|-----------|-----------------------|-----------|-----------------------|-----------|-------|-----------|
| Work mainly at / from home | 01 | Driving a car / van | 02 | Passenger in car/ van | 03 | Bus, minibus or coach | 04 | Taxi | 05 |
| Motorcycle, scooter, moped | 06 | Train | 07 | Bicycle | 08 | On foot | 09 | Other | 10 |

Household Member	C Gender		D Age								E Employment	F Occupation	G Work Place	H Travel to Work
	M	F	0-10	11-15	16-24	25-34	35-49	50-64	65-79	80+				
EXAMPLE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01	1	01	01
Self	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spouse/Partner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Child 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partner of Child	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grandchild 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grandchild 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lodger 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lodger 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WE WOULD BE GRATEFUL IF YOU WOULD COMPLETE THE FOLLOWING QUESTIONS ON SAVINGS AND INCOME SO THAT WE CAN ESTIMATE WHAT TYPE OF HOUSING YOU COULD / CAN AFFORD. THE INFORMATION THAT YOU PROVIDE IS KEPT CONFIDENTIAL AND WILL NOT BE USED FOR ANY OTHER PURPOSES THAN ASSESSING HOUSING AFFORDABILITY.

16 Please advise what savings and equity your household has by completing columns A, B, C AND D

a) How much does your household have in savings? (please estimate)

- No Savings ☐ 1
Under £5,000 ☐ 2
£5,000 - £10,000 ☐ 3
£10,001 - £20,000 ☐ 4
£20,001 - £30,000 ☐ 5
£30,001 - £40,000 ☐ 6
£40,001 - £50,000 ☐ 7
Above £50,000 ☐ 8

b) If you are a home owner, roughly how much equity value do you own? (i.e. estimated current value minus mortgage owed)

- Negative Equity ☐ 1
Under £25,000 ☐ 2
£25,001 - £50,000 ☐ 3
£50,001 - £75,000 ☐ 4
£75,001 - £100,000 ☐ 5
£100,001 - £150,000 ☐ 6
£150,001 - £200,000 ☐ 7
Above £200,000 ☐ 8

c) Please give total annual income of combined self & partner only (before tax and deductions, but not including benefits / allowances).

- None ☐ 1
Under £10,000 ☐ 2
£10,000 - £15,000 ☐ 3
£15,001 - £20,000 ☐ 4
£20,001 - £25,000 ☐ 5
£25,001 - £30,000 ☐ 6
£30,001 - £40,000 ☐ 7
£40,001 - £50,000 ☐ 8
£50,001 - £60,000 ☐ 9
Above £60,000 ☐ 10

16d If your household receives any financial support, please indicate what type:- (Please cross all that

- Housing Benefit/ Local Housing Allowance ☐ 1 Income Support ☐ 2 Job Seekers Allowance / ESA ☐ 3 Working Family Tax Credit ☐ 4
Pension Credits ☐ 5 Disability Allowance ☐ 6 Council Tax Benefit ☐ 7 Other ☐ 8

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

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


Yes ☐ 1  **GO TO 17b**

No ☐ 2 


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

17b If YES, please cross the appropriate box(es) below:-

Moving within Borough


The existing household is moving ☐ 1 

**GO TO SECTION B
ON PAGE 5**


Of those currently living with you a member is forming a new home ☐ 2 

**GO TO SECTION C
ON PAGE 6**

Moving outside Borough

The existing household is moving ☐ 3 

GO TO 17 c+d

Of those currently living with you a member is forming a new home ☐ 4 

GO TO 17 c+d

17c If moving outside the Borough, where are you thinking of moving to? Please cross all that apply

- Braintree ☐ 1 Chelmsford ☐ 2 Colchester ☐ 3 Maldon ☐ 4 Basildon ☐ 5 Epping Forest ☐ 6
Thurrock ☐ 7 Elsewhere in Essex ☐ 8 Greater London ☐ 9 Elsewhere in the UK ☐ 10 Abroad ☐ 11

17d If moving outside the Borough, please indicate your reasons for moving away:-

Please cross all that apply

- Family reasons ☐ 1 Employment / access to work ☐ 2 Lack of affordable rented housing ☐ 3 Unable to afford to buy a home ☐ 4
Rent arrears / repossession ☐ 5 Education ☐ 6 Quality of Neighbourhood ☐ 7 Retirement ☐ 8

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

B: EXISTING HOUSEHOLD MOVING

Complete this section **ONLY** if your existing household intends to move **WITHIN** the Borough in the next five years

18 When do you plan to move?

Within 1 year ☐ ¹ Between 1 and 2 years ☐ ² Between 2 and 3 years ☐ ³ Between 3 and 5 years ☐ ⁴

19 What type of accommodation are you looking for? (please cross one box)

Semi - Detached house ☐ ¹ Detached house ☐ ² Bungalow ☐ ³ Terraced house ☐ ⁴ Flat ☐ ⁵
Bedsit / studio / room only ☐ ⁶ Supported housing (including sheltered) ☐ ⁷ Self Build ☐ ⁸ Caravan ☐ ⁹

20 If you require supported housing, which of the following types do you require? (Please cross all that

Independent accommodation with external support ☐ ¹ Independent accommodation with live-in carer ☐ ² Residential / nursing home ☐ ³
Extra care housing (self contained units with facilities and 24hr support) ☐ ⁴ Private sheltered housing ☐ ⁵ Council / Housing Association sheltered housing ☐ ⁶

