

Exeter & Torbay Strategic Housing Market Assessment 2007

Study Technical Report
December 2007



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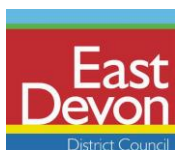
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The Study Context

- ¹ Opinion Research Services (ORS) was commissioned by the local authorities of the Exeter and Torbay Housing sub-region to undertake a comprehensive and integrated strategic housing market assessment for the Housing Market Areas of Exeter and Torbay.
- ² The study was undertaken to inform local policies, in particular relating to the housing strategy and investment programme and planning policies surrounding affordable housing provision. It is important to note that the study does not seek to determine rigid policy conclusions, but instead provides a key component of the evidence base required to develop and support a robust policy framework.
- ³ The research was based on the analysis of 3,470 interviews conducted with households (which primarily underwrote the housing needs and requirement modelling) coupled with secondary data from the UK Census, Housing Corporation, HM Land Registry, Office for National Statistics and a range of other sources along with a qualitative consultation programme with a wide range of stakeholders.
- ⁴ The commissioning partners included:
 - Devon County Council;
 - East Devon District Council;
 - Exeter City Council;
 - Mid Devon District Council;
 - Teignbridge District Council;
 - Torbay Council; and
 - Dartmoor National Park Authority.

Figure 1
Identifying the Study Area

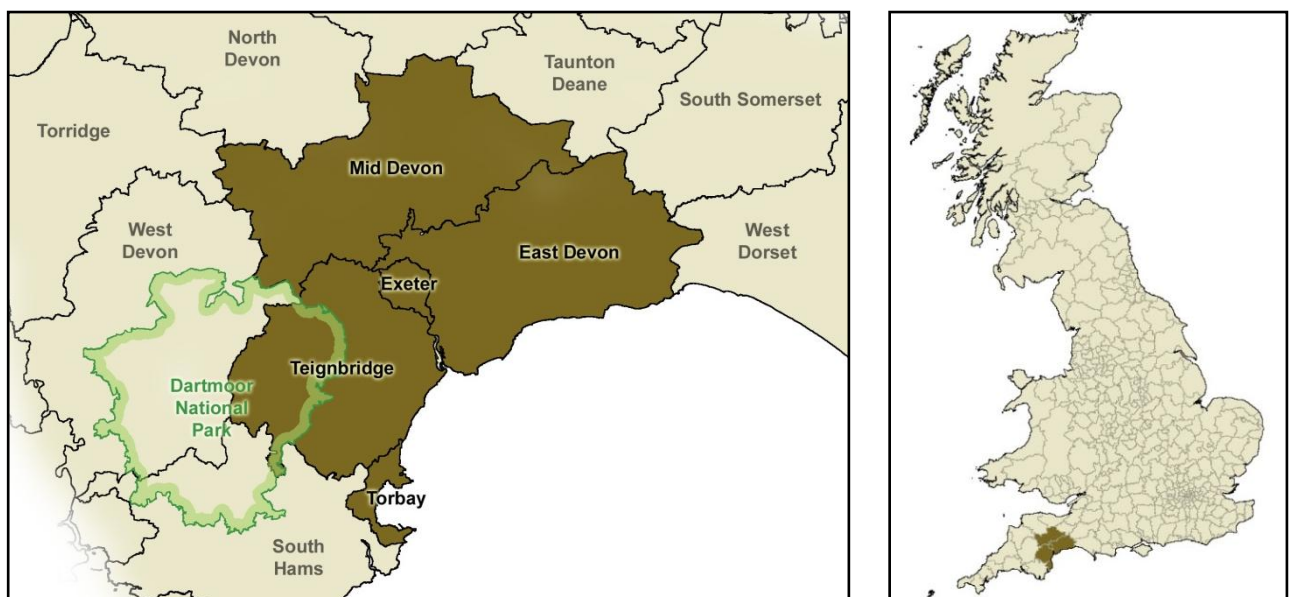


Figure 2
Overview of the Document Structure for Exeter and Torbay Strategic Housing Market Assessment



- ⁵ This document is the study technical report, which provides further details on methodological issues relating to the study research and analysis. The report also presents additional background information that was collated as part of the research to provide the necessary evidence base for the assessment.
- ⁶ The main sections of this document can be summarised as follows:
- Section A: Housing Sub-Market Gazetteer – a full list of the parishes and wards in each housing sub-market;
 - Section B: Household Survey Technical Report – details on the Local Household Survey sampling, fieldwork, associated validation process and statistical accuracy of the data;
 - Section C: Key Definitions – an overview of each of the categories of the National Statistics Socio-economic Classifications (NS-SeC) and further details on the definition of education levels reported by the ONS;
 - Section D: Local House Price Data – detailed information on local house prices over the last five years taken from the database of all property transactions maintained by HM Land Registry;
 - Section E: Details of Private Sector Rents – information about the Letting Agent Survey conducted to inform the study analysis;
 - Section F: Identifying Unsuitably Housed Households – a breakdown of how housing suitability was assessed in determining housing needs of established households;
 - Section G: Housing Market Model – information on the derivation of outputs from the Housing Market Model used to undertake the study analysis and the detailed output tables that underwrite the study conclusions; and
 - Section H: Stakeholder and Community Consultation – full reports of the detailed telephone interviews and focus group research conducted to inform and contextualise the study conclusions;
- ⁷ Other documents include the main sub-region report and an executive summary of the study findings, and summary reports for each of the sub-region's five constituent Local Authorities and the Dartmoor National Park authority.

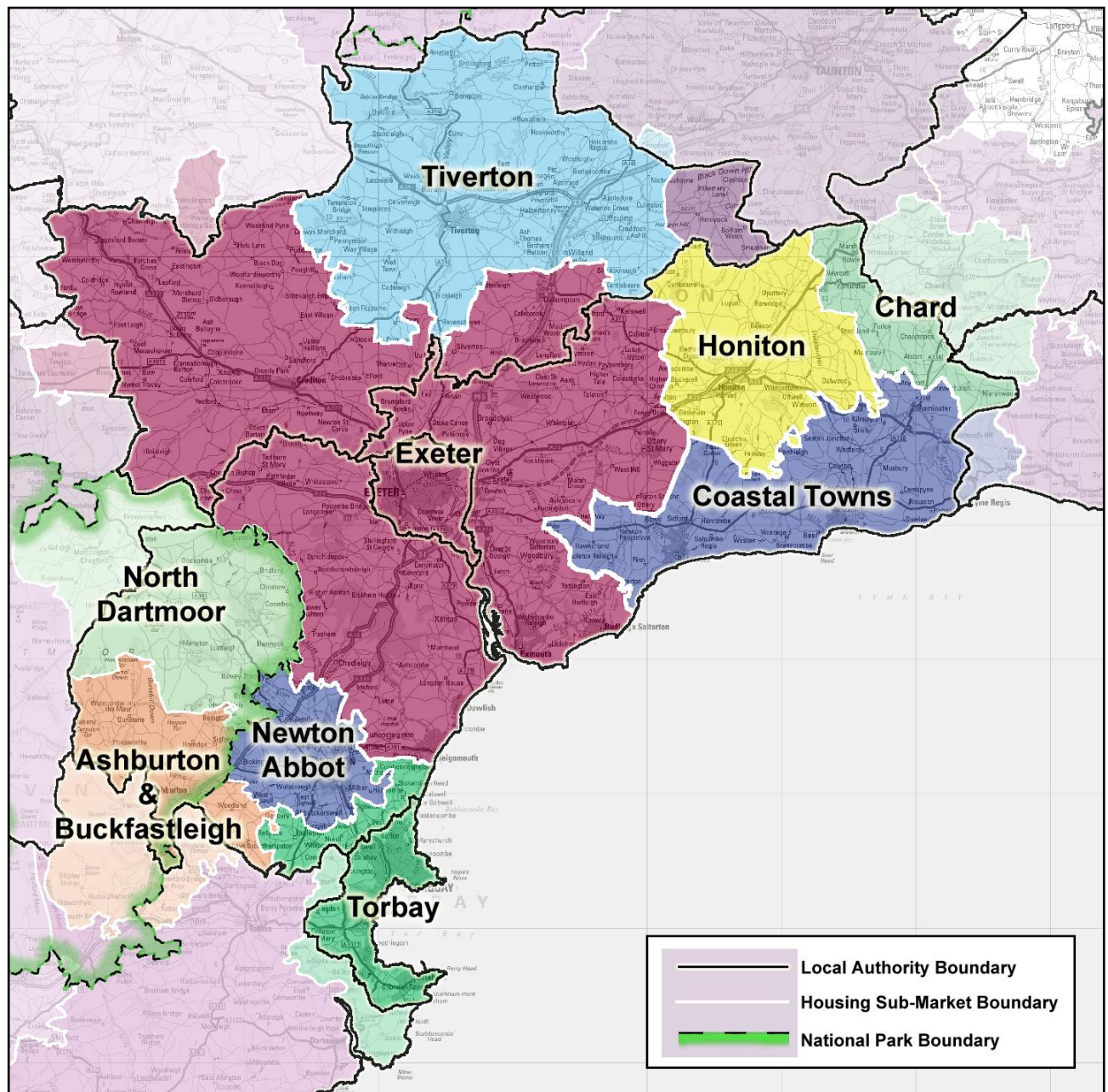
Section A: Housing Sub-Market Gazetteer

- A.1 The Exeter and Torbay Housing sub-region comprises two of the Housing Market Areas (HMAs) identified by the South West Regional Housing Board (Exeter HMA and Torbay HMA). To better understand the operation of these Housing Market Areas, this study identified the functional housing sub-markets operating within the sub-region (illustrated below).

Figure 3

Identifying the Functional Housing Sub-Markets in the Sub-Region (Source: Exeter & Torbay Strategic Housing Market Assessment 2007.

Note: Area outside the sub-region shown in lighter shading)



- A.2 Figure 3 shows the nine housing sub-markets identified. In addition to Exeter and Torbay, the towns of Tiverton, Honiton and Newton Abbot each had sufficient independence from the main urban areas to be considered independently. Similarly, when considered together Ashburton & Buckfastleigh

constituted an independent sub-market as did the towns along the coast of East Devon in the Coastal Towns sub-market and North Dartmoor. The ninth housing market considered by the study was Chard – but given that most of its population lived outside the study area only 15 interviews were conducted in the sub-market, and results for this area have typically not been reported. It should also be noted that the Taunton sub-market fringes into the extreme eastern parts of Mid Devon – but given the extremely sparse population of the area, no interviews were conducted in this sub-market and no results for this area have been included in the report.

- A.3 Housing sub-market boundaries are based on natural patterns of movement – and were not constrained by Local Authority administrative boundaries. In this context, many sub-markets will straddle more than one Local Authority area, and these will occasionally include authorities outside the sub-region.

Parishes within the Sub-region by Housing Sub-market

Ashburton & Buckfastleigh	Coastal Towns	Exeter (continued)
Ashburton	Axminster	Clyst St. George
Broadhempston	Axmouthe	Clyst St. Lawrence
Buckfastleigh	Beer	Clyst St. Mary
Buckland in the Moor	Branscombe	Coldridge
Dean Prior	Colaton Raleigh	Copplestone
Denbury and Torbryan	Colyton	Crediton
Holne	Combpyne Rousdon	Crediton Hamlets
Ilminster	Kilmington	Cullompton
Rattery	Musbury	Dawlish
South Brent	Newton Poppleford and Harford	Doddyscombsleigh
Staverton	Otterton	Down St. Mary
West Buckfastleigh	Seaton	Dunchideock
Widcombe in the Moor	Shute	Dunsford
Woodland	Sidmouth	East Budleigh
	Southleigh	Eggesford
	Uplyme	Exminster
		Exmouth
		Farringdon
		Feniton
		Hittisleigh
		Holcombe Burnell
		Huxham
		Ide
		Ideford
		Kenn
		Kennerleigh
		Kentisbeare
		Kenton
		Lapford
		Lymptone
		Mamhead
		Morchard Bishop
		Nether Exe
		Newton St. Cyres
		Nymet Rowland
		Otterton
		Ottery St. Mary

Chard	Exeter
All Saints	Ashcombe
Chardstock	Ashton
Hawkchurch	Aylesbeare
Membury	Bicton
Yarcombe	Bishopsteignton
	Bow
	Bradinch
	Broad Clyst
	Broadhembury
	Brushford
	Budleigh Salterton
	Chawleigh
	Cheriton Bishop
	Cheriton Fitzpaine
	Chudleigh
	Colebrooke
	Clannaborough
	Clyst Honiton
	Clyst Hydon

Exeter (continued)
Payhembury
Plymtree
Poltimore
Poughill
Powderham
Puddington
Rewe
Rockbeare
Sandford
Shaldon
Shillingford St. George
Shobrooke
Silverton
Sowton
Starcross
Stockleigh English
Stockleigh Pomeroy
Stoke Canon
Talaton
Tedburn St. Mary
Teignmouth
Thelbridge
Thorverton
Trusham
Upton Hellions
Upton Pyne
Washford Pyne
Wembworthy
Whimble
Whitestone
Woodbury
Woolfardisworthy
Zeal Monachorum

Newton Abbot
Abbotskerswell
Bickington
Bovey Tracey
Denbury And Torbryan
Haccombe with Combe
Hennock
Illesington
Kingsteignton
Kingskerswell
Newton Abbot
Ogwell
Teigngrace

North Dartmoor
Bovey Tracey
Bridford
Chagford
Christow
Drewsteignton
Dunsford
Gidleigh
Hennock
Illesington
Lustleigh
Manaton
Moretonhampstead
North Bovey
Throwleigh

Tiverton
All Saints
Bampton
Bickleigh
Burlescombe
Butterleigh
Cadbury
Cadeleigh
Chardstock
Cheriton Fitzpaine
Clayhanger
Cruwys Morchard
Culmstock
Halberton
Hawkchurch
Hockworthy
Holcombe Rogus
Huntsham
Kentisbeare
Loxbeare
Membury
Morebath
Oakford
Sampford Peverell
Silverton
Stoodleigh
Templeton
Tiverton
Uffculme
Upplowman
Washfield
Willand
Yarcombe

Honiton
Awliscombe
Buckerell
Combe Raleigh
Cotleigh
Dalwood
Dunkeswell
Farway
Gittisham
Honiton
Kilmington
Luppitt
Monkton
Northleigh
Offwell
Sheldon
Stockland
Upottery
Widworthy

Wards within the Sub-region by Housing Sub-market

Ashburton & Buckfastleigh	Exeter (continued)	Honiton
Ambrook	Exmouth Littleham Rural	Edenvale
Ashburton and Buckfastleigh	Exmouth Littleham Urban	Honiton St Michaels
Eastmoor	Exmouth Withycombe Raleigh	Honiton St Pauls
Haytor	Exmouth Withycombe Urban	Otterhead
Moorland	Exwick	Patteson
South Brent	Haldon	Yarty
	Heavitree	
Chard	Kenn Valley	Newton Abbot
Upper Axe	Lawrence	Abbotskerswel
Yarty	Lympstone	Ambrook
	Mincinglake	Bovey
Coastal Towns	Newbrooke	Bradley
Axminster Hamlets Raleigh	Newtown	Buckland
Axminster Town	Ottery St Mary Rural	Bushell
Beer	Ottery St Mary Town	Chudleigh
Colyton	Patteson	College
Edenvale	Pennsylvania	Haytor
Newbridges	Pinhoe	Kingskerswell
Newton Poppleford and Harpford	Polsløe	Kingsteignton East
Seaton	Powderham	Kingsteignton West
Sidmouth Rural	Priory	Milber
Sidmouth Town	Raleigh	Teignhydes
Sidmouth Woolbrook	St David's	
Trinity	St James	North Dartmoor
	St Leonard's	Bovey
	St Loyes	Chagford
	St Thomas	Chudleigh
	Sandford	Drewsteignton
	Shaldon	Dunsford
	Silverton	Haytor
	Tale Vale	Moorland
	Taw	Moretonhampstead
	Taw Vale	Teign Valley
	Teignmouth Central	
	Teignmouth East	
	Teignmouth North	
	Teignmouth West	
	Teign Valley	
	Topsham	
	Upper Yeo	
	West Creedy	
	Whipton and Barton	
	Whitestone	
	Woodbury	
	Yeo	
Exeter		
Alphington		
Boniface		
Bradninch		
Broadclyst		
Budleigh Salterton		
Cadbury		
Chudleigh		
Clystbeare		
Clyst Valley		
Cowick		
Cullompton Outer		
Cullompton Town		
Dawlish Central		
Dawlish North East		
Dawlish South West		
Dunsford		
Duryard		
East Creedy		
Exe Valley		
Exmouth Brixington		
Exmouth Halsdon		

Tiverton
Cadbury
Canal
Canonsleigh
Castle
Clare
Cullompton Outer
Culm
East Creed
Halberton
Lowman
Paullet
Shuttern
Silverton
Westexe North
Westexe South
Willand

Torbay
Berry Head-with-Furzeham
Blatchcombe
Churston-with-Galmpton
Clifton-with-Maidenway
Cockington-with-Chelston
Ellacombe
Goodrington-with-Roselands
Preston
Roundham-with-Hyde
St Marychurch
St Mary's-with-Summercombe
Shiphay-with-the-Willows
Tormohun
Watcombe
Wellswood

Section B: Household Survey Technical Report

Survey Design

B.1 In partnership with the Councils, a detailed questionnaire was designed to gather the required information – including comprehensive information about individual household members both past and present. The main sections of the questionnaire are detailed below.

- Current housing circumstances – tenure, type, size and condition of current home;
- Satisfaction with current area and local services;
- Previous homes – area, type, tenure and reasons for moving;
- Future moves – likelihood of moving, preferred tenure and likely destination;
- Household profile – age, gender, relationships, ethnicity and employment;
- Health problems, special needs and housing options for getting older;
- Changes in the household structure – persons that have recently left household and the likelihood of household members leaving the household in future;
- Financial issues – sources of income, income level, savings and debts; and
- Housing costs – current costs, second homes and experiences of financial difficulties.

B.2 A copy of the full questionnaire script can be downloaded from <http://www.dshg.org.uk/downloads>

Fieldwork Summary

B.3 The need for reliable data about household composition, affordability and other characteristics, such as special needs, tenure and bedroom requirements meant that a household survey (based upon detailed personal interviews in people's homes) was the most appropriate method for the study.

B.4 Providing surveys are conducted with rigorous sampling and fieldwork standards to ensure a good approximation to a random survey, surveys can achieve very accurate results with quite moderate sized samples. However, it is not often understood that only proper random samples can be certified as more or less accurate at determinate confidence levels. The fieldwork for the Exeter & Torbay Strategic Housing Market Assessment involved a household survey of a random and representative sample of 3,460 households across the sub-region.

B.5 The population base for selecting the required sample was the Postal Address File (PAF) which is the Royal Mail register of small users (i.e. those addresses that only receive small volumes of mail each week). Whereas the majority of such users are domestic homes, they also include some small business and other non-residential addresses – but through proper fieldwork management, this population forms an appropriate basis for sampling local households.

B.6 In order to achieve the required household surveys, a total of 5,600 randomly selected addresses were approached between November 2006 and February 2007 and a total of 3,476 households were successfully interviewed. Primary target addresses were visited on at least four occasions, at different times, and on different days before being considered a non-contact.

- B.7 Only resident owners or tenants (or their resident partners) were accepted as respondents, and almost two-fifths of the interviews (38.3%) were achieved outside normal working hours ensuring adequate representation from working age respondents.

Figure 4
Household Surveys Achieved by Month of Interview
(Source: Exeter & Torbay Household Survey 2006-07)

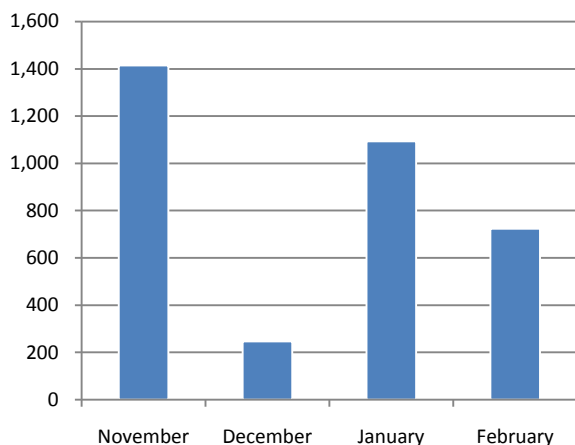
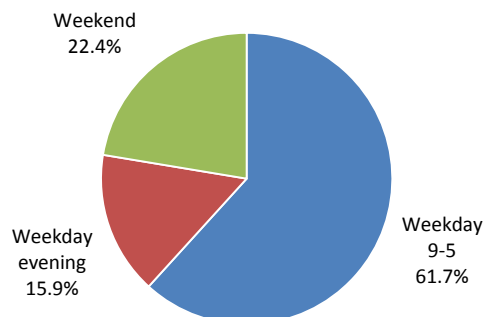


Figure 5
Household Surveys Achieved by Time of Interview
(Source: Exeter & Torbay Household Survey 2006-07)



- B.8 Of the 5,600 addresses called on, 62.1% yielded a successful interview – though this increases to 65.9% when addresses with no household resident are discounted from the base sample. The remainder of the calls were as follows:

Figure 6
Interviews Conducted by Area (Source: Exeter & Torbay Household Survey 2006-07)

Outcome of Contact	Number of Addresses Approached	% of Addresses Approached	% of Households Approached
Household Interviewed			
Successful interview	3,476	62.1%	65.9%
Partial interview or interview failed quality checks	9	0.2%	0.2%
Household Not Interviewed			
Refused to be interviewed	1,122	20.0%	21.3%
Not contactable	667	11.9%	12.6%
No Household Resident			
Property empty	133	2.4%	-
Non-residential or business only property	45	0.8%	-
Property confirmed demolished	10	0.2%	-
Property otherwise untraceable	138	2.5%	-
TOTAL	5,600	100.0%	100.0%

- B.9 Recent CLG Guidance emphasises the importance of high response rates, and identifies an acceptable range of 60-80%. The achieved response rate of 65.9% clearly sits comfortably within this range.

Sampling Framework

- B.10 The sampling strata were defined geographically, through considering the intersection between local authority administrative boundaries and housing sub-market boundaries as the basis for the primary stratification. A base sample of 150 interviews was allocated to each housing sub-market (with the exception of Chard) and distributed proportionately between the local authority areas on the basis of the population within the sub-market. A further 1,800 interviews were subsequently allocated across all strata proportionate to their overall population.
- B.11 Some key settlements were also identified, and their boundaries provided further strata for boosting the sample within these areas to provide more localised analysis. This stage accounted for an additional 460 interviews, bringing the overall target to 3,460 interviews across the whole sub-region.

Figure 7

Population and Target Interviews by Sample Strata (Source: Exeter & Torbay Household Survey 2006-07)

Local Authority & Housing Sub-Market Area	Population			Target Interviews			
	Number	% of sub-market	% of study area	Base	Proportion	Urban top-up	Total
Ashburton & Buckfastleigh sub-market							
Teignbridge	4,300	76%	1.6%	114	30	-	144
DNP outside Teignbridge	1,400	24%	0.5%	36	10	-	46
Sub-total	5,700	100%	2.2%	150	40	-	190
Coastal Towns sub-market							
East Devon	20,200	100%	7.7%	150	136	-	286
Sub-total	20,200	100%	7.7%	150	136	-	286
Exeter sub-market							
East Devon	31,700	27%	12.0%	40	216	-	256
Exeter City	48,700	41%	18.5%	63	340	-	403
Mid Devon	15,400	13%	5.8%	19	99	-	118
Teignbridge	22,400	19%	8.5%	28	152	314	494
Sub-total	118,200	100%	44.9%	150	807	314	1,271
Honiton sub-market							
East Devon	8,600	100%	3.3%	150	58	-	208
Sub-total	8,600	100%	3.3%	150	58	-	208
Newton Abbot sub-market							
Teignbridge	22,400	100%	8.5%	150	151	80	381
Sub-total	22,400	100%	8.5%	150	151	80	381
North Dartmoor sub-market							
Teignbridge	2,700	68%	1.0%	104	19	-	123
DNP outside Teignbridge	1,300	32%	0.5%	46	9	-	55
Sub-total	4,000	100%	1.5%	150	28	-	178
Tiverton sub-market							
Mid Devon	16,800	100%	6.4%	150	108	-	258
Sub-total	16,800	100%	6.4%	150	108	-	258
Torbay sub-market							
Teignbridge	4,000	6%	1.5%	9	28	-	37
Torbay UA	62,300	94%	23.6%	141	429	66	636
Sub-total	66,300	100%	25.2%	150	457	66	673
Chard sub-market							
East Devon	1,300	-	0.5%	-	15	-	15
Sub-total	1,300	-	0.5%	-	15	-	15
TOTAL	263,500	-	100%	1,200	1,800	460	3,460

- B.12 Within each stratum, every dwelling had an equal chance of selection that would not be influenced by any previous selection, with the exception of prohibiting the selection of the same dwelling on more than one occasion.
- B.13 Figure 8 summarises the overall primary sample across the entire sub-region, and the supplementary reserve addresses that were issued. The sample of reserve addresses was selected in the same way as the primary address sample, and these addresses were issued on an area-by-area basis to compensate for different non-response levels in each stratum.

Figure 8

Primary and Reserve Sample Frame and Target and Achieved Interviews by Sample Strata (Source: Exeter & Torbay Household Survey 2006-07.
Note: Invalid contacts include business premises and other non-residential addresses, along with untraceable properties believed demolished)

Local Authority & Housing Sub-Market Area	Target Interviews	Sample Selected			Invalid Contacts	Valid Sample	Interviews Achieved	
		Primary	Reserve	Total				
Ashburton & Buckfastleigh sub-market								
Teignbridge	144	216	-	216	2	214	146	
DNP outside Teignbridge	46	69	-	69	-	69	47	
Sub-total	190	285	-	285	2	283	193	
Coastal Towns sub-market								
East Devon	286	429	-	429	1	428	266	
Sub-total	286	429	-	429	1	428	266	
Exeter sub-market								
East Devon	256	384	-	384	2	382	259	
Exeter City	403	605	74	679	7	672	412	
Mid Devon	118	177	42	219	1	218	118	
Teignbridge	494	741	70	811	14	797	484	
Sub-total	1,271	1,907	186	2,093	24	2,069	1,273	
Honiton sub-market								
East Devon	208	312	-	312	3	309	220	
Sub-total	208	312	-	312	3	309	220	
Newton Abbot sub-market								
Teignbridge	381	572	41	613	10	603	378	
Sub-total	381	572	41	613	10	603	378	
North Dartmoor sub-market								
Teignbridge	123	185	-	185	1	184	139	
DNP outside Teignbridge	55	83	-	83	-	83	74	
Sub-total	178	268	-	268	1	267	213	
Tiverton sub-market								
Mid Devon	258	387	-	387	6	381	249	
Sub-total	258	387	-	387	6	381	249	
Torbay sub-market								
Teignbridge	37	56	-	56	2	54	25	
Torbay UA	636	954	180	1,134	6	1,128	644	
Sub-total	673	1,010	180	1,190	8	1,182	669	
Chard sub-market								
East Devon	15	23	-	23	-	23	15	
Sub-total	15	23	-	23	-	23	15	
TOTAL	3,460	5,193	407	5,600	55	5,545	3,476	

B.14 Figure 9 summarises the outcome of the contact at each valid address within each strata of the sample. Where no contact was made, interviewers had normally visited the households on at least four occasions, including two visits outside normal working hours.

