



Town Planning

Submitted to
Rottingdean Parish Council

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April 2015

Neighbourhood Plan Housing Needs Advice: Survey Analysis

Rottingdean Parish Council

June 2015
Final Draft

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1 Introduction

Housing needs assessment in Neighbourhood Planning

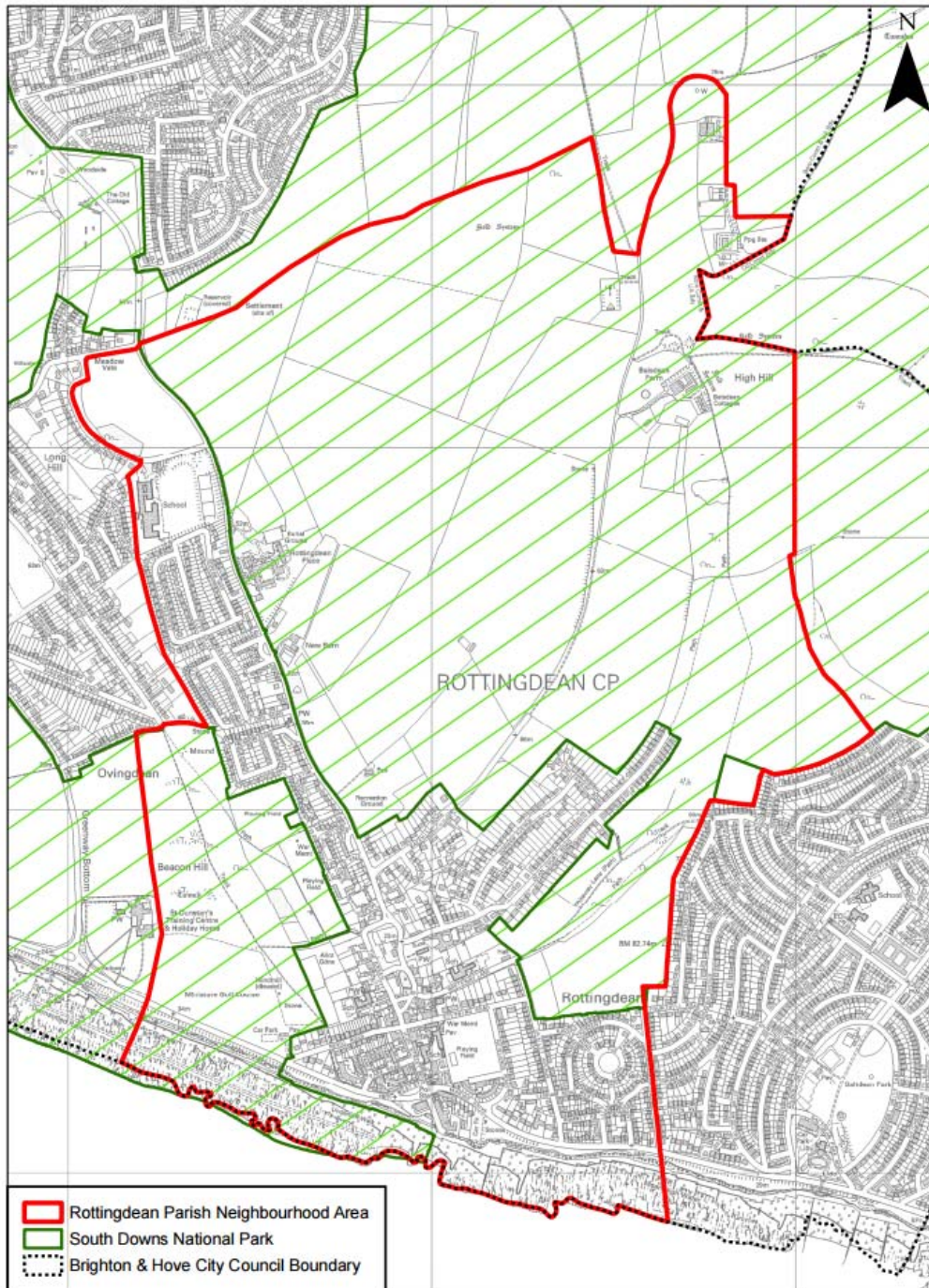
1. The 2011 Localism Act introduced Neighbourhood Planning, allowing parishes or neighbourhood forums across England to develop and adopt legally binding development plans for their neighbourhood area.
2. As more and more parishes and forums seek to address housing growth, including tenure and type of new housing, it has become evident that developing policies need to be underpinned by robust, objectively assessed data.
3. In the words of the National Planning Practice Guidance (NPPG), establishing future need for housing is not an exact science, and no single approach will provide a definitive answer. The process involves making balanced judgements, as well as gathering numbers and facts. At a neighbourhood planning level, one important consideration is determining the extent to which the neighbourhood diverges from the local authority average, reflecting the fact that a single town or parish almost never constitutes a housing market on its own and must therefore be assessed in its wider context.
4. The guidance quoted above on housing needs assessment is primarily aimed at local planning authorities preparing Strategic Housing Market Assessments (SHMAs). However, it helpfully states that those preparing neighbourhood plans can use the guidance to identify specific local needs that may be relevant to a neighbourhood, but that any assessment at such a local level should be proportionate.

