

Basildon Borough Housing Needs Review 2015

A report to Basildon Borough Council

November 2015

1 Executive summary

Survey analysis

The survey achieved a good response with 2,248 completed questionnaires, above the required minimum of 2,174. As is common with this type of postal survey, responses were received from an above average proportion of people in older age groups. For most analysis purposes the data were therefore weighted to more accurately reflect the age profile of the 'Household Reference Person' as described in census data.

- **Household composition and residence:** half the households represented in the survey were formed of couples, including 35% with dependent children. Another 28% were single adults who were more likely to be from older age groups. Half the sample had lived in their current home for at least ten years and only 14% were recent residents of two years or less.
- **Property size and under occupation:** three bedrooms was the most prevalent size of property (42%) with approximately 20% having each of two or four bedrooms. Apparent under occupation increases with the size of the property: in two bed homes 67% use both as bedrooms but where there are four bedrooms only 26% use them all as bedrooms.
- **Household composition and residence:** half the households represented in the survey were formed of couples, including 35% with dependent children. Another 28% were single adults who were more likely to be from older age groups. Half the sample had lived in their current home for at least ten years and only 14% were recent residents of two years or less.
- **Property size and under occupation:** three bedrooms was the most prevalent size of property (42%) with approximately 20% having each of two or four bedrooms. Apparent under occupation increases with the size of the property: in two bed homes 67% use both as bedrooms but where there are four bedrooms only 26% use them all as bedrooms.
- **Condition of property:** Two out of three think their home is in good condition and only 3% say poor. Those in rented accommodation are more likely to say 'poor' – around 10% compared with only 1% of homeowners.
- **Fuel poverty:** currently 16% spend more than 10% of their income on fuel with a further 15% spending close to that figure. People in rented accommodation are twice as likely as homeowners to be in fuel poverty.
- **Vehicle ownership and parking:** Some 87% of households had at least one vehicle which was used by household members. The most frequent option for parking was their own driveway but this was less likely for tenants, especially Council tenants.
- **Opinions of the local neighbourhood:** in relation to local shopping facilities, schools, local transport links and healthcare facilities views are very similar with about two out of three people rating each as 'very good' or 'good' and only small percentages saying 'poor' or 'very poor'. There is more criticism of the general upkeep and maintenance of the area and 21% describe it as 'poor'

or ‘very poor’ compared with only 10% who say ‘very good’. Those living in Crouch ward seem to feel their facilities are relatively poor but they do give a slightly above average rating for general upkeep.

- **Disability, ill health and household adaptations:** overall one in five households include someone with a disability or long term limiting health problem. This is much more likely amongst older age groups. More than 40% of these households already have some adaptations to increase access or mobility and 10% of the total sample (including some who are not currently disabled or in ill health) think they may need adaptations in the future. Stair lifts, handrails and accessible bathroom and toilet facilities are the most likely requirements.
- **Employment and benefits:** 58% of all the adults within households in the sample are currently in work, mostly full time. This rises to 70% if we only consider adults of working age. There are a small number of adults over retirement age who are working. In terms of households, 60% are economically active, 25% are retired and 11% economically inactive. More than half, 57%, of households taking part are in receipt of one or more benefits. Most likely is the state pension at 24%.
- **Monthly rent and mortgage payments:** average monthly mortgage payments ranged from £419 for a one bed property to £916 for one with four beds. Social rent payments went from £249 to £441 and rents charged by private landlords were the highest of all, at £573 to £1,103 for one to four bed homes.
- **Likelihood of households moving:** As many as 20% think they may move in the next two years with 11% thinking it ‘very’ and 9% ‘fairly’ likely. Younger people have a higher propensity to move, as do those living in privately rented accommodation, where 55% think a move is likely. Important reasons for moving are: to obtain a larger property (mainly couples with and without children and aged under 50), to move to another area, to reduce housing costs or to obtain a smaller property. Those looking to downsize are typically single adults or couples over 50 years of age, living in properties with three or four bedrooms.
- **New households:** in addition, 9% of households said it was likely that someone would move out to form a new household in the next two years. These were typically young adults becoming independent of the family home or people marrying or moving in with a partner.
- **Moving households, preferred size:** where existing households were moving they would most likely look to obtain two or three bedrooms but new households being created generally wanted something a little smaller, one to two bedrooms.
- **Moving households, preference and expectation for type of property:** amongst existing households moving there is a strong preference for detached or semi detached houses although expectation is moderated slightly to include more terraced properties. Whilst many of the newly forming household express some preference for a house, their most likely choice would be a flat. But some of them do expect to need to ‘trade down’ to a flat from the detached or semi detached that they might like. Where a bungalow or sheltered accommodation is preferred most people seem confident of being able to obtain what they would like.

- **Moving households, preference and expectation for tenure of property:** where existing households are to move there is a strong preference for buying a property and, although expectation shows some shift to buying with a mortgage rather than outright, most potential buyers seem confident of being able to achieve purchase. New households are also most likely to expect that they will buy. The major difference between preference and expectation is found in relation to renting in the private sector; it is the choice of only 3% but three times that number expect that it will be the option open to them. This is particularly true of new households for whom purchase may not be possible.
- **Social housing, preference and expectation:** there is strong demand for Council housing at almost one in four of both existing and new households. Those already in social housing and with lower incomes are most likely to express this preference. Only 10% of existing households moving and 7% of new ones are currently on the Homesearchers Register.
- **Moving preference, location of new home:** both new and existing movers express a strong preference for remaining in Basildon (57%) or elsewhere in Essex (33%). Only a few seem keen to move further afield and this is as true of younger residents as older ones. Overall, Billericay and Wickford would be the most favoured locations
- **Movers financial considerations:** potential movers have a wide range of income levels although the highest concentration is below £26,000 pa. New households will tend to have lower incomes than existing ones. Existing households looking to buy would most favour the range £250,000 to £400,000 but for new households the likely maximum for the majority of them would be £250,000. Expected rent levels seem low for the area, although many people referred to social rents which may partly explain this. Where people want to rent from the Council, 60% give £500 as their maximum payment. This pushed a little higher for Housing Associations and slightly higher again for private rents but no-one feels they can pay more than £1,200 per month for any type or tenure.

Analysis of secondary data

In order to give some context to the findings of the survey, we used secondary data to analyse the wider housing, demographic, economic and social characteristics of Basildon BC. In doing this we were aware of the parallel work being done as part of the Thames Gateway South Essex Strategic Housing Market Assessment, and were careful to avoid 'second guessing' their findings around housing market issues.

- **Population change and growth:** internal migration from within the UK has been an important factor in population growth in Basildon BC since 2010, now running at a similar level to natural growth. This indicates a need for additional dwellings. The proportion of older age groups is expected to increase over the period until 2037, especially the proportion of over 90's with the proportion of the population in working age groups reducing by five percentage points.
- **Economic factors:** economic activity rates (82%) in Basildon BC compare favourably against most neighbours, east region and Great Britain averages. Most jobs are concentrated in the middle of the skills spectrum (administrative / secretarial/ skilled manual / service and sales sectors) with a parallel middle

level of educational achievements (concentrated around the NVQ1 level). There are higher proportions in the manufacturing, construction, wholesale, retail and motor trades sectors. People working in Basildon have rates of pay around the regional average and slightly higher than neighbouring authorities; but pay levels of those living in Basildon and commuting to work elsewhere were around 1.5 times higher.

- **Deprivation:** deprivation is a localised issue in parts of Basildon BC, with 11% of neighbourhoods among the most deprived in the country. The position has deteriorated since 2010
- **Housing market:** the authority has similar levels of home ownership to the national average but lower proportions of private renting and higher levels of social renting. House prices have risen steadily, 2015 seeing a 12% increase. Volumes of sales have increased to pre-2007 levels, but affordability ratios have worsened (lower quartile prices now thirteen times lower quartile earnings)
- **Housing needs:** the Homeseeker's register currently holds around 1,735 applicants, after revised access criteria was issued in 2014. These include 302 homeless and 404 transfer applicants. Overcrowding is 4% higher than the regional average, and is most intense in the social rented sector. Under-occupation is more of an issue in the owner-occupier sector, and to some extent in the private rented sector. The Census 2011 identified 716 concealed households (excluding single person households who may wish to move out). Although homelessness applications and acceptances rose after 2010, most recent figures for 2015-16 show significant reductions, and numbers in temporary accommodation have fallen in parallel.
- **Empty and second homes:** 1.89% of stock is recorded on the Council Tax register as empty (1,443 homes), with 357 having lain empty for over six months, and the majority, 1086, empty for under six months
- **Lettings:** between half and two thirds social sector lettings are to new tenants, with the remainder going to transfers. While lone parents and couples with children form a substantial proportion of lettings, lettings to single older people are also significant reflecting greater supply of units in sheltered accommodation.
- **Older people's housing;** housing with support forms the majority of supply for older people, with 87% of the supply being for rent (well above county average). In the housing with care sub-sector a lower proportion (61%) is for rent. All told Basildon BC is well-provided with older people's housing, but the dominant product of supported housing for rent does not reflect emerging tenure patterns for older people.
- **Health and disability:** the authority has similar levels of good, average and poor health to the regional and national averages, as are the proportions reporting limiting health or disability problems.

2 Introduction

Basildon Borough Council commissioned Cobweb Consulting to carry out an independent Borough-wide Housing Needs Review in June 2015

The Review's objectives were:

- To assist in the strategic planning for future housing needs by informing the development of priorities and Action Plans of the emerging Basildon Borough Integrated Housing Strategy 2015-2020
- To assist the council in providing new housing stock of different tenures responsive to the diversity of the Borough's general and specific household needs
- To help ensure that all the Council's Housing, Allocations, Affordable Rent, Homelessness, Private Sector, Fuel Poverty and Planning strategies and other operational initiatives are sufficiently robust and responsive to local circumstances and needs

In parallel with this review, the Council, as part of the Thames Gateway South Essex Housing Market Area commissioned an update of the Strategic Housing Market Assessment, as well as additional work on Affordable Housing policies. The Housing Needs Review is designed to complement these other two pieces of work, and draw on them where appropriate.

We would like to acknowledge the help and assistance given by the Steering Group, particularly Tina Wynn, our main client contact, and Lisa Richardson.

This report is written by Danny Friedman, Ros Grimes and Philip Leather

Cobweb Consulting

3 Methodology

We adopted a two-stage approach to undertaking the review:

- **A postal sample survey of residents** (including an option to complete the survey via a web link)
- **Analysis of secondary data**, including administrative data held by Basildon and other national and County held datasets

3.1 Postal sample survey and web survey

We undertook a two stage postal sample survey. The Borough aimed for +/- 2.07% statistical accuracy at a 95% confidence level. That is, for example, there would be a 95% chance that a question to which 45% of the sample answered 'yes' between 43% and 47% of all residents would also have answered 'yes'. This would require 2,174 responses at least. An initial mailing of 14,500 was followed up with a smaller mailing of 4,200, to boost responses in wards that were under-represented. In the event, 2,248 responses were achieved including 102 via a web version.

The samples were drawn at random from the authority's AddressBase and each household received a questionnaire (agreed with the client), a covering explanatory letter with details where further information and help could be obtained (and how to access the web version) and a pre-paid return envelope. The survey was publicised through the Council website and in newsletters.

An incentive, a prize draw with prizes of £100 and two of £50, was offered to encourage responses

The paper questionnaires were returned to the Cobweb Consulting offices where they were input into Excel (and the web version downloaded into Excel) and subsequently exported to a statistical analytical package, where the analysis was done. Web-based responses were directly downloaded into the analysis framework. Open-ended responses were coded.

3.2 Secondary data analysis

Two types of secondary data were analysed: administrative data held by Basildon BC, including data related to the housing register (Homeseeker's Register), homelessness, housing benefit and supported housing. We also had reference to demographic data gathered as part of the Thames Gateway South Essex SHMA refresh, currently underway.

We also analysed a range of data from central government and nationally-held sources, including DCLG Live Tables, Census 2011, Annual Survey of Hours and Earnings, and the CORE database, covering social housing lettings.

4 Detailed findings from the survey

The final total for the survey was 2248 completed questionnaires. The majority of responses were from the paper questionnaires with 102 from the web version. The breakdown achieved by ward is shown in this table

Table 4.1 Sample by ward			
	%		%
Billericay East	7	Nethermayne	6
Billericay West	9	Pitsea North West	6
Burstead	7	Pitsea South East	5
Crouch	4	St Martin's	5
Fryerns	6	Vange	5
Landon Park	6	Wickford Castledon	5
Langdon Hills	6	Wickford North	7
Lee Chapel North	6	Wickford Park	4

Base: all respondents (2248)

The sample sizes in each ward varied from 97 to 196. This would be sufficient to examine results for any individual ward if required. Aggregating the wards into the three areas gives: Billericay 25%, Basildon 55% and Wickford 17% of the sample (there were 3% for whom the ward could not be determined). Each provides a sample sufficiently robust to be considered separately.

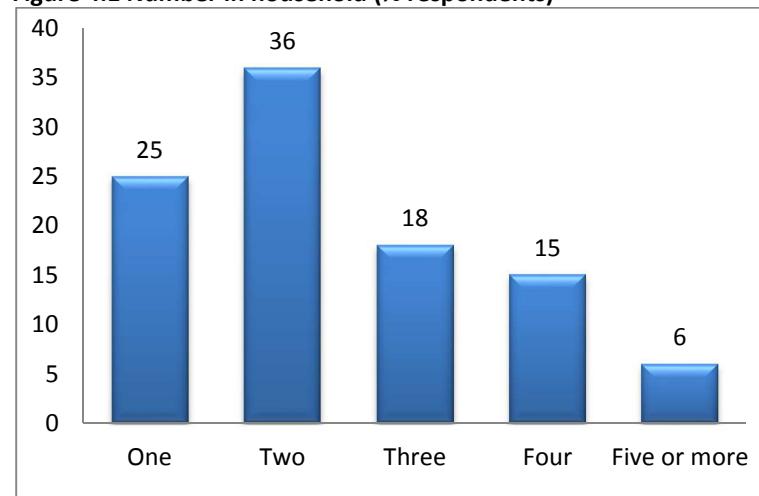
The profile of the sample by gender, age group, ethnic group and citizenship is shown in Appendix 1. As with many similar surveys, relatively more questionnaires were returned by older residents meaning that the achieved sample was not representative of the Borough by age. We have therefore applied a weighting based on the ONS 2011 figures for Household Reference Persons in Basildon so that the results may be interpreted as representative of the Borough. Unless otherwise stated, the figures in this report are taken from the weighted data.

The remainder of this section is divided into the topics covered by the questionnaire with the main emphasis being on future need.