Figure 9

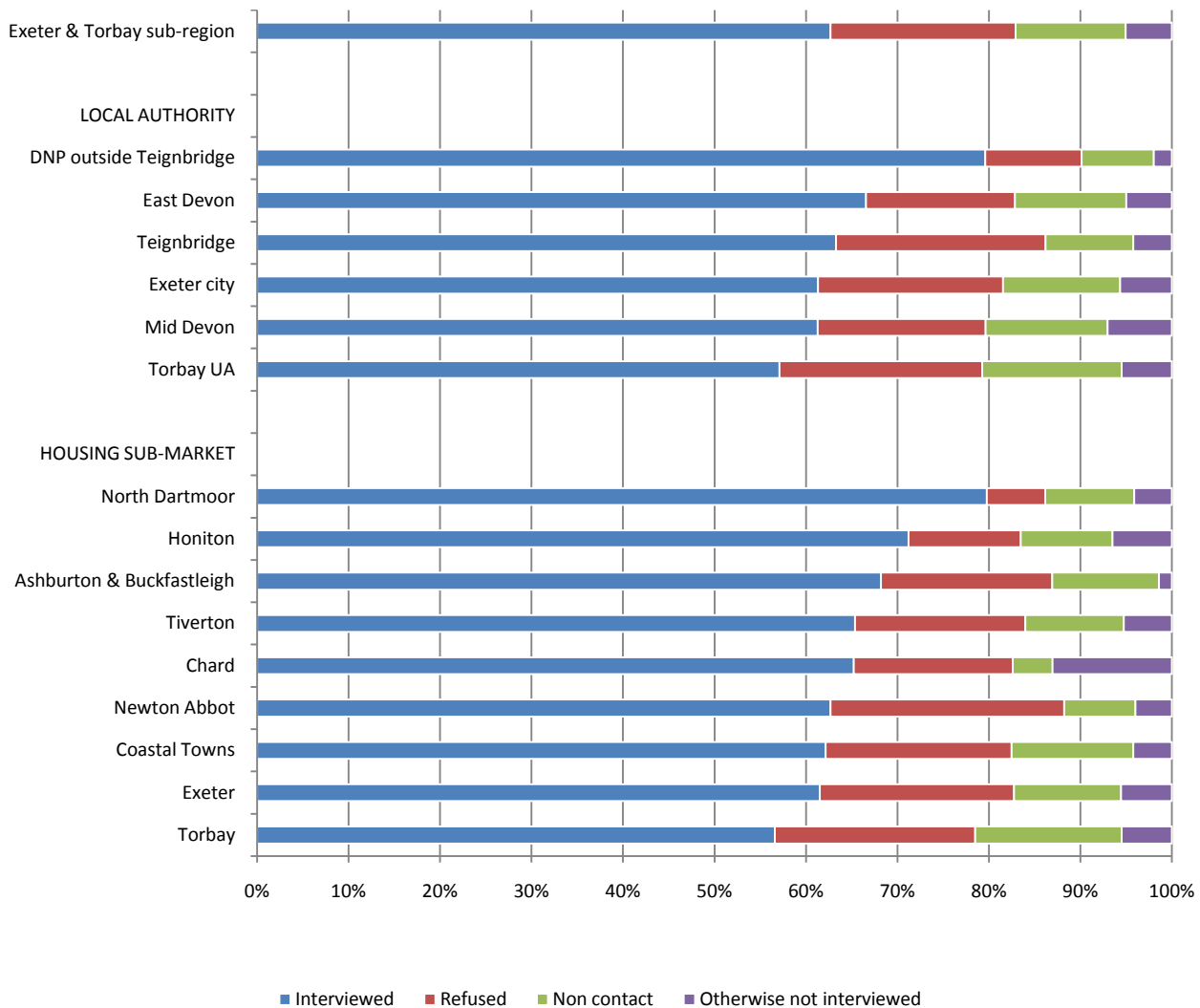
Outcome of Contact Attempts by Sample Strata (Source: Exeter & Torbay Household Survey 2006-07)

Local Authority & Housing Sub-Market Area	Valid Sample	Interviews Achieved		Refused	No Contact	Property Empty	Property Not Found	
		Successful	Invalid					
Ashburton & Buckfastleigh sub-market								
Teignbridge	214	146	1	40	25	2	-	
DNP outside Teignbridge	69	47	-	13	8	-	1	
Sub-total	283	193	1	53	33	2	1	
Coastal Towns sub-market								
East Devon	428	266	2	87	57	13	3	
Sub-total	428	266	2	87	57	13	3	
Exeter sub-market								
East Devon	382	259	1	57	50	5	10	
Exeter City	672	412	-	136	86	21	17	
Mid Devon	218	118	1	39	39	4	17	
Teignbridge	797	484	2	207	67	21	16	
Sub-total	2,069	1,273	4	439	242	51	60	
Honiton sub-market								
East Devon	309	220	-	38	31	9	11	
Sub-total	309	220	-	38	31	9	11	
Newton Abbot sub-market								
Teignbridge	603	378	-	154	47	12	12	
Sub-total	603	378	-	154	47	12	12	
North Dartmoor sub-market								
Teignbridge	184	139	-	14	22	2	7	
DNP outside Teignbridge	83	74	-	3	4	2	-	
Sub-total	267	213	-	17	26	4	7	
Tiverton sub-market								
Mid Devon	381	249	1	71	41	10	9	
Sub-total	381	249	1	71	41	10	9	
Torbay sub-market								
Teignbridge	54	25	-	9	17	-	3	
Torbay UA	1,128	644	1	250	172	29	32	
Sub-total	1,182	669	1	259	189	29	35	
Chard sub-market								
East Devon	23	15	-	4	1	3	-	
Sub-total	23	15	-	4	1	3	-	
TOTAL	5,545	3,476	9	1,122	667	133	138	

- B.15 Figure 10 illustrates the overall response rate in terms of the number of properties approached that yielded a successful interview for each of the local authority areas and housing sub-markets, and for the sub-region as a whole.
- B.16 Response rates varied by local authority and housing sub-market – but generally 60-70% of the valid addresses approached yielded a successful interview. The highest response rates were in North Dartmoor, with as many as 80% of all addresses yielding a completed interview. Conversely, the lowest access rates were in Torbay, with interviews being achieved at fewer than 60% of addresses.

Figure 10

Outcome of Interview Attempt by LA and Housing Sub-Market (Source: Exeter and Torbay Household Survey 2006-07)



- B.17 Figure 11 provides further information on the statistical weighting process. To compensate for the stratification, a grossing factor was calculated and associated with each interview as detailed in the table.
- B.18 Once the achieved sample has been weighted, the proportion of weighted cases within each stratum matches the proportion within the original population – which ensures that the sample stratification does not influence the overall study results.

Figure 11

Interviews Conducted by Area (Source: Exeter & Torbay Household Survey 2006-07. Note: The Grossing Factor is the number of resident households represented by each interview, and is derived by dividing the number of resident households by the number of interviews achieved in each stratum)

Local Authority & Housing Sub-Market Area	Population	Valid Sample	Empty Properties		Resident Households	Interviews Achieved	Grossing Factor
			Sample	Population			
Ashburton & Buckfastleigh sub-market							
Teignbridge	4,300	214	2	-	4,300	146	29.5
DNP outside Teignbridge	1,400	69	-	-	1,400	47	29.8
Sub-total	5,700	283	2	-	5,700	193	-
Coastal Towns sub-market							
East Devon	20,200	428	13	600	19,600	266	73.7
Sub-total	20,200	428	13	600	19,600	266	-
Exeter sub-market							
East Devon	31,700	382	5	400	31,300	259	120.8
Exeter City	48,700	672	21	1,500	47,300	412	114.8
Mid Devon	15,400	218	4	300	15,100	118	128.0
Teignbridge	22,400	797	21	600	21,800	484	45.0
Sub-total	118,200	2,069	51	2,800	115,500	1,273	-
Honiton sub-market							
East Devon	8,600	309	9	200	8,300	220	37.7
Sub-total	8,600	309	9	200	8,300	220	-
Newton Abbot sub-market							
Teignbridge	22,400	603	12	500	21,900	378	57.9
Sub-total	22,400	603	12	500	21,900	378	-
North Dartmoor sub-market							
Teignbridge	2,700	184	2	-	2,700	139	19.4
DNP outside Teignbridge	1,300	83	2	-	1,300	74	17.6
Sub-total	4,000	267	4	100	3,900	213	-
Tiverton sub-market							
Mid Devon	16,800	381	10	400	16,400	249	65.9
Sub-total	16,800	381	10	400	16,400	249	-
Torbay sub-market							
Teignbridge	4,000	54	-	-	4,000	25	160.0
Torbay UA	62,300	1,128	29	1,500	60,700	644	94.3
Sub-total	66,300	1,182	29	1,500	64,800	669	-
Chard sub-market							
East Devon	1,300	23	3	200	1,100	15	73.3
Sub-total	1,300	23	3	200	1,100	15	-
TOTAL	263,500	5,545	133	6,300	257,200	3,476	-

Statistical Confidence

- B.19 A random sample should be representative of its population to within specified statistical limits, and (as previously noted) the Exeter & Torbay Local Household Survey achieved 3,476 personal interviews with households randomly selected throughout the area. The analysis for such a sample should represent the entire population of households to within $\pm 1.7\%$ points at the 95% level confidence – that is, if all households in the Exeter & Torbay sub-region were interviewed, 19 times out of 20 the results would not differ by more than 1.7% points from the results for the sample.
- B.20 Such error margins and levels of confidence are linked. Whilst we can be 95% confident that the overall sample is accurate to within $\pm 1.7\%$ points, we are confident that 4 times out of 5 the results will actually be within $\pm 0.9\%$ points. A further factor that influences the error margin is the split in opinion. If the result for a specific question is significantly biased to one response (e.g. if 95% of the sample stated Option A whilst only 5% stated Option B) the results will be subject to a smaller error than if there was less consensus (i.e. where both Option A and Option B are represented more equally). Whilst the achieved sample is always accurate to within $\pm 1.3\%$ points (based on the worse case scenario of a 50:50 split in opinion), the error margin reduces to $\pm 0.6\%$ points when at least 95% of respondents opt for the same option.
- B.21 The level of accuracy and impact of changes in the opinion split are illustrated below, though most social research projects adopt a confidence level of 95% when reporting their findings.

Figure 12
Differential Error Margins by Confidence Level and Opinion Split

Confidence Level	Opinion Split				
	50:50	75:25	90:10	95:5	99:1
Margin of Error $\pm$					
80% (4 times out of 5)	1.1%	0.9%	0.7%	0.5%	0.2%
90% (9 times out of 10)	1.4%	1.2%	0.8%	0.6%	0.3%
95% (19 times out of 20)	1.7%	1.4%	1.0%	0.7%	0.3%
99% (99 times out of 100)	2.2%	1.9%	1.3%	1.0%	0.4%

- B.22 Of course, the above table is based on results for the entire population. When results for individual sub-groups are considered, the error margins will increase – but to what extent will depend on the number of achieved interviews within the sub-group, as detailed below.

Figure 13
Differential Error Margins by Sub-sample Size and Opinion Split

% of Overall Sample in Sub-sample	Opinion Split				
	50:50	75:25	90:10	95:5	99:1
Margin of Error $\pm$ @ 95% Confidence Level					
75% of sample (2,607 cases)	1.9%	1.7%	1.2%	0.8%	0.4%
50% of sample (1,738 cases)	2.4%	2.0%	1.4%	1.0%	0.5%
25% of sample (869 cases)	3.3%	2.9%	2.0%	1.4%	0.7%
10% of sample (348 cases)	5.3%	4.5%	3.2%	2.3%	1.0%
5% of sample (174 cases)	7.4%	6.4%	4.5%	3.2%	1.5%

- B.23 The overall accuracy for the household interview sample is detailed in Figure 14 in terms of the whole sample, the individual local authority samples and the housing sub-market samples.
- B.24 Overall results from the interview survey from the entire study area should always be accurate to within $\pm 1.7\%$ points at the 95% level of confidence. Even the least accurate local authority results should be accurate to within $\pm 5.1\%$ points and the least accurate housing sub-market area results accurate to $\pm 7.1\%$ points, again at the 95% level of confidence. Results are more accurate in some areas where larger samples were achieved or where a bias in opinion was identified (rather than a 50:50 split).

Figure 14

Differential Error Margins $\pm$ @ 95% Confidence Level by Local Authority, Housing Sub-market and Opinion Split (Source: Exeter and Torbay Household Survey 2006-07)

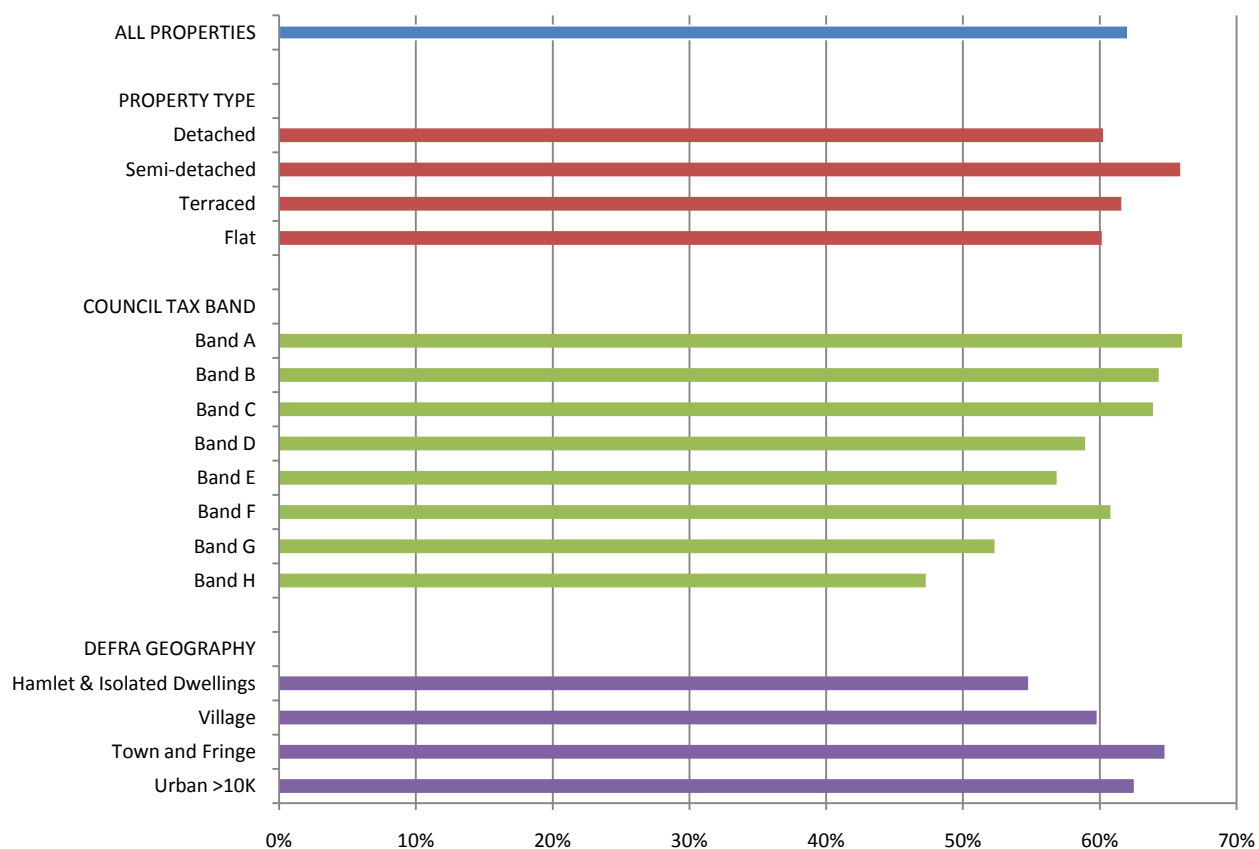
Sub-Area		Achieved Interviews	Opinion Split	
			50:50	90:10
Local Authority Area				
	East Devon	760	3.6%	2.1%
	Exeter City	412	4.8%	2.9%
	Mid Devon	367	5.1%	3.1%
	Teignbridge	1,172	2.9%	1.7%
	Dartmoor National Park	390	5.0%	3.0%
	Torbay UA	644	3.9%	2.3%
Housing Sub-market				
	Ashburton & Buckfastleigh	193	7.1%	4.2%
	Coastal Towns	266	6.0%	3.6%
	Exeter	1,273	2.7%	1.6%
	Honiton	220	6.6%	4.0%
	Newton Abbot	378	5.0%	3.0%
	North Dartmoor	213	6.7%	4.0%
	Tiverton	249	6.2%	3.7%
	Torbay	669	3.8%	2.3%

Response Bias

- B.25 The confidence limits described above consider only the probability of errors arising in the figures from chance, and do not take account of other potentially more systematic errors arising from sample bias – that is, where some households are more likely to participate in the study than others.
- B.26 As previously noted, interviews were achieved at 62.1% of all addresses approached – with 65.9% of all households approached participating in the survey. As previously noted, the CLG Guidance suggests that 60-80% of households should be expected to participate in a household survey – so a response rate of 65.9% sits comfortably within this range.
- B.27 Of course, this rate varied for different types of properties approached. The rates achieved at addresses of different types are detailed below.

Figure 15

Outcome of Interview Attempt by LA and Housing Sub-Market (Source: Exeter and Torbay Household Survey 2006-07)

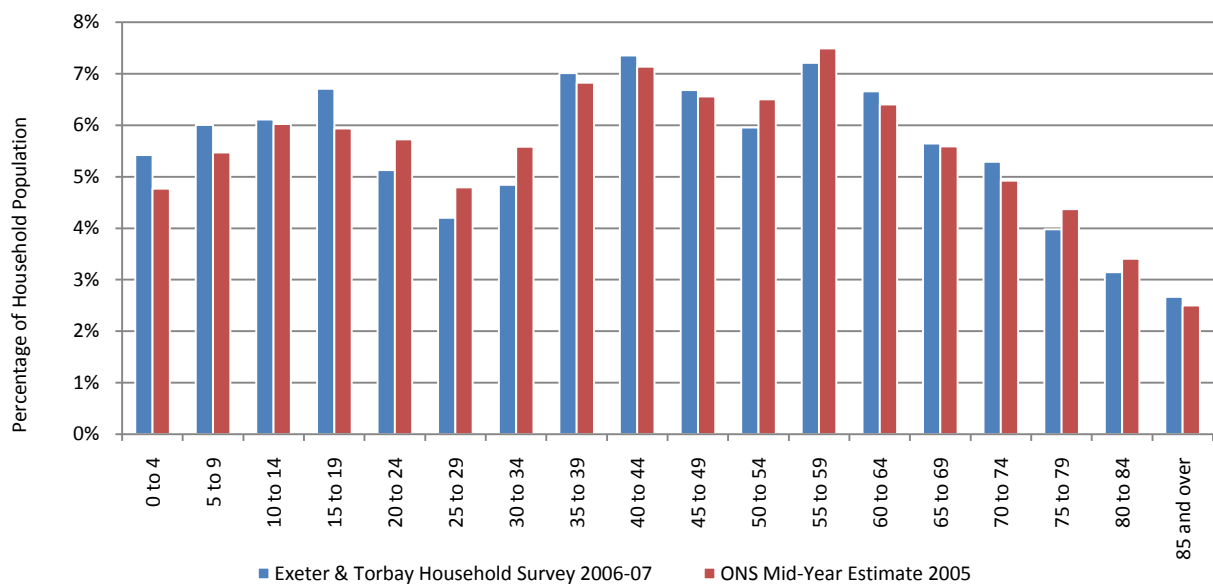


- B.28 To compensate for these differential response rates, a second weight is derived for each case. This weight for observed response bias is then combined with the original grossing factor for stratification to generate a combined weighting factor for each case.
- B.29 Whilst it's not possible to identify further response bias in this way (insofar as no information is available about the households that were not interviewed), the profile of the achieved interviews was also critically considered against existing secondary data sources.
- B.30 The following figures demonstrate the consistency of the survey with key secondary data for the area.

- B.31 The age profile shown by the survey data is broadly consistent with the ONS Mid-Year Estimate for 2005, and definitely within the margin of error for the survey. It is worth noting that the survey shows slightly more older people than estimated in 2005, but this is consistent with the increase already seen since the 2001 Census and is likely to reflect the later reference date for the survey. Interestingly, the survey suggests higher proportions of children than the ONS figures – but there is no corresponding difference in the figures for those of childbearing age, which indicates that there may be more children in the sub-region than official estimates suggest (for bias in the survey would tend to show more parents as well as more children).

Figure 16

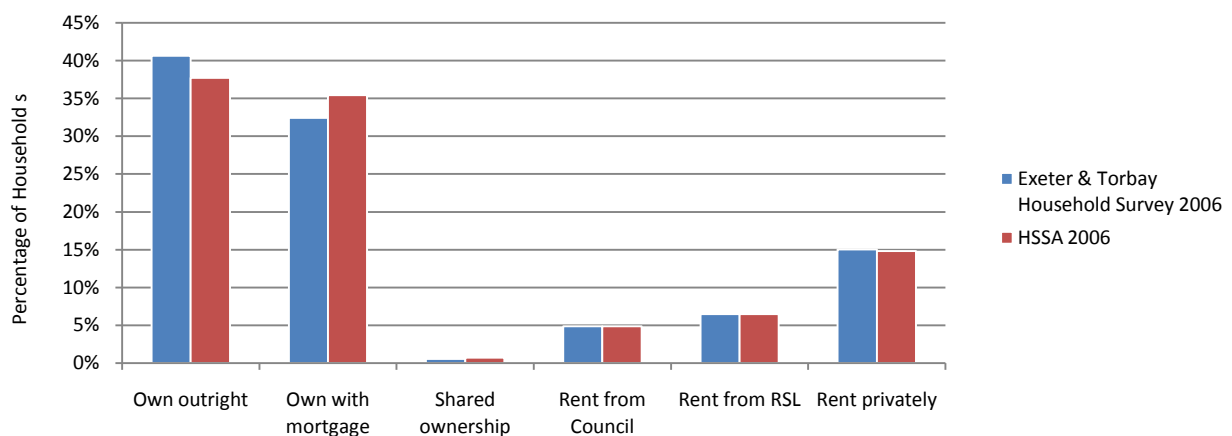
Age Profile for Household Residents (Source 1: Exeter and Torbay Household Survey 2006-07. Source 2: ONS Mid-Year Population Estimate 2005. Note: Household Population assumes % of Resident Population in Communal Housing has remained constant for each 5-year cohort since the 2001 Census)



- B.32 When we consider the tenure mix, there seems to be a slight over-representation of outright owners. Nevertheless, the distribution of market housing is based on the balance at the time of the Census, and as the population is aging it is not surprising that more households in the sub-region have paid off their mortgages during this period. This is coupled with a likelihood that some migrant households may well have purchased outright with equity released by property sales in the South East and London.

Figure 17

Tenure Profile for Households (Source 1: Exeter and Torbay Household Survey 2006-07. Source 2: Housing Strategy Statistical Appendix 2006. Note: Assumes that the division of market housing has remained constant since the 2001 Census)



- B.33 Whilst slight differences are apparent between the survey data and secondary sources, we are confident that the primary data provides a robust basis for analysis.

Section C: Key Definitions

The National Statistics Socio-economic Classification (NS-SeC)

- ^{C.1} In 2001, the Office for National Statistics replaced the traditional Social Class based on Occupation (SC) and Socio-economic Groups (SEG) with a new system for classifying the socio-economic circumstances of individuals and households.
- ^{C.2} The system, known as the National Statistics Socio-economic Classification (NS-SeC), is based on the following eight classes.

Figure 18
Description of NS-SeC Classes (Source: Office of National Statistics)

NS-SeC Class	Description
Higher managerial and professional	Persons who employ others in enterprises employing 25 or more persons, and who delegate some part of their managerial and entrepreneurial functions on to salaried staff. Positions involving general planning and supervision of operations on behalf of the employer. Positions covering all types of higher professional work.
Lower managerial and professional	Positions in which those employed generally plan and supervise operations on behalf of the employer under the direction of senior managers. Positions which involve formal and immediate supervision of others engaged in intermediate occupations.
Intermediate	Positions not involving general planning or supervisory powers, in clerical, sales, service and intermediate technical occupations. Positions in this group are 'mixed' in terms of employment regulation, i.e. are intermediate with respect to the service relationship and the labour contract. This group normally have little authority and are bureaucratically regulated.
Small employers and own account workers	Persons (other than higher or lower professionals) who carry out all or most of the entrepreneurial and managerial functions of the enterprise but employ less than 25 employees. Self-employed positions in which the persons involved have no employees other than family workers.
Lower supervisory and technical	Positions having a modified form of 'labour contract' and involve formal and immediate supervision of others engaged in such occupations often including a job title such as foreman or supervisor.
Semi-routine occupations	Positions in which employees are engaged in semi-routine occupations which have a slightly modified labour contract and have at least some need for employee discretion.
Routine occupations	Positions where employees are engaged in routine occupations which have a basic labour contract and little need for employee discretion.
Never worked and long-term unemployed	Those who are over 16 years of age who have left full-time education, but have never been in paid employment, or have been unemployed for more than a year.

Education Level

C.3 Information on education level is based on the highest educational qualification obtained, grouped as follows.

Figure 19

Description of Education Levels (Source: Office of National Statistics)

Education Level	Description
Level 0 / No qualifications	No academic, vocational or professional qualifications.
Level 1	1+ 'O' levels/CSE/GCSE (any grade) NVQ level 1 Foundation GNVQ
Level 2	5+ 'O' levels 5+ CSEs (grade 1) 5+ GCSEs (grade A - C) School Certificate 1+ A levels/AS levels NVQ level 2 Intermediate GNVQ or equivalents
Level 3	2+ 'A' levels 4+ AS levels Higher School Certificate NVQ level 3 Advanced GNVQ or equivalents
Level 4 / 5	First degree Higher Degree NVQ levels 4 – 5 HNC HND Qualified Teacher Status Qualified Medical Doctor Qualified Dentist Qualified Nurse, Midwife, Health Visitor or equivalents
Other qualifications / Level unknown	Other qualifications (e.g. City and Guilds; RSA/OCR; BTEC/Edexcel) Other professional qualifications.

