

LAND OFF ARUNDEL ROAD, ANGMERING MARKET HOUSING MIX ASSESSMENT

Prepared on behalf of
Redrow Homes Southern

August 2022

**LAND OFF ARUNDEL ROAD, ANGMERING
MARKET HOUSING MIX ASSESSMENT**

**PREPARED ON BEHALF OF
REDROW HOMES SOUTHERN**

AUGUST 2022

Barton Willmore LLP
26 Kings Hill Avenue
Kings Hill
West Malling
Kent
ME19 4AE

Tel: 01322 374660

Email: development.economics@bartonwillmore.co.uk

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1.0 LAND OFF ARUNDEL ROAD, ANGMERING MARKET HOUSING MIX ASSESSMENT

i) Introduction

- 1.1 This market housing mix assessment has been prepared by Barton Willmore now Stantec's National Development Economics Team on behalf of Redrow Homes Southern. The assessment has been prepared to support the planning application submitted to Arun District Council (ADC) for the development of approximately 156 dwellings on Land off Arundel Road, Angmering (the Site).
- 1.2 From the overall delivery of approximately 156 dwellings on the Site, the market mix is proposed to be formed of 2-bed (31.2%), 3-bed (33.9%), and 4-bed+ (34.9%). No 1-bed properties are proposed on the market although it should be noted that the affordable element of the scheme is 22.9% 1-bed.
- 1.3 The purpose of the assessment prepared by Barton Willmore now Stantec is to identify whether the proposed **market** housing mix for the scheme is appropriate for the **local** area, in the context of the market housing mix recommended for the Site by the Council's evidence base.
- 1.4 Table 1.1 sets out the recommended market mix of ADC's 'Updated Housing Needs Evidence' report (UHNE report, September 2016) against Redrow's proposed market mix on the Site. This mix is recommended across the District and is not broken down to sub-District areas.

Table 1.1: ADC vs Redrow Housing Mix for Land off Arundel Road, Angmering

<i>Bedroom Size</i>	WDC (District-wide)	Redrow Homes proposed market mix
1-bed	5-10%	0%
2-bed	40-45%	31.2%
3-bed	35-40%	33.9%
4+bed	10-15%	34.9%

Source: Table 1, ADC Updated Housing Needs Evidence report, September 2016

- 1.5 The caveats included by the UHNE report's authors should also be considered. The UHNE report states that its recommendations in respect of housing mix are only "*an appropriate starting point for monitoring housing provision*"¹ (our emphasis). The UHNE report is clear

¹ Paragraph 1.6, page 6, Arun District Council Updated Housing Needs Evidence Base, September 2016

that each application should be considered on its own merits by stating "*Consideration should however be given to site specific circumstances, **local needs, evidence and existing housing mix in the locality, in applying this to individual development schemes***"² (our emphasis).

- 1.6 The Arun District Local Plan (2018) also states under the 'Housing Mix' section, "***Requirements vary across the District and factors such as proximity to public transport and services, place and site characteristics will determine what is a suitable dwelling mix at any particular location***"³ (our emphasis).
- 1.7 Policy H DM1 (Housing Mix) states "*For developments of 11 units or more the Council shall require a balanced mix of market and affordable dwelling sizes including family sized accommodation based on the most up to date SHMA recommendations. The tenure mix for development schemes shall be **negotiated on a case-by-case basis** taking any necessary viability considerations into account. Developers shall have regard to the most up to date version of the SHMA*"⁴ (our emphasis).
- 1.8 Redrow's proposed mix in Table 1.1 must be considered in the context of the above. Redrow propose the delivery of a *higher* proportion of larger 4+ bed market housing than recommended by the UHNE. The provision of 1 to 3-bed housing is *lower* than recommended in the UHNE. In this report we provide analysis to determine whether the higher provision of 4+ bed properties and no provision of 1-bed is justified.
- 1.9 To identify the appropriate market mix, we consider the most recent housing mix evidence in the Council's evidence base, and analyse demographic data, market trends data, and consumer behaviour data collected by Experian. This evidence is presented in detail in appendices to this technical note, with the main headlines presented in this summary.

ii) Background

- 1.10 The analysis presented here is embedded in the National Planning Policy Framework's (NPPF, 2021) objective to create **mixed, balanced, and inclusive** communities. A full summary of national and local evidence is provided in Appendix A to this Housing mix assessment.
- 1.11 To establish the most appropriate market mix, a **localised** area of study is required to be established in line with national policy. This is because a housing mix in one location of ADC may not necessarily be appropriate in another, particularly in the context of ADC being characterised by contrasting urban and rural areas.

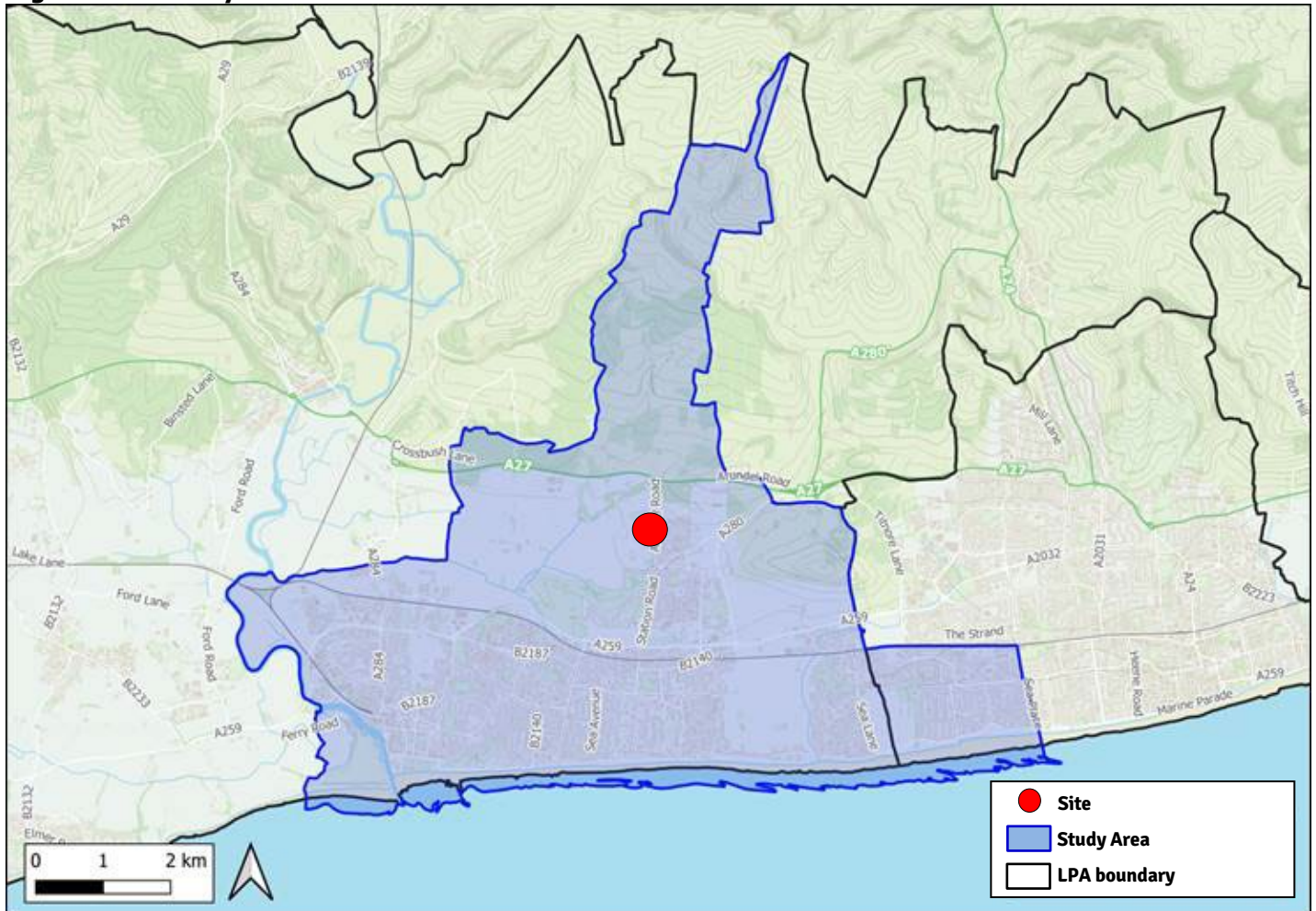
² Ibid

³ Paragraph 12.2.3, page 133, Arun District Council Adoption Arun Local Plan 2011-2031 (July 2018)