21 How many bedrooms are you looking for? (please cross one box)

One ☐ ¹ Two ☐ ² Three ☐ ³ Four ☐ ⁴ Five or more ☐ ⁵

22 Are you moving specifically because your housing benefit was reduced in April 2013?

Yes ☐ ¹ No ☐ ²

23 What tenure is preferred? (please cross one box)

Owner occupation (inc. Leaseholder) ☐ ¹ Private rent ☐ ² Council rent ☐ ³ Housing Association Rent ☐ ⁴ HA shared ownership (part rent / part buy) ☐ ⁵ Tied to employment ☐ ⁶

24 Are you registered on any of the following Housing Waiting Lists? (Please cross all that

Brentwood Borough Council ☐ ¹ Housing Association ☐ ² Another Council ☐ ³

25 Where is accommodation required? (Please cross up to two boxes)

Brentwood ☐ ¹ Brizes and Doddinghurst ☐ ² Herongate, Ingrave and West Horndon ☐ ³ Hutton ☐ ⁴ Ingatestone, Fryerning and Mountnessing ☐ ⁵
Pilgrims Hatch ☐ ⁶ Shenfield ☐ ⁷ South Weald ☐ ⁸ Tipps Cross ☐ ⁹ Warley ☐ ¹⁰

26 Why are the above locations preferred? (Please cross all that apply)

Always lived here ☐ ¹ Nearer family ☐ ² Employment / closer to work ☐ ³ Nearer / better shopping / leisure ☐ ⁴ Greater availability of more affordable housing ☐ ⁵
Better / nearer schools and colleges ☐ ⁶ Better public transport ☐ ⁷ Quality of neighbourhood ☐ ⁸ Type of housing ☐ ⁹

IF A NEW HOUSEHOLD IS ALSO FORMING,  GO TO SECTION C ON PAGE 6

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

C: NEW FORMING HOUSEHOLDS

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

The shaded boxes are provided for a second household forming, if required.

27 Who is looking / likely to look for accommodation in the next three years?

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

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

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

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

	Household	
	1	2
In your existing household.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Elsewhere within the Borough.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Outside the Borough.....	3 <input type="checkbox"/>	3 <input type="checkbox"/>

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

	Household 1		Household 2	
	Adult 1	Adult 2	Adult 1	Adult 2
18 - 24.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
25 - 34.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
35 - 49.....	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
50 - 64.....	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>
65 +.....	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>

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

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

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

	Needed		Preferred	
	1	2	1	2
Owner occupation (inc. Leaseholder)...	1 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Private Rent.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Council rent.....	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Housing Association Rent.....	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>
Housing Assoc. shared ownership (part rent / part buy).....	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>
Tied to employment.....	6 <input type="checkbox"/>	6 <input type="checkbox"/>	6 <input type="checkbox"/>	6 <input type="checkbox"/>

30 Would the new household consider sharing accommodation with a friend?

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

31 When will each "new" household need their home?

	Household	
	1	2
Within 1 year.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Between 1 and 2 years.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Between 2 and 3 years.....	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Between 3 and 5 years.....	4 <input type="checkbox"/>	4 <input type="checkbox"/>

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

	Needed		Preferred	
	1	2	1	2
Semi - Detached house.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Detached house.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Terraced house.....	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>	3 <input type="checkbox"/>
Flat	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>	4 <input type="checkbox"/>
Bedsit / studio / room only.....	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>	5 <input type="checkbox"/>
Bungalow.....	6 <input type="checkbox"/>	6 <input type="checkbox"/>	6 <input type="checkbox"/>	6 <input type="checkbox"/>
Supported housing (including sheltered).....	7 <input type="checkbox"/>	7 <input type="checkbox"/>	7 <input type="checkbox"/>	7 <input type="checkbox"/>
Self build.....	8 <input type="checkbox"/>	8 <input type="checkbox"/>	8 <input type="checkbox"/>	8 <input type="checkbox"/>
Caravan.....	9 <input type="checkbox"/>	9 <input type="checkbox"/>	9 <input type="checkbox"/>	9 <input type="checkbox"/>

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

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

34 Where is accommodation required?

Please cross up to two locations for each household

	Household	
	1	2
Brentwood	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Brizes and Doddinghurst.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Herongate, Ingrave and West Hordon.....	3 <input type="checkbox"/>	2 <input type="checkbox"/>
Hutton	4 <input type="checkbox"/>	2 <input type="checkbox"/>
Ingatestone, Fryerning and Mountnessing.....	5 <input type="checkbox"/>	2 <input type="checkbox"/>
Pilgrims Hatch.....	6 <input type="checkbox"/>	2 <input type="checkbox"/>
Shenfield.....	7 <input type="checkbox"/>	2 <input type="checkbox"/>
South Weald.....	8 <input type="checkbox"/>	2 <input type="checkbox"/>
Tipps Cross.....	9 <input type="checkbox"/>	2 <input type="checkbox"/>
Warley.....	10 <input type="checkbox"/>	2 <input type="checkbox"/>

35 Why are the locations above preferred?

Please cross all that apply

	Household	
	1	2
Always lived here.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Nearer family.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Employment / closer to work.....	3 <input type="checkbox"/>	2 <input type="checkbox"/>
Nearer / better shopping / leisure facilities.....	4 <input type="checkbox"/>	2 <input type="checkbox"/>
Greater availability of more affordable housing.....	5 <input type="checkbox"/>	2 <input type="checkbox"/>
Better / nearer schools / colleges.....	6 <input type="checkbox"/>	2 <input type="checkbox"/>
Better public transport.....	7 <input type="checkbox"/>	2 <input type="checkbox"/>
Greater availability of smaller houses.....	8 <input type="checkbox"/>	2 <input type="checkbox"/>
Quality of neighbourhood.....	9 <input type="checkbox"/>	2 <input type="checkbox"/>

36 Is the "new" household registered on any Housing Waiting Lists? Please cross all that apply

	Household	
	1	2
Brentwood Borough Council.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Housing Association.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
Another Council.....	3 <input type="checkbox"/>	2 <input type="checkbox"/>

37 Is the "new" household likely to be claiming Housing Benefit?

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

38a How much would each "new" household be able and willing to pay in rent or mortgage costs per month?