Section D: Local House Price Data

Information by Housing Sub-market Area and Parish

Figure 20

Property Sales in Ashburton & Buckfastleigh sub-market by Parish 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
Ashburton	96	112.8	109	146.4	86	164.9	77	195.8	71	201.6
Broadhempston	19	170.1	9	194.3	14	267.2	7	318.2	7	335.7
Buckfastleigh	84	98.0	90	130.4	70	163.5	64	162.7	60	179.6
Buckland in the Moor	0	-	0	-	0	-	0	-	0	-
Dean Prior	1	85.0	1	140.0	4	236.8	1	213.0	1	170.0
Denbury and Torbryan	11	132.0	12	287.9	10	214.1	9	245.8	13	306.2
Holne	3	288.7	1	165.0	2	194.3	0	-	2	503.5
Ilstington	70	152.0	55	182.8	40	243.5	57	249.3	47	290.7
Rattery	15	183.7	6	219.5	6	304.2	6	301.2	11	398.5
South Brent	49	123.4	36	152.6	41	183.3	29	235.2	47	215.2
Staverton	4	155.8	5	325.3	3	250.8	2	317.5	2	371.5
West Buckfastleigh	3	160.0	8	253.8	1	380.0	2	342.5	0	-
Widcombe in the Moor	2	145.0	8	351.0	7	222.1	3	408.3	2	715.6
Woodland	0	-	0	-	1	700.0	1	620.0	1	1,750.0
Ashburton & Buckfastleigh sub-market	283	122.6	282	161	244	190.3	197	209.3	210	232.4

Figure 21

Property Sales in Coastal Towns sub-market by Parish 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
Axminster	158	101.9	136	146.8	123	168.0	180	179.6	190	181.0
Axmouth	12	154.9	9	235.8	11	221.9	4	277.5	8	229.0
Beer	34	142.5	45	167.7	35	205.7	40	224.1	22	274.3
Branscombe	14	181.1	12	196.7	20	209.0	8	244.9	6	290.8
Colaton Raleigh	2	212.5	20	203.7	9	206.8	5	323.2	8	352.1
Colyton	86	165.9	85	188.2	67	218.4	67	244.8	56	276.2
Compyne Rousdon	13	158.3	5	194.7	19	287.6	8	199.4	12	287.3
Kilminster	18	170.1	15	191.3	16	266.3	11	270.6	11	364.2
Musbury	10	148.4	8	166.2	7	250.4	10	260.5	10	405.0
Newton Poppleford and Harpford	45	132.5	41	156.9	53	188.7	33	258.2	38	249.1
Otterton	12	273.0	16	200.8	12	339.4	7	312.3	12	230.8
Seaton	276	117.0	278	140.4	235	158.2	247	180.7	254	198.0
Shute	9	173.8	15	252.8	21	282.5	9	266.1	10	354.9
Sidmouth	438	172.9	388	200.7	422	231.1	398	282.5	356	263.3
Southleigh	2	210.0	1	150.0	3	430.0	0	-	2	617.5
Uplyme	23	194.8	40	272.9	46	303.0	41	301.0	40	317.0
Coastal Towns sub-market	1,141	147.5	1,093	178.5	1,089	211.6	1,060	236.4	1,021	239.1

Figure 22

Property Sales in Exeter sub-market by Parish 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
East Devon District										
Aylesbeare	5	225.2	13	258.7	14	232.0	12	291.6	2	223.3
Bicton	1	215.0	2	277.5	0	-	0	-	2	445.0
Broad Clyst	70	119.9	57	199.8	44	188.6	46	254.6	41	218.2
Broadhembury	8	215.6	13	264.3	8	337.5	10	247.7	12	283.1
Budleigh Salterton	152	164.4	142	247.4	159	231.8	160	275.7	129	267.4
Clyst Honiton	8	89.6	5	231.1	7	172.4	3	176.1	5	201.6
Clyst Hydon	4	258.8	2	220.0	4	228.8	3	350.4	5	317.6
Clyst St. George	9	231.8	15	218.9	17	323.7	7	322.9	13	345.8
Clyst St. Lawrence	0	-	0	-	0	-	0	-	0	-
Clyst St. Mary	14	187.8	5	172.8	8	282.4	10	298.7	3	298.0
East Budleigh	17	210.1	13	244.2	15	288.6	17	253.2	12	367.5
Exmouth	1152	113.0	1123	144.7	1039	169.4	919	182.7	818	188.6
Farringdon	10	145.6	11	252.1	5	285.0	7	324.0	7	228.7
Feniton	45	88.8	43	130.3	49	156.8	36	174.3	48	179.4
Huxham	0	-	0	-	0	-	0	-	0	-
Lympstone	38	170.1	46	229.4	36	283.0	35	258.4	25	263.5
Nether Exe	0	-	0	-	0	-	0	-	0	-
Otterton	12	273.0	16	200.8	12	339.4	7	312.3	12	230.8
Ottery St. Mary	224	159.9	240	184.7	246	227.8	190	261.8	204	241.9
Payhembury	13	135.8	13	168.4	9	216.0	12	317.4	9	274.2
Plymtree	5	195.6	12	250.7	7	245.2	3	356.5	11	423.0
Poltimore	3	223.3	4	284.5	3	210.3	5	287.5	3	295.5
Rewe	10	177.6	10	292.4	6	262.4	4	303.5	2	148.8
Rockbeare	20	170.1	16	247.2	20	206.1	20	294.7	9	315.2
Sowton	7	118.6	8	126.9	6	338.5	6	184.0	6	258.3
Stoke Canon	3	90.7	12	163.8	11	167.7	8	166.8	5	166.8
Talaton	5	154.6	11	205.5	7	229.1	4	232.7	14	381.9
Upton Pyne	8	228.1	6	199.6	5	342.2	3	385.0	2	203.8
Whimble	31	144.3	37	205.8	33	266.5	32	267.2	30	250.5
Woodbury	66	154.5	61	192.0	61	234.5	64	292.6	73	301.8
Mid Devon District										
Bow	29	101.1	38	119.5	25	150.7	34	165.0	15	197.2
Bradninch	37	114.2	61	151.1	69	176.1	42	192.6	43	185.2
Brushford	0	-	0	-	0	-	0	-	0	-
Chawleigh	16	139.6	11	137.4	11	207.5	12	286.3	5	308.6
Cheriton Bishop	8	186.9	9	226.2	14	242.4	14	249.7	12	311.4
Cheriton Fitzpaine	15	137.5	18	173.3	10	196.6	10	260.1	15	276.3
Clannaborough	0	-	0	-	0	-	0	-	0	-
Coldridge	6	185.1	6	185.6	5	189.2	8	270.8	3	265.0
Copplestone	26	101.1	22	136.1	20	168.1	29	163.2	37	197.5
Crediton	196	103.2	199	132.8	165	160.1	112	171.0	158	165.2
Crediton Hamlets	17	137.6	17	185.0	21	233.2	6	267.8	15	250.7
Cullompton	328	110.4	236	134.9	229	141.7	176	166.3	189	173.8
Down St. Mary	5	249.0	7	184.6	8	184.1	10	334.8	2	301.5

Continued...

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
Eggesford	4	296.9	4	364.6	2	228.8	0	-	1	185.0
Hittisleigh	1	275.0	0	-	0	-	1	330.0	1	370.0
Kennerleigh	2	265.0	1	232.5	0	-	2	212.5	1	685.0
Kentisbeare	28	145.1	16	162.7	14	267.5	14	301.1	13	229.4
Lapford	32	109.7	33	162.9	19	151.2	18	165.7	15	185.5
Morchard Bishop	17	156.3	15	184.4	27	243.1	9	205.8	14	269.3
Newton St. Cyres	14	153.0	9	191.3	14	241.1	10	248.9	8	328.5
Nymet Rowland	0	-	0	-	0	-	0	-	0	-
Poughill	4	118.3	3	272.7	3	206.0	2	152.5	2	164.5
Puddington	4	149.9	6	186.3	5	224.0	2	312.3	6	231.7
Sandford	19	149.4	21	252.8	18	209.5	15	227.2	19	236.9
Shobrooke	8	98.4	6	167.3	11	184.1	6	267.2	4	205.1
Silverton	24	123.4	55	167.0	39	185.2	22	204.4	36	198.2
Stockleigh English	0	-	0	-	0	-	0	-	0	-
Stockleigh Pomeroy	2	110.8	3	266.8	0	-	2	385.0	0	-
Thelbridge	8	215.7	7	236.2	13	235.0	9	255.2	6	337.1
Thorverton	12	148.1	9	194.8	15	214.9	3	163.3	14	204.2
Upton Hellions	0	-	0	-	0	-	0	-	0	-
Washford Pyne	0	-	0	-	0	-	0	-	0	-
Wembworthy	9	193.6	3	229.2	2	166.8	2	155.5	1	153.5
Woolfardisworthy	6	182.5	4	175.0	4	144.0	4	265.5	2	232.5
Zeal Monachorum	8	171.8	9	187.1	2	222.5	4	381.9	3	302.7
Teignbridge District										
Ashcombe	0	-	0	-	0	-	0	-	0	-
Ashton	0	-	0	-	1	240.0	5	434.5	4	417.1
Bishopsteignton	55	171.3	66	203.4	60	232.5	54	294.0	60	296.4
Chudleigh	105	129.3	128	167.6	111	190.6	120	176.5	92	194.8
Dawlish	331	106.1	377	137.8	285	149.2	332	189.6	281	174.1
Doddyscombsleigh	2	238.8	2	215.3	3	229.2	2	331.3	8	269.4
Dunchideock	2	258.5	4	307.3	5	395.1	6	292.5	2	418.0
Dunsford	9	218.7	8	187.8	7	288.0	7	312.4	8	313.0
Exminster	124	124.7	127	160.9	124	189.4	93	212.4	76	216.8
Holcombe Burnell	4	223.7	12	247.7	7	248.5	5	331.2	3	565.0
Ide	12	141.2	9	169.7	14	192.8	9	209.4	13	249.7
Ideford	6	217.3	2	207.5	2	327.5	3	331.7	2	244.0
Kenn	20	166.0	18	203.3	9	399.6	15	214.7	17	265.1
Kenton	25	128.8	19	166.1	23	222.5	13	221.0	13	284.3
Mamhead	4	188.0	1	160.0	4	265.5	2	249.0	0	-
Powderham	0	-	0	-	1	900.0	0	-	0	-
Shaldon	59	193.5	58	212.3	68	257.4	54	279.7	56	259.5
Shillingford St. George	4	191.8	5	266.0	3	278.3	1	295.0	7	277.8
Starcross	53	99.7	45	132.2	40	144.5	44	167.1	28	188.1
Tedburn St. Mary	21	164.2	18	187.9	14	187.9	9	194.9	11	264.5
Teignmouth	401	106.4	403	135.1	351	149.0	353	181.5	316	186.6
Trusham	3	209.0	0	-	3	319.2	0	-	8	345.4
Whitestone	5	201.6	6	239.5	7	189.1	8	337.6	4	298.8
Exeter sub-market	6,874	117.4	6,832	150.2	6,308	175	5,584	197.4	5,518	198.1

Figure 23

Property Sales in Honiton sub-market by Parish 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
Awliscombe	6	222.9	8	280.7	8	195.1	9	442.0	9	295.3
Buckerell	1	161.0	4	272.5	7	208.6	4	265.0	4	235.3
Combe Raleigh	2	230.5	1	147.5	2	250.0	3	231.7	6	414.6
Cotleigh	3	177.5	7	234.2	2	313.8	0	-	2	763.8
Dalwood	8	239.9	5	351.5	7	267.7	6	359.2	3	396.7
Dunkeswell	54	85.8	56	107.7	41	133.3	39	184.8	41	161.6
Farway	5	204.6	1	93.2	3	590.0	1	385.0	0	-
Gittisham	10	107.2	16	168.7	13	206.5	14	201.1	10	223.8
Honiton	422	105.3	368	131.9	388	156.0	290	172.4	289	173.0
Kilminster	18	170.1	15	191.3	16	266.3	11	270.6	11	364.2
Luppitt	1	440.0	4	223.8	2	301.5	5	264.4	6	398.3
Monkton	5	291.3	1	250.0	4	268.3	0	-	1	225.0
Northleigh	1	200.0	1	257.5	1	300.0	3	460.7	2	368.8
Offwell	2	125.0	12	229.7	8	347.0	7	325.4	8	297.4
Sheldon	4	292.5	3	410.0	0	-	1	280.0	1	187.0
Stockland	7	471.0	9	341.6	12	447.7	7	281.0	9	400.3
Uptontery	11	168.7	9	201.2	14	213.0	5	372.7	9	287.1
Widworthy	12	152.3	18	202.0	9	235.8	5	206.8	5	204.8
Honiton sub-market	559	119.8	534	149.8	527	176	404	196.6	409	199.7

Figure 24

Property Sales in Newton Abbot sub-market by Parish 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
Abbotskerswell	32	118.8	25	172.4	25	190.1	32	287.4	25	259.6
Bickington	7	159.9	4	203.5	4	282.3	3	246.7	3	398.3
Bovey Tracey	210	116.7	206	162.5	193	171.9	182	208.8	174	199.4
Denbury And Torbryan	11	132.0	12	287.9	10	214.1	9	245.8	13	306.2
Hacombe with Combe	18	160.7	13	102.7	14	268.9	19	263.9	12	289.6
Hennock	24	92.7	16	120.0	15	145.0	17	210.2	14	218.2
Illesington	70	152.0	55	182.8	40	243.5	57	249.3	47	290.7
Kingskerswell	90	123.8	100	149.6	118	165.6	82	204.3	80	202.5
Kingsteignton	341	97.2	315	122.0	275	148.6	241	174.8	179	173.2
Newton Abbot	642	97.8	595	121.9	566	144.7	533	168.3	443	170.1
Ogwell	56	124.8	55	151.8	62	177.5	43	210.2	60	200.0
Teigngrace	6	171.3	1	189.0	3	180.0	1	365.0	1	150.0
Newton Abbot sub-market	1,379	103.8	1,266	131.1	1,201	155	1,109	184.2	953	185.5

Figure 25

Property Sales in North Dartmoor sub-market by Parish 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
Bovey Tracey	210	116.7	206	162.5	193	171.9	182	208.8	174	199.4
Bridford	7	169.7	4	291.4	5	217.1	10	262.0	8	328.7
Chagford	28	154.5	43	200.8	39	254.1	32	240.6	22	302.4
Christow	11	174.8	10	207.2	17	355.1	7	276.5	8	308.1
Drewsteignton	11	182.5	22	253.0	12	218.0	10	346.6	13	351.4
Dunsford	9	218.7	8	187.8	7	288.0	7	312.4	8	313.0
Gidleigh	0	-	0	-	0	-	0	-	0	-
Hennock	24	92.7	16	120.0	15	145.0	17	210.2	14	218.2
Ilstington	70	152.0	55	182.8	40	243.5	57	249.3	47	290.7
Lustleigh	6	245.1	14	286.1	8	435.0	7	366.8	14	435.2
Manaton	3	155.0	7	355.5	5	435.4	3	245.0	2	180.3
Moretonhampstead	34	133.2	36	183.2	63	211.9	35	236.8	21	268.4
North Bovey	1	300.0	1	135.0	5	299.8	3	277.3	0	-
Throwleigh	4	212.5	3	595.8	3	295.0	2	315.0	4	415.4
North Dartmoor sub-market	136	168.3	173	235.3	177	262.6	137	274.5	117	330.1

Figure 26

Property Sales in Tiverton sub-market by Parish 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
All Saints	10	175.8	7	371.7	9	248.4	5	258.0	4	329.1
Bampton	37	112.9	55	176.9	31	234.2	35	198.0	34	191.8
Bickleigh	4	227.8	6	246.8	4	283.1	6	354.0	5	288.4
Burlescombe	12	133.7	11	175.5	9	219.9	12	245.4	21	200.9
Butterleigh	3	298.3	4	333.8	2	272.5	0	-	0	-
Cadbury	0	-	2	255.0	2	472.5	0	-	0	-
Cadeleigh	3	125.0	4	166.9	2	522.5	1	160.0	2	417.5
Chardstock	16	178.4	18	243.3	11	269.0	21	327.9	16	261.6
Cheriton Fitzpaine	15	137.5	18	173.3	10	196.6	10	260.1	15	276.3
Clayhanger	0	-	1	485.0	2	142.5	0	-	0	-
Cruwys Morchard	2	146.3	2	314.0	3	479.2	5	315.7	8	317.6
Culmstock	13	134.1	17	166.7	14	213.8	14	199.2	7	289.1
Halberton	37	142.7	24	212.4	35	232.7	19	301.5	29	314.2
Hawkchurch	9	243.2	6	276.3	7	273.3	10	311.1	7	293.4
Hockworthy	0	-	3	585.0	4	238.8	3	295.7	2	325.0
Holcombe Rogus	10	367.4	14	250.2	8	191.1	4	318.8	7	246.4
Huntsham	1	40.0	1	325.0	2	158.5	1	180.0	1	225.0
Kentisbeare	28	145.1	16	162.7	14	267.5	14	301.1	13	229.4
Loxbeare	0	-	3	208.3	3	261.7	2	462.5	0	-
Membury	7	230.8	5	327.0	10	370.8	10	298.1	12	397.5
Morebath	2	152.5	4	122.3	5	184.6	1	355.0	3	210.5
Oakford	5	203.1	8	256.6	6	203.3	3	328.3	1	120.0
Sampford Peverell	31	138.8	23	192.3	18	208.1	14	239.8	22	213.5
Silverton	24	123.4	55	167.0	39	185.2	22	204.4	36	198.2
Stoodleigh	6	266.2	10	242.5	2	187.7	3	438.3	1	335.0
Templeton	1	185.0	1	150.0	3	253.2	1	480.0	1	735.0
Tiverton	409	91.4	446	120.4	568	142.9	460	171.5	493	171.9
Uffculme	47	118.4	50	135.5	78	153.7	50	203.2	50	188.4
Uplowman	6	220.8	3	288.3	0	-	1	325.0	4	306.3
Washfield	3	202.7	6	259.6	3	211.3	4	227.0	5	258.3
Willand	171	112.5	114	131.0	119	159.8	76	189.0	83	182.0
Yarcombe	5	132.3	6	173.2	3	240.0	2	175.0	3	264.3
Tiverton sub-market	816	113.7	820	147.1	929	161.9	719	192.2	788	191.4

Figure 27

Property Sales in Chard sub-market by Parish 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Parish	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
All Saints	10	175.8	7	371.7	9	248.4	5	258.0	4	329.1
Chardstock	16	178.4	18	243.3	11	269.0	21	327.9	16	261.6
Hawkchurch	9	243.2	6	276.3	7	273.3	10	311.1	7	293.4
Membury	7	230.8	5	327.0	10	370.8	10	298.1	12	397.5
Yarcombe	5	132.3	6	173.2	3	240.0	2	175.0	3	264.3
Chard sub-market	47	193.2	42	269.4	40	288.4	48	304.6	42	312.4

Figure 28

Property Sales by Sub-market 2001-06: Number of Transactions and Mean Price

(Source: HM Land Registry. Note: Parish figures include all sales within the parish, including those outside the housing sub-market)

Sub-market	2001/02		2002/03		2003/04		2004/05		2005/06	
	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K	Sales	Mean £K
Ashburton & Buckfastleigh	283	122.6	282	161	244	190.3	197	209.3	210	232.4
Coastal Towns	1,141	147.5	1,093	178.5	1,089	211.6	1,060	236.4	1,021	239.1
Exeter	6,874	117.4	6,832	150.2	6,308	175	5,584	197.4	5,518	198.1
Honiton	559	119.8	534	149.8	527	176	404	196.6	409	199.7
Newton Abbot	1,379	103.8	1,266	131.1	1,201	155	1,109	184.2	953	185.5
North Dartmoor	136	168.3	173	235.3	177	262.6	137	274.5	117	330.1
Tiverton	816	113.7	820	147.1	929	161.9	719	192.2	788	191.4
Chard	47	193.2	42	269.4	40	288.4	48	304.6	42	312.4

Information by Local Authority Area and Ward

Figure 29

Property Sales in East Devon by Ward 2001-06: Mean Price and Percentage of Transactions with Values of £100,000 or less
(Source: HM Land Registry)

Ward	2001/02		2002/03		2003/04		2004/05		2005/06	
	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K
Axminster Rural	158.3	35.0%	216.8	15.6%	252.8	9.7%	224.6	2.0%	189.6	1.5%
Axminster Town	94.1	68.5%	133.5	41.8%	148.9	25.3%	172.9	11.4%	182.7	6.2%
Beer and Branscombe	153.7	39.6%	173.8	26.3%	206.9	20.0%	227.6	8.3%	277.8	3.6%
Broadclyst	135.4	38.1%	215.2	3.6%	194.5	9.0%	267.8	1.3%	242.3	1.6%
Budleigh	169.0	24.3%	247.1	6.5%	236.7	6.9%	273.5	5.1%	275.9	2.8%
Clyst Valley	175.0	20.0%	203.5	15.4%	311.6	2.8%	287.3	0.0%	294.5	6.9%
Coly Valley	166.5	24.1%	194.0	11.0%	251.6	4.4%	258.8	1.2%	285.5	1.4%
Dunkeswell	104.4	68.3%	123.5	55.0%	138.8	25.6%	190.3	7.0%	193.7	8.3%
Exe Valley	192.3	14.8%	237.6	6.5%	284.5	0.0%	259.5	0.0%	200.8	9.1%
Exmouth Brixington	125.8	34.6%	151.1	10.2%	190.6	2.1%	203.0	2.1%	199.3	2.5%
Exmouth Halsdon	117.0	40.0%	152.8	14.0%	181.1	7.0%	196.5	2.5%	214.8	2.4%
Exmouth Littleham	129.7	50.0%	156.5	26.5%	187.0	19.1%	201.9	9.8%	205.2	13.4%
Exmouth Town	103.1	63.7%	136.3	42.6%	145.3	24.9%	161.8	21.3%	163.6	19.8%
Exmouth Withycombe Raleigh	92.1	74.5%	128.4	31.7%	143.8	21.0%	156.6	9.8%	166.2	3.7%
Feniton and Buckerell	90.3	71.7%	147.3	22.0%	167.9	3.4%	185.3	2.1%	185.2	3.7%
Honiton St Michael's	101.7	62.1%	128.2	33.6%	153.5	10.1%	162.3	9.6%	173.0	10.4%
Honiton St Paul's	109.6	51.5%	139.1	31.0%	161.6	15.8%	192.0	5.5%	176.5	5.2%
Newbridges	178.4	13.3%	226.7	9.3%	271.0	2.0%	281.4	2.8%	376.3	0.0%
Newton Poppleford and Harpford	132.5	35.6%	156.9	24.4%	188.7	9.4%	258.2	0.0%	249.1	5.3%
Otterhead	280.8	7.4%	255.6	0.0%	313.5	0.0%	303.1	11.8%	382.5	0.0%
Ottery St Mary Rural	237.0	6.7%	256.3	4.7%	309.1	3.3%	357.1	0.0%	356.2	1.4%
Ottery St Mary Town	113.2	54.3%	153.5	21.0%	183.6	8.9%	202.2	7.4%	184.0	3.6%
Raleigh	214.1	12.5%	200.4	4.3%	262.8	0.0%	293.6	0.0%	296.8	0.0%
Seaton	117.0	48.2%	140.4	31.3%	158.2	15.7%	180.7	13.8%	198.0	13.8%
Sidmouth Rural	231.1	16.2%	276.4	5.9%	329.6	0.0%	440.7	1.7%	409.9	5.0%
Sidmouth Sidford	146.2	23.7%	178.3	11.6%	209.9	1.5%	234.4	1.3%	212.3	6.1%
Sidmouth Town	173.3	26.6%	198.6	15.9%	233.6	5.7%	273.7	0.5%	272.9	3.6%
Tale Vale	181.4	37.5%	236.5	4.3%	247.5	3.1%	333.3	0.0%	321.4	0.0%
Trinity	175.0	25.0%	259.5	3.7%	287.4	0.0%	283.9	3.8%	299.3	0.0%
Whimble	145.8	36.1%	205.8	4.2%	259.9	0.0%	263.3	5.6%	292.3	6.8%
Woodbury and Lymstone	162.5	32.6%	211.0	12.1%	256.1	4.6%	281.7	3.5%	290.9	0.0%
Yarty	181.3	21.1%	268.2	5.6%	291.6	3.0%	302.8	2.6%	316.1	2.9%
East Devon	130.2	46.7%	162.4	26.7%	194.2	11.7%	221.4	7.3%	225.2	6.5%

Figure 30

Property Sales in Exeter City by Ward 2001-06: Mean Price and Percentage of Transactions with Values of £100,000 or less

(Source: HM Land Registry)

Ward	2001/02		2002/03		2003/04		2004/05		2005/06	
	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K
Alphington	100.2	61.9%	133.8	26.8%	150.6	13.1%	163.2	6.9%	173.7	5.2%
Cowick	98.5	54.9%	128.2	27.2%	153.4	9.3%	170.2	6.2%	173.7	7.1%
Duryard	142.3	37.1%	176.8	9.3%	245.8	2.4%	258.2	2.2%	271.4	0.0%
Exwick	80.6	86.2%	108.0	49.4%	126.5	25.5%	151.6	3.4%	148.1	6.0%
Heavitree	94.4	63.8%	113.5	39.5%	138.7	13.9%	160.7	8.9%	160.7	7.9%
Mincinglake	86.6	75.9%	113.6	38.5%	141.8	20.7%	156.7	10.3%	153.8	8.7%
Newtown	99.5	61.9%	142.6	32.2%	152.6	26.5%	168.6	11.5%	170.8	13.2%
Pennsylvania	111.9	57.0%	132.8	31.8%	179.6	11.1%	209.8	9.0%	197.9	5.7%
Pinhoe	114.0	50.0%	150.6	16.1%	173.7	6.0%	192.4	1.9%	197.0	1.9%
Polsloe	107.9	63.1%	135.8	18.4%	153.0	8.7%	172.2	4.0%	166.1	4.6%
Priory	103.3	69.4%	102.3	60.0%	126.3	37.5%	153.7	17.9%	160.5	12.7%
St David's	96.0	74.2%	103.2	61.2%	150.6	21.1%	165.3	19.1%	158.2	20.9%
St James	119.0	48.0%	157.1	25.6%	156.0	23.7%	199.8	6.5%	198.2	6.5%
St Leonard's	157.2	32.3%	195.1	8.7%	215.1	3.8%	231.3	5.4%	236.8	5.6%
St Loyes	115.8	35.0%	148.1	18.7%	181.3	8.2%	207.4	2.7%	200.0	2.1%
St Thomas	84.4	83.9%	105.3	51.9%	131.6	9.1%	141.5	6.5%	153.5	4.1%
Topsham	158.4	33.3%	199.5	14.2%	231.8	6.9%	280.5	2.7%	259.6	7.1%
Whipton & Barton	98.4	63.6%	119.7	39.3%	141.5	29.9%	170.4	9.8%	171.5	4.0%
Exeter	101.1	65.7%	128.7	38.5%	154.4	18.8%	179.4	8.6%	180.7	6.3%

Figure 31

Property Sales in Mid Devon by Ward 2001-06: Mean Price and Percentage of Transactions with Values of £100,000 or less

(Source: HM Land Registry)

Ward	2001/02		2002/03		2003/04		2004/05		2005/06	
	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K
Boniface	103.2	55.0%	115.0	48.8%	150.1	21.5%	167.1	12.7%	167.2	6.8%
Bradninch	102.3	55.9%	151.1	27.9%	172.4	6.0%	189.4	7.5%	180.3	2.4%
Cadbury	161.2	21.1%	210.1	4.8%	275.9	8.7%	277.4	0.0%	244.6	9.5%
Canonsleigh	178.2	27.8%	234.4	18.9%	204.9	11.6%	254.2	5.9%	217.3	9.4%
Castle	87.8	75.3%	119.3	51.2%	133.6	24.9%	178.3	5.7%	167.0	13.5%
Clare and Shuttern	146.1	40.7%	195.8	20.7%	225.6	13.2%	242.8	2.0%	214.1	2.2%
Cranmore	92.4	72.8%	113.7	54.0%	155.6	14.2%	178.7	10.3%	183.3	7.4%
Cullompton North	109.4	44.9%	129.2	33.3%	145.7	27.5%	166.0	13.0%	169.6	7.4%
Cullompton Outer	160.7	29.4%	211.4	12.8%	229.4	0.0%	265.2	6.9%	282.0	0.0%
Cullompton South	92.1	71.4%	123.4	39.8%	131.1	21.0%	157.2	7.0%	156.5	8.4%
Halberton	153.6	27.9%	220.8	7.4%	232.7	14.3%	302.7	10.0%	313.3	3.0%
Lawrence	103.1	59.2%	144.7	31.1%	169.3	12.8%	176.0	12.2%	163.4	16.7%
Lower Culm	113.9	44.2%	132.3	29.6%	156.6	7.8%	186.1	5.8%	180.9	7.9%
Lowman	91.4	69.0%	118.6	54.7%	138.6	20.9%	172.3	7.9%	167.6	4.5%
Newbrooke	131.3	45.8%	195.9	22.2%	216.0	4.0%	270.1	5.6%	287.4	0.0%
Sandford and Creedy	168.7	33.9%	218.1	14.8%	225.2	11.9%	235.8	4.9%	267.4	4.2%
Silverton	123.4	50.0%	167.0	21.8%	185.2	10.3%	204.4	9.1%	198.2	8.3%
Taw	208.1	28.1%	215.0	10.3%	192.4	10.5%	306.4	4.2%	264.4	0.0%
Taw Vale	119.6	47.9%	156.5	34.1%	171.9	16.7%	213.9	0.0%	216.3	0.0%
Upper Culm	129.4	37.5%	163.7	10.5%	206.7	10.5%	252.3	5.3%	268.5	7.1%
Upper Yeo	116.0	58.3%	150.7	41.9%	164.9	18.9%	171.2	13.5%	232.2	10.0%
Way	134.7	28.6%	198.5	8.7%	251.3	0.0%	263.8	5.9%	280.6	4.0%
Westexe	94.4	69.9%	129.5	45.4%	159.3	26.6%	146.4	8.8%	175.9	5.9%
Yeo	129.5	42.3%	170.3	12.5%	211.9	7.3%	203.3	2.0%	233.4	0.0%
Mid Devon	111.5	55.3%	140.8	39.1%	163.7	19.3%	189.6	7.9%	193.8	7.8%