⁴ Policy H DM1, page 133, Arun District Council Adoption Arun Local Plan 2011-2031 (July 2018)

- 1.12 Furthermore, whereas a study area incorporating the entire area of the local authority may be too large, the study area should not be too small either. We have therefore considered the area set out in Figure 1.1, which is made up of the post code areas BN12, BN16, and BN17. This covers 11 electoral wards in Arun District and 1 in Worthing Borough.

Figure 1.1: Study Area



- 1.13 Our analysis also considers the place of Angmering in the Arun District Local Plan. The housing mix of developments such as Redrow's needs to support the population characteristics which can support Local Plan policies for Angmering.
- 1.14 Angmering is classified within the 'Village and Suburban Centres' and the Local Plan states that *"Village and suburban centres, including shopping parades and standalone shops form an important resource for businesses, visitors and residents. The expansion and additional provision of such facilities to a scale appropriate to the existing settlement or the planned*

expansion of that settlement will be welcomed by the Council provided that it adds to the range and accessibility of goods and services.”⁵

1.15 The Local Plan moves on to state, “*Barnham, Eastergate, Westergate and **Angmering** will **develop** their roles as **well-connected large villages** serving inland Arun; providing an **enhanced range** of shops, employment, housing, community facilities and local services, supported by improved transport links”⁶ (our emphasis).*

1.16 Policy EMP S1 ‘Strategic Economic Growth’ states how a high-quality employment site is allocated in Angmering at Water Lane.

1.17 A housing mix which supports Angmering’s place in the Local Plan is therefore essential and must be weighted in order to provide a population capable of meeting the Local Plan objectives for Angmering and align with the 2021 National Planning Policy Framework’s (NPPF) requirement to establish “*mixed and balanced*” communities and meet the NPPF requirement that “*housing should be located where it will enhance or maintain the vitality of rural communities.*”

1.18 The report’s analysis and recommendations come under the following headings:

- Demographics:
 - Revised analysis of 2011 Census data;
 - 2020-based Mid-Year Population Estimates;
 - 2018-based ONS Sub National Population Projections.
- Market Trends:
 - Analysis of the demand for ‘type’ (detached, semi-detached, terraced or flats) and bedroom size of property in the study area between December 2020 and December 2021.
- Experian Mosaic Consumer Classification analysis:
 - Providing detailed data on the ‘type’ of resident in the Study Area and beyond.

iii) Key Points of Analysis

1.19 The key conclusions determined by this Housing mix assessment are summarised below, with detailed evidence provided in the appendices on each topic.

⁵ Policy RET SP1, page 93, Arun District Council Adoption Arun Local Plan 2011-2031 (July 2018)

⁶ Paragraph 4.16, page 33, Arun District Council Adoption Arun Local Plan 2011-2031 (July 2018)

Demographic Evidence

- 1.20 Detailed demographic evidence is provided in Appendix B to this Housing mix assessment. The key points of the analysis are as follows:

Population change

- Between the 2001 Census and the most recent population estimates (2020), the population structure of the Study Area has experienced a **decline (-4%)** in first time buyers/young families (25-44 years);
- The child age (0-17 years) population has experienced a much lower increase since 2001 than the older age groups;
- In contrast there has been a significant proportional increase in the older population of the study area (25%);
- There has been an increase of 19% since 2001 in the 18-24 age group. This is likely due to young people living at home into adulthood due to the acute affordability issues in the wider District;
- The gap between the older and younger population is widening rapidly compared to other areas and is a trend which planning can help to address by targeting a mix supporting a more mixed and balanced community as required by the NPPF;
- Planning should contribute to seeking to rebalance the population so that the 25-44 age group does not continue to decline, and the child age population doesn't stagnate, as these are exactly the people who will help to maintain Angmering's place in the settlement hierarchy as set out in the Local Plan.

Under-occupation of homes

- Under-occupation of family sized housing recorded by the 2011 Census shows how a significant proportion of over 65s live in under-occupied family sized housing;
- This is a particular issue in larger properties. Of those residents who are 65 and over, 87% live in a property where one or more bedrooms are empty. This issue is more acute in the study area than in Arun (85%) West Sussex (85%) and the south east (84%);
- This reflects the relative affluence of older residents in the study area, who do not need to downsize for financial reasons and choose to remain in large family homes;
- It also reflects the lack of choice of specialist accommodation available to older people across Arun District as the SHMA identifies (page 35 of the SHMA shows only 68 units of Extra Care accommodation available, and calculates a need of 2,257 units 2011-2031);

- This trend explains why the young family/first time buyer population has declined since 2001, as for the most part they have to travel outside of the study area to find an adequately sized property;
- It should also be noted how this under-occupancy is likely to have increased since the 2011 Census. 2021 Census information in this regard should be published over the next 12 months.

Overcrowding

- The 2011 Census data indicates that 1,290 households were overcrowded in the study area as of 2011;
- Given the size of the households which are overcrowded, more family sized properties of at least 2 bedrooms are required, with most demand for larger family housing of 3+ bedrooms to alleviate this pressure.

Housing Market Trends (July 2017 – July 2022)

1.21 Detailed housing market trend evidence from the past 5 years is provided in Appendix C to this housing mix assessment. The key points of analysis are as follows:

- We have obtained our market trend data from the home.co.uk web site, and to provide a representative period we have considered a 5-year trend period to include three years pre-Covid, the Covid period, and post-Covid (July 2017-July 2022);
- The home.co.uk web site has been used because of its comprehensive database of sales and rental data. The web site states, *"Established in 1996, Home.co.uk has used search engine technology to build and maintain the most comprehensive database of UK residential properties advertised for sale and rent on the Internet."*
- The web site enables trends to be viewed over a range of time periods, owing to its recording of data on a monthly basis;
- As stated above we have considered the most recent five years (July 2017-July 2022);
- The measurables provided by the home.co.uk web site are as follows:
 - Average Asking Prices by Type (Detached, Semi-detached, Terraced, or Flat);
 - Median Property Asking Prices by Type (Detached, Semi-detached, Terraced, or Flat);
 - Average Asking Prices by Number of Bedrooms (1, 2, 3, 4, or 5+ bedrooms);
 - Median Asking Prices by Number of Bedrooms (1, 2, 3, 4, or 5+ bedrooms);
 - Number of Properties Found Advertised for Sale by Type (Detached, Semi-detached, Terraced, or Flat);
 - Number of Properties Found Advertised for Sale in by Number of Bedrooms (1, 2, 3, 4, or 5+ bedrooms);

- Average Time on Market by Type (days) (Detached, Semi-detached, Terraced, or Flat);
- Median Time on Market by Type (days) (Detached, Semi-detached, Terraced, or Flat);
- Average Time on Market by Number of Bedrooms (1, 2, 3, 4, or 5+ bedrooms);
- Median Time on Market by Number of Bedrooms (1, 2, 3, 4, or 5+ bedrooms).
- We have used these measurables to judge which type and bedroom size is in more demand in each post code area. For example, between July 2017 and July 2022, the price of 4-bed properties in BN17 increased by 56%. In comparison, 1-bed properties have increased by 3% (the lowest increase). For this measure we have therefore conclude that 4-bed properties are in most demand, and 1-bed are in least demand.
- We have followed this process for each of the data sets listed in the bullet points above, and for each of the postcodes, giving a ranking of 1 to 4 (Type) and 1 to 5 (Bedrooms), 1 meaning most demand and 4/5 meaning least demand.
- Overall, across the three post code areas forming the study area, **houses** (whether detached, semi-detached, or terraced) are in **most demand**, with terraced slightly more in demand than semi-detached, followed by detached;
- In terms of bedroom size, 3 and 4-bed have almost the same level of demand, with 3-bed marginally ahead of 4-bed;
- A gap is then evidence to the 5+ bed category being slightly ahead of 2-bed;
- 1-bed properties are in least demand by quite a significant margin.

