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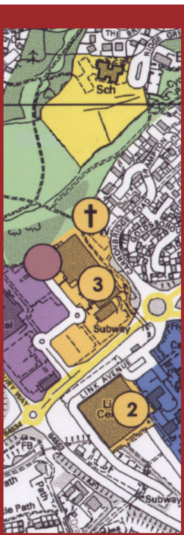

YATE HOUSEHOLD SURVEY 2010

Report of Survey carried out by Periscope Ltd

on behalf of

Heron Land Developments Ltd

April 2011

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TABLES:

SECTION ONE – INTRODUCTION

1.1 This is the third in a series of household surveys of the residents of Yate and Chipping Sodbury undertaken by Periscope Ltd. The two previous surveys were undertaken in 1998 and 2003.

1.2 In each case the survey has been undertaken by the same market research company and on a common format, although the questions asked have been refined to an extent to reflect current circumstances. A copy of the 2010 survey questionnaire is appended.

1.3 The structured sample selected was statistically robust. It involved 508 one-to-one interviews with residents which took place throughout December 2010.

1.4 The survey asked a variety of questions which broadly fall under the following headings:

- Family;
- Current Home;
- Previous Home;
- Next Home;
- About Yate and the Quality of Life;
- Yate Shopping;
- Yate Leisure;
- Yate Employment; and
- Yate Services.

1.5 The key characteristics of the survey sample are identified on Table 1 on the following page:

Table 1: Key Characteristics of Survey Sample

Gender		%	**Age Grouping**		%
Male	200	39	18-34	105	21
Female	308	61	35-54	202	40
Total	*508*	*100*	55 plus	201	39
			Total	*508*	*100*
Household Income (£000)			**Household Composition**		
<10	28	10	Single Person	119	2
10-20	48	16	Couple	107	21
21-30	68	23	Family	164	32
31-50	98	34	Couple (children left home)	118	23
50 plus	50	*17*	*Total*	*508*	*100*
Total	*292*	*100*			
Type of House			**Home Tenure**		
Terraced	153	30	Rented	83	16
Semi-detached	188	37	Owned	397	78
Detached	145	29	Living with parents	28	6
Other	22	*4*	*Total*	*508*	*100*
Total	*508*	*100*			

SECTION TWO – SURVEY FINDINGS

2.1 Sources of Housing Demand

2.1.1 The survey asked questions about respondents' previous place of residence. This is recorded by postcode, BS37 (being the local area of Yate and Chipping Sodbury), other BS (Bristol) codes and elsewhere.

Table 2: Previous Home of Movers

Post Code	2010 Survey %	2003 %
BS 37	59	54
Other BS codes	22	24
Other	19	22
Total	*100*	*100*

2.1.2 The survey reveals an increase of 5% in the proportion of movers relocating within Yate and Chipping Sodbury compared with the 2003 survey, implying an increase in loyalty to the town.

2.1.3 Whilst the majority of movers had owned their previous home, a significant proportion (43%) had either rented their previous home or lived with parents. This highlights the importance of the first time buyer market in Yate.

Table 3: Previous Home Tenure

Previous Home Tenure	2010 Survey %	2003 Survey %
Owned	57	51
Rented	26	32
Lived with Parents	17	17
Total	*100*	*100*

2.1.4 The increase of 6% in previous owner-occupation, taken together with the 78% of owner occupiers in the survey, implies a further strengthening in owner occupation in the town. The slightly lower proportion of those whose previous home was not owner occupied implies less first time buyers, but the difference is small.

2.1.5 Rental tenure shows a marked reduction in local authority homes and a comparable increase in private landlords. Housing Association ownership has remained unchanged.

Table 4: Rented Sector Tenure

Landlord	**2010 %**	**2003 %**
Local Authority	21	40
Housing Association	15	15
Private Landlord	60	45
Other	4	0
Total	*100*	*100*

2.2 Reasons for Last Move

2.2.1 Analysis of respondents' reasons for purchasing their current home in Yate displays a strong loyalty to the town, with strong ties among family/friends and employment in particular.