4.1 Household composition and residence

The number of people in a household varied from one to eleven but the majority were one or two person households.

Figure 4.1 Number in household (% respondents)

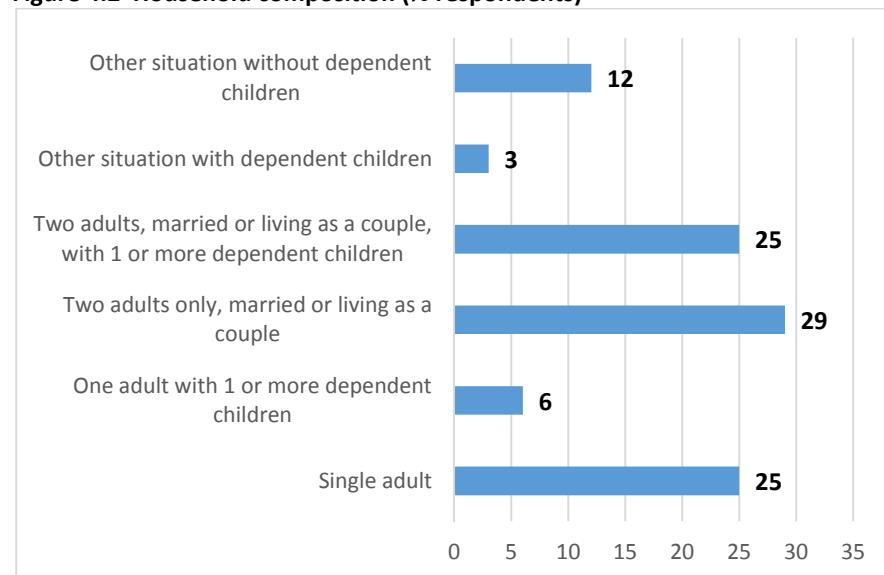


Base: all respondents (2174) Weighted data

There were higher proportions of one person households in the older age groups, particularly where the respondent was over 65. For those under 35 the most likely household size was two people but for the 35 - 49 age range three or four was more common.

Detailed information was recorded for each household member (age, gender and relationship to the Head of Household) so that it would be available for further analysis. This is also summarised in Figure 4.2 which shows household types.

Figure 4.2 Household composition (% respondents)



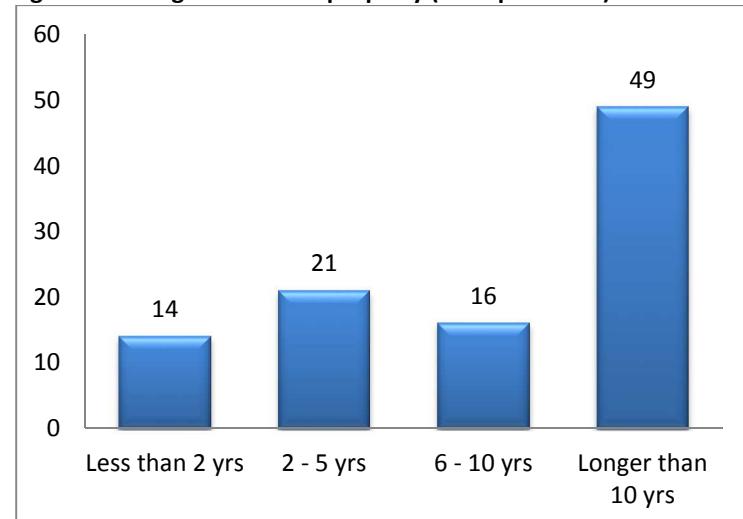
Base: all respondents (2162)

The most frequently occurring type of household was two adults with only slightly fewer single adults or couples with children. The first category can be interpreted as

adult households which may or may not include couples. The majority of them included at least three people, suggesting there may be substantial numbers of grown up children remaining in the family home. The presence of dependent children was most likely in the 25 – 49 age range.

Respondents were also asked how long they had lived in their current property and it can be seen that many residents were of long standing, with almost half having lived in their current property for at least 10 years.

Figure 4.3 Length of time in property (% respondents)



Base: all respondents (2174)

Not surprisingly, this was much more likely amongst older residents; the figure was at least 67% for each of the age groups above 50 years old. There were differences by tenure too, with the extremes of almost 80% of those who own their homes outright having been there for at least ten years whereas 77% of those in the private rented sector had been in their homes for less than five years.

4.2 Property type and under occupation

All types of property were represented with 74% of residents living in houses.

Table 4.2 Type of property	
	%
Detached house	22
Semi detached house	22
Terraced or mews house	30
Bungalow	9
Flat in building with 3 floors or less	10
Flat in building with 4 or more floors	2
Sheltered or retirement accommodation	3
Supported accommodation	<1
Other	2

Base: all respondents (2205)

This was fairly evenly spread between the different types of house and some of the ‘other’ types were link detached or maisonettes suggesting a very broad variety of property types overall.

Reference to the age of the respondents allows a number of observations. For example, bungalows are more likely where the resident is over 65, particularly over 75 (more than 20% of this age group). In contrast, flats are more popular for those under 35, especially under 25 (although that sample is relatively small). And living in a terraced or mews property is more likely where residents are aged 25 to 49 years. Those with disabilities are three times more likely to live in a bungalow than others. Household composition may also be relevant – single people are roughly twice as likely to be living in flats whereas families are more likely to be in houses.

The number of bedrooms was also recorded and is as shown in this table.

Table 4.3 Number of bedrooms	
	%
One	11
Two	22
Three	42
Four	21
Five	3
Six or more	<1

Base: all respondents (2203)

Three bedrooms was the most prevalent size with similar numbers having two or four beds. Relating this to property type, it may be seen that most detached and semi-detached homes have three or four bedrooms; detached tend more towards four and semis to three. The most likely size of a terraced or mews home is also three bedrooms but then tending to two. Bungalows mainly have two or three beds, two being a little more likely. Low rise flats tend to one bedroom, possibly two but high rise flats are generally a little larger, more having two bedrooms than one. Most of the sheltered accommodation has only one bedroom.

An analysis of the number of bedrooms in the property and the number actually used as bedrooms shows the incidence of unused bedrooms increases with the size of the property. For example, in a two bedroom home, 67% use both bedrooms but in a home with four bedrooms, only 26% use all four as bedrooms. This indicates a degree of under occupation. NB the sample size for six or more bedrooms is very small (10) so the percentages are unreliable.

Table 4.4 Bedrooms and bedroom usage

Beds	Used as bedrooms					
	One	Two	Three	Four	Five	Six +
One	100 (100)					
Two	32	67 (60)	1			
Three	15	35	50 (35)			
Four	8	20	46	26 (21)		
Five	6	6	28	33	27 (20)	
Six +			20	20	30	30 (50)

Base: all respondents (2166) Row percentages

The figures in brackets in the shaded boxes in this table show the same results for respondents aged 55 or over. As they are slightly lower it can be concluded that under occupation is a little more likely amongst older residents.

4.3 Tenure and tenure history

Three out of four of those who responded to the survey were home owners, as this table shows. More than half of this group owned their property with a mortgage.

Table 4.5 Current tenure by age group

	Total	Under 35 yrs	35 – 64 yrs	65yrs and over
	%	%	%	%
Owned outright	34	4	25	74
Owned with a mortgage	40	60	50	4
Shared ownership	1	3	1	1
Rented from a Housing Association	5	8	5	4
Rented from Basildon Council	11	10	9	15
Rented from a private landlord	8	15	9	1
Other	1	<1	1	1

Base: all respondents (2199)

Most of the remainder are tenants of social landlords with a small private rented representation. This tenure breakdown broadly reflects that of the Borough although owner-occupiers are over-represented, and private renters under-represented.

There are marked differences between age groups. For example, it may be seen that owning outright is much more likely for those 55 or over, particularly the over 65's. Those with mortgages are more likely to be in the 25 – 64 age range, with a peak for 35 – 49 years. Renting cuts across all age groups with those in the private sector mostly under 50 and social tenants generally having a slightly older age profile, although both Housing Association and Council tenants have above average proportions of under 25's.

In terms of household types, social renting seems biased towards single adults. This is particularly true of Council tenants, where more than half are single adults. The largest percentage with a mortgage are couples with children.

Recent tenure patterns may also be examined. This table shows current tenure on the left, and compared with the previous property tenure, for people who have moved within the previous five years.

Table 4.6 Current tenure and comparison with former, recent movers							
		Previous					
Current	%	Owned	Shared Own	Social rented	Private rented	Living with family	Other
Owned	58	55	2	4	18	19	1
Shared ownership	2	25	0	13	19	31	12
Social rented	20	7	1	52	17	15	8
Private rented	18	19	0	6	52	16	7
Other	1	30	0	50	0	10	10

Base: all living in their current home for five years or less (774) Row percentages

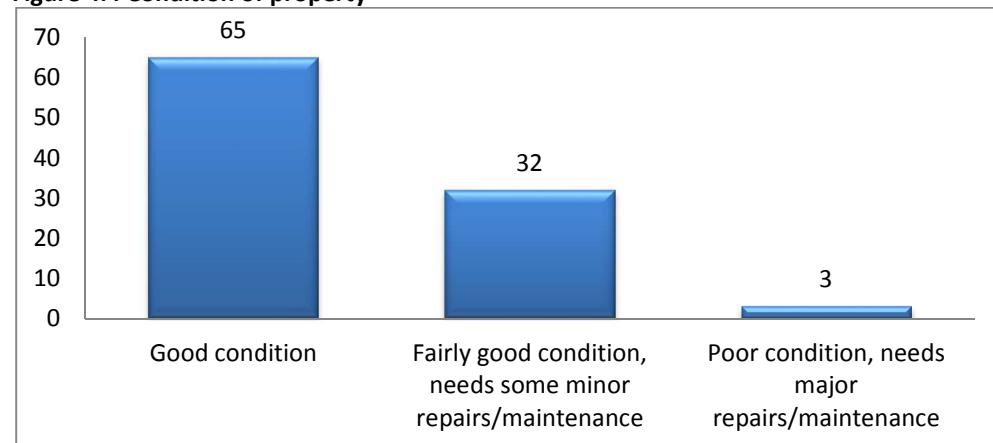
The cross analysis shows that, for example, 22% of those who currently own their home had moved from the rented sectors and for 19% it was their first move away from the family home. Those moving into the private rented sector at their last move had mainly come from home ownership or their family home. The latter might suggest that it is difficult for some new entrants into the housing market to opt for purchase of a property.

This question identified nine people who had previously been homeless and were now renting from social (6) or private (3) landlords.

4.4 Condition of the property and fuel poverty

Respondents were asked to make their own assessment of the condition of their property and the majority were positive about this.

Figure 4.4 Condition of property



Base: all respondents (2163)

Two out of three thought their home was in good condition and only three percent said poor. Those in rented accommodation were less positive: around 9–11% thought their home was in ‘poor’ condition, compared with only 1% of home owners. This applied fairly evenly to tenants of Housing Associations, the Council and private landlords.

The type of work that residents giving a poor rating thought was needed is shown below.

Table 4.7 Attention needed for property in poor condition

	%
Toilet/bathroom needs attention or replacement	34
New windows needed	25
New kitchen needed	22
Damp or mould	20
Roof or gutter needs repair	16
Heating/boiler needs attention	16
Cracks in walls or ceilings	15
Decorating needed	12
Door needs repair or replacement	9
Garage/porch/outbuildings	9
General maintenance	8
Electrical work	6
Other work	27

Base: all rating their property in poor condition (69)

Most likely to be requested was replacement or improvements to toilet and bathroom facilities and there was a wide variety of work needed overall. Individual sample numbers are quite small here but there are indications that tenants are more likely to

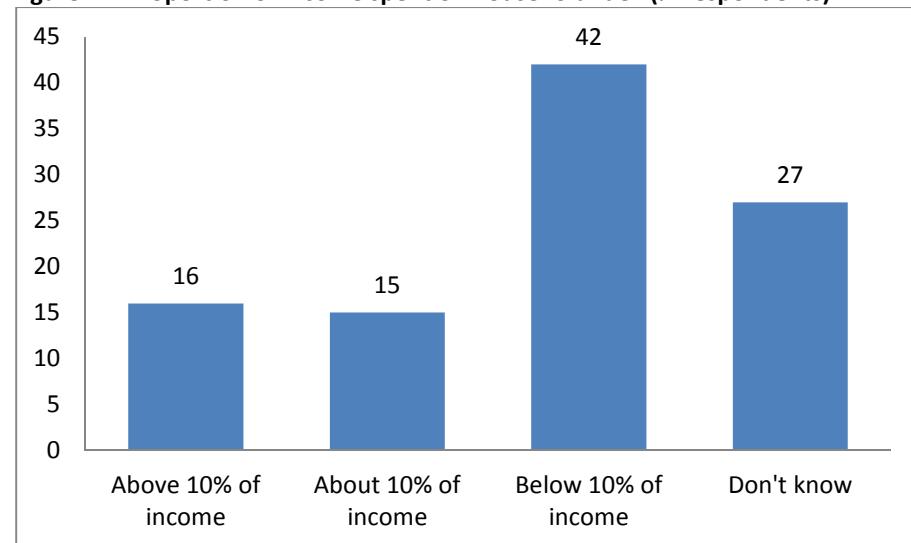
have problems with damp and mould than are home owners. Also that needs for improved bathroom facilities are most frequently found among tenants of social landlords.

Those in rented accommodation were more likely to think that the work was urgent, 74% saying it was needed within six months, compared with only 27% of home owners.

The number of homeowners in this sample was small (16 people) but about 40% of them were unsure that they would be able to ensure the work was done, mainly due to a lack of funds.

A simple question on the proportion of income spent on household fuel was asked so that the extent of fuel poverty could be assessed. The current level seems to be 16%, on the basis of spending more than 10% of income on fuel.

Figure 4.7 Proportion of income spent on household fuel (% respondents)



Base: all respondents (2148)

The figure is higher, rising to 26%, in households where there is someone with a disability or long term illness. The incidence of fuel poverty is higher in Basildon wards (19%) than in either Billericay (11%) or Wickford (12%). In particular, the wards of Vange, St Martins, Pitsea North West and Lee Chapel North have levels around 25 - 28% of households.

In addition, there are a similar number of households who seem to be bordering on fuel poverty as they spend around 10% of their income on fuel.