Mosaic Consumer Classification

1.22 Detailed consumer classification evidence is provided in Appendix D to this housing mix assessment. The key points of analysis are as follows.

- The 'Senior Security' typology forms 30% of the study area's population;
- Senior Security is characterised by elderly people (87% aged 66+) with assets who are enjoying a comfortable retirement, no children living at home, 97% owner-occupiers, living in semi-detached and detached properties;
- Senior Security occupiers have no incentive to downsize, meaning under-occupied family homes are unlikely to come back onto the open market;
- The 'Aspiring Homemakers' typology represents 15% of the study area;
- This typology is characterised by families with young children, normally 3 bedrooms, predominantly terraced/semi-detached, predominantly aged 26-45, and normally occupying their property for between 1 and 3 years;
- Aspiring Homemakers will predominantly be looking for 3-bed and 4+ bed properties of which there is limited availability because of the under-occupied Senior Security properties which are unlikely to return to the market soon;

- The 'Vintage Value' typology forms 11% of the study area's population;
- Vintage Value is characterised by elderly people with limited pension income, mostly living alone, 89% being aged 56+, and 48% living in terraced/semi-detached properties;
- Again, these smaller family sized properties which are owned are unlikely to come back onto the open market soon due to the majority (61%) of occupiers remaining in these properties for 11+ years.

iv) Summary, Conclusions and Way Forward

- 1.23 In summary, the combination of demographic, market trend, and Mosaic consumer data analysis presented in this report supports a development formed primarily of 3 and 4-bedroom **houses** to support younger working families with school age children. A much smaller proportion of 2 and 5-bed would also be justified. None of the evidence points to a need for flats or 1-bed properties.
- 1.24 The delivery of predominantly 3 and 4-bed properties will help to reverse demographic trends which have led to a local area of study which is heavily weighted towards the 45+ age group and will only become more polarised towards the older population without delivery of the right types of housing to attract people in the 25-44 age group primarily.
- 1.25 This will help to ensure that the area of study and Angmering itself can be as 'mixed and balanced' as possible, in line with the requirements of the NPPF.
- 1.26 Without development capable of attracting the age group set out above, the place of Angmering in ADC's Local Plan settlement hierarchy (Village and Suburban Centre) will be in jeopardy, as the amenities which the Local Plan characterises Angmering as offering (an enhanced range of shops, employment, housing, community facilities and local services, supported by improved transport links) will become unviable.
- 1.27 These conclusions are evidenced in detail by the data analysis contained in the appendices to this report.

APPENDIX A: NATIONAL AND LOCAL PLANNING POLICY

NATIONAL PLANNING POLICY

i) National Planning Policy Framework (NPPF, 2021)

- A.1 The National Planning Policy Framework (NPPF) sets out the Government's planning policies for England and how these are expected to be applied. NPPF (paragraph 7) states that "*The purpose of the planning system is to contribute to the achievement of sustainable development.*" In this context the NPPF lists three overarching objectives which are interdependent. These objectives are **economic**, **social**, and **environmental**.
- A.2 In respect of delivering a wide choice of high-quality homes, paragraph 60 of the NPPF states that "*To support the Government's objective of **significantly boosting** the supply of homes, it is important that a sufficient amount and variety of land can come forward where it is needed, that the **needs of groups with specific housing requirements** are addressed and that land with permission is developed without unnecessary delay.*"
- A.3 Furthermore, paragraph 63 refers to the NPPF's objective of creating "***mixed and balanced communities***", and paragraph 92 states how "*Planning policies and decisions should aim to achieve healthy, **inclusive** and safe places.*"

ii) Planning Practice Guidance (2019)

- A.4 Planning Practice Guidance (PPG) supports the policies of the NPPF and provides detailed guidance on how to implement the policies in practice. Included within this is a section (PPG ID2a) relating to the Housing Need Assessment (HNA). The HNA sets out the Standard Method for calculating overall housing need which represents the minimum housing need figure for each local authority, although the HNA PPG is clear (paragraph ID2a-010) that "*there will be circumstances where it is appropriate to consider whether actual housing need is higher than the standard method indicate.*"
- A.5 Alongside discussion of the overall housing need, the HNA PPG includes a section on 'Identifying the need for different types of housing'. Within this sub section the HNA PPG states that "*The standard method for assessing local housing need identifies an overall minimum average annual housing need figure but does not break this down into the housing need of individual groups.*" It also states how the needs for particular types of people "*may well exceed, or be proportionally high in relation to, the overall housing need figure calculated using the standard method.*" ⁷

⁷ ID: 67-001-20190722, Planning Practice Guidance, July 2019

APPENDIX B: DEMOGRAPHIC PROFILE AND HOUSING STOCK

i) Introduction

- B.1 This section of the report sets out relevant ONS data relating to the demographic profile of the study area, alongside more wider projections for Arun District Council (ADC). For the purposes of demographic assessment, the study area we have determined is made up of ward level geography illustrated in Figure 1.1.

ii) Overall Population Change in the Study Area

- B.2 The following table establishes the change in population between census years 2001 and 2011, and the longer period between the 2001 Census and most recent 2020 Mid-Year Population Estimates (MYPEs).

Table B.1: Study area age profile change by broad age groups (2001-2011-2020)

	2001	2011	2020	2001-2011	% Change	2001-2020	% Change
0-17	11,966	12,245	12,988	279	2%	1,022	9%
18-24	3,320	4,357	3,960	1,037	31%	640	19%
25-44	14,186	14,233	13,556	47	0%	-630	-4%
45-64	15,861	18,326	19,294	2,465	16%	3,433	22%
65+	18,067	19,338	22,629	1,271	7%	4,562	25%
Total	63,400	68,499	72,427	5,099	8%	9,027	14%

Source: ONS 2001 and 2011 Census, 2020-based Mid-Year Population Estimates

- B.3 The change in age profile shows how the population of the Study Area grew by 8% in the 10 years between 2001 and 2011. It has continued to grow since 2011, albeit at a slower rate of approximately 6% over the past 9 years since 2011. However, since the 2001 Census there has been a 14% increase in the overall population of the study area.
- B.4 This increase of 14% in the study area is comparative with population growth of 14% across the wider Arun District. This indicates high pressure for housing in the study area when compared with the District average.
- B.5 Table B.1 also provides a breakdown in the population change by age group. **The 18-24 age group** has experienced a 19% increase since the 2001 Census. Given that this age group will largely be in full time education or in the early stages of a career, this increase is most likely to be due to people in this age group continuing to live in the family home into young adulthood. This is a common theme in the south east and particularly more affluent areas such as the study area.