	Household	
	1	2
Below £80 pw / £350 pm.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
£81 - £115 pw / £351 - £500 pm.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
£116 - £130 pw / £501 - £560 pm.....	3 <input type="checkbox"/>	2 <input type="checkbox"/>
£131 - £150 pw / £561 - £650 pm.....	4 <input type="checkbox"/>	2 <input type="checkbox"/>
£151 - £200 pw / £651 - £860 pm.....	5 <input type="checkbox"/>	2 <input type="checkbox"/>
£201 - £250 pw / £861 - £1,080 pm.....	6 <input type="checkbox"/>	2 <input type="checkbox"/>

38b What savings does each household have to meet a deposit and legal costs?

	Household	
	1	2
Under £1,000.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
£1,000 - £5,000.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
£5,001 - £10,000.....	3 <input type="checkbox"/>	2 <input type="checkbox"/>
£10,001 - £20,000.....	4 <input type="checkbox"/>	2 <input type="checkbox"/>
£20,001 - £30,000.....	5 <input type="checkbox"/>	2 <input type="checkbox"/>
£30,001 - £40,000.....	6 <input type="checkbox"/>	2 <input type="checkbox"/>
Over £40,000.....	7 <input type="checkbox"/>	2 <input type="checkbox"/>

38c Will each "new" household get help with a deposit from parents / relatives?

	Household	
	1	2
By a loan.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
By a gift.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
No need.....	3 <input type="checkbox"/>	2 <input type="checkbox"/>
No help available.....	4 <input type="checkbox"/>	2 <input type="checkbox"/>

38d Please give total annual HOUSEHOLD income for the person or couple in each new household (including benefits & allowances but before tax and deductions)

	Household	
	1	2
None	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Under £10,000.....	2 <input type="checkbox"/>	2 <input type="checkbox"/>
£10,000 - £15,000.....	3 <input type="checkbox"/>	2 <input type="checkbox"/>
£15,001 - £20,000.....	4 <input type="checkbox"/>	2 <input type="checkbox"/>
£20,001 - £25,000.....	5 <input type="checkbox"/>	2 <input type="checkbox"/>
£25,001 - £30,000.....	6 <input type="checkbox"/>	2 <input type="checkbox"/>
£30,001 - £40,000.....	7 <input type="checkbox"/>	2 <input type="checkbox"/>
£40,001 - £50,000.....	8 <input type="checkbox"/>	2 <input type="checkbox"/>
£50,001 - £60,000.....	9 <input type="checkbox"/>	2 <input type="checkbox"/>
Above.....	10 <input type="checkbox"/>	2 <input type="checkbox"/>

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

**DAVID COUTTIE ASSOCIATES
FREEPOST HF2416
HUDDERSFIELD
HD1 2XY**



POSTER



**BRENTWOOD
BOROUGH COUNCIL**

HOUSING SURVEY

WE NEED YOUR HELP!

**WE ARE SENDING QUESTIONNAIRES TO OVER
5,000 HOUSEHOLDS IN THE BOROUGH DURING MAY 2013**

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



**COMPLETED FORMS NEED TO BE
RETURNED BY 5 JUNE 2013**

THANK YOU FOR YOUR SUPPORT

SECONDARY DATA SOURCES

Secondary Data Sources

DATA SOURCE	DESCRIPTION	SOURCE LOCATION	COVERAGE	FREQUENCY OF RELEASE	NEXT RELEASE DATE	SAMPLE	COST
2012 Annual Survey of Hours and Earnings (ASHE)	<p>The Annual Survey of Hours and Earnings (ASHE) provides information about the level, distribution and make-up of earnings and hours paid for employees within industries, occupations and regions.</p> <p>The ASHE contains UK data on earnings for employees by sex and full-time/part-time workers. Further breakdowns include by region, occupation, industry, region by occupation and age-groups. These breakdowns are available for the following variables: gross weekly pay, weekly pay excluding overtime, basic pay including other pay, overtime pay, gross hourly pay, hourly pay excluding overtime, gross annual pay, annual incentive pay, total paid hours, basic paid hours and paid overtime hours.</p>	National Statistics Online / NOMIS	Nationally	Annually	December 2013	Approximately 1% sample of employees on the Inland Revenue PAYE register	Free
2011 Annual Business Inquiry	The Annual Business Inquiry (ABI) is conducted in two parts: one dealing with employment, the other with financial information. The financial inquiry covers about two thirds of the UK economy including: production; construction; distribution and service industries; agriculture (part), hunting, forestry and fishing. The coverage of the employment inquiry is wider.	National Statistics Online / NOMIS	Local Authority and above	Annually	December 2013 (ABI year 2011)	(ABI) estimates cover all UK businesses registered for (VAT) and/or (PAYE), classified to the 1992 / 2003 standard industrial Classification.	Limited data from NOMIS available free Full access to ABI data is restricted. You must first obtain a Chancellor of the Exchequer's Notice from ONS.
2010/11 ONS Annual Population Survey	The ONS Annual Population Survey is a residence based labour market survey encompassing population, economic activity, economic inactivity and qualifications.	National Statistics Online / NOMIS	Local Authority and above	Annually and Updated Quarterly	January 2013	There are approx 170,000 households and 360,000 persons per dataset. but varies from year to year.	Free