Figure 32

Property Sales in Teignbridge by Ward 2001-06: Mean Price and Percentage of Transactions with Values of £100,000 or less

(Source: HM Land Registry)

Ward	2001/02		2002/03		2003/04		2004/05		2005/06	
	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K
Ambrook	131.1	33.9%	176.9	17.8%	199.4	7.1%	253.2	0.0%	250.6	1.9%
Ashburton and Buckfastleigh	105.9	52.8%	139.2	38.7%	164.3	21.2%	180.8	14.2%	191.5	10.7%
Bishopsteignton	171.3	21.8%	203.4	16.7%	232.5	1.7%	294.0	1.9%	296.4	1.7%
Bovey	120.3	44.0%	170.3	26.8%	182.4	13.4%	214.6	3.7%	217.0	1.6%
Bradley	98.8	65.2%	122.3	41.8%	146.4	12.7%	176.2	0.0%	177.7	3.5%
Buckland and Milber	96.3	63.4%	118.8	40.1%	137.0	32.5%	153.4	10.8%	165.4	4.2%
Bushell	96.3	67.9%	125.6	57.9%	140.8	39.9%	166.0	14.4%	157.1	10.2%
Chudleigh	122.5	48.1%	162.3	28.5%	185.1	8.7%	180.7	13.1%	197.8	4.7%
College	101.2	72.3%	119.2	49.3%	156.5	23.9%	182.9	14.7%	187.4	7.5%
Dawlish Central and North East	96.0	63.5%	123.4	38.5%	143.3	28.7%	180.3	20.7%	167.1	18.0%
Dawlish South West	123.1	56.1%	158.1	32.7%	157.9	20.2%	206.4	9.2%	189.6	12.6%
Haytor	152.7	16.9%	184.2	10.2%	247.1	0.0%	249.2	1.7%	297.2	0.0%
Ipplepen	133.6	33.9%	185.3	6.5%	189.8	4.7%	227.3	0.0%	218.8	2.9%
Kenn Valley	134.3	22.8%	172.9	5.5%	214.7	1.9%	217.0	0.8%	234.8	0.9%
Kenton with Starcross	112.9	57.3%	142.5	29.2%	178.5	14.9%	181.7	5.1%	218.6	0.0%
Kerswell-with-Combe	135.4	31.8%	154.2	20.0%	187.4	6.7%	220.9	8.8%	219.0	4.3%
Kingsteignton East	101.1	58.1%	129.9	32.2%	152.3	10.9%	179.6	6.3%	179.8	3.7%
Kingsteignton West	99.6	62.6%	113.0	36.3%	147.2	13.0%	174.6	4.9%	165.1	4.1%
Moorland	139.6	47.5%	231.3	21.2%	232.3	10.0%	251.8	0.0%	297.1	0.0%
Shaldon and Stokeinteignhead	204.6	16.9%	209.3	12.2%	252.8	3.8%	280.3	1.4%	262.3	3.2%
Teignbridge North	178.4	23.3%	216.4	11.1%	203.4	7.1%	277.8	0.0%	322.2	5.6%
Teignmouth Central	113.2	50.0%	148.8	22.7%	163.0	10.8%	201.3	7.2%	197.9	6.5%
Teignmouth East	121.7	47.4%	137.9	36.9%	156.4	33.0%	182.2	15.9%	195.5	13.0%
Teignmouth West	80.2	80.5%	115.3	43.9%	127.1	19.5%	155.1	15.0%	159.8	7.0%
Teign Valley	193.3	15.6%	215.4	8.3%	306.2	2.8%	309.0	0.0%	322.4	0.0%
Teignbridge	112.0	54.1%	141.1	35.2%	169.8	19.6%	192.0	9.8%	205.4	6.7%

Figure 33

Property Sales in Torbay by Ward 2001-06: Mean Price and Percentage of Transactions with Values of £100,000 or less

(Source: HM Land Registry)

Ward	2001/02		2002/03		2003/04		2004/05		2005/06	
	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K
Berry Head-with-Furzeham	99.3	65.3%	128.9	36.6%	156.2	20.1%	170.7	9.1%	175.4	7.8%
Blatchcombe	97.2	62.6%	120.1	38.0%	132.9	23.1%	155.4	12.1%	160.3	7.1%
Churston-with-Galmpton	136.7	23.2%	166.1	13.7%	198.6	3.3%	223.0	1.7%	237.8	1.4%
Clifton-with-Maidenway	83.7	83.0%	108.6	52.0%	132.8	20.7%	152.1	10.7%	158.0	6.5%
Cockington-with-Chelston	113.8	61.4%	146.9	33.8%	186.7	19.6%	204.7	8.8%	199.4	7.3%
Ellacombe	75.4	83.2%	87.4	74.1%	106.0	54.5%	130.2	21.0%	131.2	23.6%
Goodrington-with-Roselands	108.4	53.7%	129.0	30.3%	143.9	17.9%	169.9	8.4%	177.7	8.2%
Preston	108.7	48.5%	133.6	29.6%	159.8	15.6%	180.6	8.6%	192.8	8.2%
Roundham-with-Hyde	83.6	78.1%	115.0	57.6%	135.3	44.6%	150.1	27.4%	157.1	20.2%
St Marychurch	98.6	72.0%	117.8	48.6%	144.0	23.8%	162.7	11.4%	174.9	8.9%
St Mary's-with-Summercombe	96.7	67.2%	114.3	47.6%	142.4	26.7%	172.6	9.4%	177.5	10.3%
Shiphay-with-the-Willows	96.4	69.3%	120.9	33.5%	145.4	6.0%	177.3	2.0%	173.8	4.6%
Tormohun	84.7	77.6%	105.2	63.4%	124.3	48.1%	147.1	36.2%	145.9	29.5%
Watcombe	95.9	68.9%	109.0	54.4%	128.4	39.2%	154.6	11.4%	153.0	13.4%
Wellswood	132.6	50.3%	155.4	36.2%	180.5	29.9%	200.8	15.0%	228.5	17.2%
Torbay	98.3	66.6%	119.4	48.4%	141.8	28.9%	167.1	15.9%	176.1	12.3%

Figure 34

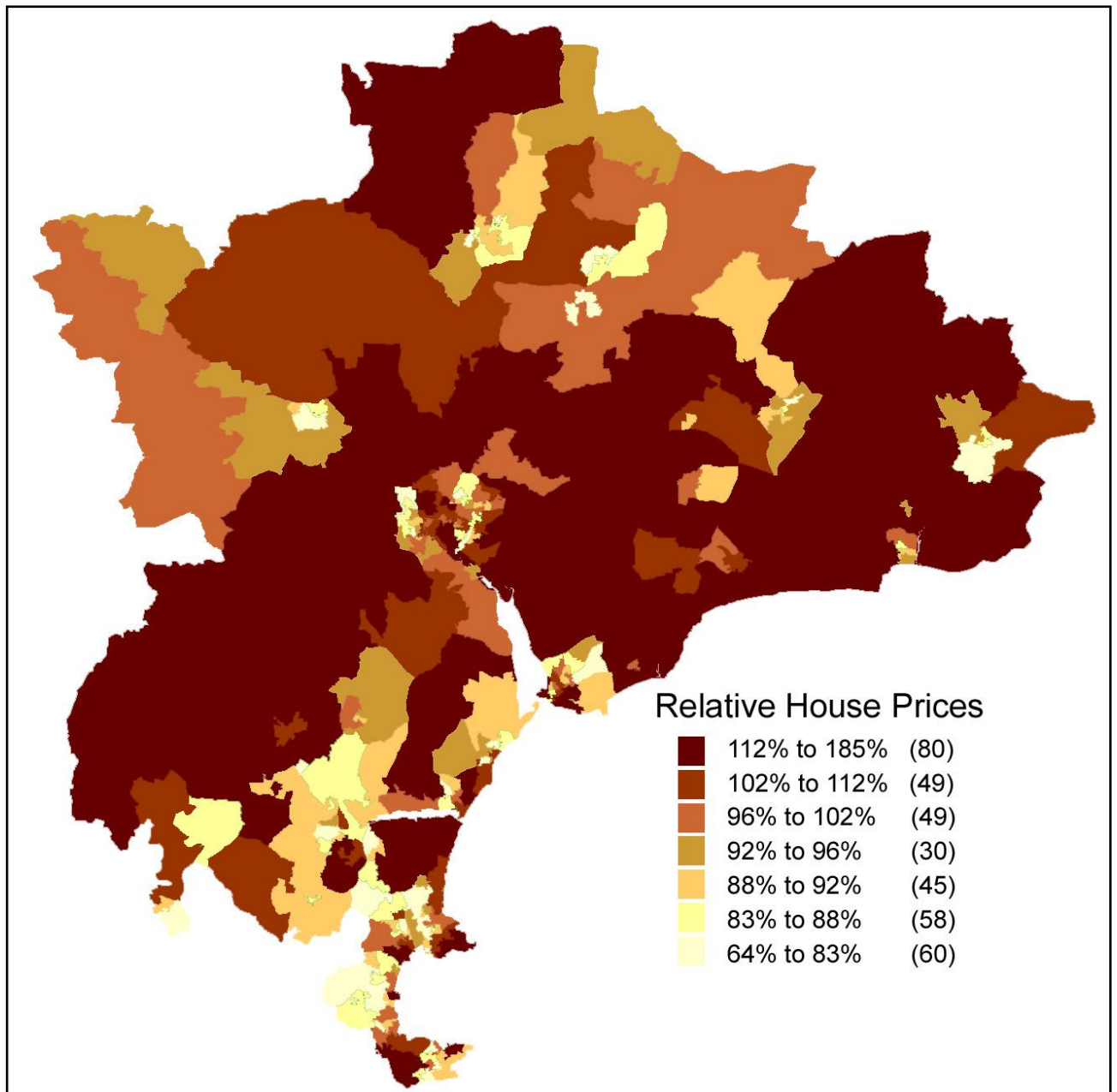
Property Sales by Ward 2001-06: Mean Price and Percentage of Transactions with Values of £100,000 or less

(Source: HM Land Registry)

Ward	2001/02		2002/03		2003/04		2004/05		2005/06	
	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K	Mean £K	% up to £100K
East Devon	130.2	46.7%	162.4	26.7%	194.2	11.7%	221.4	7.3%	225.2	6.5%
Exeter	101.1	65.7%	128.7	38.5%	154.4	18.8%	179.4	8.6%	180.7	6.3%
Mid Devon	111.5	55.3%	140.8	39.1%	163.7	19.3%	189.6	7.9%	193.8	7.8%
Teignbridge	112.0	54.1%	141.1	35.2%	169.8	19.6%	192.0	9.8%	205.4	6.7%
Torbay	98.3	66.6%	119.4	48.4%	141.8	28.9%	167.1	15.9%	176.1	12.3%

Figure 35

Relative House Prices by Area (Source: HM Land Registry. Note: Figures show average sales price based on standardised housing mix. Dark shades show prices above sub-region average, light shades show prices below sub-region average. Percentage of sub-region average is detailed in the key)



Section E: Details of Private Sector Rents

- E.1 The amount of secondary data available about the private rented sector is relatively sparse, so to help inform the Housing Market Assessment, a survey of properties currently advertised to let across the Exeter & Torbay sub-region was conducted between November 2006 and February 2007 in parallel with the local household survey.
- E.2 Details of a total of 968 advertised properties were collated, including 738 properties advertised by a total of 44 letting and estate agents, 82 properties advertised on 2 property websites and 148 properties advertised privately. Figure 36 and Figure 37 provide further information on the date and source of the information.

Figure 36
Advertised Properties Recorded by Month
(Source: Survey of Letting Agents in Exeter & Torbay sub-region 2006-07)

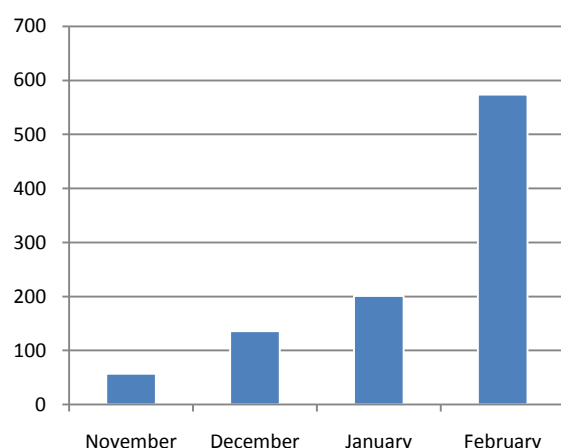
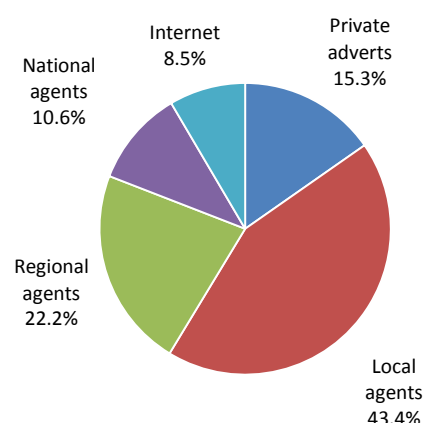


Figure 37
Source of Advertisement
(Source: Survey of Letting Agents in Exeter & Torbay sub-region 2006-07)



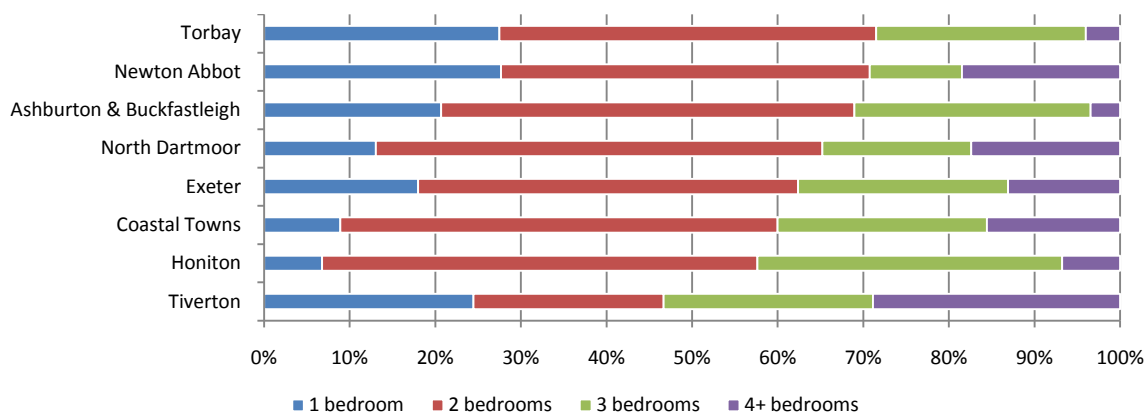
- E.3 Figure 38 details the distribution of the sample in terms of property size and housing sub-market area, demonstrating that good coverage was achieved across the whole of the sub-region.

Figure 38
Survey of Letting Agents Sample by Housing Sub-Market & Property Size (Source: Survey of Letting Agents in Exeter & Torbay sub-region 2006-07.
Note: All Properties include a small number of cases where the property size was not known)

Housing Sub-Market	Property Size				All Properties
	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms	
Ashburton & Buckfastleigh	6	14	8	1	29
Chard	0	0	2	1	3
Coastal Towns	4	23	11	7	45
Exeter	88	217	120	64	497
Honiton	4	30	21	4	59
Newton Abbot	18	28	7	12	65
North Dartmoor	3	12	4	4	23
Tiverton	11	10	11	13	45
Torbay	55	88	49	8	202
TOTAL	189	422	233	114	968

Figure 39

Size Mix of Advertised Properties by Housing Sub-market (Source: Survey of Letting Agents in Exeter & Torbay sub-region 2006-07) Note: The availability and mix of lets in February may not match summer availability, as 6 months assured shorthold would release properties in August.



- E.4 Figure 40 details the lowest decile, lowest quartile and median prices (i.e. the weekly rent at which 10%, 25% and 50% of properties would be available respectively), along with the mean rent broken down by property size.

Figure 40

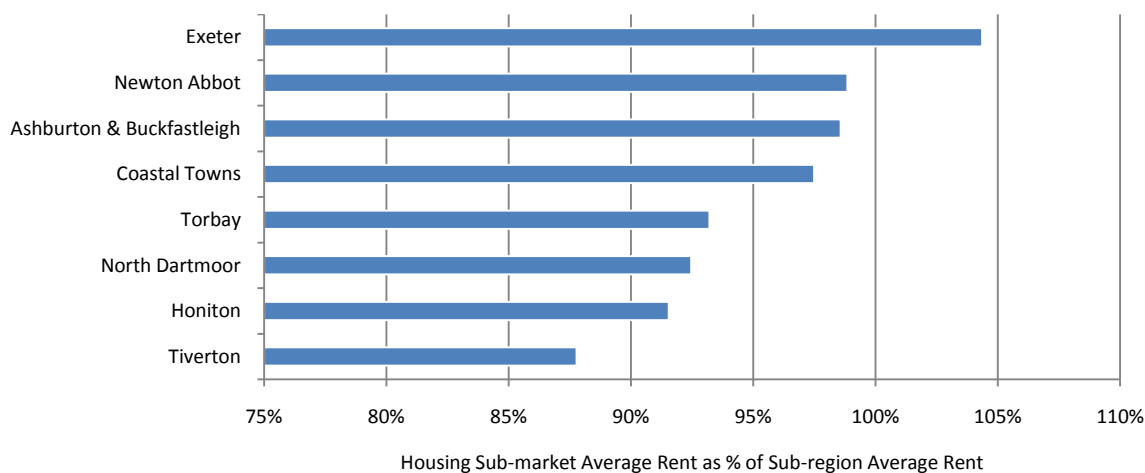
Weekly Rent for Private Rented properties in the Exeter & Torbay sub-region by Property Size (Source: Survey of Letting Agents in Exeter & Torbay sub-region 2006-07)

Property Size	Lowest Decile	Lowest Quartile	Average	
			Median	Mean
WEEKLY RENT				
1 bedroom	80.77	92.31	105.00	106.16
2 bedrooms	118.85	126.92	140.00	142.48
3 bedrooms	144.23	155.77	167.31	172.90
4+ bedrooms	161.54	184.62	225.00	231.98

- E.5 Figure 41 shows how the average rent in each sub-market relates to the overall sub-region price on the basis of a standardised housing mix with the 100% line representing the sub-regional average. It is apparent from the data that standardised rents tend to be highest within the Exeter housing sub-market.

Figure 41

Housing Sub-market Average Rents Relative to Sub-region Average Rent (Source: Survey of Letting Agents in Exeter & Torbay sub-region 2006-07)



Section F: Identifying Unsuitably Housed Households

Introduction

- F.1 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 housing market without some assistance (Bramley & Pawson, 2000). Therefore, to identify existing housing need we must first consider the adequacy and suitability of households' current housing circumstances.
- F.2 A classification of unsuitable housing, adapted from Parker and Stirling (1995): "Seen to be Fair: a guide to allocations", was presented by Bramley and Pawson (2000) in the DETR publication "Local Housing Needs Assessment: A Guide to Good Practice". The classification is sub-divided into four main categories, with a total of sixteen sub-divisions as detailed below.

Figure 42
Classification of Unsuitable Housing (Source: Bramley & Pawson, 2000)

Main Category	Sub-divisions
Homeless or with insecure tenure	i. under notice, real threat of notice, or lease coming to an end ii. living in temporary accommodation (e.g. hostel, B&B, with friends or relatives) iii. accommodation too expensive
Mismatch of household and dwelling	iv. overcrowded v. house too large (difficult to maintain) vi. households with children living in high flats or maisonettes vii. sharing a kitchen, bathroom or WC with another household viii. household containing person with mobility impairment or other special needs living in unsuitable dwelling (e.g. accessed via steps or containing stairs)
Dwelling amenities and condition	ix. lacks a separate bathroom, kitchen or inside WC x. subject to major disrepair or unfitness
Social requirements	xi. harassment or threats of harassment from neighbours or others living in the vicinity xii. relationship breakdown xiii. family unable to live together because of lack of accommodation xiv. need to give or receive support including living closer to family/friends xv. need to live closer to employment and/or other essential facilities xvi. want to live independently

- F.3 Most of the identified sub-divisions concern established households and several may cause a household to need to move from one property to another, though many will not necessarily need to move if appropriate changes are made to their existing home.
- F.4 Even where a move is deemed necessary, facilitating households to relocate from one property to another will not inherently require additional homes to be provided because, whilst the characteristics of such dwellings may differ, the overall number of homes will remain the same. Nevertheless, to satisfy the needs of all households, it may be necessary to provide some additional housing with

particular characteristics leaving an equivalent number of dwellings (with different characteristics) available to meet housing needs and demands from elsewhere in the market.

- F.5 Whilst the majority of sub-divisions concerning established households may not contribute directly to the additional housing requirement, households who are currently in temporary housing (group ii.) and a number of sub-divisions of the social requirements category may each require additional housing provision.

Established Households in Unsuitable Housing

- F.6 Figure 42 established four main categories for identifying unsuitable housing, each with a number of sub-divisions. Whilst some of the indicators related to households currently lacking their own housing, the majority considered the circumstances of existing households.

- F.7 Information on a wide range of housing issues was collated by the Household Survey, and by drawing on information gathered throughout the questionnaire we are able to rigorously identify whether or not households' current homes are suitable for their needs. Whilst the assessment of housing suitability is based on responses to questions within the survey, many of the indicators are assessed relatively objectively on the basis of answers provided to factual questions. This is a far more sophisticated approach than relying on households identifying themselves with one or more problems selected from a "shopping list" of possibilities, and avoids households associating themselves with issues on the basis of interviewer prompts.

- F.8 Objective assessments (based upon factual information) can clearly be used in assessing issues such as households' lack of facilities. Where, for example, respondents are asked whether they have an inside WC or not. Such a factual yes/no response clearly leads to an objective assessment of the criteria.

- F.9 The measure of overcrowding and under-occupancy is also calculated objectively. The number of rooms required by a household is assessed through analysing the household profile against an agreed "bedroom & living room standard". This requirement is then set against the number of rooms available in the home. The bedroom standard used for the Exeter & Torbay study is as follows, providing one bedroom for each of the following groups or individuals:

- Each adult couple;
- Each remaining adult (aged 21 or over);
- Each pair of children of the same gender;
- Each pair of children aged under 10;
- Each remaining child that has not been paired.

- F.10 The number of rooms required is then set against the number of bedrooms in the current home, to determine the level of overcrowding or under-occupation.

- F.11 A similar (though less complicated) assessment is used to identify children living in high rise flats – where the presence of children within the household is compared with the floor on which the household lives to determine whether or not the combination is acceptable.

- F.12 Where it is not possible to identify problems in an objective manner, subjective responses from the Survey have been used. Nevertheless, these are largely responses provided in an unprompted manner to more general, open-ended questions. This avoids any bias being introduced by the interviewing process.

F.13 A summary of the categories used to assess housing suitability from the Household Survey data is detailed below:

Figure 43
Assessment of Unsuitably Housed Households

Category	Analysis Method
Homeless or with insecure tenure	
Tenancy under notice, real threat of notice or lease coming to an end	Household wanting/having/needing to move because of end of tenancy, eviction, repossession or otherwise forced to move; or Landlord or mortgagor taking action to repossess the property or evict them because of arrears
Accommodation too expensive	Household currently in rent or mortgage arrears; and Household currently finding housing costs extremely difficult to manage
Mismatch of Household and Dwelling	
Overcrowding	Size and composition of household used to assess number of bedrooms required; compared with Number of current bedrooms
Households having to share a kitchen, bathroom, washbasin or WC with another household	Household with children/pensioners; and Living in multiple occupancy dwelling; and Sharing at least one basic facility
Home too difficult to maintain	Someone in household has long-term illness and difficulty maintaining the garden; or Someone in the household has long-term illness and has problems maintaining the home
Children living in high-rise flats	Household with children aged under 16; and Living in a flat above 4th floor
Households with support needs	Someone in the household has long-term illness and has problems with general mobility in the home, climbing stairs in/to the home or access to toilet facilities because of the home's layout; or Someone in the household has long-term illness and has problems with bathing or showering or preparing food because of the home's layout; or Need a carer to stay permanently or overnight and do not have space for them; or Need to move to supported housing, residential home, nursing home or hospital; or Household wanting/having/needing to move to receive care from a friend or relative
Dwelling amenities and condition	
Dwelling lacking basic amenities	Household having no bathroom or shower-room; or Household having no inside WC; or Household having no kitchen; or Household having no washbasin with running hot water
Problems with heating	Household having no heating in the home; or Household relying exclusively on portable fires or heaters

Continued...

Category	Analysis Method
Major disrepair problems	Household experiencing serious problems (as opposed to only experiencing problems) with at least one of the following: ▪ Roof repairs ▪ Other exterior structural repairs ▪ Interior structural repairs ▪ Rising damp
General problems with disrepair	Household experiencing serious problems (as opposed to only experiencing problems) with two or more of the following: ▪ Damp penetration or condensation ▪ Window repairs ▪ Electrical or wiring repairs ▪ Gas supply or appliances ▪ Heating or plumbing ▪ Drainage ▪ Repairs to gutters or down pipes
Social requirements	
Harassment	Household wanting/having/needing to move because of racial or other harassment problems
Need to live closer to essential facilities	Household wanting/having/needing to move to live closer to hospital/doctor
Family reasons	Household wanting/having/needing to move because of separation from partner, to join other household members or to give care to a friend or relative

F.14 Households are classified as being unsuitably housed if one or more of the above factors are found to apply. The households identified are considered to be living in unsuitable housing regardless of the number of problems that are identified. This avoids potential double counting.

F.15 Although local authorities typically use points systems to score and prioritise overall needs, our analysis does not use artificial calculations to score the relative unsuitability of housing. After all, to say that some homes are more unsuitable than others does not mean that the households in the latter are not in need.

Section G: Housing Market Model

- G.1 For any housing market assessment, the key or core issues are:
- How many additional units are required?
 - How many additional units should be affordable homes?
 - For what type of open-market housing is there demand?
 - How will 'demand' and 'need' change over time?
- G.2 The ORS Housing Market Model addresses these issues by analysing the whole housing market. Instead of focusing only or primarily upon poorer households and social sector need, it interprets the interaction of requirement and supply across all sectors of the housing market. Social sector needs are interpreted within the context of market housing demands. This takes account of the interaction of effective and ineffective demands and needs, and the likely supply from the range of properties vacated within the existing stock.
- G.3 The Model interprets the market dynamically – by likening the interchange between households and vacancies to “musical chairs”. The “musical chairs” analogy brings out the dynamic relation between requirement and supply – most households find suitable vacancies only because others move or suffer dissolution. In this context, the Model is primarily concerned with households likely to (or that otherwise need to) move. Of course, some households likely to stay in their current home may still have housing needs that should be addressed – but, by definition, the appropriate solutions for such problems will be provided in-situ and will therefore not impact on the mix of additional housing provision.
- G.4 Whether households want or need to move, and what housing is appropriate for them, depends upon their characteristics, requirements and current accommodation. Effective demand is driven primarily by choice – nonetheless, even well-off households can find accommodation only if suitable vacancies arise. On the other hand, housing need is considered objectively – by evaluating households' current housing circumstances alongside their ability to afford local housing to establish a realistic assessment of housing need.
- G.5 Through analysing the creation and take-up of vacancies the Model recognises that it is only because some households wish to and do move that others can find suitable homes. Nevertheless, the lack of suitable existing housing does not constrain the allocation process – for the mix of housing required by all households (including those currently without housing and unable to afford) is analysed, and it is the shortfalls identified in the existing stock that determine the mix of new housing required.
- G.6 The elements of housing need and demand are detailed in Figure 44.