- B.6 Turning to the **25-44 age group**, this is the age group most likely to be formed of first-time buyers, the majority of whom will be starting or extending their family, with infants or school age children. This is the only age group to have experienced a *decline* in the study area since 2001 (-4%) and compares with a decline of only -2% in Arun District and across the south east region.
- B.7 The decline in this age group indicates a lack of supply of the type of properties which are likely to be needed by first time buyers and families with young children, i.e., properties of 2+ bedrooms. This lack of supply, coupled with the affordability pressure across Arun District and the wider south east is likely to have driven the majority of this age group to other more affordable parts of the District and/or region.
- B.8 In contrast the **65+ age group** has experienced a 25% increase in population since 2001. This compares with a District-wide increase of 28%, and an increase of 38% across the south east.
- B.9 What this population analysis reveals is a rapidly widening gap in the study area between young families/first time buyers and the older population. The contrast between the two groups is significantly greater than at District or regional level. If allowed to continue without the correct housing provision to slow the trend, the study area will become an area which is heavily polarised towards the elderly.

iii) **Occupancy Rates in the Study Area**

- B.10 The occupancy rates of properties in the study area can reveal important characteristics and link to the population analysis set out above. The data from the ONS reveals several issues related to **under**-occupancy, i.e., where one or more bedrooms are not being used and the property is under-occupied.
- B.11 Tables B.2 and B.3 show occupancy ratings by broad age group in the study area. Table B.2 shows the **number of people** living in each category, and B.3 the **proportion** of each age group in each category.

Table B.2: Persons by age and occupancy rating in the Study Area

	Occupancy rating (bedrooms) of +2 or more	Occupancy rating (bedrooms) of +1	Occupancy rating (bedrooms) of 0	Occupancy rating (bedrooms) of -1 or less
Age 0 to 15	1,644	4,159	4,043	998
Age 16 to 49	5,099	9,393	8,326	1,707
Age 50 to 64	6,109	4,873	2,358	275
Age 65 and over	8,122	7,950	2,372	122

Source: DC3404EW - General health by long-term health problem or disability by occupancy rating (bedrooms) by age

Table B.3: Proportion of age group by occupancy rating in the Study Area

	Occupancy rating (bedrooms) of +2 or more	Occupancy rating (bedrooms) of +1	Occupancy rating (bedrooms) of 0	Occupancy rating (bedrooms) of -1 or less
Age 0 to 15	15%	38%	37%	9%
Age 16 to 49	21%	38%	34%	7%
Age 50 to 64	45%	36%	17%	2%
Age 65 and over	44%	43%	13%	1%

Source: DC3404EW - General health by long-term health problem or disability by occupancy rating (bedrooms) by age

- B.12 The data shows how 87% of those aged 65+ live in **under**-occupied households, where **at least** 1 bedroom is unoccupied. This level of under-occupancy in the 65+ age group compares with Arun District (85%), West Sussex (85%), and the south east region (85%).
- B.13 The data also shows how 81% of 50–64-year-olds live in under-occupied properties, again marginally higher than the Arun and South East averages (80%) and equal to West Sussex.
- B.14 This indicates a higher proportion of under-occupied family sized housing of 3+ bedrooms in the study area compared with the District, and Region. It also indicates how the owners of these properties are not under any pressure to downsize, perhaps due to them being financially stable. The result is that these family sized homes do not come back onto the market and demand for this size of home increases.

iv) Overcrowding in the Study Area

- B.15 To emphasise the occupancy data, Table B.4 provides data on overcrowding. This is indicated by the number of people living in properties of different bedroom sizes.
- B.16 Those properties shaded grey are those which are either under-occupied or at capacity.
- B.17 However, the unshaded areas are those properties in the study area considered to be *overcrowded*. The data indicates that 3% of 3-person households live in 1-bed properties (107 households), 12% of 4 person households live in overcrowded properties of 1 or 2-bed (374 households), 50% of 5-person households live in overcrowded properties of between 1 and 3 bedrooms (515 households), and 72% of 6+ person households (266 households). In total it can be considered that 1,290 households in the study area are overcrowded.
- B.18 Given the size of the households which are overcrowded, more family sized properties of at least 2 bedrooms are required, with most demand for larger family housing of 4+ bedrooms to alleviate this pressure.

Table B.4: Tenure by household size by number of bedrooms in the Study Area

	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5 or more bedrooms
1 person in household	24%	42%	28%	5%	1%
2 people in household	7%	38%	40%	13%	3%
3 people in household	3%	24%	52%	18%	4%
4 people in household	1%	11%	56%	26%	6%
5 people in household	0%	6%	43%	36%	14%
6+ people in household	0%	4%	36%	31%	28%

Source: DC4405EW - Tenure by household size by number of bedrooms

v) Demographic Projections for ADC

- B.19 Analysis of the most up-to-date Sub-National Population Projections (SNPP) is not available at sub-District level, however the ONS 2018-based series projects that ADC's child age population (0-17 years) will stay relatively stagnant, and the young adults group (18-24 years) will experience a small increase (4%). The first-time buyers/young families age group is projected to experience a slightly larger increase (7%), whereas the 65+ age group will increase by 50%. The projections are set out in Table B.5 below.

Table B.5: 2018-based ONS Sub National Population Projections for ADC

Age group	2018	2043	2018-2043	
0-17	28,698	29,186	488	2%
18-24	9,929	10,318	389	4%
25-44	32,245	34,524	2,279	7%
45-64	43,089	45,657	2,568	6%
65+	45,866	68,659	22,793	50%

Source: ONS

- B.20 As most of the population growth in ADC is projected to be in the older population, it is important to note that it is less common for older generations to migrate, more commonly choosing to remain in their own family homes.
- B.21 It is feasible, therefore, that the increase in elderly population will primarily be as a direct result of existing population living longer and choosing to remain within the area in their existing larger homes. This will only exacerbate the **under-occupancy** issues we have identified in respect of the local study area and reduce the number of family sized (3 and 4-bed) properties coming back onto the market across the District.
- B.22 However these projections are solely underpinned by past trends. They **do not** consider any policies for change which may be applied locally or nationally.
- B.23 To ensure a '**mixed and balanced**' community remains in line with the aspirations of national policy mechanisms need to be put in place to assist in balancing the population of ADC and the local area to the development site. This can be done by providing the mix of homes required to rebalance the demographic structure of the area.

vi) Summary

- B.24 In summary, the demographic analysis has been prepared in the in the context of the NPPF's objective that *"housing should be located where it will **enhance** or **maintain** the vitality of*

rural communities" (Our emphasis) and the objective of creating "*mixed and balanced*" communities.

B.25 For the Study Area this would mean ensuring that the existing amenities in the village, i.e., the primary school, nursery, medical centre, public house, and shops, remain viable. This relies on the village being formed of a population structure to do this, which in turn is linked to the type and size of housing planned for in the future.

- Population change since 2001 in the Study Area shows a **decline** in the young families/first-time buyers age group (25-44) indicating that family sized housing is unobtainable for many in this age group;
- The child age population (0-17 years) increased marginally between 2001 and 2011 (2%) and the growth is only marginal between 2001 and 2020 (9%);
- In contrast the 18-24, 45-64, and 65+ age groups have all experienced comparatively large increases in the study area since 2001, which has continued since 2011 in the 45-64 and 65+ age groups but has started to slow in the 18-24 age group indicating a slowdown in housing for people in the 18-24 age group
- The reasons for the decline in the 25-44 age group are therefore likely to be a lack of supply of family-sized housing, the high relative price of properties, and the occupation of family sized housing by older residents who have no plans or need to downsize;
- Because of these reasons families have no choice but to relocate elsewhere;
- The under-occupation of family sized housing is illustrated by 87% of the study area's 65+ population living in houses where at least 1 bedroom is unoccupied;
- The proportion of the 50-64 and 65+ age groups who live in under-occupied properties either exceeds or is equal to that of the wider Arun District, West Sussex, and the south east region;
- The highest proportions of overcrowding in the study area are in 3-bedroom properties indicating a need for 4-bedroom properties;
- These factors combine to show most need for family sized housing (3 and 4-bed) in the study area.