The most noticeable differences between the sub groups relate to tenure, as this table shows

Table 4.8 Proportion of income spent on fuel related to tenure

	Own outright	Mortgage	Shared ownership	Rent HA	Rent Council	Rent privately
	%	%	%	%	%	%
Above 10%	13	13	3	25	25	29
About 10%	17	14	13	11	11	19
Below 10%	44	54	62	16	15	23
Don't know	26	19	22	48	49	29

Base: all respondents (2131)

Those in all types of rented accommodation are far more likely to be spending more than 10% of their income on fuel than are homeowners. This is particularly true of those in the private sector. There is a higher level of 'don't knows' in the rented sector but still relatively few who are confident they spend less than 10%. The type of property does not seem to have a great deal of influence, except that those living in detached houses are noticeably less likely to be spending above the 10% threshold – 9% compared with an average of 17% for most other property types. This, however, may be due to those living in such properties probably having higher incomes rather than the property type. Analysis by household composition shows that couples, with and without children, are a little less likely to spend more than 10% on fuel (11 – 12%) and are more confident than others that they spend below the threshold.

Household income information is not available for all households but it is possible to consider those who are considering moving and relate their incomes to fuel poverty.

Table 4.9 Proportion of income spent on fuel by income level

Household income	Proportion spent on fuel			
	More than 10%	About 10%	Less than 10%	Don't know
Up to £15,600 pa	45	13	13	28
£15,601 - £31,200	23	16	37	23
£31,201 - £50,000	16	14	50	20
£50,001 - £100,000	5	16	59	20
Over £100,000	9	9	68	14

Base: existing households considering moving (238)

As might be expected, there is a clear relationship between income level and fuel poverty – the lower the annual income, the greater the incidence of fuel poverty and 'borderline' spending of about 10%. For those at the lowest income level, almost 60% of households are either in fuel poverty or very close to it. Even those on the highest incomes have the capacity to spend more than or around 10% on fuel.

4.5 Vehicle ownership and parking.

The majority of households - 87% - had cars, vans or motorcycles which were used by household members. Some 44% had more than one vehicle to accommodate.

Table 4.10 Number of vehicles used by household members

	%
One	43
Two	34
Three or more	10
None	13

Base: all respondents (2116)

Those living in Basildon wards had lower levels of vehicle ownership/usage than residents of Billericay or Wickford.

The most common option for parking seemed to be in their own driveway.

Table 4.11 Location of vehicle parking by tenure

	Total	Owner occupier	Social rent	Private rent
	%	%	%	%
Driveway/off street parking	73	79	46	54
In a separate garage/garage block	17	18	14	12
In a public car park	5	2	16	17
In the street	20	18	35	28
Elsewhere e.g. on wasteland	<1	<1	1	1

Base: all using at least one vehicle (1843)

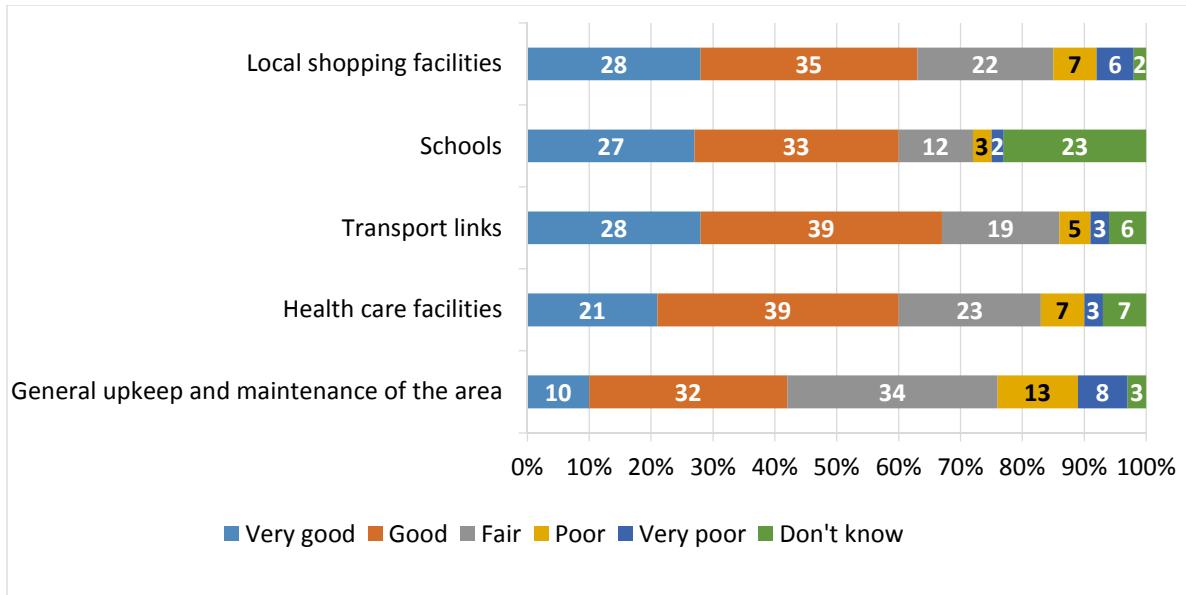
Some people clearly used more than one location to accommodate their vehicles. Overall 20% mentioned street parking but only 12% were limited to this location alone. There are some noticeable differences due to the tenure of the property, as the table shows. Those living in Council or Housing Association homes were much more likely to park in the street as fewer of these properties have their own parking facilities. The same is true of homes in the private rented sector but to a lesser extent as more than half of them do appear to have off street options.

There are some differences by ward, no doubt influenced at least in part by the tenure profiles in those areas. For example, being able to park on their own property was more likely in the Billericay and Wickstead wards. Least likely to do this were people living in Lee Chapel North, St Martins and Fryerns. These latter wards, plus Nethermayne, were the ones where street parking was relied upon most heavily. For example, 46% in St Martins use street parking, compared with only 7% in Burstead.

4.6 Opinions of their neighbourhood.

Respondents were asked to rate several aspects of their local area, defined as within about 15 minutes' walk of where they lived. This table shows ratings from the whole sample.

Figure 4.8 Rating of neighbourhood features



Base: all respondents (2217)

With the exception of 'general upkeep and maintenance of the area', there is a good deal of consistency in the opinions of neighbourhood characteristics, with around two thirds of respondents finding most aspects 'good' or 'very good'. There was more criticism of general upkeep of the area; some 21% think this 'poor' or 'very poor' and only 10% describe it as 'very good'.

There are, of course, differences by ward and the following are examples.

- Shopping facilities are best regarded in St Martins, Billericay East and Fryerns but seen as relatively poor in Laindon Park and Langdon Hills.
- Schools are rated highest in Billericay and Burstead, lowest in Crouch, Laindon Park and Pitsea South East
- Transport links are best regarded in St Martins, Billericay East and Fryerns but weakest in Crouch and Langdon Hills
- Health care facilities are best rated in Nethermayne and Billericay West but worst in Crouch and Wickford North
- General upkeep is rated lower overall than the other aspects; it is best in Billericay East and Burstead but worst in both Pitsea wards and Lee Chapel North

There is a clear pattern showing that people who live in Crouch ward feel their facilities are relatively poor although they give a slightly above average rating for general upkeep.

4.7 Disability, ill health and household adaptations.

A sizeable proportion - 20% - of households include at least one household member with a long term health problem or disability. This is much more likely amongst the oldest age groups, rising to 37% of those aged 75 – 84 and 64% of those 85 or older. It is also more likely amongst those who live in social housing; almost half (45%) of those in Council properties say that they have a disability or long term illness. There

are also differences between wards; the incidence of disability is highest amongst those living in Basildon wards (23%) compared with Billericay (13%) and Wickford (16%). Within Basildon the incidence is highest in Vange and Pitsea North West but this may relate to other factors such as the distribution of social housing.

Almost half of those with disabilities or health problems - 43% - already have adaptations to their home to increase mobility and accessibility. Again this is found more often amongst older age groups, in this case 65 and over but increasing with age.

A total of 42% of those already affected by illness or disability think they may need (further) adaptations in the future. There is some overlap here as half of them already have some adaptations but think they will need more. There were an additional number (around 53 people, 2% of the total sample) who are not currently affected but nevertheless think they may need adaptations in the future. Taken together, this means that about 10% of the total sample expect to need adaptations in the future. The breakdown by tenure shows that of those households needing future adaptations 64% are owner occupiers (including two people in shared ownership) with 26% in social housing and 8% only in the private sector.

Stair lifts and handrails were most frequently mentioned as potential future needs as table 4.12 shows. But there were also a lot of requests linked to making bathroom and toilet facilities accessible. Walk in showers or wet rooms were the main feature in this category but people also wanted downstairs access or aids to assist them. Only 4% mentioned needing a bungalow or property on one level so they are clearly prepared to adapt existing homes.

The comparison by tenure (excluding the private tenants as the sample is small) shows that those in social housing are a little less likely to ask for a stair lift but a little more likely to need help with improving access to bath/shower/toilet facilities.

	Total	Owner occupier	Social rent	Private rent
	%	%	%	%
Stair lift	29	33	15	33
Hand/grab rails	27	22	29	59
Walk in/accessible shower	15	12	17	37
Wet room	11	7	23	0
Ramps	11	12	10	18
Toilet/bath/shower downstairs	9	10	6	12
New/adapted bathroom	6	5	8	0
Mobility aids	5	7	2	0
Toilet/bath aids	5	5	4	18
Property on one floor/bungalow	4	5	4	0
Other	13	13	19	0

Base: all needing adaptations in the future (200)

Income information is only available for about 50 of these households, to be able to assess their ability to pay for adaptations. It shows that: 28% have an income below £15,600 pa, 24% have an income between £15,600 and £31,200 pa, 20% an income between £31,200 and £50,000 pa and 9% an income of more than £50,000 pa. This suggests that some people may be able to afford to pay for the adaptations they will need.

We also know that 45% receive the state pension and 11% pension credit; 23% Housing Benefit and 20% Council Tax support; 6% Income Support and 47% a Disability related benefit. This does perhaps suggest that the ability of this group of people to afford adaptations is limited.

4.8 Employment, benefits, rent and mortgage payments.

Employment status was asked for all the adults in each household – the respondents, partner if applicable and any others. As a result there is data for 4,311 individuals and the outcomes are shown in the following table.

Table 4.13 Employment status of adults		
	All adults	Adults of working age
	%	%
Full-time work (30 hours or more per week)	45	54
Part-time work (16 - 30 hours per week)	10	12
Part time work (less than 16 hours per week)	3	4
Government Training/Apprenticeship	1	1
Registered unemployed and looking for work	1	2
Retired	21	14
Looking after home or family full time and not seeking work	4	5
Student/full time education	9	4
Unable to work due to long-term sickness / disability	3	4
None of the above	3	2

Base: all adults in participating households (4450/2772)

More than half of these adults were working, mainly full time. The next most likely outcome was that people were retired. Unemployment within the sample is at the low level of 1%.

The second column in the table above shows the figures for the adults of working age. Amongst this group 70% are in work, mainly full time. Unemployment is still only 2% and there are a few people who are have retired early.

There are also a number of adults (25) over retirement age who are working. Some 40% of them work full time and if we consider their ages it can be seen that they are very much at the lower age range of 'retired' with an average age of 67 years. The majority of the remainder work 16 – 30 hrs and tend to be a little older.

Relating all of this to households we have identified that:

- 60% are economically active i.e. the head of household and/or their partner if they have one is employed, in training or registered unemployed
- 25% are retired i.e. head of household and partner if they have one is retired
- 11% are economically inactive i.e. looking after the home full time, a student or unable to work due to sickness or disability

This leaves 4% who fall into another category or for whom there is no information.

There was also a simple question on benefits, asking whether anyone in the household was in receipt of any of those on the list.

Table 4.14 Receipt of benefits			
	%		%
Income Support	3	DLA / PIP	10
Housing Benefit	13	Other disability-related benefits	2
Council Tax Support	11	Child Benefit	21
State Pension	24	Child Tax Credit	10
Pension Credit	4	Working Tax Credit	5
Jobseekers Allowance	2	Universal Credit	<1
ESA	5	None of these	43

Base: all respondents providing response (2017)

Levels of receipt were fairly low, only 13% of the households in the sample are on Housing Benefit, for example. Most likely overall was the State Pension, although some respondents added additional notes to the effect that they did not regard that as a 'benefit'. As to be expected, there were substantial variations according to the economic activity status of the household. Housing Benefit, for example, is received by 75% of households which are economically inactive but only 6% of those which are economically active.

A substantial proportion, 43%, of households received none of the benefits. This figure rises to 55% for households which are economically active.

The final aspect of financial questioning was to ask the monthly payments people were currently making for a mortgage or rent. This may be presented in a number of ways but the table below shows average payments by number of bedrooms.

Table 4.15 Average monthly payments by size of property			
	Mortgage £	Social Rent £	Private rent £
One bedroom	419	249	573
Two beds	592	367	745
Three beds	660	339	793
Four beds	916	441	1103

Base: all paying rent or mortgage and providing response (960) Unweighted data

There is wide disparity in the rents paid to social and private landlords with the latter being more than twice as high. Mortgage payments fall in between the two rent levels. These figures suggest that renting privately in Basildon is a very expensive option for those looking for a home.

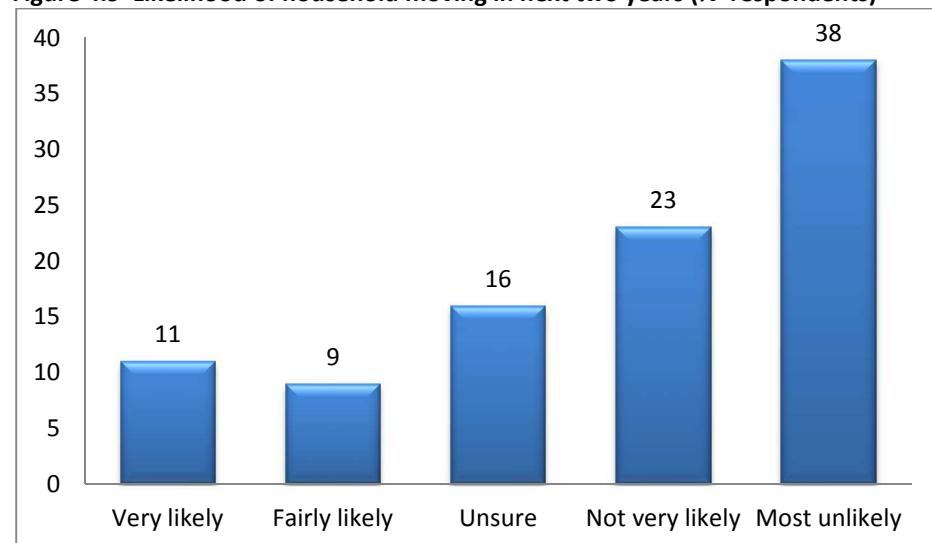
4.9 Future needs.

In order to assess likely future needs in the local housing market, the questionnaire contained detailed questions for households who may be in the property market in the near future. There were two aspects to this – either the whole household might move or one or more members might move out to form a new household. It was found that one in four of the households were in this position. The following sections examine their motivations and intentions.