Table 5: Reason for last move

Reason	**2010 %**	**2003 %**
Originally/always lived in Yate	28	28
Employment in Yate	17	14
Close to family/friends	14	21
Liked look of area	10	18
Affordable prices/rents	9	n/a
Convenient for amenities	7	n/a
Liked look of home	5	15
Other	10	4
Total	*100*	*100*

2.2.2 The survey questions covered a range of factors but the results show that overall the social factors are the most important. Compared with the 2003 survey however employment is a more significant reason for moving to the present home. The 2003 survey did not distinguish affordability but it is notable that relatively it is not a significant factor.

2.2.3 The importance of the home being located in Yate is clearly highlighted in the survey, with 42% stating it was extremely important and a further 21% saying it was important. This is a slight reduction on the 2003 survey – 63% compared with 72%. 57% said it was important the house was in that particular part of Yate; this was most important for couples with young children.

2.2.4 As revealed in Table 5 affordability does not appear to have been a key consideration in choice of specific home. Table 6 indicates a wide range of factors which respondents cited as influencing their choice of the current home. Consistent with Table 5 affordability had reduced in relative importance since 2003. Proximity to family and friends is again prominent, but less so than 2003.

Table 6: Why this home?

Why this home?	**2010 %**	**2003 %**
Affordable price	18	34
Suitable size	17	23
Style and appearance	13	21
Quiet, safe location	13	n/a
Location for family/friends	12	21
Other	27	1
Total	*100*	*100*

2.3 Household Income Analysis

2.3.1 43% of respondents were unwilling or unable to state a household income, but those that did gave an average household income of £33,911. Nearly half of respondents (49%) earned less than £30,000. The general increase in average salaries since 2003 is not necessarily significant having regard to inflation over the intervening period.

Table 7: Household Income

Household Income (£000)	**2010 %**	**2003 %**
<30	49	71
31-50	34	21
50 plus	17	8
Total	*100*	*100*

Table 8: Household income by age group

	2010 Household Income (£000) (%)			
Age Group	**<30**	**31-50**	**50 plus**	***Total***
18-34	37	*46*	*17*	*100*
35-54	32	*44*	*24*	*100*
55 plus	73	*18*	*9*	*100*

2.3.2 The majority of respondents aged 18-34 and 35-54 have a household income of between £31,000 - £50,000, while 73% of the 55 plus age group have household incomes of less than £30,000.

2.4 Current Home

2.4.1 The survey provided information on respondents' current and former house type and the number of bedrooms. This indicates an increased prominence of detached houses and a reduction in terraced houses, flats and maisonettes, reflecting the traditional pattern of trading-up within Yate.

Table 9: House Type

Type of House	Current %	Former %
Flat/Maisonette	3	9
Terraced	30	38
Semi-detached	37	37
Detached	28	15
Bungalow	2	1
Total	*100*	*100*

Table 10: Current House Type by age group

	Age Group		
Type of House	**18-34**	**35-54**	**55 plus**
Flat/Maisonette	3	1	4
Terraced	38	28	28
Semi-detached	44	39	32
Detached	16	32	32
Bungalow	-	-	4
Total	*100*	100	100

2.4.2 Table 11 presents the above information in terms of the number of bedrooms which respondents have, again reflecting the trading-up characteristic in the housing market.

Table 11: House Size

No. of Bedrooms	Current %	Former %
1	1	3
2	14	31
3	60	52
4	23	13
5 plus	2	1
Total	*100*	*100*

2.4.3 The choice of house type and size is also associated with income levels. Of those who answered questions regarding income, the tables below show that as income increases, purchasers move up the housing ladder both in terms of the style of property and the size.