DATA SOURCE	DESCRIPTION	SOURCE LOCATION	COVERAGE	FREQUENCY OF RELEASE	NEXT RELEASE DATE	SAMPLE	
Census 2011	The Census is a count of all people and all households. It the most complete source of information about the population that we have. The most recent census was on 27 March 2011. It covers everyone at the same time and asks the same core questions which makes it easy for comparisons in different parts of the country.	Office for National Statistics	Nationally	Every 10 years			
Census 2001	The Census is a count of all people and all households. It the most complete source of information about the population that we have. The most recent census was on 29 April 2001. It covers everyone at the same time and asks the same core questions which makes it easy for comparisons in different parts of the country.	Office for National Statistics	Nationally	Every 10 years	Census undertaken 27th March 2011. Data available generally two years later (2013)		Free
Census 1991	See description above	Office for National Statistics	Nationally	Every 10 years	As above		Free
Core HA New lettings Data 2010/11	CORE records information on the characteristics of both HA and LA new social housing tenants and the homes they rent and buy. A Housing Association with more than 250 units or 250 bedspaces is required by the Tenant Services Authority to complete CORE logs fully and accurately.	CORE website www.core.ac.uk	Nationally	Updated each time a letting or sale is made	Ongoing		Free
Tenant Services Authority (TSA) (Formerly Housing Corporation)	The TSA regulates social housing landlords and sets high standards of management across housing association homes and in the future Local Authority social homes. .	www.tenantservicesauthority.org	Nationally	N/A			Free
Homes and Community Agency (HCA) (Formerly Housing Corporation)	The HCA will make sure that homes are built in an economically, socially and environmentally sustainable way, as well as promoting good design. It also has a key role in regenerating communities and will base its approach on the Government's regeneration framework – Transforming Places; Changing Lives.	www.homesandcommunities.co.uk	Nationally	N/A			Free

DATA SOURCE	DESCRIPTION	SOURCE LOCATION	COVERAGE	FREQUENCY OF RELEASE	NEXT RELEASE DATE	SAMPLE	COST
Housing Strategy Statistical Appendix (HSSA)	The HSSA contains 14 sections of Local Authority statistical information. It is a handy reference document which brings together data items from many different housing areas. The purpose of the Appendix is to bring together statistical information relevant to the formulation of the Housing Strategy.	www.communities.gov.uk	Nationally	Annually	Generally available from June each year – 2013 HSSA available June 2013		Free
Land Registry House Price Index	The Land Registry House Price Index is the most accurate independent house price index available. It includes figures at national, regional, county and local authority level. It allows you to obtain lists of average house prices from 1995 onwards in any area of England and Wales for any range of months.	www.landregistry.gov.uk	Postcode, Local Authority and above	Monthly & Quarterly	Quarterly		Monthly updated data is free but quarterly data available for a fee. Contact land Registry
P1(e) Returns	P1(e) returns are the primary source of data for statutorily homeless households. The purpose of the P1(e) returns is to collect information on applications, acceptances by priority need groups, households provided with temporary accommodation and households leaving temporary accommodation..	Local Authority	Local Authority	Quarterly	-		Free
April 2013 ONS Claimant Count	The claimant count records the number of people claiming Jobseekers Allowance (JSA) broken down by age, duration and their sought or usual occupation.	National Statistics Online / NOMIS	Local Authority and above	Monthly	-		Free

GLOSSARY OF TERMS

GLOSSARY

ABI	Annual Business Inquiry.
Affordability	<p>A measure of whether households can access and sustain the costs of private sector housing. DCA use two types of affordability: mortgage and rental.</p> <p><u>Mortgage affordability</u> measures whether households can afford a deposit and a mortgage; <u>rental affordability</u> measures whether a household can afford a private rental.</p> <p>Mortgage affordability is based on conditions set by mortgage lenders - a minimum level of household income and savings. We use a 3 times multiple of gross income. Rental affordability is defined as the rent being less than a proportion of a household's gross income. We use a 25% level of rental affordability.</p>
Affordable Housing	<p>Affordable housing is that provided, with subsidy¹, 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.</p> <p>The definition in PPS3 is:-</p> <p><i>"Affordable housing includes social rented housing and intermediate housing, provided to specified eligible households whose needs are not met by the market"</i></p> <p>This definition covers housing for social rent and intermediate housing through shared ownership, shared equity and sub-market rent.</p>
Affordable Rent	A form of social housing, involving homes being made available at a rent level of up to 80% of market rent (inclusive of service charges).
CLG Bedroom Standard²	<p>The standard number of bedrooms allocated to each household in accordance with its age/sex/marital status composition and the relationship of the members to one another.</p> <p>A separate bedroom is allocated to each married couple, any person aged 21 or over, each pair of adolescents aged 10 – 20 of the same sex, and each pair of children under 10. Any unpaired person aged 10 – 20 is paired, if possible with a child under 10 of the same sex, or, if that is not possible, he or she is given a separate bedroom, as is any unpaired child under 10. This standard is then compared with the actual number of bedrooms available for the sole use of the household and the differences are tabulated.</p>
BME	Black & Minority Ethnic.
Choice Based Lettings (CBL)	Choice Based Lettings allows applicants for social housing (and tenants who want to transfer) to apply for vacancies which are advertised widely in the neighbourhood. Applicants can see the full range of available properties and can apply for any home to which they are matched.
CLG	Communities and Local Government. CLG has responsibility for local and regional government, housing, planning, fire, regeneration, social exclusion and neighbourhood renewal with the ambition to create sustainable communities for all. Previously known as DETR, DTLR, ODPM and DCLG.