4.9.1 Likelihood of moving

Asked how likely it was that the whole household would move in the next two years, respondents gave the following answers. (Some declined to answer.)

Figure 4.9 Likelihood of household moving in next two years (% respondents)



Base: all respondents (2110)

As many as 20% thought that they might move with more than half saying 'very' likely. The propensity to move was much higher amongst younger people; at least 22% of those under 35 thought it 'very' likely that they would move, compared with only 3% of people over the age of 65. Couples with children and single parents also expressed a stronger wish to move than others. The only apparent influence due to location is that residents of Billericay wards seem more settled than others.

Table 4.16 shows a marked difference in views for those living in privately rented accommodation as they have a much higher propensity to move. Just over half of the people in this sector think it likely they will move and only 16% feel it is unlikely. Otherwise those in Social housing are a little more likely to move but the differences are small.

Table 4.16 Likelihood of household moving by current tenure

	Total	Owner occupier	Social rented	Private rented
	%	%	%	%
Very likely	11	8	15	37
Fairly likely	9	8	8	18
Unsure	16	15	14	28
Not very likely	23	26	21	8
Most unlikely	38	41	39	8

Base: all respondents (2195)

We can also summarise the response by property type

Table 4.17 Likelihood of household moving by property type

	Det or semi house	Terrace house	Bungalow	Flat 3 floors or less	Flat 4 floors or more	Sheltered
	%	%	%	%	%	%
Likely to move	15	23	10	38	38	10
Unsure	16	17	12	16	22	5
Unlikely to move	67	58	74	45	35	79

Base: all respondents (2204)

This clearly shows that those living in bungalows and sheltered accommodation were least likely to move but, in contrast, those in flats were far more likely to think of moving. There is probably some correlation here with the age of the homeowner and the tenure of the property but it nevertheless shows the potential change in property types.

Those thinking of moving were asked their reasons. A list of the most likely reasons was provided but there was also scope for them to add their own. This table shows the responses recorded.

Table 4.18 Reasons for whole household moving

Would like a larger property	%
To move to a different area for other reasons	39
To reduce housing costs	25
Would like a smaller property	17
To move to a different area to be nearer family and friends	14
To obtain more care and support for health or age reasons	12
Access problems with current home eg too many stairs	9
To move to a different area for employment reasons	8
To be nearer shops and services	7
Poor neighbours/ASB/crime/racism	6
To own property/get on the property ladder	3

To be nearer good schools and colleges	2
Other reasons	13

Base: all very or fairly likely to move in the next two years (446)

More than one in three of the existing households looking to move were doing so to obtain a larger property. Some 34% of this group were couples with children and another 26% couples so it is presumably largely 'family' homes which were being sought. They currently have one to three bedrooms with two most likely. A closer analysis shows that these households were most likely to be currently living in a terraced property (35% of a sample of 212 households) or a low rise flat (26%). Some 26% were currently living in detached houses or semis and 6% in higher rise flats but there were very few who currently have a bungalow or sheltered accommodation. In terms of tenure, half of them were currently homeowners with mortgages. Most of the remainder were in rented homes, either social (22%) or private (19%). Only a few owned their homes outright which seems logical as those people are probably at a later life stage and have already been able to achieve at least some of their aspirations. Those currently aspiring to a larger home were largely under 50 years old.

The next reason most frequently given for moving was because they wanted to move to another area (for reasons other than employment or family connections). Others were looking to downsize or to obtain a property more suitable for their needs. Those looking to downsize are typically couples or single adults over 50 years of age living in properties with three or four bedrooms. Around 60% of them currently live in detached houses or semis (which again seems as might be expected) and most of the remainder in terraced homes. The great majority of this group are home owners although there is a proportion (19%) who are social housing tenants and just 9% in privately rented accommodation.

Those moving to obtain more care and support tend to be in the older age groups but those citing access problems are from a broader range of ages so we can assume that those issues are not necessarily age related.

A second question was asked to establish whether there were any household members who would need to move out and form a separate household in the next two years and 9% replied that this was likely. This equates to about 200 people. The strongest response on this came from households where the respondent was in the 50 - 65 age range, where the likelihood of someone moving out was 20%. And related to household composition, two out of three of these potential 'out movers' came from households described as 'other situation without dependent children'. This suggests that there may be grown up children moving out of the family home and this is supported by the stated reasons for new household formation which are shown in table 4.19. Again, some possible reasons were offered to respondents with the scope to add their own.

Table 4.19 Reasons for new household seeking separate accommodation

	%
Becoming independent from family home	67
Marriage/moving in with a partner	25
To be nearer employment	12
To obtain more care and support for health or age reasons	6
Going to University/education related reason	5
To obtain a more suitable property	3
Overcrowding	2
Relationship breakdown	1
Other reason	4

Base: all with household member moving into separate accommodation (207)

Overwhelmingly, the most common reason was ‘becoming independent from the family home’, which relates to the notes about grown up children above. Marriage or moving in with a partner was the next most likely reason. A small number of ‘out movers’ would be looking to obtain care and support.

There are differences between the numbers of ‘out movers’ in different wards but this is likely to be chance; age and family composition are probably stronger influences on the decision.

A small number of households (30) were in the position of looking to move and having someone who would move out to form a new household.

4.9.2 Composition of moving households

Detailed information was recorded on the number of people who form the moving households or the new ones created, so that calculations could be made on bedroom requirements if necessary. For the purposes of this report the information is summarised in Table 4.20 as household composition. As they are likely to be rather different in nature, current and new households are shown separately.

Table 4.20 Composition of moving households

	Total H/H	Current H/H	New H/H
	%	%	%
A single adult	33	20	49
One adult with one or more dependent* children	7	8	5
Two adults only, who are married or living as a couple	38	40	34
Two adults who are married or living as a couple, with 1 or more dependent* children	15	24	2
Other situation with dependent* children	2	2	1
Other situation without dependent* children (including where grown-up children remain at home)	7	5	9

Base: all moving or newly forming households providing information (428)

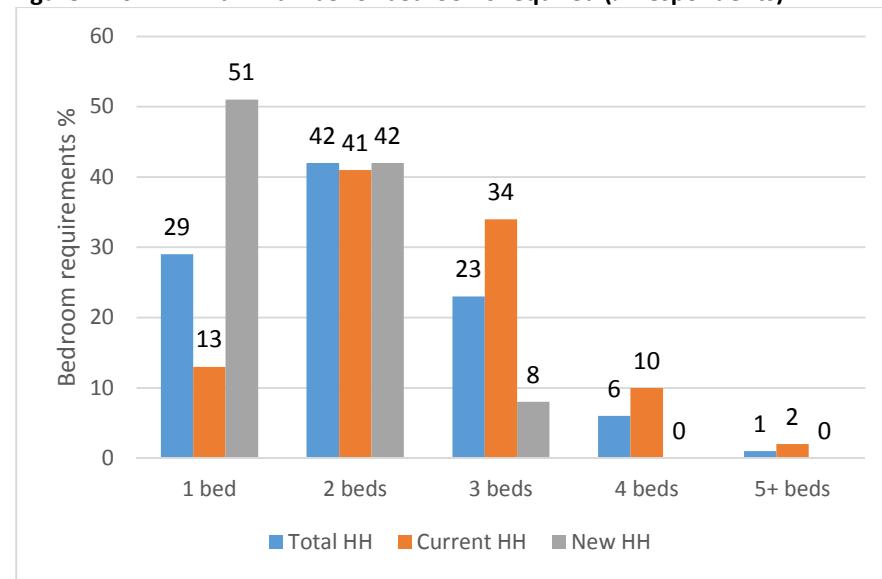
Where the existing household is expecting to move it is most likely to be formed of a couple with or without children. Most of the remaining movers are single adults. In contrast, new households are most likely to be single adults, which fits with the main reason being to become independent of the family home. There are also a good number of couples forming new households which also fits with the second most important reason being marriage or moving in with a partner.

This suggests there will be a future need for a variety of properties to meet the needs of these diverse households.

4.9.3 Moving preferences: size, type and tenure.

Respondents were asked what would be the minimum number of bedrooms required. This is a preference rather than 'need' although the latter could be calculated if necessary.

Figure 4.10 Minimum number of bedrooms required (% respondents)



Base: all moving or newly forming households providing information (411)

Current households moving are most likely to want two or three bedrooms in their new home and, recalling that this group included families and the most frequently given reason for moving was to obtain a larger property, this seems in keeping with those requirements. New households were mostly looking for something a little smaller, one or two bedrooms. Again, this reflects that most of these will be single people or newly forming couples.

The total households column shows what the overall requirement is likely to be within the market.

An analysis of the type of property the moving households would prefer to have (Table 4.21) further shows the differing natures of these households. Existing households are much more likely to require a detached house or a bungalow, reflecting that their main reasons for moving were to obtain larger or smaller properties. Analysis by age shows

that it is older people who are more likely to be seeking a bungalow or, to some extent, a flat.

Table 4.21 Type of property preferred by moving households			
	Total H/H	Current H/H	New H/H
	%	%	%
Detached house	36	48	19
Semi detached house	24	24	25
Terraced or mews house	15	12	18
Bungalow	18	30	3
Flat or apartment	22	10	39
Sheltered accommodation	4	6	2
Nursing or care home	1	1	1
Supported accommodation	1	2	-
Caravan or mobile home	<1	1	-

Base: all moving or newly forming households providing information (456)

NB the percentages add to more than 100 because some people gave alternatives.

The new households (who are mostly younger) are most likely to prefer a flat. This they presumably feel is more appropriate for their situation. Again, the total column illustrates the overall market situation.

Expectation tends to be moderated from these stated preferences. The following table shows how property preference relates to the type that the moving households expect to have.

Table 4.22 Type of property preferred compared with expectation						
	Total H/H		Current H/H		New H/H	
	%	%	%	%	%	%
	Prefer	Expect	Prefer	Expect	Prefer	Expect
Detached house	36	20	48	31	19	6
Semi detached house	24	24	24	31	25	15
Terraced or mews house	15	20	12	20	18	21
Bungalow	18	16	30	25	3	3
Flat or apartment	22	30	10	11	39	55
Sheltered accommodation	4	4	6	5	2	2
Nursing or care home	1	1	1	1	1	1
Supported accommodation	1	1	2	2	-	1
Caravan or mobile home	<1	1	1	1	-	1

Base: all moving or newly forming households providing information (430)

For example, only 31% of current households moving *expect* to have a detached house compared with the 48% who would *like* one: some clearly feel they will need to 'trade down' to a semi or terraced property. Whether this perception relates to supply of detached homes or their own ability to obtain one is unclear. Another example is that rather more of the new households (55%) think they will have a flat than would perhaps like one. They too see themselves 'trading down' from the detached or semi-detached that they might like. Again we can only speculate on the reason, it may simply be that they are tempering aspiration with realism.

In other respects, preference and expectation are similar. Those wanting a bungalow seem fairly confident of being able to obtain one. The same is largely true of sheltered, care and supported housing. There may be a slight shortfall of sheltered housing but the numbers are small so the figures cannot be totally reliable as percentages.

Moving households were also asked about their preferences and expectations for the tenure of their next property.

Table 4.23 Preferred tenure compared with expectation						
	Total H/H		Current H/H		New H/H	
	%	%	%	%	%	%
	Prefer	Expect	Prefer	Expect	Prefer	Expect
Buy a property outright	28	18	40	27	12	2
Buy with a mortgage	41	44	34	42	51	48
Have a shared ownership home	6	3	7	4	5	2
Rent from a Housing Association	8	9	10	9	6	7
Rent from a Council	22	22	21	22	24	23
Have an 'affordable rent' property (up to 80% market rent)	6	5	4	5	8	4
Rent from a private landlord	3	9	<1	4	6	18
Obtain accommodation linked to a job	1	1	1	1	1	2

Base: all moving or newly forming households providing information (430)

Amongst the existing households who may move there is a strong preference for purchasing a property, with or without a mortgage. Expectation shows some shift from buying outright to obtaining a mortgage but most of those wishing to purchase seem to think they will do so. Amongst newly forming households there seems a reasonably realistic approach to buying with a mortgage, illustrated by very similar figures for preference and expectation. Relating this to expected income levels offers difficulties in interpretation. There are people at all income levels who state a preference for buying, both outright and with a mortgage. This is understandable as it relates to their aspiration to own a property. Fewer people expect to buy and there is some shift from wanting to buy outright to obtaining a mortgage but there are still people at all income levels who say they expect to buy. For example, one in three people who will have an income of less than £20,800 expect to buy, either outright or with a mortgage. This may appear unrealistic but it is difficult to interpret without more information. For example, this group may include young people who will be receiving considerable assistance from parents or there may be retired people with a small income but a wholly owned property which they can sell (possibly releasing capital). So the clearest conclusion from reference to income is that it is those in the higher income ranges who have the strongest expectation that they will buy with a mortgage.

The most noticeable difference between preference and expectation is in relation to the private rented sector. Very few give this as their preferred tenure but some, especially new households, expect that this may be the route they take. It seems that

this reflects a lack of confidence in their ability to buy. Referring back to the earlier analysis of monthly rent and mortgage payments, it was seen that private rents are generally higher than mortgage payments for the same size property. This suggests that the main barrier to purchase is probably the ability to find the necessary deposit rather than the ability to meet monthly payments.

Preference and expectation for social housing, shared ownership and affordable rents are very similar. There seems a strong demand for Council housing at almost one in four of both current and new households. The existing households who state a preference for Council housing are predominantly those who are already in social housing but it does also include around one in four of those currently in the private sector and a few home owners. There is a clearer finding when referring to the potential income of these households – it is very largely those with lower incomes, especially those below £20,800, who either prefer or expect that their move will be to social housing.

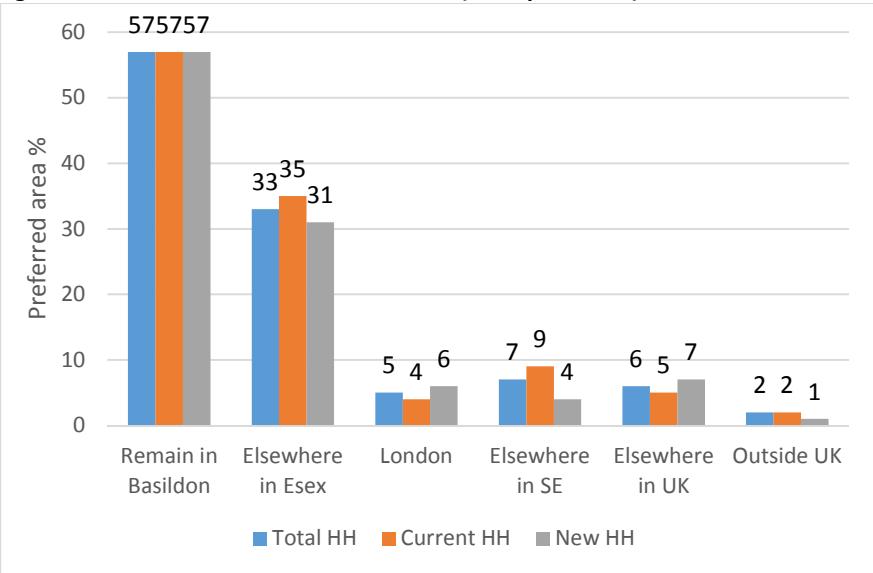
Again, the total column in table 4.23 reflects the likely overall situation for the market.