Table 12: House type by household income

	Household Income (£000) (%)			
Type of House	**<10**	**11-30**	**31-50**	**50 plus**
Flat/Maisonette	4	4	1	-
Terraced	25	33	20	10
Semi-detached	53	43	43	22
Detached	11	16	36	68
Bungalow	7	4	-	-
Total	*100*	*100*	*100*	*100*

Table 13: House size by household income

	Household Income (£000) (%)			
No. of bedrooms	**<10**	**11-30**	**31-50**	**50 plus**
1	4	1	-	-
2	18	20	9	2
3	74	69	52	28
4	4	10	34	64
5 plus	-	-	5	6
Total	*100*	*100*	*100*	*100*

2.4.4 This income effect is illustrated in the price paid for the current home, with the majority of purchasers with household incomes below £30,000 paying less than £100,000 for their current home.

Table 14: Amount paid by household income

	Household Income (£000) (%)			
Amount Paid (£000)	**<10**	**11-30**	**31-50**	**50 plus**
<100	67	58	46	32
100-140	-	8	12	24
140-200	33	22	23	24
200 plus	-	12	19	20
Total	*100*	*100*	*100*	*100*

2.4.5 Respondents were asked to estimate the current value of their home. The results to this question show the extent to which prices in the area have risen since 2003, with now only 0.5% of houses being worth less than £100,000 and more than 60% worth more than £200,000. Based on respondent estimates the average current value of their home is £205,672.

Table 15: Estimated value of current home

Estimated Current Value (£000)	2010 %	2003 %
<100	0.5	31
101-140	9.5	35
141-200	30	18
200 plus	60	16
Total	*100*	*100*

2.4.6 The survey examined how recently respondents had moved into their current house.

Table 16: When moved to current home

When moved to current home	2010 %	2003 %
2008-2010	15	-
2004-2007	21	-
1999-2003	16	28
1994-1998	10	33
1989-1993	8	16
1984-1988	8	6
Pre-1984	21	17
Total	*100*	*100*

2.4.7 52% of respondents had moved house in the last 10 years, and 15% had moved in the last 3 years. At the time of the 2003 survey, 61% of respondents had moved in the last 10 years, and 28% in the last 3 years. This shows a more static community in 2010, with less movement than in 2003. Of those respondents who moved between 2008 and 2010, the majority moved into rented accommodation, appearing to reflect the increase in house prices in the area and the nationwide issue of decreasing mortgage lending leading to less people able to purchase their own home.

2.4.8 The research has shown that homes costing less than £100,000 have historically been purchased by those with household incomes of less than £30,000. Rising house prices in Yate have moved prices for the smaller homes above the £100,000 threshold and the larger homes above the £200,000 threshold. Table 17 shows the correlation between household income and respondents renting accommodation.

Table 17: Households Renting

Household Income (£000)	2010 %
<10	17
11-30	64
31-50	13
50 plus	6
Total	*100*

2.4.9 The 18-34 age group is the most dynamic in terms of household generation. It is notable that within this age group 56% of respondents own their own home, compared with 78% in the town as a whole.

Table 18: 18-34 Age Group Tenure

Non-owners	**2010 %**
Renting couples	14
Renting singles	6
Living with parents	24
Sub Total	*44*
Owners	
Owners single	5
Owners couples – no children	11
Owners couples with children	40
Sub Total	*56*

2.5 Future Demand

2.5.1 The survey identified that 79% of respondents are unlikely to move within the next 2 years and 69% unlikely to do so in the next 5 years. 14% said they were likely to move in the next 2 years and 20% in 3-5 years time. The latter is a significant increase on 2003 whilst those expecting to move in 2 years is broadly similar. The increase in the proportion of potential movers is significant in the context of current (2010) housing market conditions.

Table 19: Respondents likely to move

Respondents likely to move	2010 < 2 Years (%)	2010 3-5 years (%)	2003 < 2 Years (%)	2003 3-5 years (%)
Very Likely	7	10	15	5
Likely	7	10		

Neither	7	11	5	4
Unlikely	13	12	80	91
Very Unlikely	66	57		

2.5.2 27% of couples in private sector rented accommodation and 26% of 18-34 year olds were expecting to move home in the next 2 years, while 88% of retired respondents were unlikely to move.