APPENDIX C: HOUSING MARKET TRENDS

i) Introduction

- C.1 This section provides data from the local housing market over a 5-year period to provide a representative period to include three years pre-Covid, the Covid period, and post-Covid (July 2017 – July 2022). The data assessed has been taken from home.co.uk and is utilised to provide an indication of the size and type of dwellings that are most in demand in the study area.
- C.2 Data from this source is not available at the same low level geographic level as the demographic data, i.e., ward-level. Furthermore, a wider area of search is required to obtain a representative number of properties for the analysis. In this context, the assessment provides local analysis by assessing a sub-district area with Angmering at its centre. Therefore, the analysed area is made up of postcodes BN12, BN16, and BN17.

ii) Study Area Market Trends – BN12

Asking Price Trends

Table C1: Average Asking Price by Type in BN12 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
Detached	£521,415	£687,037	+32%	2
Semi	£328,970	£452,300	+37%	1
Terraced	£296,039	£332,500	+12%	4
Flat	£256,732	£295,852	+15%	3

Source: home.co.uk

- C.3 Table C1 shows an increase in average price of all types of housing. However, semi-detached and detached properties have increased significantly more than flats and terraced properties, indicating highest demand and need.

Table C2: Median Asking Price by Type in BN12 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
Detached	£450,000	£640,000	+42%	1
Semi	£326,250	£425,000	+30%	2
Terraced	£307,475	£332,500	+8%	3
Flat	£250,000	£240,000	-4%	4

Source: home.co.uk

- C.4 This measure emphasises the demand shown in the previous table but showing an even greater disparity between the demand for detached and semi-detached properties against terraced and flats. It should be noted that flats have experienced a *decline* in price over the past 5 years, indicating a drop in demand.

Table C3: Average Asking Prices by Number of Bedrooms in BN12 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	£691,954	£1,300,000	+88%	1
4 Bedrooms	£567,669	£648,136	+14%	4
3 Bedrooms	£388,137	£565,645	+46%	2
2 Bedrooms	£313,545	£358,857	+14%	4
1 Bedroom	£169,100	£245,833	+45%	3

Source: home.co.uk

- C.5 Table C3 indicates most demand for larger properties of 5+ bedrooms, with a gap to an equal demand for 3 and 1-bed properties. The 2 and 4-bed categories have experienced an increase, but not to the same extent as 2 and 4-bed.

Table C4: Median Asking Prices by Number of Bedrooms in BN12 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	£680,000	£1,350,000	+99%	1
4 Bedrooms	£500,000	£650,000	+30%	4
3 Bedrooms	£350,000	£575,000	+64%	2
2 Bedrooms	£295,000	£315,000	+7%	5
1 Bedroom	£165,500	£260,000	+57%	3

Source: home.co.uk

- C.6 The median measure emphasises the average measure in Table C3, although there is more of a gap between the indicated demand for 2 and 4-bed properties.

Number of Properties on the Market**Table C5: Number of Properties Found Advertised for Sale in BN12 by Type**

Type	Jul 2017	Jul 2022	Change	Rank
Detached	115	27	-77%	2
Semi	44	15	-66%	3
Terraced	10	2	-80%	1
Flat	54	27	-50%	4

Source: home.co.uk

- C.7 Table C5 shows the largest proportional fall in the number of properties for sale in the Terraced category, although the Detached category has experienced an almost identical proportional fall from a significantly higher number of properties (115 detached against 10 terraced). Semi-detached properties are close behind with more of a gap to Flats.

Table C6: Number of Properties Found Advertised for Sale in BN12 by Number of Bedrooms

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	13	3	-77%	2
4 Bedrooms	49	11	-78%	1
3 Bedrooms	79	31	-61%	4
2 Bedrooms	86	28	-67%	3
1 Bedroom	5	6	+20%	5

Source: home.co.uk

- C.8 This measure indicates greatest demand for 4-bedroom properties ahead of 5+ bed properties. There is similar demand next for 2-bed and 3-bed. There is a contrast with 1-bed properties which have experienced an *increase* in the number of properties from a very low starting number of properties (from 5 to 6). This indicates very little demand for 1-bed properties, aligning with the lack of demand indicated for flats in Table C2.

*Time on the Market***Table C7: Average Time on Market by Type in BN12 (days)**

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
Detached	112 days	71 days	-37%	2	3
Semi	62 days	51 days	-18%	3	2
Terraced	72 days	25 days	-65%	1	1
Flat	<i>123 days</i>	<i>168 days</i>	<i>+37%</i>	<i>4</i>	<i>4</i>

Source: home.co.uk

C.9 Table C7 indicates an increase in need for houses (of all types) and a fall in need for flats.

C.10 Within the houses category, terraced properties appear in highest demand, followed equally by semi-detached and detached.

Table C8: Median Time on Market by Type in BN12 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
Detached	61 days	33 days	-46%	3	3
Semi	38 days	20 days	-47%	2	1
Terraced	66 days	25 days	-62%	1	2
Flat	<i>48 days</i>	<i>66 days</i>	<i>+38%</i>	<i>4</i>	<i>4</i>

Source: home.co.uk

C.11 Table C8 indicates a similar pattern to C7, although this indicates that terraced and semi-detached are in most demand, followed marginally by detached. Table C8 emphasises Table C7 in respect of the lack of demand for flats.

Table C9: Average Time on Market by Number of Bedrooms in BN12 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
5+ Bedrooms	<i>130 days</i>	<i>379 days</i>	<i>+192%</i>	<i>5</i>	<i>5</i>
4 Bedrooms	106 days	60 days	-43%	1	2
3 Bedrooms	77 days	56 days	-27%	2	1
2 Bedrooms	<i>108 days</i>	<i>141 days</i>	<i>+31%</i>	<i>4</i>	<i>3</i>
1 Bedroom	<i>284 days</i>	<i>283 days</i>	<i>-0%</i>	<i>3</i>	<i>4</i>

Source: home.co.uk

- C.12 Table C9 indicates quite clear demand for 3 and 4-bed properties ahead of any other size. The other sizes have all experienced a stagnation or *increase* in time on the market indicating less demand.

Table C10: Median Time on Market by Number of Bedrooms in BN12 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
5+ Bedrooms	88 days	67 days	-24%	3	4
4 Bedrooms	65 days	23 days	-65%	1	1
3 Bedrooms	48 days	47 days	-2%	4	2
2 Bedrooms	48 days	48 days	0%	5	3
1 Bedroom	125 days	75 days	-40%	2	5

Source: home.co.uk

- C.13 Table C10 indicates most demand for 4-bedroom properties ahead of 3-bed properties again. The 5+ and 1-bed categories are similar, whereas little demand is shown for 2-bed in this measure.

BN12 – Summary

- C.14 Overall our ranking system shows very similar demand for houses of all types, albeit there appears to be marginally more demand for semi-detached and terraced properties, than detached.
- C.15 In terms of bedroom size, 4-bed properties appear in most demand, followed by 3-bed. This is followed by 5+ bed before a gap to less demand for 1-bed and 2-bed.