¹ This subsidy is not always public subsidy.

² This definition is taken from the Survey of English Housing, CLG.

CML	Council of Mortgage Lenders
Concealed Household	A Concealed Household is someone living within a household wanting to move to their own accommodation and form a separate household (e.g. adult children living with their parents).
CORE	The Continuous Recording System (Housing Association and Local Authority Lettings / New Tenants).
DETR	Government body superseded by CLG. (See CLG)
Discounted Market Rented Housing	New Units utilising the equity from the discounted or free land from the planning process where Housing Associations could build at only development cost and provide, without grant, units which would be available at lower than private rented market cost but above Housing Corporation rent caps.
ELASH	English Local Authority Statistics on Housing – The replacement for the HSSA
Existing Household	An existing household encompasses the household in its entirety.
FTB	First Time Buyer – Term used for people who have not previously owned a home
HMO	House in Multiple Accommodation – A house which is occupied by persons who do not form a single household
Homeless Household	A household is accepted as statutorily homeless by the authority if it meets the criteria set out in the Housing Act 1996.
Household	The Census definition of a household is:- <i>“A household comprises either one person living alone or a group of people (not necessarily related) living at the same address with common housekeeping - that is, sharing at least one meal a day or sharing a living room or sitting room.”</i>
Housing Demand	Is the quantity and type / quality of housing which households wish to buy or rent and are able to afford. It therefore takes account of preferences and ability to pay.
Housing Need	Refers to households lacking their own housing or living in housing which is inadequate or unsuitable, who are unlikely to be able to meet their needs in the local housing market without some assistance.
Housing Register	A register of people waiting for affordable housing. It may have two components: a list for those not currently occupying affordable housing (more properly known as the Housing Register) and a Transfer List for those tenants who wish to move to another affordable home within the same District.
HSSA	The Housing Strategy Statistical Appendix.

Implied Numbers	The “numbers implied” column inserted in some of the tables is DCA’s assessment of the total numbers to be derived after applying the appropriate weighting factor based on sub area location and tenure responses to that sub-areas household numbers. Where multiple choice is not involved, this will generally equate to the household population of the Local Authority as a whole but some individual questions may not be answered by all respondents, giving a marginally lower total.
Inadequate Housing	Housing which is inadequate or unsuitable in meeting the needs of the household, comprising a range of criteria on house condition, size, cost and security of tenure. These criteria are used to assess whether the unsuitability can be resolved by improvements to the dwelling, or whether the household has to move to another home.
Intermediate Housing	Housing at prices or rents above those of social rented but below market prices or rents. This includes shared ownership, shared equity and sub-market renting.
LA	Local Authority.
LCHO	Low Cost Home Ownership.
LDF	Local Development Framework. This is a folder of local development documents that outlines how planning will be managed within a Local Authority area.
LTV	Loan to Value - the percentage of loan a person needs against the value of the property.
Nuclear NPS	Nuclear National Policy Statement - The Government wanted a planning system for major infrastructure which is rapid, predictable and accountable. The energy National Policy Statements (NPSs) will be a blueprint for decision-making on individual applications for development consent for nationally significant energy infrastructure.
NOMIS	National On-line Manpower Information System.
NPPF	The National Policy Planning Framework which replaces PPS3.
ONS	Office for National Statistics.
Over Occupation / Over occupation	Over occupation / Overcrowding occurs when, using the bedroom standard , there are insufficient bedrooms in the property based on the number of residents and their age/sex/marital status composition. Over occupation is more common in the public sector than the private sector.
Relets	RSL rented accommodation that becomes vacant due to the departure of a previous tenant; therefore the accommodation can be re-let to another tenant or new applicant on the Housing Register.
Registered Social Landlords (RSL)	A Housing Association or a not-for-profit company, registered by the Tenants Services Authority (TSA), providing social housing.

Right to Buy (RTB)	The Right To Buy Scheme gives eligible council tenants the right to buy their property from their council at a discount. Many RSL tenants have similar rights under the Right To Acquire.
Survey of English Housing (SHE)	The Survey of English Housing is a continuous household survey that collects information from nearly 20,000 households about the characteristics of their housing and their attitudes to housing and related issues.
Sheltered Accommodation	Sheltered Accommodation is housing which is purpose built for older people with associated facilities and services.
SHG – Social Housing Grant	Capital provided by the HCA, or Local Authority, to fully or partially fund RSLs when developing social housing. SHG is paid under s18 of the Housing Act 1996.
SO – Shared Ownership	Either newly built or existing properties purchased by a housing provider, which are then sold on a part rent / part buy basis under a shared ownership lease. The shared owner buys a percentage of the property, funded by mortgage and / or savings. The remaining percentage is still owned by the housing provider who charges a rent on it. Purchasers can, in some cases ‘staircase out’ to full ownership.
SSA	Strategic Siting Assessment – the name of the assessment made by the Department for Trade and Industry on the appraisal of potential sites for Nuclear Power Stations
Transfer	A local Authority or RSL tenant who have transferred to another LA or RSL property
Transfer List	A list of Local Authority and RSL tenants that have applied for alternative Local Authority housing. Housing Associations may keep their own Transfer Lists and some authorities may combine transfer applicants in one Housing Register.
Under Occupation	A household is under-occupying if more than one spare bedroom is available, using the bedroom standard as a test. Under-occupation is common in the private sector.