Some 10% of existing households and 7% of potential new ones are currently on the Homeseeker Register. This is considerably fewer than the 22/23% who expect to rent from the Council. The profile is similar though in that the majority of those on the Homeseeker Register are from households currently in social housing and are at lower income levels. There are some interesting differences when we compare those on and not on the Register amongst people expecting to rent from the Council. Numbers are relatively small but those not on the Register and expecting to rent from the Council have an older age profile; there are higher proportions of those 35 – 64 and fewer young people. There are also far more homeowners amongst those who are not on the Register, 43% compared with only 14% of people who are on the Register. This perhaps suggests unrealistic expectations amongst some of those who expect to be able to rent from the Council.

4.9.4 Moving preferences: location

In terms of the location of their new home, the patterns are very similar for both existing movers and new households. The strong preference is to remain in Basildon, some 57% overall wish to do this.

Figure 4.11 Preferred area for new home (% respondents)



Base: all moving or newly forming households providing information (408)

NB some people gave multiple answers so percentages add to more than 100

A further one in three are looking to live elsewhere in Essex with much smaller numbers thinking of London or other locations in the South East.

A breakdown of these preferences by age group does not really show a great deal of difference. If anything, younger people are more keen to remain in Basildon than older ones and do not seem any more disposed to leaving the area. Some of the numbers are quite small but the general pattern of preference is clear.

Table 4.24 Movers preferences for area to live by age group

	Under 35	35 - 64	65 and over
	%	%	%
Remain in Basildon	68	54	56
Elsewhere in Essex	31	34	33
In London	3	6	5
Elsewhere in the South East	5	7	9
Elsewhere in the UK	2	7	6
Outside the UK	3	1	0

Base: moving households (403)

Within the Borough preferred areas are:

- Billericay (34% of those wanting to stay in the area)
- Wickford (22%)
- Basildon (15%)
- Laindon (12%)
- Pitsea (11%)
- Langdon Hills (11%)
- Noakbridge, Kingswood, Vange and Lee Chapel (from 4 - 8%)

4.9.5 Moving households: financial considerations.

Most respondents were able to provide an idea at least of what the likely income band would be for the households moving.

Table 4.25 Gross annual household income for moving households			
	Total H/H	Current H/H	New H/H
	%	%	%
Under £5,200	4	4	5
£5,200 - £10,400	9	10	7
£10,401 - £15,600	8	5	13
£15,601 - £20,800	9	8	9
£20,801 - £26,000	10	8	12
£26,001 - £31,200	6	5	6
£31,201 - £36,400	6	5	8
£36,401 - £41,600	8	10	5
£41,601 - £46,800	4	4	3
£46,801 - £50,000	4	4	4
£50,001 - £52,000	3	3	2
£52,001 - £75,000	9	13	5
£75,001 - £100,000	3	6	1
£100,001 - £150,000	3	5	1
Over £150,000	2	3	1
Don't know	13	8	19

Base: all moving or newly forming households providing information (413)

Overall there is a wide spread of incomes with the biggest concentration below £26,000 pa. The incomes of newly forming households tended to be lower than those of existing ones, which is entirely understandable, and they were also less sure of their potential incomes. However, there were still one third who were expecting to have an income in excess of £26,000 pa.

Whether hoping to rent or buy, these respondents were asked the maximum price they thought they could afford. As with all other factors, there were noticeable differences between current and new households.

Looking first at purchase, table 4.26 shows that most people had an idea what their limits would be.

Table 4.26 Maximum purchase price

	Total H/H	Current H/H	New H/H
	%	%	%
Up to £125,000	11	4	22
From £125,001 - £150,000	10	5	17
From £150,001 - £200,000	16	16	15
From £200,001 - £250,000	12	12	12
From £250,001 - £300,000	11	16	5
From £300,001 - £400,000	10	17	1
From £400,001 - £500,000	6	9	1
Over £500,000	7	11	1
Don't know	18	11	27

Base: all moving or newly forming households providing information (341)

The most likely maximum purchase price for those existing households preferring to buy was in the range £250,000 to £400,000, one third fell in this range. But there were slightly more people for whom the maximum was less than £250,000. New households had a much lower maximum limit, almost 40% being able to afford no more than £150,000 and two out of three no more than £250,000.

More detail may be found by referencing this to the size of property required. The table below shows, for each bedroom size, the percentage who could afford each price range.

Table 4.27 Maximum purchase price for each bedroom size

	One bed	Two beds	Three beds	Four or more beds
	%	%	%	%
Up to £125,000	22	7	3	0
From £125,001 - £150,000	17	14	4	0
From £150,001 - £200,000	33	26	8	0
From £200,001 - £250,000	11	18	18	0
From £250,001 - £300,000	3	16	20	8
From £300,001 - £400,000	3	9	18	25
From £400,001 - £500,000	0	2	13	25
Over £500,000	3	1	11	42
Don't know	8	7	5	0

Base: all moving or newly forming households providing information (244)

There is a clear progression that those able to afford less are seeking smaller properties. The majority of people looking for a one bed, for example, had an upper limit of £200,000. But most of those looking for four or five bedrooms expect to pay at least £300,000.

Fewer people wanted to rent a property but again the existing households would be able to afford more than new ones. In interpreting these figures it should be recalled that most of these people were expecting to rent from social landlords, the Council in particular, and this may cause them to offer lower figures.

Table 4.28 Maximum monthly rent affordable

	Total H/H	Current H/H	New H/H
	%	%	%
Less than £300 per month	12	11	14
£300 - £500 per month	32	25	37
£501 - £700 per month	15	16	13
£701 - £900 per month	12	17	8
£901 - £1,200 per month	4	7	2
£1,201 - £1,500 per month	1	2	0
£1,501 - £1,750 per month	<1	1	0
£1,751 - £2,000 per month	1	2	0
More than £2,000 per month	1	1	1
Don't know	22	18	27

Base: all moving or newly forming households providing information (235)

The range £300 - £500 per month was the most frequently mentioned for both types but existing households were more likely to go above this figure. Almost half of them could afford more than £500 pcm. Although fewer newly forming households were able to assess their limit, it was clear that £700 per month was the maximum for most of them.

This can also be broken down, to an extent, by the type of landlord from which people expect to rent, as shown in the next table. There is some overlap in the figures as some people gave more than one option as their answer eg they said they would rent from the Council **or** a Housing Association.

Table 4.29 Maximum monthly rent affordable by tenure

	Rent from HA	Rent from Council	Rent from private l'lord
	%	%	%
Less than £300 per month	17	24	3
£300 - £500 per month	27	38	38
£501 - £700 per month	20	12	15
£701 - £900 per month	13	7	21
£901 - £1,200 per month	3	0	6
More than £1,200 per month	0	0	0
Don't know	17	19	18

Base: all moving or newly forming households expecting to rent from these landlords (192)

Expectations were lowest for Council rents with more than 60% expecting to pay less than £500 per month and almost all expecting £700 to be the maximum. This was pushed slightly higher for Housing Association rents and very slightly more still for the private sector. But it seems that no one felt they could afford rent of any kind above £1,200 per month. In relation to the number of bedrooms required, there is a very broad trend that people expect to pay more for larger properties (some of the sample sizes are very small so percentages are unreliable). Relating this also to expected household income is difficult because the sub sample sizes are very small in places. But for those expecting to rent from social landlords it seems that up to an income of

£20,800 pa most people give £500 as the maximum they can afford. After that it creeps up a little but even up to incomes of £46,000 pa there are some who give £500 as their maximum capability. For those expecting to rent from a private landlord it is broadly the case that once income rises above £20,800 pa then most people expect to pay more than £500 per month.

5 Analysis of secondary data

Clearly, it is important that the findings from the resident survey are contextualised in terms of the wider housing, economic and social structure of Basildon Borough, and likely changes and developments in the housing market that could affect housing needs.

However, in parallel with this study, the Thames Gateway South Essex SHMA (TGSE SHMA) is currently being refreshed and the area covered by this study includes Basildon. As required by official SHMA Guidance, the SHMA will explore the major dimensions of the housing market, so here we will restrict ourselves to examination of key issues, drawing on existing local administrative data and national data sources.

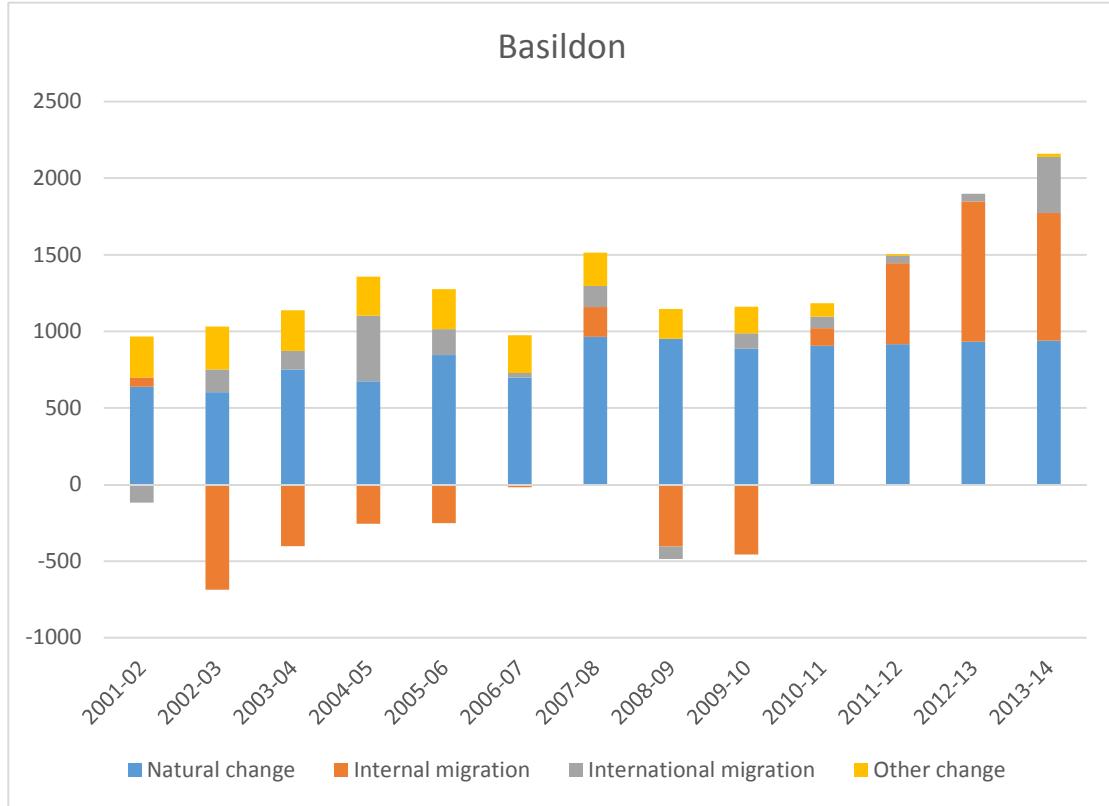
5.3 Key contextual data

5.3.1 Population change

The principal driver of demand for housing is demographic change. Initial work undertaken on the TGSE SHMA indicates that:

- Up to 2010, most population increase in Basildon Borough Council has been through natural change (Figure 5.1), but since then, internal migration (i.e. from within the UK), has substantially contributed to growth. Before 2010 internal migration change had mostly been negative (net out migration).
- The TGSE outlines a number of population growth scenarios for 2013-2037, based on different projections. These range from a forecast population increase of between 15,506 (8.7%) which is just based on natural change, and 29,211 (16.4%), which includes in-migration. The ‘trend’ official forecasts by ONS (population) and CLG (households) show population growth of 27,900 (15.7%) made up mostly of natural growth but with a steady increase in net internal migration; and household growth of 15,500 (21%).
- The additional households would require additional dwellings ranging between 531 and 708 per annum, allowing for a vacancy reserve.
- Completions over the last three years have averaged 480 dwellings but have varied substantially from year to year. As noted in NPPF, an increased output would deliver a larger number of affordable dwellings.

Figure 5.1 Basildon: components of population change 2001-14



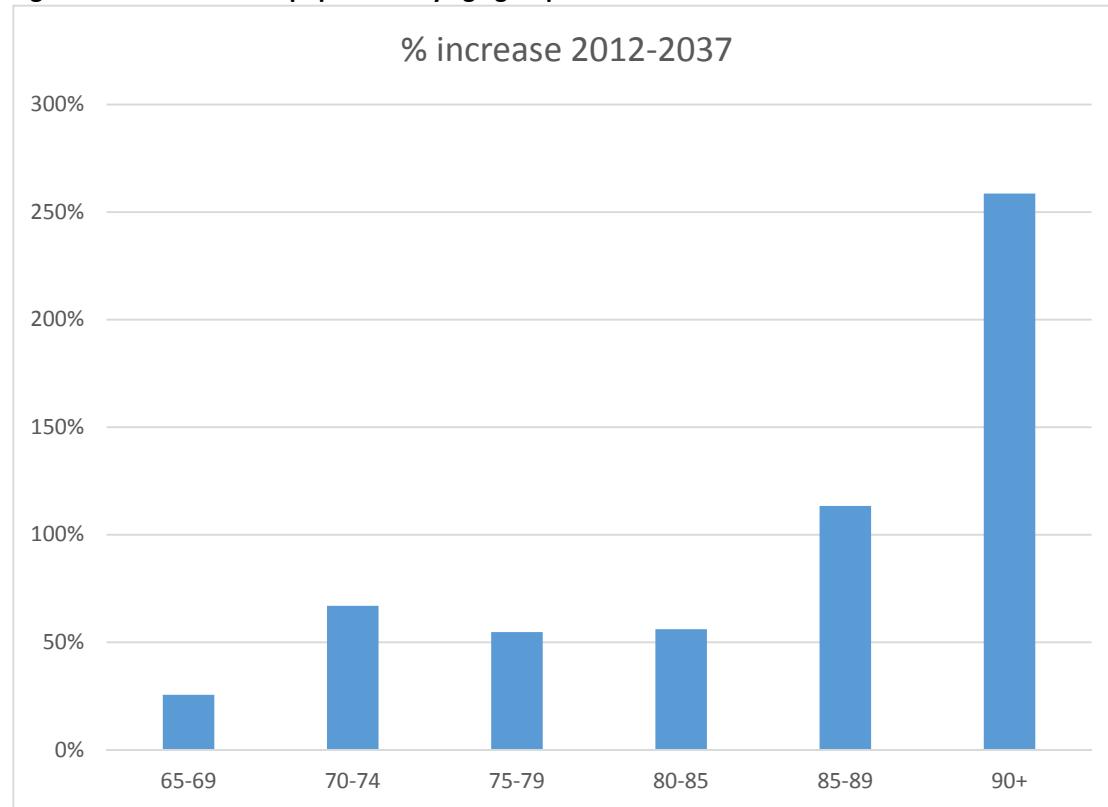
Source: ONS Mid-year estimates 2001-14, Crown Copyright 2015

Clearly, the additional dwelling requirement will need to be factored in alongside the housing needs evidence from this study, which also indicates increasing dwelling requirements from newly-forming households among the existing Basildon population.