Figure 44
Derivation of Elements of Housing Need and Demand

Element	Derivation
Established households currently in need Profile A1	Households currently living in unsuitable housing that need to move to resolve their housing problems and cannot afford to buy or rent market housing (including homeless households temporarily accommodated in PSL housing). By definition, all households require affordable housing – but the split between intermediate and social rent is based on affordability. The size of property required is based on household composition. It is assumed that the identified existing need is addressed over a 10-year period, therefore 10% of the total is counted annually.
Newly arising need from established households Profile A2	The future projection for this flow is based on recent trend figures for the last 12 months. Households currently living in unsuitable housing who were suitably housed one-year ago are assumed to constitute new need during the period, together with households who were forced to move during the period and were re-housed in affordable housing due to a problem that would have not been identified 12 months ago. By definition, all households require affordable housing – but the split between intermediate and social rent is based on affordability. The size of property required is based on household composition.
Effective demand from established households Profile A3	The future projection for this flow is based on expectations of existing households moving within the sub-region over the next 12 months. Households are only counted if they are able to afford to buy or rent market housing, therefore by definition all will require market housing. Size of property required is based on household expectations in the context of expressed demand.
Hidden households emerging as new households Profile B1	The future projection for this flow is based on recent trend figures for the last 12 months. The figure only includes newly forming households from host households in the sub-region. Households are allocated to market, intermediate or social housing on the basis of affordability. Size of property required is based on trends in terms of the number of bedrooms in properties occupied by recent newly forming households.
Homeless households housed in hostels and B&B accommodation Profile B2	Households currently living in communal housing that require re-housing in traditional housing. It is assumed that the identified existing need is addressed over a 10-year period, therefore 10% of the total is counted annually.
In-migrant households to the sub-region Profile C (Profile C' for 20-year trend)	The future projection for this flow is based on recent trend figures for the last 12 months, with five-year projections adjusted on the basis of ONS migration data for the last five years. Alternative analysis was also undertaken on the basis of Devon CC migration data for the last twenty years. Households are allocated to market, intermediate or social housing on the basis of affordability. Size of property required is based on trends in terms of the number of bedrooms in properties occupied by recent in-migrant households.

- G.7 The extent to which the market clears depends upon the match or mismatch between the households seeking housing, on the one hand, and the available stock, on the other. The sources of housing supply are detailed in Figure 45.

Figure 45
Derivation of Elements of Housing Supply

Element	Derivation
Property vacated by established households moving home Profile E	The future projection for this flow is determined by the three flows of established households considered within the elements of housing need and demand: – Established households currently in need; – Newly arising need from established households; and – Effective demand from established households. All established households moving are assumed to vacate their current home. The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.
Property vacated following household dissolution due to death or household merging Profile F	The future projection for this flow is based on the structure of individual households coupled with ONS survival rate statistics. Each household is allocated a probability of survival such that a residual probability of dissolution can be derived. All households identified as moving to “live with” another household, moving to communal housing or otherwise no longer requiring independent housing are also counted as vacating their current home. The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.
Property vacated by out-migrant households leaving the sub-region Profile G (Profile G' for 20-year trend)	The future projection for this flow is based on expectations of existing households moving away from the sub-region over the next 12 months, with five-year projections adjusted on the basis of ONS migration data for the last five years. Alternative analysis was also undertaken on the basis of Devon CC migration data for the last twenty years. All out-migrant households are assumed to vacate their current home. The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.

- G.8 Of course, new housing development and property conversions will also contribute to housing supply in the sub-region – but these components are not considered by the Model, for it is seeking to understand how the existing housing stock will (or more importantly will not) be able to house future households in the area.
- G.9 To do this, the Model notionally assigns – or matches – available housing to households. Through matching gross housing requirements with supply (vacancies created), the model identifies net housing requirements – i.e. those households who are unlikely to find suitable housing within the existing housing stock. Such an approach was recognised by Bramley and Pawson (2000) in the DETR Good Practice Guidance, where it was noted that:

The value of this approach is that it makes the connections between what is happening in the private sector and the social sector explicit. It keeps track of households, who can't just disappear without trace, and draws particular attention to the roles of migration.

G.10 Such an approach has subsequently been adopted by DTZ Pinda Consulting in the “Housing Market Assessment Manual” produced for the Office of the Deputy Prime Minister (ODPM) – where the supply/demand dynamic between households and dwellings is considered at various levels of abstraction.

G.11 The key stages of the model can be summarised as follows:

- **Gross Housing Requirement** [Profile D] = Established Households [Profile A] +
New Households [Profile B] +
In-migrant Households [Profile C]
- **Housing Supply** [Profile H] = Established Households [Profile E] +
Household Dissolution [Profile F] +
Out-migrant Households [Profile G]
- **Net Housing Requirement** [Profile I] = Gross Housing Requirement [Profile D] -
Housing Supply [Profile H]

Assessing Affordability

G.12 Household affordability critically underpins the housing requirement analysis – determining both the ability to afford market housing (and be an effective housing demand) and the inability to afford market housing (and be a real housing need). Affordability is a complex issue and can be assessed in a number of different ways, but each method depends on common factors that are crucial to the analysis. The affordability of any particular household will depend on the relationship between:

- The cost of appropriate local housing, and
- The amount that the household is able to afford.

G.13 Having established the cost of local rented housing, it is also important to consider the amount that households are able to afford. The National Housing Federation have traditionally promoted that it is appropriate for households to spend up to 30% of their net income on rent or mortgage payments, and in providing affordable housing, Local Authorities and RSLs have often based affordability tests on this relatively straight-forward calculation. Nevertheless, whilst this may be suitable for households expecting to pay relatively low rents in the social sector, the implications become somewhat unrealistic in considering the payments for more expensive properties in the private sector.

G.14 The London Housing Federation “Mind the Gaps” document recognises that households may be expected to contribute as much as 50% of net income towards their total housing costs – noting that it is not the proportion of income that is the over-riding factor, but that the most important consideration is the amount of residual income available after the identified costs have been paid.

G.15 The affordability tests used for the study seek to ensure that households are not committed beyond their means, but do not allocate affordable housing to households who are realistically able to afford housing in the private sector.

Assessing Affordability for Owner Occupation

- ^{G.16} In terms of the affordability assessment for owner-occupiers, whilst private renters will be expected to meet recurring costs each week or month it is accepted that owner occupiers will normally rely upon a loan or mortgage from a building society or other lender. Therefore, in the context of owner occupation, it is important that the householder is not only able to afford the repayments of such a loan but that also such a loan is accessible to that household. For this reason, a mortgage multiplier is normally applied to determine the amount households are able to afford when considering home purchase.
- ^{G.17} The assessment of mortgage eligibility adopted for this analysis is based upon the method proposed by Government in the emerging guidance for Local Housing Assessments – with lending for single incomes assumed to be 3.5x the income and lending for joint incomes based on a 2.9x multiplier. It is also important that the assessment of affordability for owner occupation considers other household resources, including:
- Savings;
 - Debts;
 - Equity (positive or negative) from current home (for current owners); as well as the
 - Amount that can be borrowed.
- ^{G.18} Perhaps the most important additional resource is any equity that a household may have in their existing home because, whilst the early years of a mortgage may not impact significantly on the amount of capital repaid, increases in house prices can bring significant additional resources.
- ^{G.19} In summary, the amount affordable for owner-occupation is therefore: savings minus debts plus/minus positive/negative equity plus the borrowable amount.

Assessing Affordability for Weekly Rent

- ^{G.20} Unlike with owner-occupation, the rental market does not require a single capital payment to be made upfront that has to be funded from a source such as a mortgage. Instead, it is based exclusively on a recurring payment taken from the individual household budget. Once again, the assessment for rent has been based upon that proposed in the emerging guidance, with 25% of household gross income assumed to be available for rent.
- ^{G.21} In practice, the use of gross income (as oppose to the net income) reduces the assumed payments for lower income households – because they are typically liable for less deductions (such as income tax and national insurance) from their income. Where households have no deductions from their earnings, they are assumed to pay only 25% of their net income on housing cost – but this increases to a maximum contribution of 31.5% of net income for those households earning up to £15,000 gross.

Understanding the Required Housing Mix

Type of Housing Required

- G.22 The following section provides detailed outputs from the Housing Market Model. In considering the projected flows of housing need, demand and supply, we can determine the likely pressure placed upon the dwelling stock – and the implicit requirement for additional housing provision.
- G.23 In seeking to understand the required housing mix, household affordability has been grouped into three classifications – Market Housing, Intermediate Housing and Social Rented Housing – in the context of the following statements from PPS3:

Affordable housing is:

Affordable housing includes social rented and intermediate housing, provided to specified eligible households whose needs are not met by the market. 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.*

Social rented housing is:

Rented housing owned and managed by local authorities and registered social landlords, for which guideline target rents are determined through the national rent regime. The proposals set out in the Three Year Review of Rent Restructuring (July 2004) were implemented as policy in April 2006. It may also include rented housing owned or managed by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Housing Corporation as a condition of grant.

Intermediate affordable housing is:

'Housing at prices and rents above those of social rent, but below market price or rents, and which meet the criteria set out above. These can include shared equity products (e.g. HomeBuy), other low cost homes for sale and intermediate rent

The definition does not exclude homes provided by private sector bodies or provided without grant funding. Where such homes meet the definition above, they may be considered, for planning purposes, as affordable housing. Whereas, those homes that do not meet the definition, for example, 'low cost market' housing, may not be considered, for planning purposes, as affordable housing.

There is further guidance on eligibility for affordable housing, recycling of subsidy, specific features of social rented and intermediate affordable housing and the application of the affordable housing definition, in particular with regard to the extent to which non-grant funded and private sector low cost housing products meet the definition in the Affordable Housing Policy Statement.

G.24 In allocating households to specific types of housing, the key determining factor is affordability:

- **Social Rented Housing** – for those households unable to afford any more than target social rents;
- **Intermediate Housing** – for those households able to afford more than target social rents, but unable to afford to buy owner-occupied housing and unable to afford to rent privately at rents at the market rent threshold; and
- **Market Housing** – for those households able to afford to buy owner-occupied housing or able to afford to rent privately at rents at or above the market rent threshold.

G.25 Therefore, the gross requirement for Intermediate Housing constitutes households who cannot afford threshold prices for market housing (i.e. they can't afford to pay lowest quartile rents in the private sector or lowest quartile purchase prices) but can afford more than target social rents.

G.26 When considering the appropriate housing supply, the following sources of supply are considered:

- **Social Rented Housing** – social housing provided to rent from local authorities and Registered Social Landlords;
- **Intermediate Housing** – dedicated intermediate housing products (such as shared ownership, discount market sale, sub-market rent, etc.) and housing in the private rented sector with rents below the market rent threshold (i.e. within the lowest quartile); and
- **Market Housing** – owner-occupied housing and housing in the private rented sector.

G.27 It is worth noting that the supply of Intermediate Housing from within the existing stock constitutes both existing Intermediate Housing products (such as shared ownership) likely to be vacated, and also housing in the private rented sector that costs less than the threshold prices for market housing (i.e. housing with rents in the lowest quartile). Whilst this housing is not controlled, it is “affordable” (in the English language meaning) to households allocated to the Intermediate Housing requirement – so this supply is offset against the gross Intermediate Housing requirement when calculating the net Intermediate Housing requirement within the modelling analysis.

G.28 The net requirement for Intermediate Housing constitutes those households identified within the gross Intermediate Housing requirement who are unlikely to be able to find a home within the existing housing stock at a price they could afford – so in providing additional housing for them, the housing would have to cost less than the threshold prices for market housing (though more than target social rents). To ensure that the new housing meets the needs of these households, it would have to be provided as Intermediate Affordable Housing (as set out in PPS3) – for any new private rented housing would not have rents within the lowest quartile unless they were controlled.

Housing Requirement by Sub-Area

- G.29 To produce sub-area results, expected figures are calculated by applying the proportion of households resident in each sub-area to each profile of Housing Requirement and each profile of Supply. Observed figures are then calculated by independently applying the modelling process to the sub-sample of the dataset relating to each sub-area – i.e. data relating to those interviews that were undertaken with households within the identified sub-area.
- G.30 Once figures for each sub-area have been derived for each modelling profile, the average of the observed and expected results are calculated to determine the sub-area outputs. This approach ensures that small sub-samples do not unduly influence the model's outputs, yet recognises that different sub-areas will have different characteristics than those of the sub-region as a whole.

Profile A1: Established Households Currently in Need

Households currently living in unsuitable housing that need to move to resolve their housing problems and cannot afford to buy or rent market housing (including homeless households temporarily accommodated in PSL housing).

By definition, all households require affordable housing – but the split between intermediate and social rent is based on affordability. The size of property required is based on household composition.

It is assumed that the identified existing need is addressed over a 10-year period, therefore 10% of the total is counted annually.

Figure 46

Resolving Housing Suitability Problems (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households	
	Discounted	Remaining
Households assessed as currently living in unsuitable housing	-	38,831
Households with an objectively assessed in-situ solution	19,658	19,173
Households with a subjectively assessed in-situ solution (where the household neither wants nor expects nor needs to move)	10,021	9,152
Households that need to move, but that will leave the area	569	8,538
Households that need to move, but will be moving into institutional housing or join another household	160	8,423
Households that need to move, but can afford to rent or buy market housing	2,551	5,872
Households that need to move, but cannot afford to rent or buy market housing		5,872
Households accepted as statutorily homeless currently housed in housing leased temporarily from the private sector (PSL housing)		447
Established Households Currently in Need		6,319
Amortisation rate		10%
Annual requirement		632
5-year Requirement		3,160

Figure 47

5-year Gross Housing Requirement by Housing Type and Size: Established Households Currently in Need (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	0.0%	1.9%	24.4%	26.3%
2 bedrooms	0.0%	11.5%	21.7%	33.2%
3 bedrooms	0.0%	12.8%	22.0%	34.7%
4+ bedrooms	0.0%	3.5%	2.3%	5.7%
Total	0.0%	29.6%	70.4%	100.0%
5-year Gross Requirement				
1 bedroom	-	60	771	832
2 bedrooms	-	364	686	1,050
3 bedrooms	-	403	694	1,097
4+ bedrooms	-	110	71	181
Total	-	937	2,223	3,160

Profile A2: Newly Arising Need from Established Households

The future projection for this flow is based on recent trend figures for the last 12 months.

Households currently living in unsuitable housing who were suitably housed one-year ago are assumed to constitute new need during the period, together with households who were forced to move during the period and were re-housed in affordable housing due to a problem that would have not been identified 12 months ago.

By definition, all households require affordable housing – but the split between intermediate and social rent is based on affordability. The size of property required is based on household composition.

Figure 48

Length of Time Households have Experienced Problems (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Households with problems that existed for more than 12 months	3,790
Households with problems that have arisen within the last 12 months	2,082
Households that need to move, but cannot afford to rent or buy market housing	5,872

Figure 49

5-year Gross Housing Requirement: Newly Arising Need from Established Households (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Annual requirement	2,082
Modelling period (years)	5
5-year Requirement	10,410

Figure 50

5-year Gross Housing Requirement by Housing Type and Size: Newly Arising Need from Established Households (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	0.0%	0.0%	25.7%	25.7%
2 bedrooms	0.0%	10.9%	29.4%	40.3%
3 bedrooms	0.0%	2.4%	29.1%	31.5%
4+ bedrooms	0.0%	0.0%	2.5%	2.5%
Total	0.0%	13.3%	86.7%	100.0%
5-year Gross Requirement				
1 bedroom	-	-	2,678	2,678
2 bedrooms	-	1,135	3,061	4,196
3 bedrooms	-	246	3,033	3,279
4+ bedrooms	-	-	257	257
Total	-	1,381	9,029	10,410

Profile A3: Effective Demand from Established Households

The future projection for this flow is based on expectations of existing households moving within the sub-region over the next 12 months.

Households are only counted if they are able to afford to buy or rent market housing, therefore by definition all will require market housing.

Size of property required is based on the number bedrooms households can afford and expect to have when they move.

Figure 51

Household Moves Expected in Next 12 Months by Future Housing Circumstances and Location of Next Home (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Future Housing Circumstances	Location of Future Home		All Households
	Within sub-region	Elsewhere	
Independent Household			
Able to afford local market housing	10,514	2,866	13,379
Unable to afford local market housing	4,915	590	5,505
Household Moving to Live with Family or Friends	567	48	615
All Households	15,996	3,504	19,500

Figure 52

5-year Gross Housing Requirement: Effective Demand from Established Households (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Annual requirement	10,514
Modelling period (years)	5
5-year Requirement	52,569

Figure 53

5-year Gross Housing Requirement by Housing Type and Size: Effective Demand from Established Households (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	4.7%	0.0%	0.0%	4.7%
2 bedrooms	25.4%	0.0%	0.0%	25.4%
3 bedrooms	42.7%	0.0%	0.0%	42.7%
4+ bedrooms	27.1%	0.0%	0.0%	27.1%
Total	100.0%	0.0%	0.0%	100.0%
5-year Gross Requirement				
1 bedroom	2,481	-	-	2,481
2 bedrooms	13,372	-	-	13,372
3 bedrooms	22,459	-	-	22,459
4+ bedrooms	14,257	-	-	14,257
Total	52,569	-	-	52,569

Profile A : Gross Housing Requirements from Established Households

The future projection for this flow is determined by the three flows of established households considered within the elements of housing need and demand:

A1: Established households currently in need;

A2: Newly arising need from established households; and

A3: Effective demand from established households.

Figure 54

5-year Gross Housing Requirement by Housing Type and Size: Established Households (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
A1: Established Households Currently in Need				
1 bedroom	-	60	771	832
2 bedrooms	-	364	686	1,050
3 bedrooms	-	403	694	1,097
4+ bedrooms	-	110	71	181
Total	-	937	2,223	3,160
A2: Newly Arising Need from Established Households				
1 bedroom	-	-	2,678	2,678
2 bedrooms	-	1,135	3,061	4,196
3 bedrooms	-	246	3,033	3,279
4+ bedrooms	-	-	257	257
Total	-	1,381	9,029	10,410
A3: Effective Demand from Established Households				
1 bedroom	2,481	-	-	2,481
2 bedrooms	13,372	-	-	13,372
3 bedrooms	22,459	-	-	22,459
4+ bedrooms	14,257	-	-	14,257
Total	52,569	-	-	52,569
5-year Gross Requirement				
1 bedroom	2,481	60	3,449	5,991
2 bedrooms	13,372	1,499	3,748	18,618
3 bedrooms	22,459	649	3,728	26,835
4+ bedrooms	14,257	110	328	14,695
Total	52,569	2,318	11,252	66,139

Profile B1: Hidden Households Emerging as New Households

The future projection for this flow is based on recent trend figures for the last 12 months. The figure only includes newly forming households from host households in the sub-region.

Households are allocated to market, intermediate or social housing on the basis of affordability.

Size of property required is based on trends in terms of the number of bedrooms in properties occupied by recent newly forming households.

Figure 55

Household Moves in Last 12 Months by Previous Housing Circumstances and Location of Previous Home (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Previous Housing Circumstances	Location of Previous Home		All Households
	Within sub-region	Elsewhere	
Established Household	15,257	6,227	21,484
Concealed Household Living with Family or Friends	5,803	429	6,232
All Households	21,060	6,656	27,716

Figure 56

5-year Gross Housing Requirement: Hidden Households Emerging as New Households (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Annual requirement	5,803
Modelling period (years)	5
5-year Requirement	29,015

Figure 57

5-year Gross Housing Requirement by Housing Type and Size: Hidden Households Emerging as New Households (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	11.9%	5.9%	14.2%	32.0%
2 bedrooms	19.0%	8.6%	14.8%	42.4%
3 bedrooms	10.0%	0.9%	6.5%	17.4%
4+ bedrooms	2.2%	5.0%	1.1%	8.2%
Total	43.0%	20.4%	36.6%	100.0%
5-year Gross Requirement				
1 bedroom	3,454	1,706	4,126	9,285
2 bedrooms	5,505	2,493	4,303	12,301
3 bedrooms	2,889	266	1,886	5,041
4+ bedrooms	632	1,448	308	2,388
Total	12,479	5,912	10,623	29,015

Profile B2: Homeless Households Housed in Hostels and B&B Accommodation

Households currently living in communal housing that require re-housing in traditional housing.

All households are allocated to social housing as no information is available about their affordability and this is the likely tenure for the majority of these households.

It is assumed that the identified existing need is addressed over a 10-year period, therefore 10% of the total is counted annually.

Figure 58

Resolving Housing Suitability Problems (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Households accepted as statutorily homeless temporarily housed in Bed & Breakfast or hostel accommodation	127
Single people currently sleeping rough	20
Homeless Households not Housed in Traditional Housing	147
Amortisation rate	10%
Annual requirement	15
5-year Requirement	74

Figure 59

5-year Gross Housing Requirement by Housing Type and Size: Homeless Households Housed in Hostels and B&B Accommodation (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	0.0%	0.0%	26.0%	26.0%
2 bedrooms	0.0%	0.0%	47.9%	47.9%
3 bedrooms	0.0%	0.0%	22.0%	22.0%
4+ bedrooms	0.0%	0.0%	4.2%	4.2%
Total	0.0%	0.0%	100.0%	100.0%
5-year Gross Requirement				
1 bedroom	-	-	19	19
2 bedrooms	-	-	35	35
3 bedrooms	-	-	16	16
4+ bedrooms	-	-	3	3
Total	-	-	74	74

Profile B: Gross Housing Requirements from New Households

The future projection for this flow is determined by the two flows of new households considered within the elements of housing need and demand:

B1: Hidden households emerging as new households; and

B2: Homeless households housed in hostels and B&B accommodation.

Figure 60

5-year Gross Housing Requirement by Housing Type and Size: New Households (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
B1: Hidden Households Emerging as New Households				
1 bedroom	3,454	1,706	4,126	9,285
2 bedrooms	5,505	2,493	4,303	12,301
3 bedrooms	2,889	266	1,886	5,041
4+ bedrooms	632	1,448	308	2,388
Total	12,479	5,912	10,623	29,015
B2: Homeless Households Housed in Hostels and B&B Accommodation				
1 bedroom	-	-	19	19
2 bedrooms	-	-	35	35
3 bedrooms	-	-	16	16
4+ bedrooms	-	-	3	3
Total	-	-	74	74
5-year Gross Requirement				
1 bedroom	3,454	1,706	4,145	9,305
2 bedrooms	5,505	2,493	4,338	12,336
3 bedrooms	2,889	266	1,902	5,057
4+ bedrooms	632	1,448	311	2,391
Total	12,479	5,912	10,697	29,088

Profile C: Gross Housing Requirements from In-migrant Households

The future projection for this flow is based on recent trend figures for the last 12 months from the household survey, with five-year projections adjusted on the basis of ONS migration data for the last five years.

Note that migrants to communal housing (such as students) and people joining other established households in the sub-region are not counted, as they do not contribute to the overall housing requirement.

Households are allocated to market, intermediate or social housing on the basis of affordability.

Size of property required is based on trends in terms of the number of bedrooms in properties occupied by recent in-migrant households.

Figure 61

Household Moves in Last 12 Months by Previous Housing Circumstances and Location of Previous Home (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Previous Housing Circumstances	Location of Previous Home		All Households
	Within sub-region	Elsewhere	
Established Household	15,257	6,227	21,484
Concealed Household Living with Family or Friends	5,803	429	6,232
All Households	21,060	6,656	27,716

Figure 62

5-year Gross Housing Requirement: In-migrant Households to the Sub-region (Source 1: ONS Migration Statistics Unit. Source 2: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number
Person migration in the 12-months prior to the survey ¹	23,580
Person migration in the 5-years prior to the survey ¹	128,290
Proportion of 5-year migration during 12-months prior to survey	18.3%
Household migration in the 12-months prior to the survey ²	6,656
Divided by proportion of 5-year migration	18.3%
5-year Requirement	36,201

Figure 63

5-year Gross Housing Requirement by Housing Type and Size: In-migrant Households to the Sub-region (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	6.5%	5.0%	3.5%	14.9%
2 bedrooms	26.4%	3.0%	1.6%	30.9%
3 bedrooms	28.0%	3.7%	3.1%	34.8%
4+ bedrooms	18.8%	0.6%	0.0%	19.3%
Total	79.6%	12.2%	8.2%	100.0%
5-year Gross Requirement				
1 bedroom	2,344	1,802	1,256	5,402
2 bedrooms	9,539	1,088	564	11,191
3 bedrooms	10,151	1,327	1,131	12,609
4+ bedrooms	6,790	208	0	6,998
Total	28,825	4,425	2,951	36,201

Profile C': Gross Housing Requirements from In-migrant Households (20-Year Trend)

The future projection for this flow is based on Profile C, but adjusted on the basis of Devon CC migration data for the last twenty years.

Households are allocated to market, intermediate or social housing on the basis of affordability.

Size of property required is based on trends in terms of the number of bedrooms in properties occupied by recent in-migrant households.

Figure 64

5-year Gross Housing Requirement: In-migrant Households to the Sub-region based on 20-Year Trend (Source 1: Devon CC. Source 2: Profile C. Note: Figures may not sum due to rounding)

Factor	Number
Net migration in the 20-years prior to the survey ¹	160,800
Net migration in the 5-years prior to the survey ¹	53,900
Proportion of 20-year migration during 5-years prior to survey	33.5%
Household in-migration in the 5-years prior to the survey ²	36,201
Divided by proportion of 20-year migration	33.5%
Implied household in-migration in the 20-years prior to the survey based on baseline estimate	107,999
Annual household in-migration based on 20-year trend	5,400
5-year Requirement	27,000

Figure 65

5-year Gross Housing Requirement by Housing Type and Size: In-migrant Households to the Sub-region based on 20-Year Trend (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	6.5%	5.0%	3.5%	14.9%
2 bedrooms	26.4%	3.0%	1.6%	30.9%
3 bedrooms	28.0%	3.7%	3.1%	34.8%
4+ bedrooms	18.8%	0.6%	0.0%	19.3%
Total	79.6%	12.2%	8.2%	100.0%
5-year Gross Requirement				
1 bedroom	1,755	1,350	945	4,023
2 bedrooms	7,128	810	432	8,343
3 bedrooms	7,560	999	837	9,396
4+ bedrooms	5,076	162	0	5,211
Total	21,492	3,294	2,214	27,000

Profile D: Gross Housing Requirements

The future projection for overall gross housing requirements is determined by the three primary flows of households considered within the elements of housing need and demand:

A: Established households;

B: New households; and

C: In-migrant households to the sub-region.

Figure 66

5-year Gross Housing Requirement by Housing Type and Size (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
A: Gross Housing Requirements from Established Households				
1 bedroom	2,481	60	3,449	5,991
2 bedrooms	13,372	1,499	3,748	18,618
3 bedrooms	22,459	649	3,728	26,835
4+ bedrooms	14,257	110	328	14,695
Total	52,569	2,318	11,252	66,139
B: Gross Housing Requirements from New Households				
1 bedroom	3,454	1,706	4,145	9,305
2 bedrooms	5,505	2,493	4,338	12,336
3 bedrooms	2,889	266	1,902	5,057
4+ bedrooms	632	1,448	311	2,391
Total	12,479	5,912	10,697	29,088
C: Gross Housing Requirements from In-migrant Households				
1 bedroom	2,344	1,802	1,256	5,402
2 bedrooms	9,539	1,088	564	11,191
3 bedrooms	10,151	1,327	1,131	12,609
4+ bedrooms	6,790	208	0	6,998
Total	28,825	4,425	2,951	36,201
5-year Gross Requirement				
1 bedroom	8,279	3,568	8,850	20,697
2 bedrooms	28,416	5,080	8,650	42,145
3 bedrooms	35,499	2,242	6,761	44,501
4+ bedrooms	21,680	1,765	639	24,084
Total	93,874	12,655	24,900	131,428

Profile E1: Dwellings Vacated by Established Households Currently in Need

Households currently living in unsuitable housing that need to move to resolve their housing problems and cannot afford to buy or rent market housing (including homeless households temporarily accommodated in PSL housing).

All established households moving are assumed to vacate their current home.

The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.

It is assumed that the identified existing need is addressed over a 10-year period, therefore 10% of the total is counted annually.