Table C11: Overall Ranking for BN12

Type	Score	Bedrooms	Score
Detached	16	5+	21
Semi	14	4	14
Terraced	13	3	17
Flats	27	2	27
		1	25

iii) Study Area Market Trends – BN16

Asking Price Trends

Table C12: Average Asking Price by Type in BN16 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
Detached	£675,042	£1,121,270	+66%	1
Semi	£320,132	£402,343	+26%	3
Terraced	£289,838	£383,488	+32%	2
Flat	£295,945	£266,779	-10%	4

Source: home.co.uk

- C.16 Table C12 shows an increase in average price of all types of housing, but a *decline* in flats. Detached properties appear in most demand, quite significantly ahead of terraced and semi-detached which have experienced a similar price increase.

Table C13: Median Asking Price by Type in BN16 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
Detached	£515,000	£600,000	+17%	3
Semi	£312,500	£392,500	+26%	2
Terraced	£265,000	£355,000	+34%	1
Flat	£239,950	£240,000	+0%	4

Source: home.co.uk

- C.17 The median measure shows a stagnation in the price of flats indicating the least demand again. However, in contrast to the average measure in C13, terraced appear in most demand followed by semi-detached, and then detached houses.

Table C14: Average Asking Prices by Number of Bedrooms in BN16 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	£1,074,188	£2,522,500	+135%	1
4 Bedrooms	£593,194	£643,889	+9%	5
3 Bedrooms	£370,778	£482,257	+30%	2
2 Bedrooms	£327,506	£377,973	+15%	4
1 Bedroom	£131,762	£164,147	+25%	3

Source: home.co.uk

- C.18 Table C14 indicates the highest demand is clearly for 5+ bed properties. This is followed by 3-bed, 1-bed, 2-bed, and finally by 4-bed, although all 4 sizes are within a similar range of price increase.

Table C15: Median Asking Prices by Number of Bedrooms in BN16 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	£715,000	£1,250,000	+75%	1
4 Bedrooms	£507,498	£500,000	-1%	5
3 Bedrooms	£338,500	£437,495	+29%	2
2 Bedrooms	£299,950	£328,000	+9%	3
1 Bedroom	£129,950	£140,000	+8%	4

Source: home.co.uk

- C.19 Table C15 reflects Table C14 almost identically, the only difference being that 2-bed appear in more demand than 1-bed.

Number of Properties on the Market

Table C16: Number of Properties Found Advertised for Sale in BN16 by Type

Type	Jul 2017	Jul 2022	Change	Rank
Detached	113	37	-67%	3
Semi	82	16	-80%	1
Terraced	28	8	-71%	2
Flat	77	43	-44%	4

Source: home.co.uk

- C.20 Table C16 indicates that semi-detached properties are in most demand, followed by terraced, and detached very close behind. However, the detached category starts from a much higher number of properties (113 properties) than terraced (28 properties). This suggests detached properties are likely to be of a similar demand to terraced and semi.

Table C17: Number of Properties Found Advertised for Sale in BN16 by Number of Bedrooms

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	28	10	-64%	3
4 Bedrooms	48	9	-81%	1
3 Bedrooms	101	35	-65%	2
2 Bedrooms	101	40	-60%	4
1 Bedroom	25	17	-32%	5

Source: home.co.uk

- C.21 This measure indicates greatest demand for 4-bedroom properties ahead of 5+ bed properties. There is similar demand next for 2-bed and 3-bed. There is a contrast with 1-bed properties which have experienced an *increase* in the number of properties from a very low starting number of properties (from 5 to 6). This indicates very little demand for 1-bed properties, aligning with the lack of demand indicated for flats in Table C2.

Time on the Market

Table C18: Average Time on Market by Type in BN16 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
Detached	104 days	185 days	+78%	3	4
Semi	81 days	172 days	+112%	4	3
Terraced	78 days	99 days	+27%	2	1
Flat	137 days	168 days	+23%	1	2

Source: home.co.uk

- C.22 Table C18 shows all types of property to have experienced an *increase* in time on the market over the past five years. This suggests that all types have experience a fall in demand, with flats and terraced experiencing the smallest increase and therefore remaining in most demand, followed by detached and semi-detached.

Table C19: Median Time on Market by Type in BN16 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
Detached	66 days	46 days	-30%	3	3
Semi	56 days	35 days	-38%	2	2
Terraced	73 days	34 days	-53%	1	1
Flat	67 days	63 days	-6%	4	4

Source: home.co.uk

- C.23 Table C19 indicates most demand for all types of houses, with a lower demand for flats. Terraced appear in most demand followed by semi-detached and detached.

Table C20: Average Time on Market by Number of Bedrooms in BN16 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
5+ Bedrooms	134 days	389 days	+190%	5	5
4 Bedrooms	80 days	64 days	-20%	1	1
3 Bedrooms	102 days	120 days	+18%	3	2
2 Bedrooms	87 days	170 days	+95%	4	4
1 Bedroom	177 days	151 days	-15%	2	3

Source: home.co.uk

- C.24 Table C19 indicates the most demand clearly for 4-bedroom properties. This category has experienced the biggest decline in number of days on the market and remains on the market the least number of days in July 2022. After this 1-bed and 3-bed appear in most demand, followed by 2-bed and then 5+ bed.

Table C21: Median Time on Market by Number of Bedrooms in BN16 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
5+ Bedrooms	84 days	253 days	+201%	5	5
4 Bedrooms	56 days	56 days	0%	3	3
3 Bedrooms	66 days	37 days	-44%	1	1
2 Bedrooms	49 days	53 days	+8%	4	2
1 Bedroom	89 days	56 days	-37%	2	3

Source: home.co.uk

- C.25 Table C21 indicates most demand for 3-bedroom properties in terms of the decline in days on the market since July 2017, and the number of days on the market as of July 2022. This is followed by 1-bed, closely by 2-bed and 4-bed equally, and lastly by 5-bed.

BN16 – Summary

- C.26 Overall our ranking system shows very similar demand for houses of all types, albeit there appears to be more demand for terraced homes, followed by semi-detached and then detached. Flats are in least demand in BN16.
- C.27 In terms of bedroom size, 3-bed properties appear in most demand, followed by 4-bed. This is then followed by 1-bed and then equal demand for 2-bed and 5+ bed properties.

Table C22: Overall Ranking for BN16

Type	Score	Bedrooms	Score
Detached	20	5+	25
Semi	17	4	19
Terraced	11	3	13
Flats	23	2	25
		1	22

iv) Study Area Market Trends – BN17*Asking Price Trends***Table C23: Average Asking Price by Type in BN17 (£000's)**

Type	Jul 2017	Jul 2022	Change	Rank
Detached	£431,588	£554,708	+29%	2
Semi	£280,083	£396,944	+42%	1
Terraced	£271,655	£340,184	+25%	3
Flat	£147,830	£169,729	+15%	4

Source: home.co.uk

- C.28 Table C23 indicates that houses of all types are in more demand than flats, with semi-detached properties in most demand ahead of detached, and close behind, terraced.

Table C24: Median Asking Price by Type in BN17 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
Detached	£385,000	£475,000	+23%	3
Semi	£272,475	£375,000	+38%	1
Terraced	£259,950	£325,000	+25%	2
Flat	£134,975	£150,000	+11%	4

Source: home.co.uk

- C.29 The median measure reflects the average measure. Semi-detached are indicated as being in most demand with the highest increase in price over the past 5 years, with a similar increase in terraced and detached. Flats have experienced an increase but much less than houses of all types.