2.5.3 Amongst those who are likely to move the main reasons are shown in Table 20.

Table 20: Reasons for Moving

Reasons for Moving	**2010 %**	**2003%**
Bigger/better house	22	50
Downsizing	10	10
Family/Job commitments	14	16
Moving in/Buying with partner	10	10
More rural area	10	-
Different style of house	4	-
Going to university	3	-
Nearer school of choice	3	-
Move away from neighbours/neighbourhood	7	-
I want to but…	7	-
If could afford it	-	14
Other	10	-
Total	*100*	*100*

2.5.4 In both the 2010 and 2003 surveys the most common reason for moving home is for a bigger/better home, with family/job commitments also an important reason. Downsizing and moving in/buying with partner also remain popular reasons.

2.5.5 The income profile of those likely to move is shown in Table 21.

Table 21: Income of likely movers

Household Income (£000)	**2010 %**
<10	5
11-30	32
31-50	41
50 plus	22
Total	*100*

2.5.6 A significant proportion of the likely movers have a household income between £31,000 and £50,000.

2.5.7 Of those likely to move and purchase a property (as opposed to renting), the majority estimated they would pay between £180,000 and £200,000. This is consistent with the style, age and size of property favoured by the respondents as shown below.

Table 22: House Purchase Aspirations – Type

Type of House	Aspiration %	Current %
Flat/Maisonette	8	3
Terraced	6	30
Semi-detached	29	37
Detached	35	28
Bungalow	13	2
Other	9	n/a
Total	*100*	*100*

2.5.8 The aspirations reflect a further strengthening in the demand for detached houses and continued reduction in demand for terraced houses (see Table 9).

2.5.9 In terms of size of dwellings, the aspiration is for less 3 bedroom dwellings but an increase in one and two bedroom dwellings. This is likely to reflect the desire among prospective first time buyers to get on to the property ladder, as reflected in the data for the 18-34 age group (see Table 18). Demand for four and five + bedroom dwellings remains proportionately unchanged.

Table 23: House Purchase Aspirations – Number of Bedrooms

No. of Bedrooms	Aspiration %	Current %
1	5	1
2	23	14
3	38	60
4	23	23
5 plus	2	2
Don't Know	9	-
Total	*100*	*100*

2.5.10 A further breakdown of aspirations is possible by house type.

Table 24: Housing Demand

	No of bedrooms (%)					
Type of House	**1**	**2**	**3**	**4**	**5**	***Total***
Flat/Maisonette	44	44	12	-	-	*100*
Terraced	-	33	67	-	-	*100*
Semi-detached	3	24	49	24	-	*100*
Detached	-	6	45	43	6	*100*
Bungalow	-	54	46	-	-	*100*

2.5.11 Table 25 compares expectations in terms of future house purchase price (value) with the income profile of Yate residents.

Table 25: Value of Next Home

	Value of Next Home (£000) (%)			
Household Income (£000)	<100	100-140	140-200	200 plus
<10	-	25	7	-
11-30	100	50	47	12
31-50	-	25	23	56
50 plus	-	-	23	32
Total	*100*	*100*	*100*	*100*

2.5.12 The majority of the Yate households have incomes in the £11,000-30,000 range. They will be the principal purchasers of homes up to £200,000. This analysis also shows the demand for larger homes over £200,000 from households with incomes over £30,000.

Table 26: Pricing Profile

	Size – No. of bedrooms (%)			
Purchase Price (£000)	1	2	3	4 plus
<100	-	6	-	-
100-140	-	28	-	-
140-200	-	44	46	14
200-260	-	22	26	27
260-300	-	-	14	23
300 plus	-	-	14	36
Total	*0*	*100*	*100*	*100*

2.5.13 This shows the need to offer 2 bed homes below £140,000 but with the majority of 2 bed homes being priced between £140,000 and £200,000. There will be a demand for 3 bed homes selling above £140,000 and a substantial demand for a range of 4/5 bed homes selling at more than £200,000.