Local study context

5. The Rottingdean Neighbourhood Development Plan (NDP) is at a significant stage in its preparation. The Plan has been developed in the context of the emerging City of Brighton and Hove Core Strategy, which will replace the saved policies of the existing adopted Local Plan. Currently, the Council is consulting on proposed modifications to the Core Strategy (which defines the vision and policies for the future of Brighton and Hove to 2030). This plan (Proposed modifications – October 2014) sets a minimum housing target of 13,200 new homes to be achieved by 2030.
6. Rottingdean Parish Council commissioned AECOM to advise on the design of a parish housing needs survey and to provide analysis of the data from survey returns to help the Council to understand, among other matters, the type, tenure and quantity of housing needed, which will inform neighbourhood plan policies.
7. Rottingdean is a coastal village in East Sussex around four miles east of Brighton city centre. Its local authority is Brighton and Hove City Council (henceforth BHCC). The town's main east-west road link is the A259 which follows the coast through the parish, and links Brighton to Worthing and Eastbourne. North-south road links are more limited. The B2123 links the village with the neighbouring village of Woodingdean, and meets the A27 at Falmer. The town has no railway station of its own, and the nearest stations are those at Brighton and Falmer. The nearest major airport is Gatwick, approximately 25 miles to the north.

8. Rottingdean is considered for planning purposes part of the Sussex Coast Housing Market area, sitting within the SHMA's Brighton sub-market area. The Neighbourhood Plan area is illustrated in **Figure 1** below. As the Neighbourhood Plan area aligns exactly with the Parish Council area, Rottingdean Parish has been used throughout this report as the basis for statistical analysis using data from the 2011 Census.

Figure 1: Rottingdean Parish Neighbourhood Area (Source: Brighton and Hove City Council, 2003. Crown Copyright)



Work to date

9. In May 2014, AECOM (then URS) provided advice to the Parish Council in respect of the emerging neighbourhood plan. We reviewed the plan's evidence base and provided site selection advice.
10. We subsequently provided more general neighbourhood planning advice, covering the future process of evidence gathering, how to develop a vision and objectives for the plan, and how to develop policy.
11. Later in 2014, AECOM (then URS) was commissioned to work with the Parish Council on the design of the parish housing needs survey and analysis of responses, which comprises the subject of this report.

Study objectives

12. The objectives of this report can be summarised as:
 - Design of a housing needs survey to explore demand for housing in Rottingdean over the BHCC Local Plan period (to 2030);
 - Analysis of that data to determine patterns of housing demand; and
 - Setting out of recommendations based on our data analysis that can be used to inform the Neighbourhood Plan's housing policies.