SURVEY METHODOLOGY

1 SURVEY METHODOLOGY

1.1 Background and Context

- 1.1.1 A Strategic Housing Market Assessment (SHMA) is a collection of data (both primary and / or secondary) detailing all aspects influencing housing markets in a particular area.
- 1.1.2 The Brentwood SHMA, along with other strategies and research are a crucial part of the evidence base for the Council to review local housing strategies and Local Development Frameworks. It can also inform business planning processes, as well as identify targets for investment
- 1.1.3 The methodology adopted for this Assessment utilises a mix of primary and secondary data from local and national sources which are appropriately identified throughout the report.
- 1.1.4 The core objectives of this project were to identify a robust evidence for future base to support the targets to be set in the Local Development Framework Documents, and local housing and planning policies for delivery at local level.
- 1.1.5 It is now essential to assess the future demand and need for housing in the Borough by tenure, type and size to inform future development of market housing and to inform affordable housing delivery in each sub-area and the main service villages.
- 1.1.6 The assessment must also consider the impact of demographic and household formation change, socio-economic trends and of household migration as key drivers of the housing market.
- 1.1.7 The survey will identify the needs of special housing groups whose requirements are different to those of general households and may require specific support strategies.
- 1.1.8 **The report will closely follow the 2007 CLG Practice Guidance process** (to which DCA contributed as it was developed), particularly in the style of the Report.
- 1.1.9 The assessment process will involve consultation with the Local Housing Partnership Group of local authority personnel and key delivery partners.

1.2 Purpose, Aims and Objectives

1.2.1 The purpose of the survey was to undertake a comprehensive and robust assessment to obtain high quality information about current and future housing needs at a local authority level and to inform the development of policies and underpin local housing strategies.

1.2.2 The objectives of the survey were to:-

- Support future housing strategy to meet the criteria set out by Communities and Local Government (CLG) in its Good Practice Guidance and the Housing Strategy Guidance and to prioritise investment decisions;
- Co-ordinate housing and community care strategies;
- Inform the Council's affordable housing policies in the Local Development Framework and assist in target setting for site development briefs and for negotiation in accordance with the NPPF.

1.3 The Local Area

1.3.1 A sub-area structure was agreed with the Council and consisted of grouping the Borough into 3 sub-areas. The structure is detailed in Table 1-1 below.

Table 1-1 Sub-Area Structure

Sub-Areas	Wards contained within
North	<i>Brizes and Doddinghurst</i> <i>Tipps Cross</i> <i>South Weald</i> <i>Ingatestone, Fryerning and Mountnessing</i>
Urban	<i>Pilgrims Hatch</i> <i>Shenfield</i> <i>Hutton North</i> <i>Hutton Central</i> <i>Hutton South</i> <i>Brentwood North</i> <i>Brentwood West</i> <i>Brentwood South</i>
South	<i>Warley</i> <i>Hutton East</i> <i>Herongate, Ingrave and West Hordon</i>

1.4 Methodology

- 1.4.1 The survey consisted of the following elements:-
- A postal household survey completed by 1,081 households across the 3 sub-areas.
 - In depth analysis of the local housing market to assess affordability through an internet search of local estate agents in relation to the delivery, cost and supply of market access level properties and in the private rented sector.
 - Secondary data analysis, including a strategic review of the 2001 Census, 2011 Census, Borough Population Growth, Local Plan, Nomis, Land Registry, Housing Strategy, 2007 SHMA Report, LDF documents and the Housing Register and CORE/ELASH (HSSA) Returns.
- 1.4.2 The questionnaire was designed in consultation with Council officers and based upon tried and tested questionnaires used in previous comparable assessments.
- 1.4.3 The questionnaire was designed to gather a comprehensive range of information on existing and concealed households and was structured in three parts.
- 1.4.4 Part One sought information about the existing housing situation including:-
- household composition by gender, age and ethnicity;
 - 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.
- 1.4.5 Part Two of the questionnaire collected information on the existing households' future moving intentions and Part Three on the moving intentions of concealed households. Questions in these two sections included:-
- when people expect to move;
 - who is forming new households;
 - how much they can afford and the household savings and income;
 - preferred tenure, type, size and location of the housing they require;
 - supported housing and support service requirements.
- 1.4.6 The survey questionnaire is provided as an **Appendix (I)**.

1.5 Sampling

1.5.1 Sample size depends on two key factors: the degree of accuracy required 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.

1.5.2 The Survey sample size was structured to achieve a 95% confidence rate and was weighted to known data to ensure that the results reflect the population. Using simple random sampling, the confidence interval with a sample size of 2,000 households is in the region of 2%.

1.5.3 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%).

1.5.4 The postal sample was stratified into the 3 sub-areas as specified at Table 1-1 and selected by random probability from the Council Tax Register.

1.5.5 The main issue is whether non-respondents are different in some way to responders (e.g. low education, older). Increasing the sample size does not necessarily alleviate this problem if some groups of people systematically do not respond.

1.6 Promotion

1.6.1 A comprehensive promotion campaign of posters (**Appendix II**) and local press coverage was agreed with the Council to create awareness of the survey, and its importance to the Council. All councillors and parish clerks were contacted to inform them of the survey and enlist their assistance in publicising the survey and maximising the response rate.

1.7 Survey Process and Response

1.7.1 The questionnaires were posted on 15th May 2013, allowing around three weeks for response, with an original closing date of the 5th June 2013.

1.7.2 3.1% of all households in Brentwood took part in the survey. The response rate by sub-area and Borough is detailed in the table below.