Figure 67

Resolving Housing Suitability Problems (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households	
	Discounted	Remaining
Households assessed as currently living in unsuitable housing	-	38,831
Households with an objectively assessed in-situ solution	19,658	19,173
Households with a subjectively assessed in-situ solution (where the household neither wants nor expects nor needs to move)	10,021	9,152
Households that need to move, but that will leave the area	569	8,538
Households that need to move, but will be moving into institutional housing or join another household	160	8,423
Households that need to move, but can afford to rent or buy market housing	2,551	5,872
Households that need to move, but cannot afford to rent or buy market housing		5,872
Households accepted as statutorily homeless currently housed in housing leased temporarily from the private sector (PSL housing)		447
Established Households Currently in Need		6,319
Amortisation rate		10%
Annual supply		632
5-year Supply		3,160

Figure 68

5-year Housing Supply by Housing Type and Size: Dwellings Vacated by Established Households Currently in Need (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	8.3%	0.0%	23.7%	32.0%
2 bedrooms	5.3%	6.5%	24.8%	36.6%
3 bedrooms	6.4%	0.8%	22.2%	29.4%
4+ bedrooms	0.0%	2.0%	0.0%	2.0%
Total	20.0%	9.3%	70.7%	100.0%
5-year Supply				
1 bedroom	263	-	749	1,012
2 bedrooms	166	207	782	1,155
3 bedrooms	202	24	703	929
4+ bedrooms	-	64	-	64
Total	631	295	2,234	3,160

Profile E2: Dwellings Vacated by Newly Arising Need from Established Households

The future projection for this flow is based on recent trend figures for the last 12 months.

Households currently living in unsuitable housing who were suitably housed one-year ago are assumed to constitute new need during the period, together with households who were forced to move during the period and were re-housed in affordable housing due to a problem that would have not been identified 12 months ago.

All established households moving are assumed to vacate their current home.

The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.

Figure 69

Length of Time Households have Experienced Problems (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Households with problems that existed for more than 12 months	3,790
Households with problems that have arisen within the last 12 months	2,082
Households that need to move, but cannot afford to rent or buy market housing	5,872

Figure 70

5-year Housing Supply: Newly Arising Need from Established Households (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Annual supply	2,082
Modelling period (years)	5
5-year Supply	10,410

Figure 71

5-year Housing Supply by Housing Type and Size: Dwellings Vacated by Newly Arising Need from Established Households (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	0.0%	0.0%	22.4%	22.4%
2 bedrooms	5.2%	9.1%	12.9%	27.2%
3 bedrooms	7.6%	2.2%	35.0%	44.7%
4+ bedrooms	0.0%	5.7%	0.0%	5.7%
Total	12.8%	17.0%	70.2%	100.0%
5-year Supply				
1 bedroom	0	0	2,330	2,330
2 bedrooms	544	950	1,340	2,833
3 bedrooms	788	228	3,642	4,657
4+ bedrooms	0	590	0	590
Total	1,331	1,767	7,312	10,410

Profile E3: Dwellings Vacated by Effective Demand from Established Households

The future projection for this flow is based on expectations of existing households moving within the sub-region over the next 12 months.

Households are only counted if they are able to afford to buy or rent market housing, therefore by definition all will require market housing.

All established households moving are assumed to vacate their current home.

The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.

Figure 72

Household Moves in Last 12 Months by Previous Housing Circumstances and Location of Previous Home (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Future Housing Circumstances	Location of Future Home		All Households
	Within sub-region	Elsewhere	
Independent Household			
Able to afford local market housing	10,514	2,866	13,379
Unable to afford local market housing	4,915	590	5,505
Household Moving to Live with Family or Friends	567	48	615
All Households	15,996	3,504	19,500

Figure 73

5-year Housing Supply: Dwellings Vacated by Effective Demand from Established Households (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Annual supply	10,514
Modelling period (years)	5
5-year Supply	52,569

Figure 74

5-year Housing Supply by Housing Type and Size: Dwellings Vacated by Effective Demand from Established Households (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	4.5%	1.4%	0.3%	6.2%
2 bedrooms	24.9%	4.4%	0.2%	29.5%
3 bedrooms	35.4%	3.1%	0.4%	38.8%
4+ bedrooms	24.2%	1.3%	0.0%	25.5%
Total	89.0%	10.2%	0.9%	100.0%
5-year Supply				
1 bedroom	2,352	743	143	3,238
2 bedrooms	13,068	2,315	122	15,505
3 bedrooms	18,604	1,606	189	20,400
4+ bedrooms	12,747	680	0	13,427
Total	46,771	5,344	454	52,569

Profile E: Housing Supply from Dwellings Vacated by Established Households

The future projection for this flow is determined by the three flows of established households considered within the elements of housing supply:

E1: Dwellings vacated by established households currently in need;

E2: Dwellings vacated by newly arising need from established households; and

E3: Dwellings vacated by effective demand from established households.

Figure 75

5-year Housing Supply by Housing Type and Size: Dwellings Vacated by Established Households (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
E1: Dwellings Vacated by Established Households Currently in Need				
1 bedroom	263	-	749	1,012
2 bedrooms	166	207	782	1,155
3 bedrooms	202	24	703	929
4+ bedrooms	-	64	-	64
Total	631	295	2,234	3,160
E2: Dwellings Vacated by Newly Arising Need from Established Households				
1 bedroom	-	-	2,330	2,330
2 bedrooms	544	950	1,340	2,833
3 bedrooms	788	228	3,642	4,657
4+ bedrooms	-	590	-	590
Total	1,331	1,767	7,312	10,410
E3: Dwellings Vacated by Effective Demand from Established Households				
1 bedroom	2,352	743	143	3,238
2 bedrooms	13,068	2,315	122	15,505
3 bedrooms	18,604	1,606	189	20,400
4+ bedrooms	12,747	680	-	13,427
Total	46,771	5,344	454	52,569
5-year Supply				
1 bedroom	2,615	743	3,222	6,580
2 bedrooms	13,778	3,471	2,244	19,493
3 bedrooms	19,594	1,858	4,534	25,986
4+ bedrooms	12,747	1,334	-	14,081
Total	48,734	7,406	9,999	66,139

Profile F1: Property Vacated Following Household Dissolution Due to Death

The future projection for this flow is based on the structure of individual households coupled with ONS survival rate statistics. Each household is allocated a probability of survival such that a residual probability of dissolution can be derived.

The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.

Figure 76

Property dissolution due to death (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07.
Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	7.3%	0.4%	15.4%	23.1%
2 bedrooms	33.8%	1.1%	5.4%	40.3%
3 bedrooms	26.3%	0.6%	4.1%	31.1%
4+ bedrooms	5.5%	0.0%	0.0%	5.5%
Total	73.0%	2.1%	24.9%	100.0%
5-year Supply				
1 bedroom	1,377	77	2,886	4,340
2 bedrooms	6,340	201	1,013	7,554
3 bedrooms	4,941	120	768	5,829
4+ bedrooms	1,023	3	2	1,029
Total	13,681	401	4,669	18,752

Profile F2: Property Vacated Following Households Merging

All households identified as moving to “live with” another household, moving to communal housing or otherwise no longer requiring independent housing are counted as vacating their current home.

The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.

Figure 77

Household Moves Expected in Next 12 Months by Future Housing Circumstances and Location of Next Home (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Future Housing Circumstances	Location of Future Home		All Households
	Within sub-region	Elsewhere	
Independent Household			
Able to afford local market housing	10,514	2,866	13,379
Unable to afford local market housing	4,915	590	5,505
Household Moving to Live with Family or Friends	567	48	615
All Households	15,996	3,504	19,500

Figure 78

5-year Housing Supply: Property Vacated Following Households Merging (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number of Households
Annual supply	567
Modelling period (years)	5
5-year Supply	2,836

Figure 79

5-year Gross Housing Requirement by Housing Type and Size: Property Vacated Following Households Merging (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	19.4%	0.0%	0.0%	19.4%
2 bedrooms	22.5%	0.0%	13.2%	35.8%
3 bedrooms	2.8%	0.0%	6.8%	9.6%
4+ bedrooms	35.3%	0.0%	0.0%	35.3%
Total	79.9%	0.0%	20.1%	100.0%
5-year Supply				
1 bedroom	549	-	-	549
2 bedrooms	639	-	375	1,014
3 bedrooms	79	-	194	272
4+ bedrooms	1,000	-	-	1,000
Total	2,267	-	569	2,836

Profile F: Housing Supply from Household Dissolution

The future projection for this flow is determined by the three flows of established households considered within the elements of housing supply:

F1: Dwellings vacated following household dissolution due to death; and

F2: Dwellings vacated following households merging.

Figure 80

5-year Housing Supply by Housing Type and Size: Household Dissolution (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
F1: Property Vacated Following Household Dissolution Due to Death				
1 bedroom	1,377	77	2,886	4,340
2 bedrooms	6,340	201	1,013	7,554
3 bedrooms	4,941	120	768	5,829
4+ bedrooms	1,023	3	2	1,029
Total	13,681	401	4,669	18,752
F2: Property Vacated Following Households Merging				
1 bedroom	549	-	-	549
2 bedrooms	639	-	375	1,014
3 bedrooms	79	-	194	272
4+ bedrooms	1,000	-	-	1,000
Total	2,267	-	569	2,836
5-year Supply				
1 bedroom	1,927	77	2,886	4,890
2 bedrooms	6,978	201	1,388	8,568
3 bedrooms	5,020	120	962	6,102
4+ bedrooms	2,023	3	2	2,028
Total	15,948	401	5,238	21,588

Profile G: Housing Supply from Out-migrant Households

The future projection for this flow is based on expectations of existing households moving away from the sub-region over the next 12 months.

All out-migrant households are assumed to vacate their current home.

The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.

Figure 81

Household Moves Expected in Next 12 Months by Future Housing Circumstances and Location of Next Home (Source: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Future Housing Circumstances	Location of Future Home		All Households
	Within sub-region	Elsewhere	
Independent Household			
Able to afford local market housing	10,514	2,866	13,379
Unable to afford local market housing	4,915	590	5,505
Household Moving to Live with Family or Friends	567	48	615
All Households	15,996	3,504	19,500

Figure 82

Dwellings Vacated by Out-migrant Households leaving the Sub-region (Source 1: ONS Migration Statistics Unit.

Source 2: Exeter & Torbay Household Survey 2006-07. Source 3: UK Census of Population 2001 Note: Figures may not sum due to rounding)

Factor	Number
Person migration in the 12-months prior to the survey ¹	18,680
Person migration in the 5-years prior to the survey ¹	96,750
Proportion of 5-year migration during 12-months prior to survey	19.3%
Household migration in the 12-months prior to the survey ²	3,504
Divided by proportion of 5-year migration	19.3%
Baseline estimate of 5-year migration	18,146
Person migration in the 12-months prior to the Census ³	19,480
Proportion of 5-year migration during 12-months prior to Census	20.1%
Implied household migration in the 12-months prior to the Census based on baseline estimate	3,648
Actual household migration in the 12 months prior to the Census ³	4,917
Uplift required to baseline estimate of 5-year migration	+34.8%
5-year Supply	24,459

Figure 83

5-year Housing Supply by Housing Type and Size: Dwellings Vacated by Out-migrant Households leaving the Sub-region (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	3.7%	3.3%	5.8%	12.8%
2 bedrooms	21.5%	2.0%	1.1%	24.6%
3 bedrooms	40.1%	0.9%	3.1%	44.2%
4+ bedrooms	16.1%	2.3%	0.0%	18.5%
Total	81.5%	8.6%	10.0%	100.0%
5-year Supply				
1 bedroom	914	799	1,410	3,123
2 bedrooms	5,251	493	272	6,016
3 bedrooms	9,817	231	755	10,804
4+ bedrooms	3,946	570	-	4,516
Total	19,927	2,094	2,437	24,459

Profile G': Housing Supply from Out-migrant Households (20-Year Trend)

The future projection for this flow is based on Profile G, but adjusted on the basis of Devon CC migration data for the last twenty years.

All out-migrant households are assumed to vacate their current home.

The type and size of property counted within the supply is based on the actual type and number of bedrooms in the current home, i.e. the property being vacated.

Figure 84

Dwellings Vacated by Out-migrant Households leaving the Sub-region based on 20-Year Trend (Source 1: Devon CC. Source 2: Profile G. Note: Figures may not sum due to rounding)

Factor	Number
Net migration in the 20-years prior to the survey ¹	160,800
Net migration in the 5-years prior to the survey ¹	53,900
Proportion of 20-year migration during 5-years prior to survey	33.5%
Household out-migration in the 5-years prior to the survey ²	24,459
Divided by proportion of 20-year migration	33.5%
Implied household out-migration in the 20-years prior to the survey based on baseline estimate	72,969
Annual household out-migration based on 20-year trend	3,648
5-year Supply	18,242

Figure 85

5-year Housing Supply by Housing Type and Size: Dwellings Vacated by Out-migrant Households leaving the Sub-region based on 20-Year Trend (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
Proportionate Split				
1 bedroom	3.7%	3.3%	5.8%	12.8%
2 bedrooms	21.5%	2.0%	1.1%	24.6%
3 bedrooms	40.1%	0.9%	3.1%	44.2%
4+ bedrooms	16.1%	2.3%	0.0%	18.5%
Total	81.5%	8.6%	10.0%	100.0%
5-year Gross Requirement				
1 bedroom	675	602	1,058	2,335
2 bedrooms	3,922	365	201	4,488
3 bedrooms	7,315	164	566	8,063
4+ bedrooms	2,937	420	0	3,375
Total	14,867	1,569	1,824	18,242

Profile H: Housing Supply

The future projection for overall housing supply is determined by the three primary flows of households considered within the elements of housing supply:

E: Housing supply from established households;

F: Housing supply from household dissolution; and

G: Housing supply from out-migrant households from the sub-region.

Figure 86

5-year Housing Supply by Housing Type and Size (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Supply	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
E: Housing Supply from Established Households				
1 bedroom	2,615	743	3,222	6,580
2 bedrooms	13,778	3,471	2,244	19,493
3 bedrooms	19,594	1,858	4,534	25,986
4+ bedrooms	12,747	1,334	-	14,081
Total	48,734	7,406	9,999	66,139
F: Housing Supply from Household Dissolution				
1 bedroom	1,927	77	2,886	4,890
2 bedrooms	6,978	201	1,388	8,568
3 bedrooms	5,020	120	962	6,102
4+ bedrooms	2,023	3	2	2,028
Total	15,948	401	5,238	21,588
G: Housing Supply from Out-migrant Households				
1 bedroom	914	799	1,410	3,123
2 bedrooms	5,251	493	272	6,016
3 bedrooms	9,817	231	755	10,804
4+ bedrooms	3,946	570	-	4,516
Total	19,927	2,094	2,437	24,459
5-year Supply				
1 bedroom	5,456	1,619	7,518	14,592
2 bedrooms	26,007	4,165	3,904	34,076
3 bedrooms	34,431	2,210	6,251	42,892
4+ bedrooms	18,716	1,907	2	20,626
Total	84,609	9,901	17,675	112,186

Profile I: Net Housing Requirement

The future projection for net housing requirement is determined by offsetting the overall housing supply against the overall gross housing requirement:

D: Gross housing requirement; less

H: Housing supply.

Figure 87

5-year Net Housing Requirement by Housing Type and Size (Source: ORS Housing Market Model, Exeter & Torbay Sub-regional Housing Requirement Assessment 2006-07. Note: Figures may not sum due to rounding)

Housing Requirement	Type of Housing			Total
	Market Housing	Intermediate Housing	Social Rented Housing	
D: Gross Housing Requirements				
1 bedroom	8,279	3,568	8,850	20,697
2 bedrooms	28,416	5,080	8,650	42,145
3 bedrooms	35,499	2,242	6,761	44,501
4+ bedrooms	21,680	1,765	639	24,084
Total	93,874	12,655	24,900	131,428
H: Housing Supply				
1 bedroom	5,456	1,619	7,518	14,592
2 bedrooms	26,007	4,165	3,904	34,076
3 bedrooms	34,431	2,210	6,251	42,892
4+ bedrooms	18,716	1,907	2	20,626
Total	84,609	9,901	17,675	112,186
5-year Net Requirements				
1 bedroom	2,823	1,949	1,332	6,105
2 bedrooms	2,409	915	4,746	8,069
3 bedrooms	1,068	32	510	1,610
4+ bedrooms	2,964	(142)	637	3,458
Total	9,264	2,754	7,225	19,243

Monitoring and Updating the Data

- G.31 The Housing Market Model analysis is primarily underwritten by data from the local household survey – so will need comprehensive updating at some point in the future. Nevertheless, it is possible to monitor and update the modelling outputs on the basis of key secondary data controls.
- G.32 Migration analysis can be controlled based on new secondary data – thereby changing the gross housing requirement generated by in-migrant households and the supply of housing produced by out-migrant households over a 5-year period.
- G.33 The cells highlighted in orange can be updated on the basis of data published by the ONS Migration Unit – based on data for migration between Local Authorities derived from the NHS Central Register, counting all moves into LAs within the sub-region (other than those moves between the sub-region's LAs). The purple cells can then be recalculated to provide a new base for calculating profile C and G respectively.

Figure 88

Updating 5-year Gross Housing Requirement: In-migrant Households to the Sub-region (Source 1: ONS Migration Statistics Unit. Source 2: Exeter & Torbay Household Survey 2006-07. Note: Figures may not sum due to rounding)

Factor	Number
Person migration in the 12-months prior to the survey ¹	23,580
Person migration in the 5-years prior to the survey ¹	128,290
Proportion of 5-year migration during 12-months prior to survey	18.3%
Household migration in the 12-months prior to the survey ²	6,656
Divided by proportion of 5-year migration	18.3%
5-year Requirement	36,201

Figure 89

Updating Dwellings Vacated by Out-migrant Households leaving the Sub-region (Source 1: ONS Migration Statistics Unit. Source 2: Exeter & Torbay Household Survey 2006-07. Source 3: UK Census of Population 2001 Note: Figures may not sum due to rounding)

Factor	Number
Person migration in the 12-months prior to the survey ¹	18,680
Person migration in the 5-years prior to the survey ¹	96,750
Proportion of 5-year migration during 12-months prior to survey	19.3%
Household migration in the 12-months prior to the survey ²	3,504
Divided by proportion of 5-year migration	19.3%
Baseline estimate of 5-year migration	18,146
Person migration in the 12-months prior to the Census ³	19,480
Proportion of 5-year migration during 12-months prior to Census	20.1%
Implied household migration in the 12-months prior to the Census based on baseline estimate	3,648
Actual household migration in the 12 months prior to the Census ³	4,917
Uplift required to baseline estimate of 5-year migration	+34.8%
5-year Supply	24,459

- G.34 Similarly, household dissolution can be controlled based on actual recorded deaths in the 5-years prior to the survey taken as a proportion of deaths recorded in an updated 5-year period. This uplift can simply be applied to the totals for Profile F1, and Profile F updated accordingly.

^{G.35} More generally, the main report draws on a wide range of data sources, and the publishers of these datasets are summarised in the table below.

Data Source	Publisher	Contents	Geography	Dates
2001 Census	ONS	Tenure, household type, age, migration, travel to work, education, household amenities, religion, employment and health	Census Output Area and a 5% sample of individual records)	2001
Annual Survey of Hours and Earnings	ONS	Earnings for employees on residency and workplace basis	Local authority	Annual since 1999
Land Registry records	HMLR	Record of all properties sold including selling price and tenure	Individual records including 7 digit postcode	2000 onwards
CORE data on social lettings	Housing Corporation	Individual records of recent tenants in the social sector including household size, ethnicity, income and housing benefit claimants	Individual records including 7 digit postcode	2004 onwards
Department of Work and Pensions claimant statistics	DWP	Claimants for carers allowance, disability living allowance, incapacity benefit, income support, pension credit, job seekers allowance, severe disablement allowance and widows benefit.	Ward and super output level and 5% individual records	1999 onwards
Index of Multiple Deprivation data from the CLG	CLG	National measure of relative deprivation which also incorporates education, health, income, crime and social wellbeing	Census Output Area	2004
CLG P1E data on homelessness	CLG	Ethnicity of those accepted as homeless and records of those in temporary accommodation since 2001	Local authority	Quarterly since 2000
ONS population forecasts	ONS	Forecasts of population change until 2029	Local authority	2004 based projections
ONS Mid-year population estimate	ONS	Detailed profile of current age structure of population since 1981	Local authority	Annual since 1981
ONS National Health Service Customer Records	ONS	Record of inter local authority migration bas	Local authority	Annual since 1997
Home Office Asylum Seeker Statistics	Home Office	Numbers of asylum seekers receiving support from the National Asylum Seeker Service (NASS)	Local authority	Quarterly since 2001
Department of Work and Pensions records of new National Insurance numbers	DWP	Details on nationality of people who are granted new National Insurance numbers since 2005	Local authority and parliamentary constituency	2005/06
Pupil Level Annual Schools Census	DfES	Annual survey all pupils in state schools including class sizes and pupil ethnicity	Local authority	Annual since 2003
Supporting People Client Records	Devon CC	Record of number receiving support and why	Countywide	Annual since 2004
VAT Registrations and De-registrations	HMRC	Includes the rate of new business formation and existing registered business stock since 1992 and businesses by industry and employment size	Local authority	Annual since 1992
Labour Force Survey/Annual Survey of Population	ONS	Details of working age population including employment, industry and health problems	Local authority	Since 1999
Housing Corporations Statistics	Housing Corporation	Records of registered social landlord properties	Local authority	Since 1999
Housing Strategy Statistical Appendix	CLG	Record of completions, waiting lists, private sector stock condition and housing expenditure	Local authority	Annual since 1997

Section H: Stakeholder and Community Consultation

Introduction

- H.1 A sequence of meetings and discussions were also held with a wide range of stakeholders, including individual client groups and professionals involved in housing management and provision across the sub-region. These groups were held to facilitate more in-depth discussion around local housing issues. Three focus groups were held involving estate agents, landlords, RSLs, housing funders, developers and landowners with a fourth focus group held for BME stakeholders.
- H.2 A meeting was also held with representatives from Devon County Council, local authorities in Devon, or from groups who had an interest in the economic development of Devon to discuss the current and future economic development of the Exeter and Torbay housing markets.
- H.3 To complement the use of focus groups, in-depth interviews were carried out with eleven representatives of housing, homelessness and prolific ex-offender services and health and support services. Both the focus groups and the interviews were facilitated or undertaken by skilled facilitators and interviewers from ORS.
- H.4 Due to the nature of the focus groups and individual interviews, we must remain cautious in how far we can generalise the findings to those of the population the respondents were sampled from. The sample sizes are small and the views expressed are the personal opinions of the participants which mean that the findings presented here must be viewed within that context. However this does not preclude the fact that common themes emerge or that the findings we report on are not valid. They provide a range of common perspectives that have been explored in-depth, something that large-scale quantitative studies cannot achieve. We have therefore provided a summary of findings that provide further issues for exploration and research.

Summary of Key Findings

Housing Delivery and Service Providers

- H.5 Participants identified a lack of affordable housing as being the most pressing problem affecting Exeter and Torbay. A general lack of supply of new housing was also highlighted as being an issue. The pressures of competition from employment land and the costs of section 106 agreements were thought to be affecting new housing schemes.
- H.6 It was felt second home ownership and the impact of in-migrant households were absorbing much of existing housing stock to the point that local households were leaving rural areas.
- H.7 Decreasing household size was also felt to be affecting housing in the area. There was identified to be a greater housing requirement for single people and older persons. It was anticipated that there would be even further need to provide for these two groups in the future.

- H.8 It was felt that intermediate housing may be able to bridge the gap for those who cannot afford to access market housing.

Economic Development Interests

- H.9 The economy of the Exeter housing market has been growing much more rapidly than that of the Torbay housing market.
- H.10 The expansion plans of the University of Exeter are likely to see the economy of Exeter grow even more rapidly.
- H.11 The economic growth in Exeter is placing pressure upon the transport infrastructure and also upon housing in the area. Many employees are travelling further to work in Exeter because of a lack of housing in its vicinity.
- H.12 To achieve sustainable economic development, more housing may need to be provided in the vicinity of Exeter, and more investment may be required in areas such as Newton Abbot and Torbay to prevent employees needing to travel to Exeter for work.

BME Representatives

- H.13 The BME population is perceived to have changed significantly over the past ten years. There are notably greater Gypsy/Traveller and East European populations. Generally, the BME population is thought to be represented most in private sector accommodation, some of which is tied to work.
- H.14 One of the key housing issues pertains to a wider social issue of discrimination and prejudice. At the point when the BME population communicate with local authorities there is perceived discrimination. Gypsies and Travellers are thought to experience particularly high levels of prejudice and have very few local authority sites. The group suggested that cultural awareness training is vital for local authorities.
- H.15 There is insufficient supply of information and support for the BME population, hence more is required. The creation of three new BME housing officer posts across the county will aid this process of information supply and support.

Housing, Homelessness and Ex-Offender Service Providers

- H.16 The number of homeless people in the area is thought to have remained relatively constant, although the percentage of young homeless people appears to have increased.
- H.17 Substance misuse is a key issue, particularly amongst ex-offenders, which often prevents people accessing housing.
- H.18 Many of the issues named above are being addressed by the various homelessness organisations who are beginning to work in a joined-up way, signposting service users to relevant support.
- H.19 Whilst many services are provided for homeless people, further information is required on the social housing application process. Furthermore, specific support is required on mental health and mediation issues. It has been suggested that necessary support and information might be provided in a one-stop shop as part of major service rationalisation.

Health and Support Service Providers

- H.20 Reportedly, there have been few changes in the population accessing health support services, except in mental health support, where people increasingly have higher service needs. Many service users live in social rented accommodation, although a high percentage of people accessing drug and alcohol services are homeless.
- H.21 Some of the key issues facing service users are a lack of appropriate accommodation, an inability to maintain a tenancy, a lack of support, and inappropriate support systems.
- H.22 Many service user needs are met by current support services and information provision. Currently there is some joined-up working and increasing floating support in a number of different schemes. There is a general need for more proactive information provision in order to prevent housing related problems.

Housing Delivery and Service Providers

Introduction

- H.23 In order to gain an insight into local housing issues, as perceived by key stakeholders, three focus groups were held. The following groups were invited to attend: estate agents, landlords, RSLs, housing funders, developers and landowners. Due to a particularly high response rate from estate agents and RSLs, two parallel focus groups were held with these stakeholders, whilst the third group consisted of developers and landowners.

Figure 90
Number of Focus Group Participants

Stakeholder Group	Number of Participants
Estate agents, landlords, RSLs and housing funders	15
Developers and landowners	7

- H.24 The overall objective of these groups was to explore local housing issues, gaining an understanding of the housing market that might not otherwise be attained. The following issues were explored:
- Key local housing issues
 - Roles played in shaping the local housing market
 - Correlation between housing supply and demand
 - Impacts of a deficit in intermediate housing
 - Changing area demographics and their impact on housing requirements
 - Anticipated changes in the area
- H.25 The findings from the three groups are drawn together and reported on a question-by-question basis in one report. Before discussing the findings from these groups, a brief description of the methodology is provided.

Methodology

- H.26 This sub section is not intended to provide a detailed explanation of focus group methodology, it does however provide a simple account of the nature of the focus groups. For each group, an initial

presentation was given to the participants, explaining the housing market assessment. This enabled the participants to enter discussion from a well-informed position. The presentation also outlined the issues that would be addressed during the discussion, highlighting the type of impact that their comments might have.

H.27 Following the presentation, participants then separated into focus groups of approximately eight participants and discussed local housing issues in a round-table discussion. Facilitators from ORS guided the discussion, ensuring that key issues were addressed. However, these focus groups were relatively fluid in nature, ensuring that participants were able to explore issues of concern as they arose. In order to prompt initial discussion and to gather semi-quantitative information on the key local housing issues, participants were asked to note two key issues of concern on a piece of paper. This provided the stakeholders with time to consider their answer and conclusions could be drawn from the most commonly cited issues. One of the key strengths of the focus groups was that they allowed stakeholders to understand and discuss issues that concerned their colleagues. This type of discussion rarely takes place and was perceived to be extremely beneficial.

Key Local Housing Issues

H.28 Figure 91 summarises the key local housing issues identified by stakeholders.