5.3.2 Population age

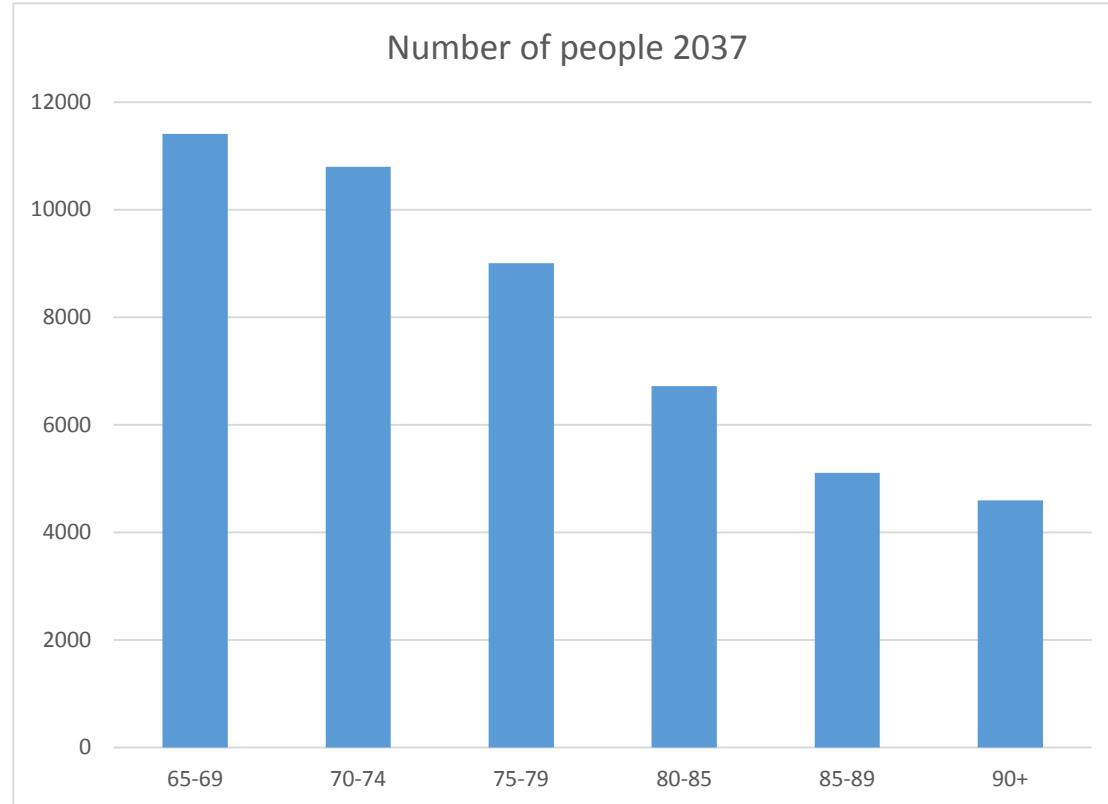
In common with most local authorities, Basildon's population is forecast to contain increasing numbers and proportions of older people, and particularly very old people. As Figure 5.2 shows, all groups aged over 65 are projected to increase significantly, with the over 90's in particular expected to increase by more than 250% between 2012 and 2037, from 1,280 to 4,600.

Figure 5.2 % increase in population by age group 2012-2037



Source: ONS, 2012-based SNPP

Figure 5.3 number of people in older age groups 2037

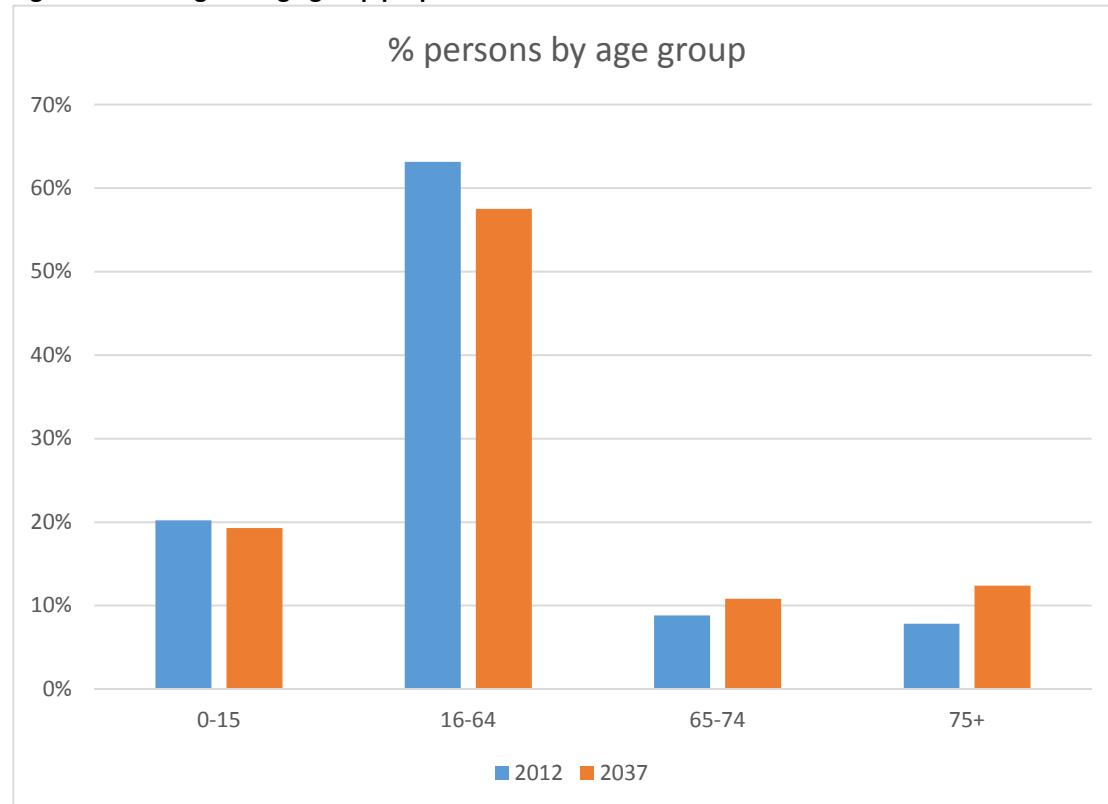


Source: ONS, 2012-based SNPP

Conversely, over the same period, the proportion of the population in younger age groups will fall significantly, with the working age population (16-64) falling by five percentage points (a reduction of 6,600 workers).

This clearly has implications on a number of fronts, firstly in terms of the size and type of accommodation needed to support this ageing population and secondly in terms of the additional labour force which will be needed to serve the local economy and more directly, to provide care, support, health and welfare services to meet the needs of older people.

Figure 5.4 Changes in age group proportions



Source: ONS, 2012-based SNPP

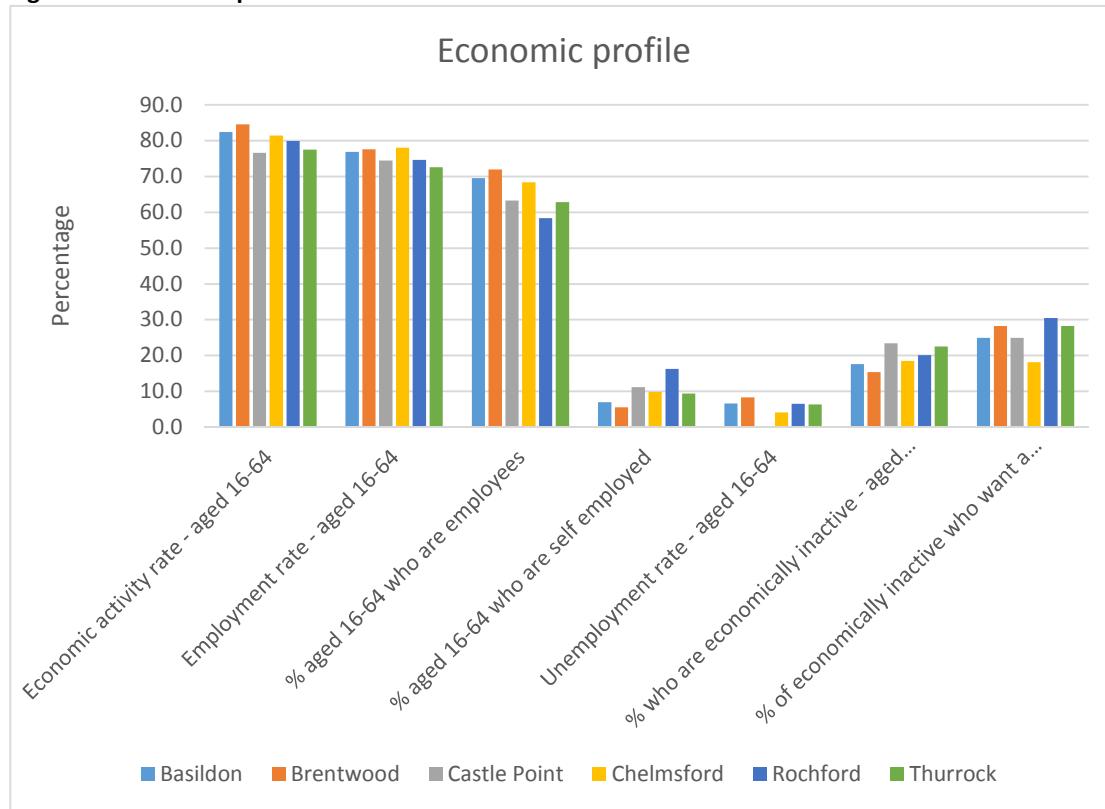
5.3.3 Economic activity

The degree of economic activity and employment are indicators of general economic prosperity and the extent of affordable housing needs. Some 82% of Basildon's population aged 16-64 were economically active in 2015, well above the levels for the East region (80%) and Great Britain (78%). The rate compares favourably with most neighbouring local authorities (Figure 5.5). Basildon also has a high employment rate, but a lower proportion of people who are self-employed.

The structure of occupations in Basildon is biased away from both high and low grade types of work and towards the middle of the skills spectrum. There are fewer managers and professionals than the regional and national averages, but also fewer people working in elementary occupations; and more people than average working in the secretarial/administrative, skilled manual, service sector, and sales areas. This is often indicative of salaries/wages in the middle to lower part of the income spectrum. This is backed up by data on qualifications which shows an above average proportion

of people with NVQ1 level qualifications but below average proportions of those with NVQ Level 2 or above, and of people with other or no qualifications. This is backed up by the higher than average proportions of people working in manufacturing, construction, wholesale, retail and motor trade sectors and lower proportions in financial and business services, and in the health education and public service sectors.

Figure 5.5 Economic profile 2015



Source: Annual Population Survey via NOMIS

5.3.4 Earnings

In terms of median annual earnings, people working in Basildon have rates of pay comparable to the regional and national levels, and a little above most near neighbours. The median earnings of those living in the authority, rather than those working there, are almost 1.5 times higher, and well above those of the region and Great Britain. This is typical of indicative of many areas around London where there is a significant level of outward commuting to higher paid employment in the capital. In 2011 over 6,250 people commuted to Westminster/the City of London from Basildon.

Figure 5.6 Gross annual earnings



Source: ONS, ASHE 2015 (Annual Survey of Hours and Earnings)

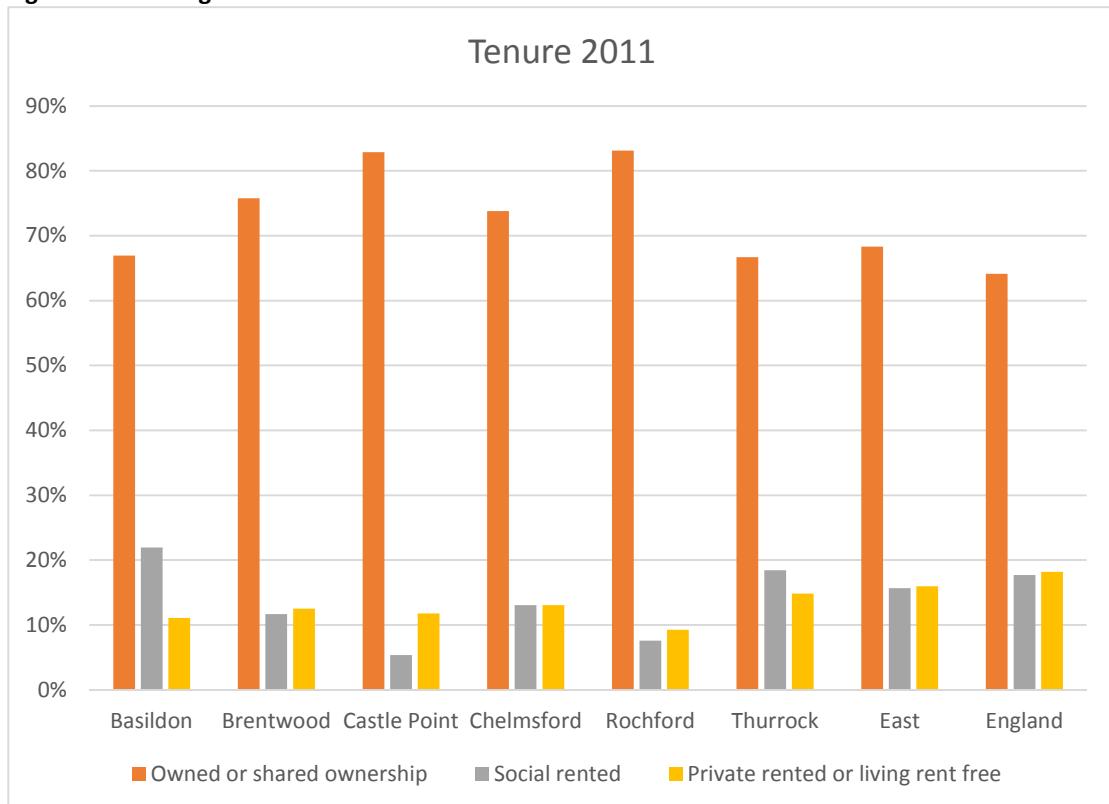
5.3.5 Deprivation

The Index of Deprivation prepared by CLG was updated in 2015. Basildon was ranked 98th amongst English local authorities in terms of its overall average score, the second most deprived in Essex after Tendring. This represents a deterioration from the 2010 position when Basildon was ranked 131st (rank 1 represents the most deprived local authority). In 2010, 4 Lower Super output Areas in the authority were in the most deprived 10% of neighbourhoods in England, but by 2015 this had risen to 12 (11% of all neighbourhoods in the authority). Hence deprivation is an issue in some parts of the authority. In terms of the components of deprivation, the authority scores worst on education, skills and training (ranked 20th most deprived), followed by crime (58th), barriers to housing and services (62nd), and incomes (91st). It ranks best (least deprived) on the living environment (308th), health (177th), and employment (105th). Of these indicators, barriers to housing and services relates most closely to affordability issues and suggests that these problems are likely to be relatively serious within the authority (the index measures relative not absolute levels of deprivation).