Table 1-2 Response Rate by Sub-area

SUB-AREA	2013 RESIDENT HOUSEHOLDS	SAMPLE	TOTAL RESPONSE	RESPONSE RATE %	CONFIDENCE INTERVAL ±%
North	7,428	1,000	223	22.3%	6.70
Urban	19,184	3,000	640	21.3%	3.95
South	5,875	1,000	218	21.8%	6.77
TOTAL	32,487	5,000	1,081	21.6%	3.04

1.8 Data Validity

- 1.8.1 All areas reached response levels based on household numbers adequate to ensure statistical validity at the confidence level of 95% (discussed in more detail in section 1.5). The confidence interval ranged from $\pm 6.77\%$ to $\pm 3.95\%$ at sub-area level and was $\pm 3.04\%$ at Borough level.
- 1.8.2 These levels at Ward, Sub-area and Borough level have resulted in a large total sample adequate to ensure that the findings of the survey are representative of the population and sufficiently large to overcome bias.

1.9 Survey Weighting

- 1.9.1 The data file was checked against the 2011 Census Tenure data and the Council's Local Authority Statistics on Housing (ELASH) for bias and re-weighted where necessary. A copy of the weighting carried out in this survey is provided with the Survey Data Tables.
- 1.9.2 Given the nature of the random sample of households within the agreed wards and sub-areas embodied in the postal survey, tenure type is expected to provide the main validation that the sample is representative of the whole population.
- 1.9.3 The data set out below on household population and tenure is based on the Council Tax number of resident households i.e. excluding vacant properties and second homes. The only known data in 2013 is the social housing stock which has been weighted to the number of units supplied by the Council, by the wards.
- 1.9.4 Private sector tenure has been compared with the 2011 Census data and re-weighted where necessary.
- 1.9.5 The overall data set is therefore representative of the Borough population and is the basis for the calculation of all the subsequent tables i.e. all responses are given the weight appropriate to the actual tenure balance.

Table 1-3 Tenure of Present Households

Question 1

Tenure	2013 Survey %	N ^{os.} implied
Owner Occupied with Mortgage	38.3	12,441
Owner Occupied no Mortgage	38.4	12,490
Private rented	11.3	3,675
Council Rented	7.8	2,524
RP rented	2.7	883
Shared Ownership	0.0	16
Tied to employ / living rent free	1.5	457
Total	100.0	32,486

*© Crown Copyright (Census)

- 1.9.6 The private rented sector constitutes 11.3% of households, lower than the national level of around 16.8% and the regional level (East) of 14.7%. This group includes those renting from a private landlord or from a friend or relative. 10.5% of households are social housing tenants, nearly half the national level. Around 77% of households are owner occupiers.

1.10 Guidance Model

- 1.10.1 This Strategic Housing Market Assessment has been undertaken in line with the CLG Strategic Housing Market Assessments Practice Guidance Version 2 (August 2007)', referred to throughout the report as the 'SHMA Practice Guidance'.

1.11 Definitions

- 1.11.1 Households that can enter the general market without intervention of any sort can be defined as demand. Those households unable to enter the general market without some form of intervention can be defined as having a housing need.
- 1.11.2 Affordability in DCA's view is defined by the relationship between local incomes and the local general housing market. Our definition of affordable housing is as follows:-

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

This definition covers housing for social rent, shared ownership, shared equity and intermediate rent.'

- 1.11.3 The issue of affordability is central to DCA's approach. Within the project a range of data on actual incomes and costs of housing and the likely level of incomes and the accessible cost of housing is captured for moving or newly forming households.
- 1.11.4 DCA 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.

1.12 Data Sources

- 1.12.1 The Guidance stresses the importance of using good quality data from a range of sources.
- 1.12.2 Extensive secondary data and primary data collected during the 2013 Housing Survey have been used. Throughout this report, the 2013 primary household survey data has been used unless indicated otherwise.
- 1.12.3 All local, Regional and national documents mentioned in the report are current at the time of report writing. However these documents are subject to change and may be superseded by revised policy and strategy over time.

- 1.12.4 The sources of data used within each section of the report are referenced where appropriate and **Appendix III** contains a list of the secondary data sources used in the report.

1.13 Survey Household Data

- 1.13.1 It should be noted that the 'numbers implied' column inserted in some of the tables is DCA's assessment of the total numbers to be derived after applying the appropriate weighting factor based on parish location and tenure responses to that sub-area's household numbers.
- 1.13.2 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.
- 1.13.3 Where multiple choice questions are involved, two percentage columns are shown. The first percentage column relates to each heading to the total number of actual responses. Those responses are set out at sub-area level in the accompanying data tables and are the basis of the 'numbers implied' column in the report.
- 1.13.4 The second percentage column relates the same numbers to the number of choices, 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.
- 1.13.5 **All tables included in this report are extracted from the DCA Housing Survey data for the Borough, unless otherwise indicated.** A comparison is also provided for some results throughout this report to the average of over 250 DCA Housing Assessment Surveys nationally.

1.14 Glossary of Terms

- 1.14.1 A glossary of the technical terms used throughout this report is provided as Appendix IV.

AFFORDABLE HOUSING DEFINITIONS

Affordable Housing Definitions

The NPPF definition of affordable housing is:-

- *'Social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market. Eligibility is determined with regard to local incomes and local house prices. Affordable housing should include provisions to remain at an affordable price for future eligible households or for the subsidy to be recycled for alternative affordable housing provision.'*

Affordable housing should:

- Meet the needs of eligible households including availability at a cost low enough for them to afford, determined with regard to local incomes and local house prices.
- Include provision for the home to remain at an affordable price for future eligible households or, if these restrictions are lifted, for the subsidy to be recycled for alternative affordable housing provision.