Structure of this report

13. The remainder of this report is structured around the objectives set out above:
 - **Chapter 2** sets out the methodology used;
 - **Chapter 3** provides analysis of the survey findings; and
 - **Chapter 4** sets out our conclusions and recommendations based on this analysis that can be used to inform the Neighbourhood Plan's housing policies.
14. A full set of data tables is included in **Appendix 1 – Survey Results.**

2 Summary of methodology

Overview of approach

15. The NPPG states that:

'no single source of information on needs will be comprehensive in identifying the appropriate assessment area; careful consideration should be given to the appropriateness of each source of information and how they relate to one another... plan makers will need to consider the usefulness of each source of information and approach for their purposes'.

16. Following this advice to gather information from a range of sources, our approach has been to design a survey aimed at complementing information available at parish level from the 2011 Census, in order to gather additional qualitative evidence, and to test and update Census findings at the local level almost four years after they were gathered.

Survey design

17. The survey was designed in line with national guidance, drawing on the National Planning Policy Framework and Practice Guidance as appropriate.¹ The survey relied on tried and tested questions from previous surveys informing Neighbourhood and Local Plans,² and was structured around four headings:

- About You;
- About Your Property;
- About Your Household; and
- About Your Future Requirements.

18. The survey consisted of multiple choice questions, some of which had comment fields to allow respondents to provide additional detail.

19. A number of the questions contained in the 'About You' and 'About Your Property' sections covered information available in the Census, such as household size and tenure, as it was considered that it would be useful to have this information available for each individual household as well as at an aggregate level for the whole parish.

20. This also allowed us to compare and contrast survey responses with Census data, in order to assess how far the survey findings reflect the needs of all households within the parish. Additionally,

¹ Available online at: <http://planningguidance.planningportal.gov.uk/blog/guidance/housing-and-economic-development-needs-assessments/methodology-assessing-housing-need/> [accessed June 2015]

² Examples consulted include Peak District Housing Needs Survey, available online at: <http://resources.peakdistrict.gov.uk/pubs/planning/housing/appendix3.pdf> [accessed June 2015]; and Newark and Sherwood Housing Needs for People over 50, available online at: <http://www.newark-sherwooddc.gov.uk/housing/olderpeopleshousingneeds/housingneedssurvey/> [accessed June 2015]

a set of diversity monitoring questions – covering, for example, age, ethnicity and religion – were included to allow us to monitor the extent to which the survey reached a representative cross-section of demographic groups within the parish.

21. Questions in the ‘About Your Household’ and ‘About Your Future Requirements’ sections were designed to be specific to Rottingdean, with the aim of capturing parish-specific trends in housing demand. These trends include the level of concealed households, levels of unmet demand, and how to translate demand into size and tenure of new properties.
22. Rottingdean has been identified as having an ageing population, and a number of questions were included to explore the extent of demand for specialist models of housing for older people. For example, the survey asked whether households have had any adaptations, and whether any household member receives care at home.
23. The survey asked respondents about their level of household income, level of savings, the maximum that they would be willing to spend on a property, and the maximum monthly mortgage or rent payment that they would be willing to pay. While these topics may be considered sensitive, such questions are typically included in housing needs surveys to collect important data to inform the level of affordable housing need.
24. The survey included a statement informing respondents that all data would be anonymised and kept strictly confidential. Respondents were asked to provide their postcode; however, this data has been used solely as an identifier to differentiate each response, and has not been included in the analysis. Survey responses have been kept wholly anonymous and confidential.

Data collection and analysis

25. The survey was hosted online by BHCC, and distributed in hard copy to all households in the Plan area by the Neighbourhood Plan Group. The survey achieved a total of 193 responses, comprising 13.0% of all 1,484 households in Rottingdean Parish, a good response rate for a survey of this kind and enabling conclusions to be considered meaningful. Survey responses were collated by the Plan Group, and the data shared with AECOM for analysis.
26. Analysis of survey findings has, where appropriate, included both quantitative statistical analysis, and qualitative analysis of open question data. Where specific questions achieved relatively low response rates, quantitative findings should be treated with caution as the number of responses may be too low to allow for robust analysis. For clarity, data tables provided in the analysis include both the number of responses to each possible answer, and the percentage of total responses that this figure represents.