5.3.6 Housing market

Basildon has about the same level of home ownership as the national average (67% in 2011) but a much lower level of private renting (11%) and a high (22%) level of social rented housing (Figure 5.7). This reflects its New Town heritage. The level of home ownership is lower than that in most of its neighbours, as is the level of private renting. As a result, the supply of social rented housing is likely to be greater in Basildon. In contrast private rented accommodation is scarcer, making it more difficult for those who cannot access the social rented sector to find rented housing.

Figure 5.7 Housing tenure 2011

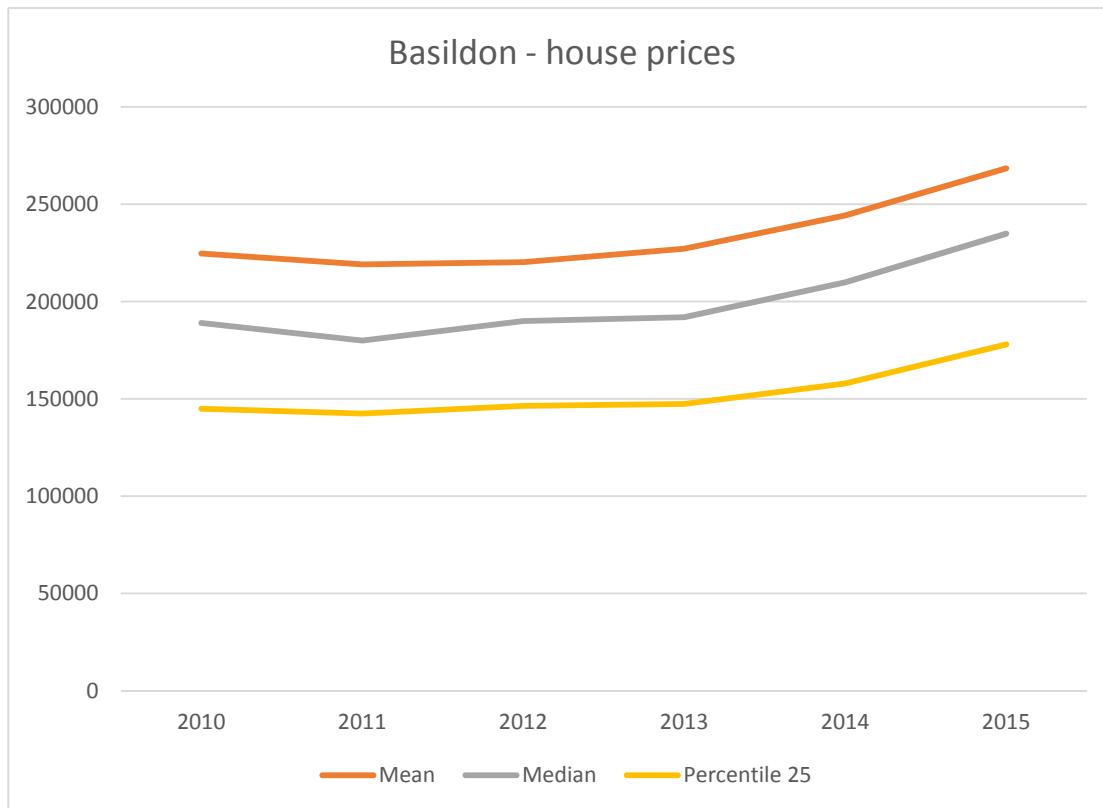


Source: ONS 2011 Census Table LC4108EW

The housing market in Basildon is relatively buoyant, as in London and across much of the South East and East of England (Figure 5.8). In 2014 and 2015, the median sale price increased by 9% and then 12% respectively, and even in the lower reaches of the market, the lower quartile price rose by 7% and then by 13%. Sales volumes in 2014 returned to 2007 levels and in 2015 look set to reach the same level. Recent increases in prices have been reflected in a severe worsening of affordability ratios. In 2014, the lower quartile sale price (£158,000) was thirteen times the lower quartile annual earnings level (£12,500).

Basildon has prices significantly below the Essex average, but Tendring, Colchester, Castle Point, Braintree and Harlow have lower values. Prices tend to be higher closer to London as would be expected, and Basildon is not in any sense a low value area.

Figure 5.8 Basildon: mean, median and lower quartile prices



Source: HM Land Registry Price Paid data, Crown Copyright 2015.

5.3.7 Housing register data

The characteristics of those on the Housing Register (Homeseeker's Register) can give an indication of current housing need and requirements which can be compared to the findings from the survey. Basildon Council controls the criteria that allow access to the Register (that is, it is not 'open') and therefore it will reflect such criteria, rather than being an exact measure of housing need. The access criteria were revised in 2014, including a longer residency period and financial threshold for qualification, resulting in a reduction of the numbers on the register.

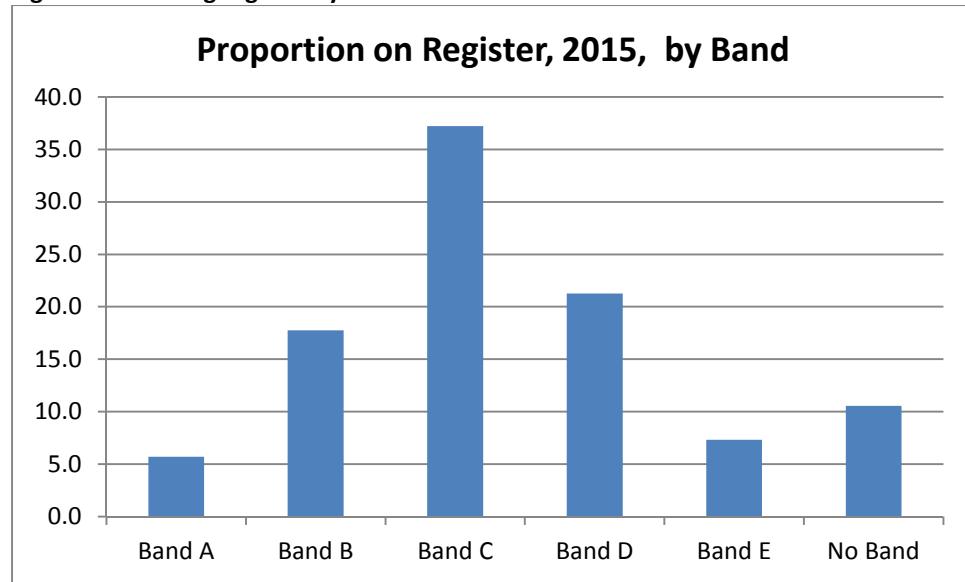
Currently there are:

- 1735 applicants on the register, of whom 490 are suspended
- Only 31% of all applications have a household member in employment
- The median income of those on the register is £11,776 pa
- There are 302 homeless applicants and 404 transfer applicants on the register, with 612 in other categories of housing need on the register

Priority for rehousing within the Register system depends on the Band of housing need the applicant is assessed to be in. Broadly, Band A are high-priority management transfers, high social/medical needs. Band B are homeless households who have been in temporary accommodation for extended periods, those in extremely poor conditions statutory overcrowded applicants, as well as those willing to downsize to non-family property; and the other bands deal with less severe degrees of periods in TA, overcrowding and poor conditions. As can be seen in Figure 5.9, around 20% of applicants are in Bands A and B, and it must be assumed that, given the limited resources through Council re-lets and nominations that the Borough controls, some

of those in Bands C and below are unlikely to have their housing needs met. This is particularly the case for those needing two-bed properties, though those needing one-beds, three plus beds or sheltered accommodation in Band C or below are more likely to have their requirements met.

Figure 5.9 Housing register by Band



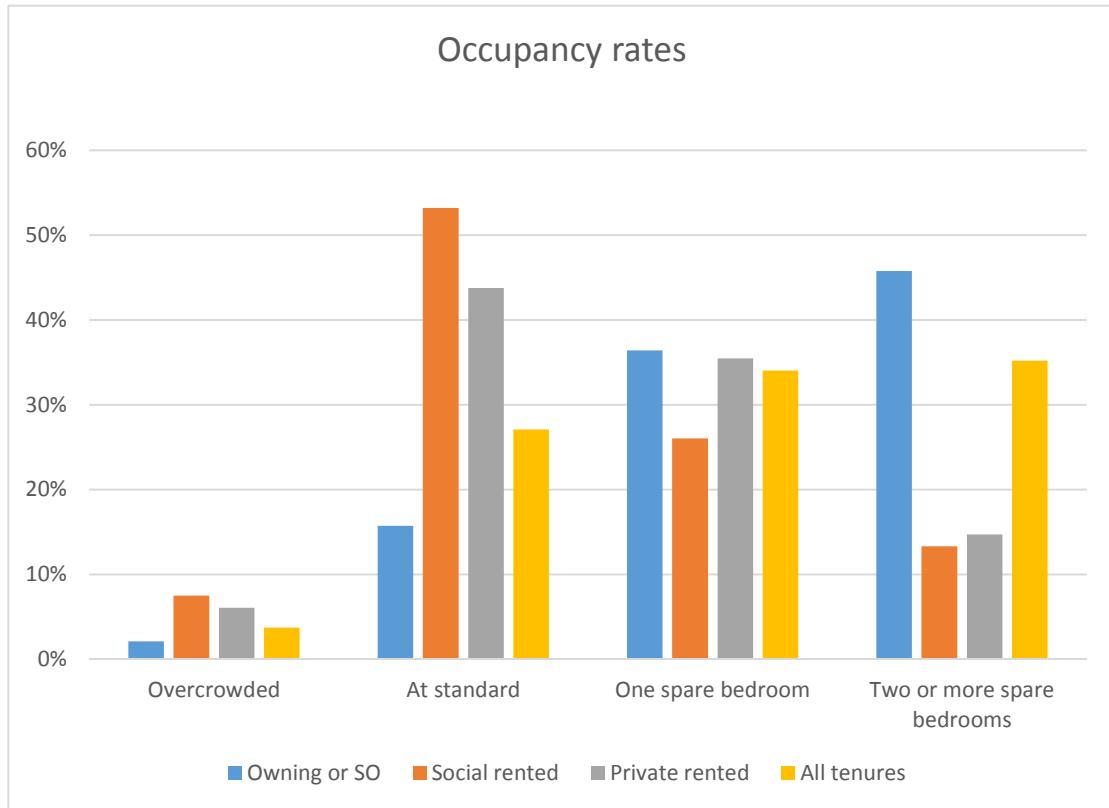
Source: BCC Housing Register

5.3.8 Overcrowding and under occupation

Figure 5.10 shows occupancy rates in the dwelling stock by tenure, taken from the 2011 Census. The overall level of overcrowding in Basildon is 4%, higher than the regional, but lower than the national, averages. This represents about 2,700 households. The rate of overcrowding is highest in the social rented sector, followed by the private rented sector, with only 2% of owners overcrowded. Under-occupation is more of an issue in the owner occupied sector, with 82% of owners having one or more spare bedrooms and 46% having two or more. Under-occupation is also much more prominent in the private rented sector (50% of households having one or more spare bedrooms) than in the social rented sector (39%).

In the private sector, the amount of accommodation which households consume is determined by their ability to pay for it, although there is considerable inertia because of the high costs of moving house to adjust housing consumption. However even private tenants who can move relatively easily show a preference to pay for more rooms than the bedroom standard indicates are necessary. This suggests that there are other attributes of housing than bedroom space which households value more highly, for example location, amenities, or gardens. Although house prices have increased steadily relative to incomes in recent decades, the level of under occupation has increased. The bedroom standard does not therefore measure household space requirements very accurately and it exaggerates the extent of under-occupation. By the same argument the standard also under-estimates the extent of overcrowding, with many households occupying housing to standard being potentially over-crowded.

Figure 5.10 occupancy by tenure



Source: ONS 2011 Census Table LC4108EW

5.3.9 Concealment

Concealed households are households which cannot ‘form’, because of a shortage of accommodation which they can afford. They live within or as part of another household and in extreme cases become homeless. One difficulty in establishing the number of concealed households relates to whether they actively wish to leave the household within which they live. In some cases, families wish to live together in extended households consisting of three or more generations. Likewise single people may be living with parents, friends or others through choice.

Data on the number of concealed households is therefore difficult to obtain, as it requires data on both household composition and household preferences. The 2011 Census estimates provides estimates of concealed households but these were derived from an analysis of household composition alone, and the wishes of the households concerned were not known. In that sense the Census may over-estimate concealment by including families which are happy to live with other families. On the other hand the Census includes as concealed households only couples (with or without children) and single parents. It excludes single people and may thus under-estimate concealment as it applies to this group.

The 2011 Census identified 716 concealed households in Basildon, representing just over 1% of all households. Some 60% were couple households, of whom three quarters had no children.