The types of affordable housing are as follows:-

Social rented housing:

- *Is owned by local authorities and private registered providers (as defined in section 80 of the Housing and Regeneration Act 2008), for which guideline target rents are determined through the national rent regime. It may also be owned by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Homes and Communities Agency.*

Affordable rented housing:-

- *Is let by local authorities or private registered providers of social housing to households who are eligible for social rented housing.*
- *Affordable Rent is subject to rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable).*

Intermediate housing:

- *Is homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition above. These can include shared equity (shared ownership and equity loans), other low cost homes for sale and intermediate rent, but not affordable rented housing.*

These definitions replace those given in previous editions of PPS3 (2006 and 2010) and related Guidance such as Delivery of Affordable Housing 2006.

LOCAL HOUSING PARTNERSHIP MEMBERS

LOCAL HOUSING PARTNERSHIP MEMBERS

Name	Organisation
Andrew Martin	Andrew Martin Planning
Sophie Westlake	A S Planning Ltd
Richard Burrows	Bellway
Trevor Faulkner	Bloor Homes
Dave Steel	Braintree District Council
Kathryn Carpenter	Braintree District Council
Emma Goodings	Braintree District Council
Jo Albini	Braintree District Council
Malcolm Knights	Brentwood Borough Council
Liz Best	Chelmsford City Council
Charis Ahmed	Chelmsford City Council
Karen Syrett	Colchester Borough Council
Holly Brett	Colchester Borough Council
Tina Bourne	Colchester Borough Council
Gary Duncan	Countryside Properties
Nick Mann	Dartmouth Park Estates
Matthew Jericho	Essex County Council
Neil Keylock	Essex County Council
Moira Griffith	Family Mosaic
Lee Webster	Flagship Housing
Robert Church	Galliford Try/Linden Homes x2 delegates
Amy Sand	Greenfields Community Housing
John Lefever	Hastoe Housing
Joy Magna	Haven Gateway
Steve Clarke	Haven Gateway
Jonathan Hills	Hills Group
Steve Heywood	
John Swords	Maldon District Council
Stuart Cock	Merseahomes
Angie Hooper	Moat Housing
Simon Butler-Finbow	
John MacFarlane	
Jonathan Woolmer	
James Firth	Strutt & Parker
Gary Guiver	Tendring District Council
Michael Aves	Kate Gordon's contact

APPENDIX VIII

DELEGATE LIST JULY 2014

Housing Market Partnership for Braintree, Brentwood, Chelmsford, Colchester and Maldon Strategic Housing Market Assessments

15th July 2014

Delegate List

Andy Stevens	AS Planning
Will Owers	Bellway
Trevor Faulkner	Bloor Homes
Dave Steel	Braintree District Council
Councillor Lady Newton	Braintree District Council
Jon Hayden	Braintree District Council
Emma Goodings	Braintree District Council
Bill Newman	Brentwood Borough Council
Shanaz Zaman	Brentwood Borough Council
Helen Gregory	Brentwood Borough Council
Tony Pearce	Brentwood Borough Council
Cllr Vicky Davies	Brentwood Borough Council
Cllr Philip Mynott	Brentwood Borough Council
Cllr Ross Carter	Brentwood Borough Council
Cllr Phil Baker	Brentwood Borough Council
Liz Best	Chelmsford City Council
Laura Percy	Chelmsford City Council
Tracy Reid	Chelmsford City Council
Sue Moore	Chelmsford City Council
Charis Ahmed	Chelmsford City Council
Helen Shackleton	CHP
John Symington	Cirrus Land Management LLP
Chris Downes	Colchester Borough Council
Holly Brett	Colchester Borough Council
Tina Hinson	Colchester Borough Council
Karen Syrett	Colchester Borough Council
Laura Chase	Colchester Borough Council
Bill Frame	Colchester Borough Council
Mark Powell-Davies	Colne Housing
Chris Dove	Dove Jeffery Homes
Dan Read	East Thames
Matthew Jericho	Essex County Council
Neil Keylock	Essex County Council
Moira Groborz	Essex Rural Community Council
Robert Crayston	Gateway
Hugh Crayston	Gateway
Daniel Allen	Greenfields Community Housing
Eddie Bacon	Greenfields Community Housing
Peter Cook	Greenfields Community Housing
Joseph Greenhow	Greenhow Planning
John Lefever	Hastoe Housing
Joy Magna	Haven Gateway
Nick Harper	Hawkspur
Martin Collins	Home Group
David Kavanagh	Iceni Projects
Ian Mayhead	Iceni Projects
David Churchill	Iceni Projects
Paul Bonnet	Iceni Homes
Robert Church	Linden Homes
Paul Gayler	Maldon District Council
Tai Tsui	Maldon District Council

John Swords	Maldon District Council
Derek Lawrence	Maldon District Council
David Coleman	Maldon District Council
Cllr Miriam Lewis	Maldon District Council
Cllr Penny Channer	Maldon District Council
Cllr Mark Durham	Maldon District Council
Cllr Brenda Harker	Maldon District Council
Cllr Robert Boyce	Maldon District Council
Stuart Cock	Mersea Homes
Michael Aves	Michael Aves Planning
Angie Hooper	Moat Housing
Tracy Kinton	Moat Housing
Dennis Norman	NPS Property Consultants
Mark Wicks	NPS Property Consultants
Barry Smith	NPS Property Consultants
Hugh Lacey	Pioneer PS
Sanna Westwood	Strategic Arc
James Firth	Strutt and Parker LLP
Laura Twitchett	Hera Management Services
Lee Porter	Hera Management Services
Alastair Pollock	Thames Gateway
Martin Jordan	Whirledge & Nott