2.6 Future Commitment to Yate

2.6.1 There is a preference amongst potential movers for their next home to be in Yate. Table 5 had identified the relative strength of different factors likely to influence this. However, the commitment to Yate is less strong than in the 2003 survey, implying a more mobile population.

Table 27: Next Move - Location Preference

Location Preference	2010 %	2003 %
Yate	45	58
Don't Know	21	24
Not Yate	33	18
Total	*100*	*100*

2.7 Additional Housing

2.7.1 Although there is a strong desire to continue living in Yate, this is not translated into a desire for more homes in the town. 75% of respondents believe there are enough houses in Yate at present, 10% want more homes and 15% did not have a view. This marks a trend towards more support for additional housing as in the 2003 survey the percentage considering there were enough homes in the town was 87%.

2.7.2 Those most in favour of further housing are in the 18-34 age group and/or in rental accommodation or living with parents.

2.7.3 Respondents were requested to consider the reasons why they supported or opposed more housing in the town. Multiple answers were invited and so the percentages below therefore relate to the total number of respondents and not just those who provided 'yes' or 'no' answers.

2.7.4 Amongst those wanting more homes, there is an understanding that additional housing could bring benefits to the town. The reasons given for Yate benefiting from more housing are:

- More people would be able to afford a home in Yate (6.5%)
- It would be good for the local economy (4.5%)

- There is a shortage of homes (3%) and
- It would force an improvement in amenities and roads (1.8%)

2.7.5 The main concerns of those not wanting additional housing were:

- The amenities could not cope (18.5%)
- The roads could not cope (15.2%) and
- Loss of open space/countryside (11.4%)

2.8 Yate Amenities

2.8.1 There is an overwhelmingly positive feeling of satisfaction amongst the survey respondents about their quality of life in Yate. This continues the pattern found in previous surveys and is slightly higher than in the 2003 survey.

Table 28: Quality of Life

Quality of Life	**%**	**2003 Survey %**
Very Good	35	85
Good	52	
Adequate	12	14
Poor	0.5	1
Very Poor	0.5	
Total	*100*	*100*

2.8.2 When asked to identify the good things about living in Yate respondents were positive in their response, providing an average of 2 features per person and some mentioning as many as 5. Most popular responses were “shops” (42%), “amenities” (30%), “schools” (19%) and “nice, quiet area” (14%).

2.8.3 In contrast, when asked about problems or disadvantages of living in Yate only 40% could think of any and they gave only 1.24 (average) features per person answering. This reinforces the positive opinion of life in Yate. The disadvantages identified relate to issues surrounding young people, including lack of cinema and other leisure facilities, as well as traffic and transport issues.

2.8.4 The survey asked if there was anything that could be done to improve life in Yate. 40% of respondents wanted a cinema, 16% wanted a better range of shops, 14% wanted more for teenagers to do and 10% wanted better evening facilities including restaurants, pubs and clubs. This may be compared with the facilities identified in the 2003 survey in this connection: cinema, youth facilities/centre, bowling, entertainment/nightclub.

2.8.5 The survey asked questions about the behaviour of respondents as regards shopping, leisure, employment and services.

2.8.6 84% of respondents do all or most of their general shopping in Yate *(2003: 73%)* with the internet and other shopping centres including Cribbs Causeway, Longwell Green and Bristol city centre also being used. A high proportion of these are within the 55+ age group. The majority of respondents carry out their food shopping weekly (46%) while they shop less often for clothes (83%) and other items, such as electrical goods (87%).

2.8.7 In terms of leisure activities, the majority of respondents eat out (66%) and drink (67%) in Yate *(2003: 59% and 78%)* with a high proportion also using the leisure centre for swimming/working out and outdoor sport. 64% of respondents travel to the Bristol fringe to visit the cinema *(2003: 54%)*, reflecting support for a cinema within Yate.

2.8.8 The survey also examined the employment and transportation profile of the respondents. More than half are employed within the Yate/Chipping Sodbury area, an increase on the position in 2003.