3 Survey analysis

27. The housing needs survey achieved 193 responses from a total of 1,484 households, or 13.2%. 187 respondents (98.9%) said that they live in the parish, and two said that they live outside.

28. The following chapter analyses all responses, under the following headings:

- Demographics;
- Household characteristics;
- Current housing type and tenure;
- Affordability; and
- Future housing needs.

29. Where relevant, the analysis compares survey responses with Census data for Rottingdean Parish.

Demographics

30. The survey included a number of equality and diversity monitoring questions used to investigate how the survey results compare with Census 2011 data for Rottingdean, Brighton and Hove, and the England average. This allows us to monitor the extent to which the survey has reached all demographic groups within the parish, and how far the findings reflect the specific needs of different groups. We have been able to use the parish of Rottingdean as the basis for this statistical analysis.

31. **Figure 2** illustrates the age profile of survey respondents, in comparison with age data for Rottingdean, Brighton and Hove, and England, recorded in the 2011 census. In 2011, the age profile of the parish was notably older than the Brighton and Hove and England averages, with considerably higher proportions of residents in the 45-64, 65-84, and 85 and over age categories. In total, 28.9% of residents were recorded as aged 65 and over. Nearly half (49.2%) of all survey respondents fell into this category, suggesting that the survey has been effective in reaching older people and that the findings will reflect their housing needs and aspirations, although care should be taken in interpretation of survey results to allow for their over-representation in this case.

32. Census findings show that the parish has relatively low proportions of residents in younger age categories. Only 7.0% of residents are aged 16-24, compared with 15.9% across Brighton and Hove and 11.9% nationally, and the proportion of residents aged 25-44 is also low in comparison to the local and national averages. In total, 25.9% of residents are adults aged 16-44, and 15.1% are children aged 0-15 (broadly in line with the average for Brighton and Hove). By contrast, however, only 10.9% of survey respondents were aged under 45, and it is likely, therefore, that the housing needs of younger people, including families with young children, may be under-represented in the survey findings.