Table C25: Average Asking Prices by Number of Bedrooms in BN17 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	£559,283	£716,667	+28%	3
4 Bedrooms	£404,412	£632,109	+56%	1
3 Bedrooms	£292,791	£384,210	+31%	2
2 Bedrooms	£228,462	£247,448	+8%	4
1 Bedroom	£139,456	£143,222	+3%	5

Source: home.co.uk

- C.30 Table C25 indicates a clearly higher demand for 4-bedroom properties ahead of all other sizes. 3 and 5+ bedroom properties are next in demand at a similar level. The 2-bed and 1-bed categories have only increased marginally in five years and are in least demand.

Table C26: Median Asking Prices by Number of Bedrooms in BN17 (£000's)

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	£412,500	£725,000	+76%	1
4 Bedrooms	£374,950	£550,000	+47%	2
3 Bedrooms	£275,000	£355,000	+29%	3
2 Bedrooms	£229,975	£230,000	+0%	5
1 Bedroom	£119,950	£125,000	+4%	4

Source: home.co.uk

- C.31 Table C26 shows a similar pattern to C25, albeit 5+ bedroom properties are in most demand, followed by 4-bedroom and then 3-bedroom. Table C26 indicates minimal demand for 1 and 2-bed properties with only marginal increase in prices since 2017.

Number of Properties on the Market

Table C27: Number of Properties Found Advertised for Sale in BN17 by Type

Type	Jul 2017	Jul 2022	Change	Rank
Detached	60	36	-40%	3
Semi	66	27	-59%	1
Terraced	45	19	-58%	2
Flat	54	57	+6%	4

Source: home.co.uk

- C.32 Table C27 shows a significant decline in the number of houses (of all types) on the market since 2017. However, in contrast there has been a small increase in the number of flats. This indicates continuing high demand for houses and declining demand for flats since 2017.

Table C28: Number of Properties Found Advertised for Sale in BN17 by Number of Bedrooms

Type	Jul 2017	Jul 2022	Change	Rank
5+ Bedrooms	12	3	-75%	1
4 Bedrooms	55	23	-58%	2
3 Bedrooms	70	50	-29%	4
2 Bedrooms	58	30	-48%	3
1 Bedroom	41	41	0%	5

Source: home.co.uk

- C.33 This measure indicates greatest demand for 5+ bedroom properties followed closely by 4-bedroom properties. This is followed by 2-bed and then 3-bed. The number of 1-bed properties for sale has remained the same since 2017 indicating minimal demand.

Time on the Market**Table C29: Average Time on Market by Type in BN17 (days)**

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
Detached	117 days	141 days	+21%	3	3
Semi	87 days	65 days	-25%	2	2
Terraced	83 days	34 days	-59%	1	1
Flat	135 days	227 days	+68%	4	4

Source: home.co.uk

- C.34 Table C29 shows a 68% increase in the time that flats spend on the market in 2022 compared with 2017, indicating low demand. Detached properties have also experienced an increase indicating minimal demand. The terraced and semi-detached categories have experienced a decline in time spent on the market since 2017 indicating increasing demand over the past 5 years.

Table C30: Median Time on Market by Type in BN17 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
Detached	66 days	48 days	-27%	3	3
Semi	49 days	25 days	-49%	2	2
Terraced	55 days	18 days	-67%	1	1
Flat	<i>51 days</i>	<i>143 days</i>	<i>+180%</i>	<i>4</i>	<i>4</i>

Source: home.co.uk

- C.35 The median measure largely reflects the average shown in Table C29, however in contrast shows a decline in the time spent on the market by detached properties indicating increasing demand over the past 5 years. The terraced and semi-detached properties are in most demand.

Table C31: Average Time on Market by Number of Bedrooms in BN17 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
5+ Bedrooms	133 days	97 days	-27%	2	3
4 Bedrooms	<i>108 days</i>	<i>155 days</i>	<i>+44%</i>	<i>4</i>	<i>4</i>
3 Bedrooms	87 days	73 days	-16%	3	1
2 Bedrooms	111 days	79 days	-29%	1	2
1 Bedroom	<i>117 days</i>	<i>266 days</i>	<i>+127%</i>	<i>5</i>	<i>5</i>

Source: home.co.uk

- C.36 Table C31 indicates most demand for 2-bed properties followed very closely by 3-bed and then 5+ bed. This measure indicates a fall in demand for 4-bed and then a significant fall in demand for 1-bed.

Table C32: Median Time on Market by Number of Bedrooms in BN17 (days)

Type	Jul 2017	Jul 2022	Change	Rank (% change)	Rank (days)
5+ Bedrooms	<i>86 days</i>	<i>95 days</i>	<i>+10%</i>	<i>4</i>	<i>4</i>
4 Bedrooms	50 days	35 days	-30%	3	2
3 Bedrooms	55 days	38 days	-31%	2	3
2 Bedrooms	67 days	29 days	-57%	1	1
1 Bedroom	<i>60 days</i>	<i>187 days</i>	<i>+212%</i>	<i>5</i>	<i>5</i>

Source: home.co.uk

- C.37 Table C32 indicates most demand for 2-bedroom properties and equal demand for 3 and 4-bed. These three categories have experienced a decline in the time on the market indicating

increased demand over the past 5 years. In contrast 5+ bedroom properties have experienced a marginal increase in time on the market indicating a slowdown in demand. More noticeable is the significant 212% increase in time on the market for 1-bed properties indicating very low demand.

BN17 – Summary

- C.38 Overall our ranking system shows the same demand for semi-detached and terraced houses in BN17. There is much less demand for detached houses and flats.
- C.39 In respect of bedroom sizes, 2-bedroom properties are in marginally more demand than 3, 4, and 5+ properties which show equal demand. There is a significant gap to 1-bed properties which have minimal demand.

Table C33: Overall Ranking for BN17

Type	Score		Bedrooms	Score
Detached	20		5+	18
Semi	11		4	18
Terraced	11		3	18
Flats	21		2	17
			1	34

v) Overall demand in the study area

- C.40 Taking the three post code areas together, Table C34 provides a combined ranking based on our approach.

Table C34: Overall Ranking for BN17

Type	Score		Bedrooms	Score
Detached	56		5+	64
Semi	42		4	51
Terraced	35		3	48
Flats	71		2	69
			1	81

- C.41 Overall, across the three post code areas forming the study area, **houses** (whether detached, semi-detached, or terraced) are in **most demand**, with terraced slightly more in demand than semi-detached, followed by detached;
- C.42 In terms of bedroom size, 3 and 4-bed have almost the same level of demand, with 3-bed marginally ahead of 4-bed. A gap is then evidence to the 5+ bed category being slightly ahead of 2-bed. 1-bed properties are in least demand by quite a significant margin.

APPENDIX D: MOSAIC CONSUMER CLASSIFICATION IN THE STUDY AREA

i) Introduction

- D.1 Experian derived Mosaic UK provides an understanding of consumer behaviour through segmentation of the Country's population. Customer segmentation gives a better understanding of locations and the people they serve and aids the decision-making process to ensure the right mix of development is considered for the right balance of people.
- D.2 Based on specifically targeted demographic data, analysis of consumer behaviour, potential risk and investment opportunity is possible. In the case of our study area, Mosaic classifications can be used to identify the characteristics of the existing population and to assist in determining the size and type of development required in the future. The classifications consist of 15 groups, within which are 66 types.

ii) Mosaic Classifications in the Study Area

- D.3 **Figure D.1** shows the Mosaic groups spatially in the study area.