Figure 91

Key Local Housing Issues Identified by Stakeholders

Key Local Housing Issues Identified	Developers & Landowners	Estate Agents & RSLs	Total
Lack of affordable housing	8	14	22
General	8	11	19
For newly forming households		3	3
Lack of land available	4	6	10
General	2	4	6
Due to competition for sites	1	-	1
Due to volume of sensitive landscape and limited Brownfield	1	-	1
Viability of sites	-	1	1
Affordability	-	1	1
Under supply of housing	4	5	9
Ratio of income to house prices	-	5	5
Poor current mix of tenure and size	-	5	5
Planning Issues	3	2	5
Lack of responsiveness of planning process at strategic level	2	1	3
Developer contributions to high Section 106 agreements	1	1	2
Poor housing standard	1	2	3
Issues pertaining to student accommodation	2	-	2
Increase of 4,000 students to private sector over next 10 years	1	-	1
Density of students close to University	1	-	1
Lack of specialised elderly housing/ageing population	1	1	2
Other issues	-	6	6
Interest rates policy and stock market favours buy to let	-	1	1
Under occupation	-	1	1
Energy issues	-	1	1
Homelessness	-	1	1
Poor use of existing stock	-	1	1
Lack of availability to transfer/ upsize/ downsize	-	1	1
Total	23	46	69

- H.29 A lack of affordable housing is by far the most frequently cited issue (n=22). Participants particularly singled out affordability as an issue for newly forming households. Closely associated to a lack of affordable housing supply are the issues of a lack of available land (n=10) and an under supply of housing in general (n=9). A number of participants believed that household income is not closely aligned with house prices (n=5), while several stakeholders commented that one of the key local housing issues is a poor current mix of tenure and size (n=5). Housing supply is obviously a major concern and this often relates to planning issues. For instance, five participants remarked that the current planning system lacks responsiveness and makes significant Section 106 demands on developers. A number of other issues were identified at least once as previously listed.
- H.30 Further to the issues identified initially, the ensuing discussion resulted in additional concerns. For instance, competition for land with health care, commerce and other sectors is reducing housing supply. Developers are thought to be in a weakened position due the high Section 106 requirements placed upon them. The second home is thought to be draining the overall supply. Moreover, it was thought that much of the building over recent years has been servicing inward migration. The last issue concerning stakeholders was the turnover of student accommodation, although it was believed that this market might not be saturated yet, as it is in Plymouth.
- H.31 One participant particularly dwelt on the issue of student accommodation. It was observed that students are capable of paying more than the low end rental sector wants to pay. It was suggested that the University is in fact one of the largest landlords in Exeter, with over 4,000 bedrooms. The issue of student accommodation may therefore be a key issue in Exeter.

Shaping the Local Housing Market

- H.32 Stakeholders were asked to comment on how they believe they are able to shape the local housing market. Certainly there was a sense that UK Government and UK planning guidance have a great deal of control over the housing market and there was a desire for consistency in the government approach to housing.
- H.33 Much of the discussion concerning control over the housing market centred on the complex role played by RSLs. It was suggested that RSLs often adopt a broker role between Local Authorities and Developers:

Sometimes RSLs broker between these two (Local Authorities and Developers), trying to help bring the needs of affordable housing together with viable development schemes, so that a realistic proposal gets planning permission. It's a sort of three-way agreement.

There is classically a mismatch between what the developer wants and what the local authority is looking for.

- H.34 RSLs considered that their role also helped to shape the housing market as they can be involved in regenerating more deprived areas. In this sense they lead the housing market and create additional supply which in some instances the private sector would not invest in. Notably, RSLs are thought to be changing how they operate, increasingly acting like developers and reinvesting in the social side. Equally, it was thought that developers are becoming more like RSLs as they are gaining grants. It was reported that the influence of RSLs in terms of affordable supply is in many ways limited nowadays. This is because of the reliance on grants from the Housing Corporation.

- H.35 Local Authorities have a specific role to play in shaping the local housing market, as they are responsible for allocating land. Landowners and developers considered that the Local Authorities were not as flexible as they could be when negotiating for new development – but Local Authorities argued that this control was used to ensure that sustainable communities were developed. There was general consensus that all stakeholders were required to play the game, in order to secure something appropriate in terms of size and tenure for any particular area.
- H.36 The developers were very clear that their activities were governed by allocations in the Regional Spatial Strategy and increasingly flats are being built in order to gain from high land values. One developer was able to point out that as specialists in housing for the elderly, they play a particular role in freeing up family housing which is being under occupied.

Correlation between Housing Supply and Demand

- H.37 The focus groups certainly identified disparities between current supply and demand. These disparities were noted in terms of current housing type and tenure, and in terms of particular groups of the population. There was an overwhelming sense that the market is being flooded with flats. The Bellway development was cited as an initiative which experienced difficulties because of this market saturation. The groups believed that such developments were necessary because of the need to overcome high land values. However, it was suggested that the planning system must intervene and overcome this issue.
- H.38 The focus groups also discussed the significant lack of affordable housing in rural and coastal areas. The housing in these areas is believed to be very expensive and out of reach of most first-time buyers and families. There is not only an issue of affordability but there also seems to be a dominance of 3-4 bedroom houses. The sustainability of local communities is being threatened as young people are unable to purchase housing in these areas and rental costs can be extortionate.
- H.39 Participants commented that a greater supply of affordable housing is required for single people and older people. It was suggested that single people get a poor deal in terms of affordable housing because a lot of them are not registered as a priority need. Recent provision of housing for older people is considered extremely expensive and often inappropriate. For instance, one participant commented that it is a slightly patronising and out of date view to think that if you are old, you only need one bedroom.
- H.40 While the stakeholders made clear statements concerning a lack of correlation between supply and demand, they also highlighted that current understanding of what is needed may be misinformed. For example, one participant stated that people may confuse their needs with their aspirations:

There is a difference between what people actually need and their aspirations and over time these have changed into what they want to put their money into, especially if you are talking about the intermediate markets.

- H.41 In addition, it was thought that people may state that they need a one-bedroom flat because there is a perception that they might receive this within a shorter timescale. In reality they might actually need and prefer two bedrooms:

The waiting list always shows a stack of requirements for one-bedroom because they think that they will get a one bedroom flat fast.

- H.42 The final point made whilst discussing this issue was that estate agents and RSLs were concerned that Local Authorities might dictate the housing mix on a development. Developers do their own market research in order to ensure that their properties will sell, whereas the Local Authority's ability to determine the housing mix was questioned.

Impacts of a Deficit in Intermediate Housing

- H.43 Part way through the discussion, participants were given a presentation which highlighted the existence of a gap in intermediate housing in Exeter. The group were then asked to discuss likely impacts of this deficit. There was general agreement that the number of households moving from social rented properties into the private sector is virtually nil. People are falling into a gap between what is social rented and market accommodation. Moreover, these people are thought to be earning good salaries. As a consequence of this deficit in intermediate housing a log jam has been created. Representatives of RSLs recognised that RSLs are going to have to provide for this new client group.
- H.44 Possible solutions to the increasing intermediate market include shared ownership schemes. It was generally agreed that there are negative perceptions of shared ownership accommodation, people would rather reportedly prefer to rent a property. In order to address negative attitudes towards the schemes, there is thought to be a need for better promotion and advertising. Developers favour shared ownership schemes above rented properties because they believe that people will take greater care of the development if they at least have a stake in the property. The discussion groups held fears that people would buy shared ownership properties and then sell them on, making them unaffordable. There was an acceptance that a cap could be placed on the price at which the property might be sold. However, this may act as a deterrent to purchasers.
- H.45 A second solution to the deficit in intermediate housing might be the provision of a rental deposit by the Council. Developers suggested that a Council paid bond might overcome a significant barrier of entry into private rented accommodation.
- H.46 A third solution to the deficit might be intermediate rented properties. This type of accommodation would be priced above social rented housing but below the market price. Traditionally such accommodation has been targeted at key workers but might be one solution to the intermediate market. In relation to this point, participants also commented that people in the intermediate market are now more likely to be willing to rent properties rather than buy. This has been assisted by investors increasingly buying properties in order to rent them.
- H.47 The group questioned whether the lack of intermediate housing had a particular impact in rural areas. It was suggested that young people are unable to find accommodation in rural areas and as a result they move to urban areas. The discussion groups were unsure that young people would stay in rural areas even if intermediate accommodation was available. It was suggested that as a result of increasing house prices, young people are currently living in the family home until they are much older than would have been expected ten years ago.
- H.48 The intermediate housing deficit is thought to be an issue which is much broader than a housing issue. It relates to wider economic conditions.

Changing Area Demographics and their Impact on Housing Requirements

- H.49 Decreasing household size was identified as the most apparent demographic change in the study area. The decrease in average household size was mostly attributed to the break-up of families and was quantified in the following statement:

Our housing list was about 1,600, of those about 600 were families and the rest were singles or couples. If you look at the list now which is 5,500, you have got around 800 families and the rest are single people and couples.

- H.50 An additional demographic change has reportedly been an increase in young professional migrants from areas such as the South East of England. It is thought that young professionals are migrating to the South West for the greater quality of life, having made sufficient money to invest in housing. There has also been significant migration from Europe, which has resulted in demographic change. The participants were concerned over the lack of official statistics on this particular migrant population and predicted that there would be a continual increase in European migration as the European Union membership increases.
- H.51 The local population is perceived to be ageing. This demographic shift has had a significant impact on housing requirements. Notably, larger family homes are being under occupied and there have been some attempts to redress this imbalance by encouraging people to move out of the family home into smaller accommodation. The group also discussed the need to understand the needs of the elderly who are now increasingly willing to move into flats rather than bungalows. The key message was the need to consult with the elderly population in order to understand their changing preferences.
- H.52 Across the local population participants thought that income gaps are widening and levels of income are not rising at the same rate as house prices. The groups stressed that this is a UK-wide issue and relates to the wider economy. It is not an issue which solely pertains to housing.

Anticipated Future Changes that may Impact Upon the Local Housing Market

- H.53 The discussion groups expected a levelling off of indigenous population growth. As a result, there is a possibility that the affordability gap might begin to close. However, this will not be the case if, as the groups predicted, levels of migration continue at the present rate.
- H.54 Developers suggested that a greater number of future developments will be mixed-use. Several recent developments of this type have been built and it is anticipated that in order to secure land, developers will need to work alongside commercial organisations, as well as RSLs. Developers also thought that live/work housing might increase, although there was a degree of uncertainty surrounding the definition of this type of housing. It was believed that should road-pricing and congestion charges be introduced, there may be an increase in this type of housing.
- H.55 One participant mentioned that the local authorities might sell more of their stock due to the high maintenance costs. This could potentially decrease levels of affordable housing. One additional future change might be an increase in the speed of the planning process. This change could be reported as hope rather than an expectation.
- H.56 It was anticipated that the new communities will have an impact, which may include a reduction in travel into Exeter from areas outside. The impacts of the new communities will need to be monitored closely. In addition to the new communities, the South Devon Link Road is expected to reduce major

traffic problems in the area. There will obviously be implications for the local housing market. The issue of tourism is key to the economy of the Torbay area and there was a great degree of uncertainty regarding the future of the industry.

- H.57 The type of developments provided for the elderly population are expected to change over the next ten years. One participant suggested that assisted living and retirement villages are becoming more popular and will increasingly be built. The final expected change is that there will be greater requirements for housing provision to be sustainable. As a result many schemes will become less viable.

Economic Development Interests

- H.58 A discussion group was held with eleven representatives from Devon County Council, local authorities in Devon and from groups who had an interest in the economic development of Devon. The purpose of the group was to highlight the current economic circumstances of the Exeter and Torbay Housing Markets and to highlight ways in which they may develop in the future.

The Economy of Exeter and Torbay Housing Markets

- H.59 It was acknowledged by all participants that there were stark differences between the economies of the Exeter Housing Market (East Devon, Exeter, Mid Devon and Teignbridge) and the Torbay Housing Market. It was felt that there has been a sharp divergence between the economies of Exeter and Torbay in the last five years which had exaggerated historic differences between the areas.
- H.60 Much of the discussion focused upon Exeter being regarded as one of the economic powerhouses of the South West. The economy of the city was felt to have been growing rapidly and this was having an impact on surrounding areas. The move of the Meteorological Office from Berkshire to Exeter has given a stimulus to the city's economy. The growth of the university and other knowledge economy jobs has also boosted the economy of Exeter.
- H.61 It was suggested that there is now an imbalance between the number of jobs in the city of Exeter and the amount of housing which is available. This is having an impact upon the travel to work patterns with many workers travelling into the city each day. It was noted that only Bristol in the South West region has more workers travelling in each day than Exeter.
- H.62 Meanwhile, Torbay was felt to have a relatively weak economy which was based around service jobs, many of which were part-time or seasonal. This has led to Torbay having the second lowest value in the UK for productivity measured by Gross Value Added (GVA). However, it was also felt that potentially the economy of Torbay could benefit from the high levels of growth in Exeter by linking the areas together more effectively.
- H.63 Within the Exeter housing market it was also felt that there was a gap appearing between the city of Exeter and the other towns in the area. Most notably it was felt that many workers were living in Newton Abbot, but travelling to work into Exeter each day. This was having a serious impact on the transport infrastructure.

Future Development of the Economy

- H.64 A range of scenarios were outline for the future development of the Exeter and Torbay Housing Markets. Based upon recent trends it was felt that the GVA of Devon was likely to grow between 2.8% and 3.2% per annum, but that this would vary across the study area.
- H.65 It was felt by some participants that a divergence away from these rates of growth would have a serious impact on the sub-region. If growth were higher than predicted it was anticipated that the area would struggle to cope because of the pressure this would place on transport and housing. It was already felt by some participants that a shortage of suitable housing may be holding up economic growth. However, if growth were lower than expected it was felt that it would be difficult to alleviate some of the issues of deprivation which currently exist in the area.
- H.66 It was acknowledged that the expansion plans of the University of Exeter were likely to have a major impact on Exeter and its surrounding area. The university plans to increase its student numbers and also create a new science park. One participant anticipated that these expansion plans could lead to up to 20,000 new homes being required within the vicinity of Exeter.
- H.67 Participants felt that it was important that economic growth was not solely focused upon the city of Exeter. In particular, they felt that it was important for the economy of Torbay to experience growth. It was noted that Torbay is identified as a New Growth Point and is hoping to benefit from improved infrastructure funding.
- H.68 Participants suggested that potentially the economy of Torbay was a good place to invest due to its good environment and relatively low wages. However, the poor transport links to the area were felt to have put off many investors. Therefore, it was seen as essential to improve the communication links of the area so that it may be able to benefit from the economic growth which has been occurring in Exeter.

Linking Housing to the Economy

- H.69 Participants saw a necessity to take a holistic view of economic growth and housing provision. It was agreed that if housing provision and economic growth did not go hand in hand then imbalances would occur.
- H.70 It was noted that there were already issues of affordability in rural areas. Evidence from the South West Regional Development Agency (SWRDA) shows that knowledge economy jobs are concentrated in urban areas while more educated workers live in rural areas. It was felt that many in-migrant worker households move directly into rural areas within the Exeter housing market. This was having a major impact upon affordability for local households who were earning lower salaries.
- H.71 It was also felt that the concentration of jobs in Exeter was causing serious problems due to workers travelling further to the city because of a lack of suitable housing within the area. This was felt to be affecting the sustainability of the economic development and addressing the distances people travel to work was highlighted as being important.
- H.72 It was acknowledged that it would be difficult for Exeter to provide more housing within its local authority boundary due to available land being taken for employment, but that more housing to provide for workers in Exeter was required. On this front, it was felt that the new community at

Cranbrook will be important to provide good quality housing to those who wish to work in Exeter without them having to travel too far to work each day.

- H.73 Participants also regarded diversifying the economic growth to other areas as being important in achieving sustainability. It was felt that if transport links to Torbay and Newton Abbot could be improved then more investment could be encouraged in these areas. This would prevent large numbers of employees travelling into Exeter each day and would again reduce the amount of commuting which is taking place.

BME Focus Group

- H.74 A focus group was held with seven members of the Devon BME community in order to examine particular issues pertaining to this population group. Devon Race Equality Council assisted in recruiting focus group participants and also provided the venue. The focus group promoted in-depth discussion of key issues that could not be gathered from the quantitative aspect of this study. It was not anticipated that participants at the focus group could be representative of entire communities but attendees were from a variety of ethnic backgrounds.

- H.75 The following issues were explored during the focus group:

- Changes in the BME population demographics
- Typical housing circumstances of the BME population
- BME population housing issues
- Current housing support and information for the BME population
- Additional housing support and information for the BME population
- Future BME population changes in the area

- H.76 The findings from the group are reported on a question-by-question basis but first a brief description of the methodology is provided.

Methodology

- H.77 This sub section is not intended to provide a detailed explanation of focus group methodology, it does however provide a simple account of the nature of the focus group. An initial presentation was given to the participants, briefly explaining the housing market assessment and the issues that would be addressed during the discussion. Participants were made aware of the type of impact their comments might have which ensured a focused discussion.

- H.78 Following the presentation, participants discussed local housing issues in a round-table discussion. A facilitator from ORS guided the discussion, ensuring that key issues were addressed. However, the focus groups were relatively fluid in nature, ensuring that participants were able to explore issues of concern as they arose.

Changes in the BME Population Demographics

- H.79 Participants were asked to generalise about the changing BME population demographics. Several participants identified an increase in the entire BME population, whilst others highlighted the particular increase in the East European, Gypsy/Traveller and Mixed population. The comments are summarised in the table below.

Figure 92
Population Changes in BME Communities

Community	Significant Population Changes
Whole BME Population	The entire Devon community has changed. In the 1970s the population was almost entirely White British but now it is far more diverse. Previously, the largest BME community was Chinese and South Asian, whereas over the past five years, the largest community has been East European and Gypsies/Travellers. Over the last 15 months the BME population has increased and they are also far more visible. The increase in the BME population is approximately equal to the general increase in the Exeter population.
Black	In the last 6-7 years there has been increased visibility but not necessarily an increased population. There is more confidence – people no longer wonder where people are visiting from, they accept that they live here.
Travellers	The underlying pattern is that there is growth of about 3-5% per year. Numbers wildly differ from year to year.
Mixed Ethnicity	The ethnic minority population which is fastest growing is the mixed population.

Typical Housing Circumstances of the BME Population

- H.80 The focus group discussed typical housing circumstances of the BME population, identifying a general trend that most BME groups live in private rented accommodation. There was a perception that only a small percentage of the BME population access social rented housing. Participants put forward a number of reasons to explain how the BME population are able to access private sector housing.
- H.81 Firstly, it was suggested that a lot of Chinese and South Asian people have accommodation tied to their work. For instance they might live above a restaurant or shop, in which they work. In addition, the group agreed that a significant percentage of the East European population are in accommodation related to and located near to their work. Notably, much of the work is thought to be in food producing factories such as Lloyd Maunder. The group raised concerns that such tied accommodation can result in difficulties with housing because if the East European population have a work related dispute then they may lose their accommodation.
- H.82 One further way in which the BME population are thought to be accessing private accommodation is through joint purchasing and joint rental. Reportedly, in Devon Afghani men often live together in groups of five – six in order to afford rental or purchase prices. It appears to be very rare that this population group will access social housing, which dispels the common myth that people migrate to the area in order to gain social benefits. In fact, it is the most economically active men that will move to the area. One participant explained that this type of communal living is often how communities start. One participant explained that this method of accessing housing is similar to the process witnessed in the 1960s with many Indian men.
- H.83 Gypsies and Travellers have housing circumstances that differ to the majority of the population. The focus group participants could identify only one authorised caravan site and a number of small private family sites across the entire county. It was made very clear that there are insufficient pitches for the number of Gypsies and Travellers in the area. Moreover, the temporary accommodation which is often provided is described as inadequate. One participant made a particularly notable statement which illustrates the perceived attitude towards Gypsies and Travellers in Devon:

Devon has a zero tolerance of Gypsies and Travellers

BME Population Housing Issues

- H.84 The majority of the group discussion centred on the housing issues faced by the BME population. The issues which arose include: discrimination, a lack of housing, complicated systems/lack of information, and housing tied to work.
- H.85 Unquestionably, the most significant issue was racism/prejudice/discrimination and the impacts that this had on access to suitable housing. There was real concern about the way Local Authorities treated residents from BME communities. The group were able to provide numerous accounts of discriminatory treatment by public authorities that acted as an obstacle to people accessing suitable housing. The Devon Race Equality Council produced the Rural Racism Handbook in 2002, which found that 98% of 300 BME interviewees had faced discrimination by public services. In addition, during case work, staff at Devon REC were made aware of further discriminatory treatment.
- H.86 In particular, Gypsies and Travellers seem to be discriminated against. It is reportedly due to bigotry that there is a lack of social and private accommodation for travellers. It would seem that the Council are trying to avoid responsibility for the presence of Travellers, who are not wanted.
- H.87 In addition to perceived discriminatory practice, Local Authorities are also thought to have limited understanding of the specific needs of particular communities:

There is a lack of appropriate housing for cultural needs. For example, a Muslim family refused a privately rented home because the bathroom had just one toilet, whereas they needed two separate toilets.

- H.88 Other examples of a lack of cultural understanding were provided by the group and it was made apparent that there are insufficient homes that are equipped for different religious and cultural needs. Housing providers must understand that there are religious and cultural needs, not simply preferences.
- H.89 Generally, there is a perception that little is done because BME groups are seen as a minority. Reportedly, policies are waved about at top level but at the ground level there is no commitment to equality. Clearly this is an important issue that requires further investigation to ensure that cultural sensitivities are properly understood by all staff across the organisations.

Lack of Housing

- H.90 Whilst some of the housing issues identified by participants were particular to the BME community, many of the issues are generic across Devon. Notably, there is a lack of affordable housing in the area, which is thought to be partly attributable to the take up of right to buy. Whilst the group realised that there is an eight year waiting list in some areas, they felt that the BME population were particularly unlikely to be provided with social housing, which is why there was a belief that the BME population are over represented in the private sector. It is the mixed ethnicity population who are more likely to try to access social housing.
- H.91 More generally, there is a lack of all housing. A number of reasons were suggested for this deficit. Firstly, a lot of accommodation in Exeter is rented by the increasing student population – and respondents thought that this was a major issue that resulted in a lack of low-end private rental properties. Whilst some respondents considered students to be a key reason for the lack of housing – and clearly in some areas local households face competition for private rented housing from student households – the study analysis has identified that the recent increase in student numbers has been

accommodated by an equivalent increase in bedspaces in student halls. Despite the recent increases not having impacted on the general housing market, there may still be pressures (that probably existed before this time) which have been exacerbated by the current housing market situation – and this may warrant further research to better understand the underlying issues.

H.92 A second issue is the perception of a vast number of second homes in the area. The group were concerned that these homes were empty for the majority of the year and there are consequences for local communities. It would be more acceptable if these properties were rented out on a daily basis, relieving some of the strain on the housing market.

H.93 In addition to the perception there are a vast number of second homes, participants also suggested that as a result of the local tourist industry, in the summer many households are removed from their accommodation to allow landlords to make a greater profit. The key issue is obviously security of tenure. There is also an issue of under occupancy in the area because of the growing elderly population. It was suggested that the elderly population are occupying large family homes. There is a need to help people move out of their homes or to convert the homes, enabling the person to remain, perhaps downstairs, whilst converting the first floor into flats.

H.94 One of the consequences of a lack of housing is overcrowding in the private sector. For instance, groups of Afghani men often purchase or rent a property jointly, overcrowding the property but enabling them to find accommodation.

H.95 Inevitably in any discussion of housing issues, the group began to discuss possible solutions to the lack of housing. Respondents suggested that there was massive under occupancy of units above shops which was seen to be a source of affordable accommodation that would be suitable for young people – and whilst this was only a perception, it may warrant further investigation to establish what opportunities may exist.

Complicated Systems and Lack of Information

H.96 Several participants in the focus group recognised that applying for social rented housing is complicated, often unnecessarily. Research with the Chinese community in Devon revealed significant lack of understanding of what housing is available, how and where it can be accessed. In addition, one participant in the group, who has been living in temporary accommodation for five years, commented that the bidding system is bizarre.

H.97 There was general consensus that the complicated system must be explained more effectively:

There isn't enough information available on the process and on what accommodation is available.

H.98 This applied not only to the BME population but also the general population – and also to a certain degree to front-line staff, who often demonstrate a lack of awareness and understanding. There is clearly a need to make sure that systems and processes are properly understood at all levels of the local authority.

H.99 In particular it was suggested that there is a lack of information provision for the Gypsy/Traveller community. Reportedly, they must find everything out themselves, and attitudes towards the Gypsy/Traveller liaison officer are extremely poor.

Housing Tied to Work

- H.100 A proportion of the BME population live in housing which is tied to employment. This was raised as a key housing issue. The group were mostly concerned about the difficulties that would arise if people were to lose their jobs.
- H.101 Whilst many housing issues were raised during the focus group discussion, participants recognised that there is a large waiting list, irrespective of a person's ethnicity. The group stressed that issues must therefore be placed in perspective.

Current Housing Support and Information for the BME Population

- H.102 When asked what current housing support and information is available for the BME population the initial response was, not a great deal. Moreover, general housing and support services provided for the population as a whole are not perceived to be useful to the BME population. When probed further, the group recognised that the Race Equality Council provided important support and information. For instance £300,000 was recently secured from the Ethnic Minority Innovation Fund for three workers to specifically support the BME population in housing issues. The officers will be in place by the end of May 2007 and will provide vital information and support. The creation of these posts demonstrates the fact that there is obvious inequality in housing provision in the area. The Race Equality Council also has an officer who works closely with the Gypsy/Traveller community, providing a superb source of information and support. The efforts of this officer are extremely well respected by the Gypsy/Traveller community.
- H.103 Further to the work of Devon REC, the Exeter Homeless Action Group also supports people from BME communities. However, participants observed that the infrastructure at EHAG is not sufficient to meet the needs of the BME population. The group generally agreed that at present housing support can be provided most effectively when officers from organisations such as the REC and EHAG provide a direct link to officers at the Local Authority. This method of communication avoids all the bodies in the middle.
- H.104 One example of good support was provided. Consultation with the Chinese community involved someone from the Local Authority listening to people's housing concerns. The group emphasised the importance of listening to people's views and concerns and then acting upon them.

Additional Housing Support and Information for the BME Population

- H.105 There is a need for a general increase in all information services to all communities on housing provision:

There should be more information on what the rules are and how you go about things

- H.106 Additional information and support will be provided by the newly appointed BME housing officers, however participants were concerned that this post cannot realise its true potential unless there is a greater supply of housing. Greater support would be achieved if the Council's attitude towards the entire community was one of equality. For example, one participant was concerned that when planning authorities seek to make changes they must automatically include the BME population, they must not be an afterthought. There was a suggestion that many of the local authorities have little interest in equality issues because the majority of the population are white. Far more support and commitment are required.

H.107 Whilst participants were asked to identify additional support and information needs of the BME community, they were keen to stress that the local population and Local Authorities require information and education on cultural awareness. Reportedly, this would solve many of the issues raised above. The type of education referred to is far wider than a fun day with samosas and saris, it is about understanding diversity. Some information has already been provided in the form of a leaflet which challenges many of the myths surrounding Gypsies and Travellers.

Future BME Population Changes in the Area

H.108 The group discussed future BME population changes in the area. There is a belief that over the following ten years, Polish and Portuguese migration will have reached a peak. The most significant increase in the BME population is likely to come from BME population migration from cities outside of the south west. Further issues will arise in the future as young BME teenagers become adults and have nowhere to live.

Housing, Homelessness and Ex-Offender Service Provider Interviews

Introduction

H.109 Detailed telephone interviews were conducted with six representatives of housing, homelessness and prolific ex-offender services. The overall objective of the interviews was to gain an insight into issues pertaining to groups of the population who typically have complex housing needs. The six interviewees were representative of a range of organisations. In particular, interviewees represented different stages of service provision in the homelessness field. Nevertheless, the organisations tended to provide services in Exeter City – and whilst the interviews provide a helpful context for understanding the issues, it is important to remember that different services are provided in Torbay and, to a lesser extent, in the other districts of the sub-region.