Table 29: Employment Location

Employment Location	**Respondent %**	**2003 Survey %**
Yate/Chipping Sodbury	56	50
Bristol city centre	7	14
Filton/Bradley Stoke/Stoke Gifford	9	14
Avonmouth	1	2
Other	27	0
Total	*100*	*100*

2.8.9 The car is by far the most dominant mode of transport for journeying to and from work. Walking and cycling together account for approximately 15% of respondents. Little change has occurred since 2003.

Table 30: Mode of Transport

Mode of Transport	**2010 %**	**2003 %**
Car	76	74
Bus	2	9
Rail	2	2
Cycle	4	3
Walk	11	12
Work from home/other	8	n/a
Total	*100*	*100*

2.8.10 The survey asked for similar information from the partners of respondents. Among partners there is a greater use of the car for journeys to work (80%) and working from home (10%), less walking and cycling (9%) and the same proportion using bus and train.

2.8.11 To give an indication of the length of journeys to work respondents were asked to state how long their journeys take.

Table 31: Length of Work Journeys

No. of Minutes	**2010 %**
<10	26
11-30	40
31-60	24
>60	6
Work at home/other	8
Total	*100*

2.8.12 In an attempt to determine the support for more local employment, respondents in work were asked to state their interest in changing to a similar job to their current one, but based locally in Yate. A significant proportion (32%) would consider switching jobs in order to work closer to home. 58% stated they would not consider changing whilst 10% didn't know.

SECTION THREE - CONCLUSIONS

3.1 The demand for housing is predominantly locally generated, although there is also strong demand from elsewhere in the Bristol area.

3.2 An increasing majority of housing in Yate is owner-occupied. First time buyers moving from rented accommodation, or from living with parents, account for 43% of home buyers. The majority of rented accommodation is owned by private landlords, with limited housing association involvement in the Yate rental sector.

3.3 There is a strong sense of community within Yate based on strong family and friends' relationships. This and the attractiveness of the town and its environment are important reasons for people purchasing their current home in Yate, but since 2003 more people highlight employment as a reason. Affordability is relatively not a strong factor.

3.4 A comparison of respondents' previous homes with their current home clearly shows the conventional aspirations of the housing market in which purchasers trade-up through the market, a pattern particularly evident in Yate from this and previous surveys. Those intending to move in the near future reflect a further strengthening in the demand for detached houses and continued reduction in demand for terraced houses.

3.5 Nearly 50% of Yate households have incomes below £30,000. This is a key factor in determining the type and size of home people can purchase, with the majority of these living in terraced or semi-detached properties purchased for less than £100,000.

3.6 A high proportion of households with incomes above £30,000 live in detached homes, reflecting the traditional aspirations in which purchasers move from apartments to terraced to semi-detached to detached house.

3.7 There is an increase in those expecting to move house in the next 3 – 5 years, but no change in the next 2 years. The majority of those intending to move are in the 18-34 age group and are currently in rental accommodation or living at home. The majority of potential home owners are looking to purchase 3 bedroom semi-detached/detached properties at prices between £180,000 and £200,000.

3.8 An overwhelming majority of Yate residents (and more than in 2003) classify their quality of life as good. The positive features of the town are the shops, amenities, schools and a nice, quiet environment. The negative features of the town relate to issues surrounding young people, including lack of cinema and other leisure facilities, as well as traffic/transport issues.

3.9 The survey identified a wish for more entertainment facilities within Yate incorporating a cinema, bowling, entertainment/nightclub and restaurants.

3.10 Among those who favour more housing in Yate, there is a recognition that additional housing could bring benefits for the town through:

- provision of affordable homes for first time buyers;
- improvement in amenities and roads; and
- boosting the local economy.

3.11 The majority of Yate residents are employed locally. The car is the primary mode of travel to work but due to local employment a significant number also walk or cycle to work.

3.12 New employment provision would encourage a third of respondents to switch jobs in order to work closer to home. Additional employment would underpin the local economy and encourage less car usage.

Boyer Planning Ltd
May 2011