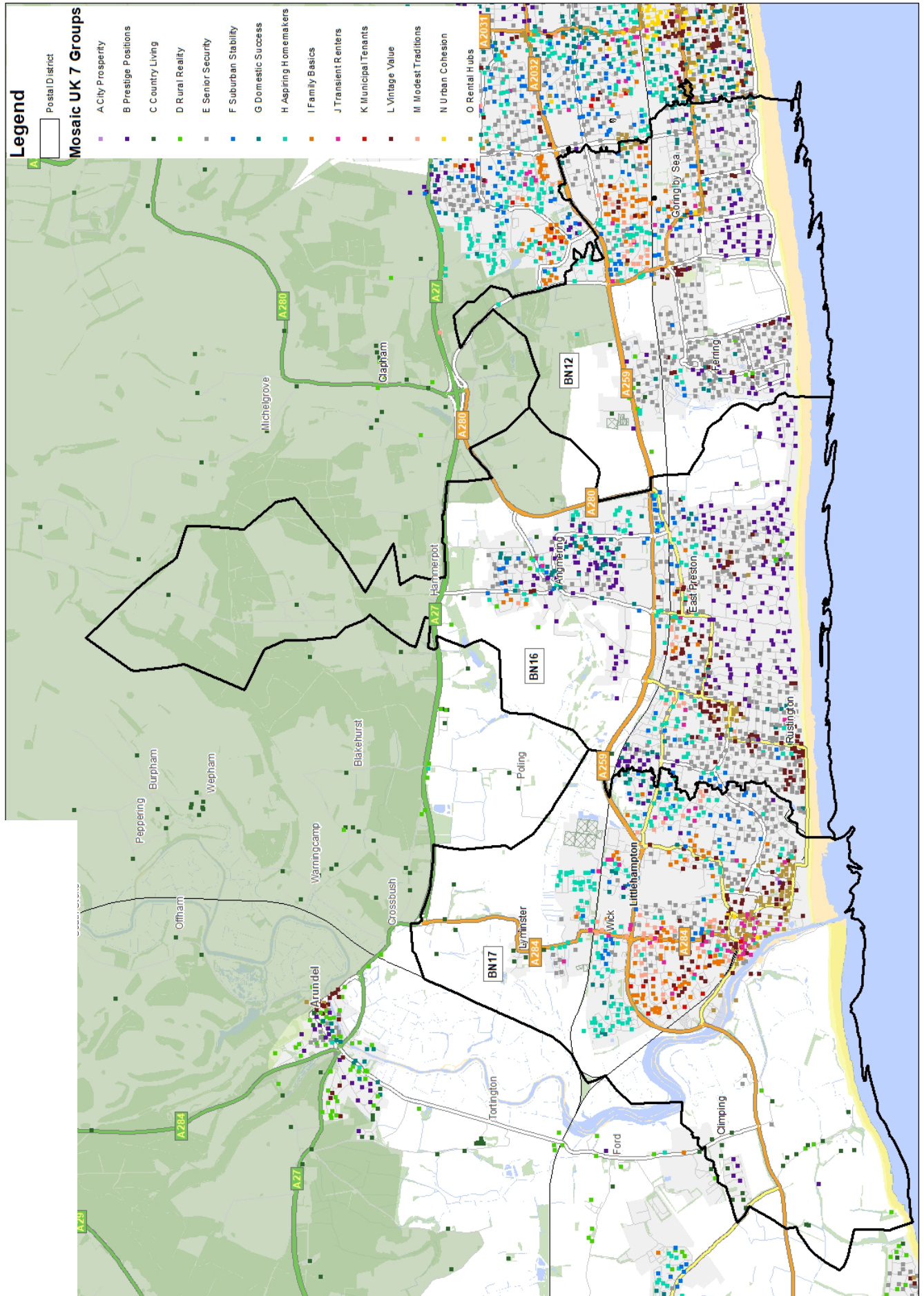


Figure D.1: Study Area (BN12, 16 & 17)

- D.4 The analysis shows the predominant typologies in the study area as set out in Table D1. We have included all groups which represent over 10% of the population.

Table D1: Mosaic Groups and Types in the Study Area

Mosaic Group (% of all households in the study area)	Mosaic Description
Senior Security (30%)	Senior Security are elderly singles and couples who are still living independently in comfortable homes that they own. Property equity gives them a reassuring level of financial security. This group includes people who have remained in family homes after their children have left, and those who have chosen to downsize to live among others of similar ages and lifestyles. These homes are comfortable semi-detached three-bedroom houses and bungalows in pleasant suburbs. They are generally very settled, long-standing residents of their local communities and have the longest length of residency of any group, having lived in their homes for nearly 25 years, on average.
Aspiring Homemakers (15%)	Aspiring Homemakers are younger households who have, often, only recently set up home. They usually own their homes in private suburbs, which they have chosen to fit their budget. Aspiring Homemakers are typically younger families, couples who are yet to have children, and singles in their 20s and 30s. A good number are setting up homes for the first time. Couples can be married or more likely cohabiting, and where there are children, they are usually of nursery or primary school age. Homes are likely to be semi-detached and terraced properties, modest in size but with three bedrooms and mostly owned; three-quarters of Aspiring Homemakers are in the process of buying their house with a mortgage.
Vintage Value 11%)	Vintage Value are elderly people who mostly live alone, either in social or private housing, often built with the elderly in mind. Levels of independence vary, but with health needs growing and incomes declining, many require an increasing amount of support. Vintage Value consists of pensioners with an average age of 74, and most are now living alone. Women outnumber men because of their longer life expectancy.

Source: Experian

- D.5 The most representative typology is Senior Security, and this typology's characteristics reflect the demographic profile we have identified earlier in this report. Senior Security is characterised by elderly people (87% aged 66+) with assets who are enjoying a comfortable retirement, no children living at home, 97% owner-occupiers, living in semi-detached and detached properties. Senior Security occupiers have no incentive to downsize, meaning under-occupied family homes are unlikely to come back onto the open market. This is why the demographic section of this report shows a significant amount of under-occupancy in the study area.
- D.6 This typology usually remains in their home for an extensive period of time, meaning new family sized properties are needed to ensure working age families move into the area.

- D.7 As the typology description (above) states, the Aspiring Homemakers group are younger people living in couples or who have recently started a family. The people in this group usually have a good job and career and will be looking to upsize in the future. The lack of larger family housing available in the study area mean they will need to look elsewhere unless new development is provided for them to upsize into as their families grow.
- D.8 The Vintage Value group is similar to the Senior Security group, however the group has a higher average age, and a good proportion of the group is not as financially affluent as Senior Security. This group lives in a mix of social and market housing and normally remain in their homes the longest of any group. Most people in this this group live alone, contributing to the under-occupancy in larger properties.

iv) Summary

- D.9 In summary, the key points to note from the Mosaic consumer classification analysis are as follows:
- The 'Senior Security' typology forms 30% of the study area's population;
 - Senior Security is characterised by elderly people (87% aged 66+) with assets who are enjoying a comfortable retirement, no children living at home, 97% owner-occupiers, living in semi-detached and detached properties;
 - Senior Security occupiers have no incentive to downsize, meaning under-occupied family homes are unlikely to come back onto the open market;
 - The 'Aspiring Homemakers' typology represents 15% of the study area;
 - This typology is characterised by families with young children, normally 3 bedrooms, predominantly terraced/semi-detached, predominantly aged 26-45, and normally occupying their property for between 1 and 3 years;
 - Aspiring Homemakers will predominantly be looking for 3-bed and 4+ bed properties of which there is limited availability because of the under-occupied Senior Security properties which are unlikely to return to the market soon;
 - The 'Vintage Value' typology forms 11% of the study area's population;
 - Vintage Value is characterised by elderly people with limited pension income, mostly living alone, 89% being aged 56+, and 48% living in terraced/semi-detached properties;
 - Again, these smaller family sized properties which are owned are unlikely to come back onto the open market soon due to the majority (61%) of occupiers remaining in these properties for 11+ years.