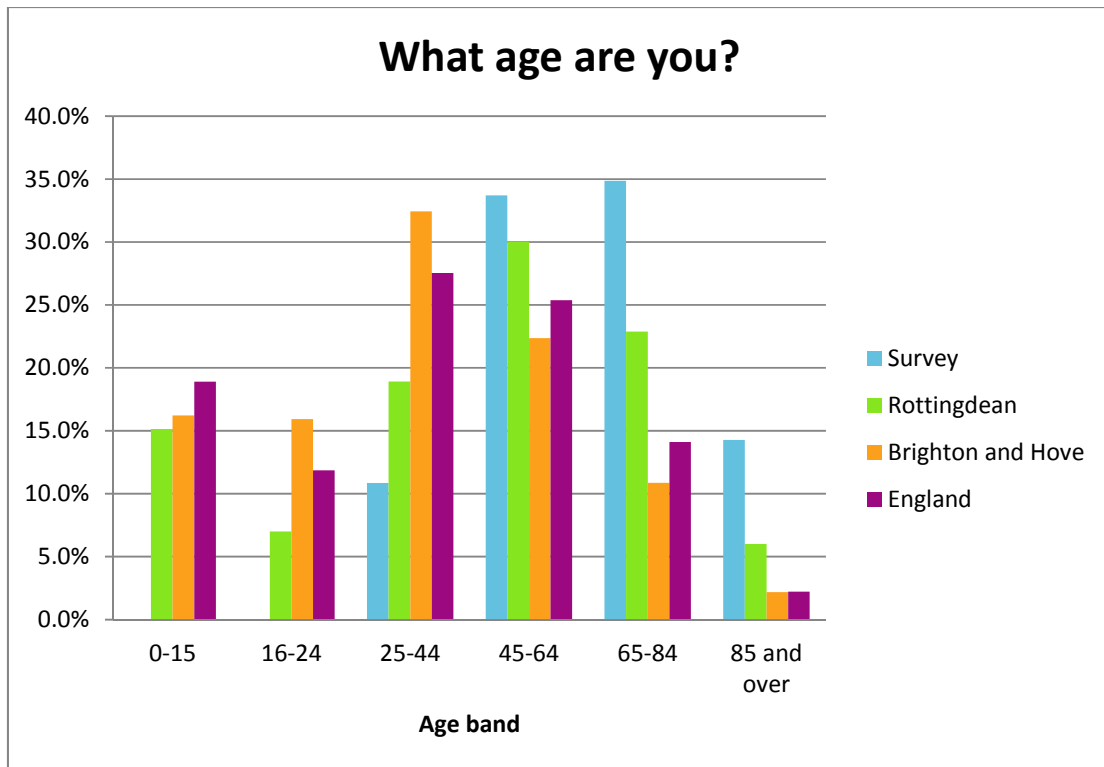


Figure 2: Age profile of survey respondents compared with Census 2011 data (Source: ONS, Census 2011)

33. Survey respondents were also more likely to be female (57.6%), reflecting a higher proportion of female than male residents recorded in the census (54.0%). In terms of ethnicity, census data included in **Table 1** shows that the population of Rottingdean is predominantly white, with smaller proportions of residents from Asian and mixed ethnic backgrounds. However, these groups were under-represented among survey respondents and so the findings may not reflect fully any housing needs or aspirations specific to these groups.

Survey		Census 2011		
What is your ethnic group?		Rottingdean	Brighton and Hove	England
White	97.1%	94.1%	89.1%	85.4%
Mixed	0.0%	2.6%	3.8%	2.3%
Asian	0.6%	2.2%	4.1%	7.8%
Black	0.0%	0.7%	1.5%	3.5%
Other	0.6%	0.5%	1.5%	1.0%

Table 1: Ethnicity of survey respondents compared with Census 2011 data (Source: ONS, Census 2011)

34. In line with census findings, the majority of survey respondents described their religion as Christian (51.5%), or said that they were atheist or had no particular religion (9.9% and 23.4% respectively). Survey respondents also included small numbers of people who gave their religion as Buddhism, Judaism or Pagan. However, the census shows small minorities of residents who describe themselves as Muslim or Hindu, who are not represented among respondents to the survey. Again, it is therefore possible that survey findings may not reflect any specific housing needs experienced by these groups.

Household characteristics

35. 71.0% of survey respondents have lived at their current address for five years or more. However, 95.2% had moved to Rottingdean from elsewhere. Half of respondents had moved to the parish from elsewhere in Brighton and Hove, with 24.3% moving from elsewhere in the South East, and 17.5% from London. Smaller proportions moved from elsewhere in the UK, and outside the UK. Only 17.2% of respondents have family living in Rottingdean (apart from those currently sharing the same address), and 41.7% of survey respondents said that they live alone.

36. Only 11.9% of respondents said that they work in the parish, which suggests its popularity as a base for commuters but may also reflect the high proportion of respondents who are aged over 65 and therefore likely to be retired. Census data shows that 21.4% of residents work at or mainly from home, significantly above the average for Brighton and Hove (12.6%) and England (10.4%). 48.4% of residents travel less than 10km to work, a distance which includes the towns of Lewes and Newhaven as well as the centre of Brighton.

37. **Table 2** shows that Rottingdean residents experience a higher rate of long-term limiting health problems and disability than the Brighton and Hove and England averages. Likewise, among survey respondents, a higher rate experiences a long-term health problem or disability that limits their day-to-day activities a little. It is likely that this reflects the older than average age profile both of Rottingdean, and of respondents to the survey.