A second potential source is through the detailed analysis of housing register data, provided that this is collected. The data provided on the Basildon Register does not permit the identification of concealed households

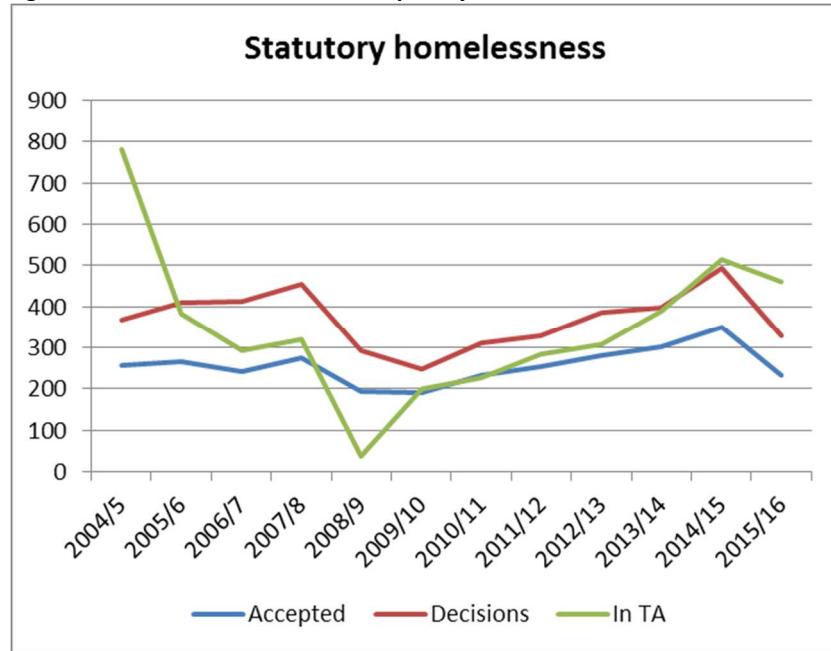
5.3.10 Homelessness and temporary accommodation

Homelessness applications and decisions are one of the most significant indicators of housing need and stress. As can be seen in Figure 5.11, after a dip between 2008-10, the number of statutory homeless applications and acceptances had risen steadily, with acceptances reaching over 350 in 2014-2015. However, estimated figures for 2015-2016¹ show significant reductions in both decisions (representing the number of approaches) and acceptances. In parallel, there was significant success in preventing homelessness, with 422 households assisted in 2014-15.

The other critical indicator is the number in temporary accommodation (TA). From a peak in 2004, numbers in TA dropped significantly until 2008-2009, when they started increasing, at a higher rate than both acceptances and applications. By 2009 there were more in TA than were being accepted every year, and by 2014-15 there were more even than the total number of approaches that year. We should also note that Basildon had been forced to use B&B as temporary accommodation for over 40 households since 2013, something that they had managed to avoid in earlier years. However, to date in 2015-16, numbers in temporary accommodation have fallen below 2014-15 levels, reflecting the reduced number of statutory homelessness acceptances. And there are currently no households in B&B.

The use of TA is clearly linked to the absence of resources to re-house homeless people, and this is illustrated strongly in figure 5.11

Figure 5.11 Homelessness and temporary accommodation



Source: DCLG Live Table 784 and P1E returns; 2015-16 data from Basildon BC

¹ We have half-year figures for 2015-16, and have doubled these to estimate approaches and decisions. Numbers in temporary accommodation are a snapshot at the end of June 2015

There is little evidence that rough sleeping is a significant issue, with the annual rough sleeper numbers in single figures (zero in 2014), though this annual count is not the most reliable measure. Of probably more significance are the reports from voluntary sector agencies of substantial hidden homelessness and 'sofa surfing' among both those likely to be statutorily homeless and others.

5.3.11 Empty and second homes

While a number of empty homes are needed for the proper functioning of housing markets, enabling mobility and movement, higher numbers are an indication of lack of demand; and lower numbers an indicator of higher demand. Basildon BC had 1,443 empty homes noted on the Council Tax Register in 2014, representing 1.89% of stock. Some 357 of these (0.47% of the stock) had been empty for six months or more, with the majority (1086, or 1.42% of the stock) being empty for periods of under six months. These figures are within the normal levels necessary to sustain mobility and to allow the refurbishment of the stock. They are lower than some neighbouring authorities (Castle Point and Thurrock), but higher than others (Chelmsford, Brentwood, and Rochford). Some 217 homes (0.28%) are classed as second homes, again a relatively low figure.

5.3.12 Social rented sector lettings

The CORE database provides details of new lettings in the social rented sector for all landlords in Basildon. Table 5.1 shows lettings data over the 2011-15 period, although the data for 2014-15 should be treated as incomplete. Between half and two thirds of lettings are to new tenants with the remainder being transfers. Single adults, lone parent families and couples with children form the main types of household entering the social rented sector. About one in five new lettings are to older single people or couples, including a relatively high proportion of transfers within the social rented stock, presumably downsizing or moving to specialised or more suitable accommodation. This is also due to a substantial proportion of sheltered accommodation becoming available. About one third of new tenants are in full or part-time employment, a relatively low proportion compared to households as a whole, reflecting the role of the sector in housing people on lower incomes. Around one in five are retired, 10-20% ill or disabled, and 10-12% unemployed. The largest group is people at home not seeking work, many of whom are likely to be single parents or other carers.

More than nine in ten tenants are of white ethnic origin. Only a minority of tenants are re-housed through referral channels such as nomination by the local authority or another landlord. Living in an unsuitable property as a result of overcrowding, ill health or poor conditions was the main reason for re-housing where this information was available.

Table 5.1 New lettings to social rented tenants

	11-12	12-13	13-14	14-15 (Provisional)
Type of letting				
Transfer	41%	35%	34%	66%
Other	59%	65%	77%	34%
Household type				
1 older	15%	16%	16%	5%
2 older	3%	6%	5%	1%
1 adult	29%	26%	27%	24%
2 adult	7%	5%	6%	8%
1 adult plus children	24%	23%	25%	33%
2 adults plus children	21%	21%	17%	26%
Other	1%	3%	4%	3%
Economic status				
Working full-time	23%	21%	16%	28%
Working part-time	9%	11%	8%	10%
Govt training/New Deal	0%	0%	0%	1%
Unemployed	12%	10%	12%	21%
Retired	16%	16%	18%	4%
Home/not seeking work	27%	28%	24%	26%
Student	1%	0%	0%	2%
Sick or disabled	12%	12%	21%	6%
Ethnic group				
White	94%	95%	94%	98%
Mixed	2%	2%	2%	1%
Asian	0%	0%	2%	1%
Black	2%	2%	1%	0%
Other	2%	2%	2%	0%
Referral				
Internal transfer	13%	13%	17%	0%
Tenant applied direct	1%	2%	2%	29%
Nominated by local housing authority	32%	24%	16%	6%
Other social landlord	1%	0%	1%	1%
Other	54%	61%	64%	64%
Reason for housing				
Decant	1%	2%	2%	3%
End of assured tenancy	2%	1%	1%	2%
Relationship breakdown	2%	1%	1%	4%
Asked to leave by family etc	4%	2%	2%	5%
Unsuitable property (overcrowding, ill health, condition)	17%	10%	10%	36%
Could not afford property	1%	1%	0%	1%
To move to independent accommodation	4%	3%	4%	9%
Under-occupation	1%	3%	2%	21%
Other	67%	77%	79%	19%

Source: CORE returns 2010-2015

5.3.14 Older people's housing

We saw above that there is a substantial projected increase in the older population of Basildon over the next two decades. All age groups aged over 65 are projected to increase significantly, with the over 90's expected to increase by more than 250% between 2012 and 2037, from 1,280 to 4,600. The majority of older people are expected to remain living in their own homes within the mainstream housing stock but others move into specialised accommodation such as sheltered housing or

housing with care. In the past, most specialised provision for older people was provided by local authorities or housing associations for rental. In recent years, with the rise in home ownership levels amongst older people, the market for leasehold specialised housing has grown substantially. Table 5.2 below provision of specialised housing for older people in Essex in 2015. Housing with support refers to any form of housing which includes some form of support to help residents live independently; and housing with care refers to the various models of housing which provide or deliver some measure of personal care on site. Housing with support still forms the overwhelming majority of provision in Basildon and across the rest of Essex despite the increasing popularity of various forms of housing with care in recent years.

Within the housing with support sub-sector, 87% of provision is for rent. This is well above the county average of two thirds and only Harlow has a higher proportion. In some other authorities, a much higher proportion of housing with care is leasehold. Overall, Basildon has a high level of housing with care provision (214 units per 1,000 aged 75 and older in 2015) and almost double the national average level of 123 per 1,000. Any adjustment of provision towards the leasehold sector will therefore need to take account of the high volume of rented housing with support.

In the housing with care sector, where more provision is recent, a lower share of the sub-sector is provision for rent (61%). This is below the country average of 75%. In several Essex authorities all housing with care provision is for rent. Basildon is well provided overall with 18.9 units of housing with care per 1,000 people aged 75 or more, compared to 16.2 across England on average.

Overall therefore Basildon is well provided with specialised housing for older people but a high proportion of this is in the form of rented housing with support, which does not reflect the emerging pattern of tenure amongst older people.

Table 5.2 Specialised housing provision for older people 2015

	Pop aged 75+ (000s)	Housing with support				Housing with care			
		Rent	Sale	Total	Per 1000 aged 75+	Rent	Sale	Total	Per 1000 aged 75+
Basildon	10.81	2014	298	2312	214.0	125	79	204	18.9
Braintree	9.69	560	903	1463	151.0	107	0	107	11.0
Brentwood	5.87	565	325	890	151.6	81	0	81	13.8
Castle Point	6.70	351	210	561	83.8	0	0	0	0.0
Chelmsford	10.60	1098	770	1868	176.3	122	10	132	12.5
Colchester	11.10	834	279	1113	100.3	80	0	80	7.2
Epping Forest	9.87	703	320	1023	103.6	99	88	187	18.9
Harlow	4.85	624	0	624	128.7	106	0	106	21.9
Maldon	4.18	701	358	1059	253.3	0	11	11	2.6
Rochford	6.25	640	390	1030	164.8	80	66	146	23.4
Tendring	18.64	859	869	1728	92.7	60	48	108	5.8
Uttlesford	4.95	506	234	740	149.5	31	0	31	6.3
Essex total	103.49	9455	4956	14411	139.2	891	302	1193	11.5

Source: Elderly Accommodation Counsel (EAC) Statistics on specialist housing provision for older people in England 2015

5.3.15 Health and disability

Data on disability is difficult to obtain because of variations in definition and difficulties in assessment. The 2011 Census provided data on people's own assessment of their health and well-being. Basildon had very similar levels of fair, bad and very bad health (18% in total) to the regional and national averages (Table 5.3). The proportions of people reporting that health or disability problems limited their daily activities a lot (8%) or a little (9%) were also similar to national and regional averages (Table 5.4). In numerical terms 14,300 people living within Basildon reported that their activities were affected a lot.

Table 5.3 General health – self assessed

	Very good health	Good health	Fair health	Bad health	Very bad health
Basildon	46%	35%	13%	4%	1%
Brentwood	51%	33%	12%	3%	1%
Castle Point	43%	36%	15%	4%	1%
Chelmsford	50%	35%	11%	3%	1%
Rochford	48%	35%	13%	3%	1%
Thurrock	48%	35%	12%	4%	1%
East of England	47%	35%	13%	4%	1%
England	47%	34%	13%	4%	1%

Source: ONS, 2011 Census Table QS302EW General Health

Table 5.4 Limitation on day to day activities – self assessed

	Day-to-day activities limited a lot	Day-to-day activities limited a little	Day-to-day activities not limited	Number limited a lot
Basildon	8%	9%	83%	14296
Brentwood	7%	9%	84%	5019
Castle Point	9%	10%	81%	7995
Chelmsford	6%	8%	86%	10186
Rochford	7%	10%	83%	5957
Thurrock	7%	8%	84%	11401
East of England	7%	9%	83%	434168
England	8%	9%	82%	4405394

Source: ONS, 2011 Census Table QS303EW Source: 2011 Census Table QS302EW Long term health problem or disability limiting activities

The PANSI database developed by Oxford Brookes University produces estimates of the proportions of younger people with a range of physical disabilities and mental disorders, which are derived by applying national incidence rates to the population by age group. These incidence rates are professionally rather than self-assessed but do not take account of local variations in incidence. Table 5.5 shows the results for Basildon. Almost 8,400 people aged 18-64 had a moderate physical disability in 2015, a number projected to increase to 8,800 by 2030. About 2,500 (rising to 2,675 in 2030) had a serious physical disability. In 2015 17,400 people had a common mental disorder

(rising to 18,000 in 2030), and 7,700 had two or more psychiatric disorders, rising to 8,000 by 2030.

Table 5.5 Numbers with moderate or serious physical disability and with mental disorders

	2014	2015	2020	2025	2030
With moderate physical disability					
18-24	586	578	541	541	599
25-34	979	983	1,021	1,004	958
35-44	1,338	1,338	1,327	1,394	1,445
45-54	2,493	2,512	2,444	2,309	2,318
55-64	2,965	2,980	3,367	3,650	3,561
Total 18-64	8,361	8,392	8,701	8,898	8,880
With serious physical disability					
18-24	114	113	106	106	117
25-34	93	94	97	96	91
35-44	406	406	403	423	439
45-54	694	699	680	643	645
55-64	1,154	1,160	1,311	1,421	1,386
Total 18-64	2,462	2,472	2,597	2,688	2,678
All aged 16-64 with					
Common mental disorder	17,365	17,390	17,637	17,804	17,977
Borderline personality disorder	487	487	494	499	504
Antisocial personality disorder	369	371	374	379	383
Psychotic disorder	432	432	439	443	447
Two or more psychiatric disorders	7,733	7,747	7,850	7,928	8,007

Source: PANSI database

Appendix 1

Profile

The breakdown of the sample by gender was 46% male and 54% female.

The age profile showed higher proportions of respondents in the older age groups, as shown in table A1

Table A1 Age of respondent			
	%		%
16 - 21	<1	55 - 64	21
22 - 24	1	65 - 74	22
25 - 34	9	75 - 84	14
35 - 49	19	85 or over	4
50 - 54	10		

Base: all respondents (2248)

Around 40% of respondents were under the age of 55 with a further 43% between 55 and 74. This is a common feature of such postal surveys and hence not unexpected. Sample sizes were sufficient to allow different age groups to be considered without the need for weighting of the data.

A broad breakdown by ethnic group is as follows

Table A2 Ethnic group	
	%
White	95
Mixed	<1
Asian	2
Black	1
Other	<1
Refused	1

Base: all respondents (2248)

The data file breaks this down further into the Census categories but as there are so few respondents from BME groups the figures would be very small so the above groupings give a better appreciation of the broad situation.

The majority were UK citizens - 97% - with 2% EU citizens and 1% from outside the EU. Only 4 people (which is 0.02%) said they were asylum seekers or refugees.