H.110 The following issues were explored during the interviews:

- Changes in the population accessing support services
- Typical housing circumstances of people accessing services
- Current housing issues of service users
- Current housing support and information available to service users
- Additional housing support and information required for service users
- Anticipated changes in the area

H.111 The findings from the detailed telephone interviews are reported on a question-by-question basis, providing a qualitative insight into the key issues. First a brief description of the methodology is given.

Methodology

H.112 This sub section is not intended to provide a detailed explanation of telephone interview methodology, it does however provide a simple account of the nature of the interviews. Initially, the purpose of the housing market assessment was explained and interviewees were made aware of the type of impact their comments might have, ensuring a focused discussion. Participants were informed that their comments would be recorded and that anonymity would be ensured.

H.113 Interviewees were prompted to discuss the issues identified above but interviews were fluid in nature and enabled participants to freely explore the pertinent issues. All interviews were transcribed, providing the evidence base for the ensuing report.

Changes in the population accessing support services

H.114 It was raised that statutory homeless figures have gone down. However, one interviewee was keen to highlight that perhaps the same number of people are presenting as homeless but they are provided with alternatives to registering as homeless. Most interviewees believed that the total homeless population has remained fairly constant over the past ten years. Generally, the homeless population are male, as females can reportedly hold their tenancy more effectively. Moreover, there is a low BME homeless population, in keeping with general population trends in the south west.

H.115 Most of the interviewees focussed on young people in relation to the homeless population. Youth homelessness is thought to be increasing, particularly amongst those aged 15-17 years. Several reasons were suggested for this increase, namely increasing family break-up and decreasing communication amongst family members. Increasing drug and alcohol abuse amongst young people has also been cited as a cause of this increasing homeless youth population. One interviewee was keen to highlight the significance of the UK Government's attempt to downgrade the class of cannabis, making many young people believe that it was legal.

H.116 One interviewee explained that the prolific ex-offender population are typically aged 20-35, with few changes in this population over recent years. This group of the population are perceived to have fairly typical housing circumstances when accessing support services.

Typical housing circumstances of people accessing services

H.117 Interviewees made few comments regarding the typical housing circumstances of people accessing their services. One interviewee did comment on the situation of prolific ex-offenders. It was suggested that they have a limited ability to sustain a tenancy and have few life skills:

Prolific ex-offenders tend to live chaotic lives, so rarely sustain a tenancy and don't have the skills to do so. If left to their own devices, it's sofa surfing or hostels. They are mostly found in Exeter city centre.

H.118 Interviewees recognised the many different circumstances in which homeless people might live. For instance, many are sofa surfers or in temporary accommodation. However, the majority of homeless people accessing support services are thought to be rough sleepers.

Current housing issues of service users

H.119 Interviewees described many different issues pertaining to service users. The issues can broadly be divided into the following categories: lack of accommodation, inability to maintain tenancy, substance misuse, and work-related issues.

Lack of accommodation

H.120 One participant stated that for prolific ex-offenders one of the key issues is finding appropriate accommodation on their release. Generally it seems that accommodation should be provided at the earliest possible stage, which in the case of homeless people would be before they become homeless.

Interviewees very clearly stated that whilst this would be the ideal situation, there is a significant lack of appropriate accommodation in the area.

H.121 Most interviewees reported a lack of housing, particularly social housing. Several reasons were identified for this deficit. Firstly, respondents suggested that two thirds of the students at Exeter University are accommodated in the private sector and that the number of students is increasing. In fact, one participant remarked:

If the university closed tomorrow there would be no housing crisis.

H.122 Nevertheless, as previously noted within the feedback from BME communities, analysis of student pressures suggest that there has been no significant increase following recent expansions at the University. Insofar as this issue has been raised again in this context, it is clear that local perceptions are that students are responsible for housing problems in the sub-region (and in Exeter city in particular) – which underwrites the suggestion that further research may be necessary to properly understand the student housing dynamic.

H.123 Secondly, increasing house prices have meant that people who traditionally would have bought a home, now rent, whilst those who rented now cannot afford anything. This has placed a significant strain on the availability of social rented housing. Thirdly, there has been a recent increase in the number of people buying properties and renting them. People increasingly see housing as their pension. However, these new landlords are inexperienced and are unwilling to rent properties to people with chaotic lifestyles, such as ex-offenders or homeless people.

H.124 Service users are faced with the dilemma of a lack of social rented housing and an inability to afford or gain access to private rented properties. One interviewee identified a clear intermediate housing need, which would reduce current housing waiting lists and prevent many people from becoming homeless. One participant also raised a particular concern regarding the lack of housing provision for people entering from outside the area.

Inability to maintain tenancy

H.125 Most interviewees commented that service users are often unable to maintain a tenancy. One reason for this problem is that service users often have mental health, drug, or alcohol issues and have limited life skills so they fail to pay their rent or are involved in disputes and have their tenancy ended. Many service users have received little schooling and little real life experience so they develop coping strategies which are inadequate. One interviewee suggested that young people often get accommodation too early and they don't have the life skills so they lose their accommodation. The issue of sustaining tenancy must be addressed.

Substance misuse

H.126 Almost without exception there are substance misuse issues amongst prolific ex-offenders. Furthermore, according to interviewees, substance misuse issues are central to many of the problems faced by homeless people. Many housing providers will not accept current drug users, hence the availability of accommodation is limited. There are shelters and accommodation that specifically cater for active drug users but there are limited spaces in these.

H.127 One interviewee was particularly concerned about the role of Housing Associations as they reportedly fail to accommodate those who they were intended to cater for, including drug users and people

addicted to alcohol. Increasingly, service users are using cocaine, rather than cannabis. Consequently, the actions of users are less predictable and can lead to additional social problems and even less likelihood of housing provision.

Work-related issues

H.128 Most service users are unable to find or maintain employment. Interviewees suggested that one reason for this is that there are few apprenticeships currently available and there are generally few employment opportunities. It was suggested that many low paid jobs have now been filled by Eastern Europeans. Whilst lack of employment opportunities is clearly a cause of low levels of employment, many service users are also apathetic towards work:

Many of the service users are anti-society and aren't willing to work for minimum wage etc. A lot of our work is in challenging their perceptions.

H.129 As a consequence of limited employment opportunities and often a lack of desire to work, service users cannot afford to rent accommodation and are entirely reliant on social support. This burden could be relieved if the issue of employment was addressed.

Current housing support and information available to service users

H.130 At present a large volume of support and information is available to service users in Exeter city. In particular interviewees discussed the wide array of Exeter-based organisations who are directly involved in supporting the homeless population. The following diagram identifies the key homelessness organisations and summarises their dominant activities.

Figure 93
Summary of Key Homelessness Services and Service Providers in Exeter

Service Provider	Key services
Housing and Citizen's Advice	<i>Advice</i>
Shelter	<i>Advice</i>
Big Issue	<i>Employment</i>
Clock Tower	<i>Healthcare</i>
EHAG	<i>Various</i>
YMCA	<i>Accommodation/ advice/ support</i>
Shilhay Community Ltd.	<i>Hostels</i>
St. Petrocs	<i>Day centre</i>
SHOT	<i>Street out-reach</i>

^{H.131} The numerous organisations named above provide significant support and information to homeless people in Exeter. The services can be classified as: i) advice, information and signposting, ii) accommodation provision, iii) move-on services, iv) employment and healthcare support, and v) multi-agency support.

Advice, information and signposting

- ^{H.132} Most organisations offering support to homeless people, even those whose main focus is on accommodation provision, will provide at least some information and advice. This ensures the availability of advice and information, irrespective of the stage at which a person chooses to access services. Advice is available on a huge variety of issues, including drug and alcohol addiction, life skills, healthy lifestyles and accessing housing. One interviewee commented that not all advice and information service providers are accessed equally. For example, most people will not bother to go directly to Local Authorities because there is a perception that if they are not in priority need, the Local Authority is not obliged to house them. Information and advice is also provided for school children. For instance, St Petrocs provides a five-lesson plan for PSHE lessons in order to prevent homelessness.
- ^{H.133} One of the key roles of all organisations is to provide appropriate signposting. Most organisations seem to be well aware of the services offered by other homeless organisations and consequently there appears to be an effective referral system. For example, the street outreach team (SHOT) finds people who are sleeping on the streets and carries out an initial assessment, signposting them to organisations such as St Petrocs where appropriate. Homelessness organisations also refer people to more specialised service providers. For example, the YMCA will direct young people with issues of drug addiction to Exeter Drugs Project. Equally, people might be referred to education providers such as Exeter College.

Accommodation provision

- ^{H.134} Many of the homelessness organisations provide some form of accommodation support. The types of accommodation vary in levels of permanence and associated support. For instance, St Petrocs provides a day centre which only offers a shower and food, whilst Shilhay hostel offers a 40-bed hostel for men, as well as 2-3 houses which offer a greater degree of independence. One of the more recently introduced accommodation schemes is Night Stop, initiated by EHAG. This project provides short-term housing for young people for up to five nights, until appropriate accommodation is found or an issue at home is resolved.

Move-on services

- ^{H.135} Support is also available to enable people to move on through the accommodation system. For instance, EHAG provide smart move and rent deposit schemes. One of the key problems for many people who wish to move on from supported or social rented accommodation is finding the necessary capital to pay a private rental deposit. EHAG provide this deposit, therefore making it possible for a person to rent accommodation.
- ^{H.136} An additional move-on scheme is provided by Shilhay Community. Much of their work is with single men who are not classed as a priority according to the Local Authority choice-based lettings scheme. However, if these men are placed in Shilhay move-on houses, when they apply for local authority housing they are made a priority. By facilitating the progression of people through the housing system, potential log-jams are avoided.

Employment and healthcare support

- ^{H.137} In order to increase service user prospects of gaining employment, several homelessness organisations provide education and training. One project example is the meaningful occupation project which offers training and various activities of interest. According to one participant, what is important about this

project is the process of attending classes between set hours, rather than the actual skills that are learnt. The project prepares participants for the routine associated with most occupations. Other employment schemes actually provide work place experience. One final example of employment support in the area is the Big Issue, which is a UK-wide employer of homeless people. Employment is significant not only because it enables people to pay rental costs but it has social and psychological impacts that may increase the likelihood of maintained tenancy.

H.138 Organisations also provide healthcare support. The most notable of these is the Clock tower medical centre, where vulnerably housed people can sign up with a GP and enter the NHS. It is important that this type of necessary support is provided alongside any housing provision.

Multi-agency support

H.139 The majority of interviewees commented on the need for homelessness organisations to work together, often in partnership:

It's about working closely with voluntary agencies and all singing from the same hymn sheet.

H.140 It seems that in Exeter, homeless organisations are beginning to communicate and work together, whereas in the past they have worked mostly in silos. Joint protocols are now being devised and there is an officer whose remit is specifically to encourage this joined-up approach. One example of this approach is that district and unitary councils across Devon jointly fund a post for preventing homelessness.

H.141 Furthermore, the prolific offender unit adopts a multi-agency approach, providing access to a probation officer, drugs services, training and PORCH, who provide accommodation. This has been referred to as a holistic approach. One interviewee remarked that at the moment agencies work together well. A joined-up approach is vital to overcoming the many housing and related issues faced by homeless people in the area.

Additional housing support and information required for service users

H.142 Whilst a range of information and support exists to service users, interviewees were still able to identify many additional information and support needs. These additional needs are classified as: i) information and specific service provision, ii) rationalisation of services, and iii) sufficient appropriate accommodation.

Information and specific service provision

H.143 Generally, there was a feeling that the local authority housing process is complex to negotiate so information on how the process works would be beneficial. Reportedly, the process is not clearly explained. One interviewee discussed plans for a street document which would direct rough sleepers in Exeter city to appropriate support. In particular there is thought to be limited housing-related information available to prolific ex-offenders when they leave prison and move to outlying areas. It was recognised that there is a significant amount of information for ex-offenders when they are in prison and when they leave there is provision in the city of Exeter.

H.144 There was a desire for more mental health support services. Presently, organisations such as St Petrocks are only capable of providing mental health support if it is crisis resolution. There is a desire to offer more drop in sessions on mental health, as this is a significant problem amongst homeless people.

H.145 Another specific service need is mediation, particularly between young people and their families. Mediation might not enable young people to remain in the family home but it will maintain essential links with the family. The provision of additional services in the area is thought to be essential:

We must have mediation. I don't think it has happened in Exeter. Maybe we should first look to mediate and keep the strong family links. Sadly parents seem to be shirking responsibility.

H.146 According to one interviewee, job centre support has worsened since the system has been altered. Face-to-face contact has been reduced to the detriment of the service user. There is a need for support and information to be provided face-to-face.

Rationalisation of services

H.147 A considerable amount of funding for homelessness support services comes from Supporting People and recently the project budget has been cut. The uncertainty surrounding the continuation of funding led several interviewees to discuss service rationalisation and efficiency. Moreover, the benefits of more efficient working were highlighted. Currently service and client audits are being completed with homeless people in Exeter in order to help shape future services.

H.148 The most commonly cited potential service change is a proposed one-stop shop which would house all homelessness organisations. Currently, many services are only available between 9am and 5pm on weekdays, whereas a one-stop shop would allow resources to be shared and services made available outside of these hours and at weekends. The proposed one-stop shop would reduce confusion and reduce the number of assessments that need to be carried out. Service providers are fearful over rationalising services because it might result in loss of jobs. However, one interviewee recommended that homelessness service providers should strive to make their jobs redundant by reducing homelessness.

Sufficient appropriate accommodation

H.149 In addition to further information provision and the rationalisation of services, interviewees stressed the need for additional accommodation. Organisations are beginning to discuss ways of providing accommodation which is not available in the current overstretched system. For instance, Shilhay community own several houses which are not funded by Supporting People, so service users are not required to move on within the statutory two years requirement. This organisation has proposed purchasing flats which can be occupied by service users who need minimal support. At present the market does not cater for people in this situation.

H.150 There is also a proposed alternative housing model which will provide affordable housing in Exeter. The housing would be owned by a trust and will be spread across Exeter, rather than creating a ghetto of affordable housing. The model is currently in its infancy but replicates similar work being carried out elsewhere in the UK.

Anticipated changes in the area

H.151 Interviewees discussed possible future conditions in the study area. These anticipated changes should be taken into account in forthcoming service planning. The anticipated changes have been classified as: i) population changes, ii) social issues, iii) housing provision.

Population changes

H.152 The interviewees were aware that in general there is an increasing population in the study area, many of whom are elderly. This is anticipated to continue and should be recognised in housing provision. There is also reportedly an increasing BME population, with many Eastern Europeans migrating to the area. There is seemingly a need to understand and accommodate their specific needs.

H.153 With regard to specific changes in the homeless population, one interviewee proposed that there will be more young people in the following ten years. One reason for this likely increase is that the large number of currently homeless young people have not received guidance and do not have the life skills to pass on to their own children.

Social issues

H.154 Supposedly, five years ago there were fewer alcohol related problems in the area. The attempt to transpose continental ideas of 24-hour drinking to the UK might be exacerbating the problems. As a result, it is expected that in the following years there will be an increase in health and behavioural problems. Alcohol and drug related problems are expected to result in continued high levels of family break up and therefore continued high levels of homelessness amongst young people. Interviewees also remarked that lack of motivation amongst young people will become a serious issue, preventing them from accessing employment.

H.155 There was some uncertainty regarding the likely key social issues over the next ten years. Whilst drugs are a key issue at present, it is thought by some that the drug cycle might break and something else will replace it. One interviewee hypothesised that alcohol addiction might become more of an issue. It is important to recognise that social issues cannot be removed from general housing issues – the two are inextricably linked.

Changes in housing provision

H.156 There are several anticipated changes in housing provision. Firstly, more shared ownership schemes are expected in order to bridge the gap between incomes and house prices. Secondly, there is an expectation that more family housing will need to be built as there is a perceived deficit in this housing type. Finally, there is an expectation that greater demands will be made for eco-friendly accommodation. It was predicted that more eco-friendly homes would reduce outgoings and make homes more affordable. These would be particularly appropriate for the low-income population.

Health and Support Service Provider Interviews

Introduction

H.157 Detailed telephone interviews were conducted with five representatives of health and support service providers. The overall objective of the interviews was to gain an insight into issues pertaining to groups of the population who are likely to have complex housing needs. The five interviewees were representative of a range of organisations. For instance, interviewees represented mental health, physical disability, drug and alcohol, and general support services. Significantly, many of the interviewees were able to give informed opinions on more than one service area due to the overlapping nature of many of these services.

H.158 The following issues were explored during the interviews:

- Changes in the population accessing health support services
- Typical housing circumstances of people accessing health support services
- Current housing issues of service users
- Current housing support and information available to service users
- Additional housing support and information required for service users
- Anticipated changes in the area

H.159 The findings from the detailed telephone interviews are reported on a question-by-question basis, providing a qualitative insight into the key issues. First a brief description of the methodology is given.

Methodology

H.160 This sub section is not intended to provide a detailed explanation of telephone interview methodology, it does however provide a simple account of the nature of the interviews. Initially, the purpose of the housing market assessment was explained and interviewees were made aware of the type of impact their comments might have, ensuring a focused discussion. Participants were informed that their comments would be recorded and that anonymity would be ensured.

H.161 Interviewees were prompted to discuss the issues identified above but interviews were fluid in nature and enabled participants to freely explore the pertinent issues. All interviews were transcribed, providing the evidence base for the ensuing report.

Changes in the population accessing health support services

H.162 Since 2003 there has been significant change in where people access health support. Supporting People projects now offer support to people in a wide mix of tenures. Prior to 2003 health service support was accommodation-based, which required people to move out of their homes in order to receive support. People living in general needs accommodation now get more support, therefore maintaining their independence. One interviewee commented:

*The idea that someone should have to move out in order receive support service is ridiculous.
Housing support should be about independence.*

H.163 Interviewees highlighted several changes in the population accessing particular services. The most pertinent change with regards to mental health service users is that a greater percentage has severe requirements. Furthermore, there is an ageing population in the area which has resulted in increasing need for mental health support. Reportedly, mental health service users lose the support of carers and friends earlier than those with learning or physical disabilities. The number of people accessing physical disability services does not appear to have increased, despite an ageing population.

H.164 Over the past five years the number of people accessing drug addiction services has increased in Devon but this may reflect increased funding and greater ability to make provisions. Also, the population accessing these services is becoming older and are mostly aged 25-40 years. Approximately one third of people accessing the services are female. Whilst people do use particular services, increasingly people are accessing services with more than one health issue. This increasingly demands service providers to work in partnership.

Typical housing circumstances of people accessing health support services

H.165 Few generalisations were made about the typical housing circumstances of people accessing health support services. However, one interviewee did explain that generally, people accessing mental health services are in social rented accommodation. Furthermore, many people who access drug and alcohol services are homeless, or of no fixed abode.

Current housing issues of service users

H.166 Several key housing issues were discussed and have been classified as: i) lack of appropriate accommodation, ii) inability to maintain tenancy, iii) lack of support, and iv) inappropriate support systems. These are explored below.

Lack of appropriate accommodation

H.167 There are purportedly difficulties in accessing appropriate housing for many drug users because landlords worry about drug users using the drugs on their premises. There appears to be a requirement for greater understanding of the needs of these people and greater housing provision. There is also considered to be a lack of appropriate accommodation for people who are considered to be a threat to the community. In some areas the Home Office funds direct housing provision but this is not available in areas such as Torbay. People with learning and physical disabilities are also lacking in appropriate accommodation. For instance, there is not enough accommodation which is accessible to wheelchair users in some Local Authorities. Equally, other Local Authorities have an excess. According to interviewees, people with physical disabilities often have to leave Torbay in order to access the necessary services.

H.168 Whilst there is apparently a wide range of accommodation available to people with mental health service requirements, there isn't enough of it. Respondents reported that many people have to move from Mid Devon and East Devon to Exeter City as this is where many of the services are concentrated. It was also noted that some move to North Devon in order to access the necessary support – though this would presumably be mainly those living towards the north of the sub-region.

H.169 Respondents noted that there is a particular deficit in a mix of appropriate housing for high need mental health service users. This might involve providing blocks of accommodation for 6-7 people, or independent housing. There is a tendency to group people with support needs together but one interviewee sought to demonstrate the need for more floating support, allowing service users to remain in their own homes, often with adaptations to the property.

Inability to maintain tenancy

H.170 In general, mental health service users have difficulties in maintaining their tenancy. Limited life skills and an inability to sustain relationships with neighbours often result in tenancy being ended. There is a lack of support from service providers, family and friends, at the necessary time, which would enable service users to remain in their accommodation. Lack of employment and consequent dependence on social benefits, makes rental payments difficult and consequently tenancy is frequently lost. Allegedly, younger males have particular difficulties in maintaining a tenancy, normally because they are taking drugs or drinking alcohol.

Lack of support

H.171 The majority of interviewees discussed the lack of support which is available to health support service users. It was suggested that there is difficulty in getting care staff and in particular there are very few specialist providers of care. There is limited capacity and training for staff who deal with people addicted to drugs and alcohol, particularly ex-offenders. This may be because there is a perception that those people who access drug and alcohol support services are intentionally homeless when they are not. Exeter DAAT is working with the Local Authority in order to change the way that these service users are perceived and to raise their housing priority level. Also, one of the roles of floating support staff is to re-educate some of the housing advice workers who deal with drug and alcohol service users.

Inappropriate support systems

H.172 There appears to be significant concern regarding the housing support systems which are currently in place for assisting people with health issues. Firstly, there are concerns about the duration of support services. At present, support is provided for two years for many service users. However, there is a lack of clarity whether support for older people should continue past that period and for some service users the service requirement might be for a much shorter period of time. Consequently, there is thought to be a need to challenge the expectation that because a person is ill they will get housing related support services.

H.173 Currently, Supporting People service assessments are carried out separately from other assessments. This multitude of assessments is inconsistent across Devon and appears to be an inefficient use of resources. There is a need to develop a consistent assessment and support framework:

Supporting People and social services provide housing related support but they are called different things. The challenge is to bring these similar services together and find similar terminologies and create a constant framework from care to enabling. It needs an integrated process.

H.174 Inconsistencies are also evident in the ways that information is collected across the different supporting services. A unified approach to information collection would ensure more targeted service provision.

H.175 One interviewee was particularly concerned with the current move-on approach to the service user. There was a suggestion that support should move to the service user, enabling them to stay in their present accommodation. This does not detract from the fact that there is also a need for some specialist support accommodation.

H.176 One key criticism was of the Housing Corporation. One interviewee commented that their approach to supported units does not cater for floating support, which is the preferred model of support. Reportedly, many RSLs would prefer to adopt the floating support system, avoiding ghettos of supported housing, which are common under the current system. Significantly, the floating support system would encourage more sustainable communities.

Current housing support and information available to service users

H.177 Interviewees discussed many housing issues particular to health service users but they also described a wide range support and information which is available to address these issues. This support and information can be classified as: i) joined-up working, ii) floating support, iii) support schemes, and iii) information provision.

Joined-up working

H.178 Several interviewees commented on the importance of joined-up working in the provision of housing support for health service users. For instance, there exists a steering group on accommodation and support for people with mental health needs in Devon. The steering group incorporates organisations such as Devon Partnership Trust and Devon Supporting People but there is no similar partnership in Torbay. One interviewee commented that an integrated approach is required. In fact, in Devon a pilot programme is in operation where service users will be assessed for housing support at the same time as their assessment for health and social care services.

H.179 Joined-up working is also taking place on the front-line of healthcare provision. For example, people with physical disabilities are being provided with a wide range of cross-organisational support in their homes. Many physical disability service users require adaptations to their homes in order to enable them to continue living there. In Devon there exists a specialist manager to ensure that these adaptations are provided.

Floating support

Floating support seems to be the key!

H.180 In the past, the access to housing related support was provided by housing advice teams in Council offices. Today there is a growing movement towards floating support, which purportedly places the customer first and reduces the need for temporary accommodation. There is a general desire for people to access support where they are, which relates strongly to the approach to lifetime homes. Interviewees still acknowledge that there is a role for some specialist support accommodation for those with higher service needs.

Support schemes

H.181 There are numerous specific support schemes in place, some of which were discussed by interviewees as examples of good practice in support provision. In particular, direct and self-directed payments are thought to have improved housing-related support in the area. Direct payments ensure significant independence and allow the service user to tailor their care to their specific needs. Self-directed payments provide an even higher level of independence as service users can spend the money on whatever housing support they choose. There are concerns that the Government might increase this independence further and allow the money to be spent on all support needs. This could result in service users reducing their spending on housing related support and therefore facing difficulties with their housing.

H.182 With regard to housing support for older people, extra care schemes are becoming increasingly popular. These schemes provide a number of necessary facilities in one location. Rather than developing new buildings there are proposals to convert current sheltered accommodation into extra care accommodation. A final support scheme which was highlighted is telecare. This technology provides service users with necessary support and avoids reliance on the limited number of staff. There has recently been a grant awarded to fund telecare provision for people with physical disabilities.

Information provision

H.183 Basic information on housing support is available to mental health service users in the form of leaflets. Supposedly RSLs provide good literature but there isn't an overall guide. Other information is available

on the Supporting People website and there is an accommodation directory. The Supporting People directory is useful to service users but it is a national directory of all Supporting People services and is not designed for service users. Service providers are expected to understand the content of the site and provide service users with the necessary information. However, there is a recognition that information needs to be made more explicit.

H.184 A recurring concern amongst interviewees is how to provide information to service users. It was suggested that a service hub, sometimes termed a one-stop shop, would be appropriate. In Devon, service users can now access all relevant information by making one phone call. Reportedly, this will also be available in Torbay in July. It should be noted that the provision of information for service users in Devon has been commended in a recent service audit, particularly in the case of people with physical disabilities. This information is enabling people to live independently.

H.185 There is clearly scope for further work for improving the consistency and availability of information that is produced for service users – and making sure that this is developed in a manner that is easily understandable to those people to whom it is targeted.

Additional housing support and information required for service users

H.186 Interviewees clearly have a perception that some housing support and information is being adequately provided for service users. However, interviewees also provided opinions on the areas where further services and information are required.

H.187 The service hub in South Devon and the independent living centre in Exeter were described as not fit for purpose. This contradicts positive comments made regarding these services in the section above. Obviously the information provided in these centres is limited and perhaps needs to be resourced more effectively. In addition to improvements to the service hub, there is thought to be a need for greater investment in extra care homes, although it was recognised that some investment is currently taking place.

H.188 Purportedly, people need to be made more aware of their housing rights, enabling them to seek help before their housing related problems become too significant. According to some participants, service providers also require further information and training as they can act as a barrier to housing support. Consequently, local authorities should be made more aware of the housing needs of different client groups. One interviewee would like to see intentional homelessness defined, as the current lack of clarity is perceived to have consequences for drug and alcohol service users, who are frequently labelled under this term.

Anticipated changes in the area

H.189 Participants were asked to provide an insight into likely changes in the local area that might have housing related impacts. Overwhelmingly, it was made apparent that care will increasingly be made available in the homes of service users. There will be an improved quality of provision of floating support. There is a thrust to being more proactive and encouraging independence. Purportedly, this will be achieved by investing in provision in rural areas, decreasing the drift towards urban centres. Also, increasing use of telecare and the availability of mortgages for people with physical disabilities will certainly enable people to live independently in their own homes. The provision of support and information is increasingly expected to be made available through a partnership approach. This may be a result of possible need for efficiency savings, with likely reduction in the Supporting People funds.

One interviewee suggested that in Torbay service provision will become more centralised, with greater collaboration with Devon County Council.

^{H.190} It is also expected that the population demographics will change. There may be increases in the percentages of older people and young people with high incomes. There is also an expectation that the number of disaffected youths will increase, which may be triggered by growing drug usage.

^{H.191} Finally, it was highlighted that the housing corporation has an important role to play in shaping the housing market. There are supporting care villages in Bristol, whereas at the moment there is a scattered community of service users across Devon. Care villages would not be consistent with the anticipated increase in floating support.