Survey		Census 2011		
Are your day-to-day activities limited because of a health problem or disability?		Rottingdean	Brighton and Hove	England
Day-to-day activities limited a lot	9.4%	9.5%	7.5%	8.3%
Day-to-day activities limited a little	14.7%	11.5%	8.8%	9.3%
Day-to-day activities not limited	73.5%	79.0%	83.7%	82.4%

Table 2: Limiting health problem or disability among survey respondents compared with Census 2011 data (Source: ONS, Census 2011)

38. Rottingdean also has a higher than average proportion of residents who provide unpaid care to family or friends (12.4%). Among survey respondents, the rate is higher still (15.1%). Of those respondents who do provide unpaid care or support, 48.0% care for a parent, 20.0% for another family member or spouse, 12.0% for a friend, and 12.0% for a child with special needs.

39. 7.5% of survey respondents said that a member of their household receives support or care at home. Of these respondents, 80.0% said that the household member receives between one and 19 hours of care each week.

Current housing type and tenure

40. The majority of respondents to the survey (62.4%) stated that they currently live in a house, with smaller proportions living in bungalows (26.3%) and flats or apartments (10.8%). None of the respondents lived in sheltered housing, a room in a shared house, or a caravan or mobile home.

41. **Table 3** compares survey findings with census data regarding housing tenure. The census shows that Rottingdean has a very high proportion of households that are owner-occupied compared to both Brighton and Hove and the average for England. Nearly half of households in the parish are owned outright, without a mortgage; more than double the rate across the Brighton and Hove local authority area. Among survey respondents, this figure rises to 69.6%.

Survey			Census 2011		
Q3: Do you own or rent your property?			Rottingdean	Brighton and Hove	England
Own	Outright (no mortgage)	69.6%	47.0%	23.4%	30.6%
	With a mortgage	25.0%	31.1%	29.9%	32.8%
	Shared ownership	0.5%	0.7%	0.9%	0.8%
	<i>Total</i>	<i>95.1%</i>	<i>78.0%</i>	<i>53.3%</i>	<i>17.7%</i>
Rent	Local authority	0.0%	2.1%	9.8%	9.4%
	Housing association/social housing provider	0.0%	1.0%	5.1%	8.3%
	Privately	4.9%	17.1%	28.0%	16.8%
	<i>Total</i>	<i>4.9%</i>	<i>20.2%</i>	<i>44.5%</i>	<i>34.5%</i>
Other		0.0%	1.0%	0.2%	1.3%

Table 3: Housing tenure of survey respondents compared with Census 2011 data (Source: ONS, Census 2011)

42. In total, 95.1% of survey respondents were owner-occupiers, with only 4.9% of respondents living in rented housing. This contrasts with census data showing that 20.2% of households in the parish are in rented accommodation, including 17.1% that rent privately and 3.1% that rent either from the local authority or from a housing association or other social housing provider. None of the respondents to the survey said that they live in local authority or housing association accommodation.

43. It is likely, therefore, that the needs of residents living in both private and social rented housing may be under-represented in the survey findings, meaning they disproportionately reflect the views of owner-occupiers in the parish. Just two survey respondents (1.1% of the total) said that a member of their household is currently on the housing register.

44. Respondents were asked how many bedrooms they had in their current property. **Figure 3** illustrates the findings, alongside census data. The census shows that Rottingdean has slightly higher than average proportions of four and five bed households, and a slightly lower than average proportion of one bed households. The proportion of two bed households is in line with the local average but higher than the national average, whereas the proportion of three bed households is higher than the local average and considerably lower than the national average.
45. Among survey respondents, the proportions living in three, four and five bedroom households are higher than the census figures for Rottingdean, and the proportion living in one and two bedroom households is significantly lower. 96.8% of respondents said that the number of bedrooms they have is currently sufficient for their needs, with only six respondents, or 3.2%, saying that their number of bedrooms was insufficient. It is likely that this reflects the high proportions of respondents living in larger properties of three or more bedrooms, and may not capture the needs of the smaller numbers of residents living in properties with fewer bedrooms.
46. Respondents who described the number of bedrooms they have as insufficient commented that they need more space either for their own children, or to allow grandparents and other family members to visit. One respondent reported that they will soon be putting the house on the market in order to move to a larger property in a more affordable area. Others commented that they would like to be able to get planning permission to convert roof space into additional bedrooms.

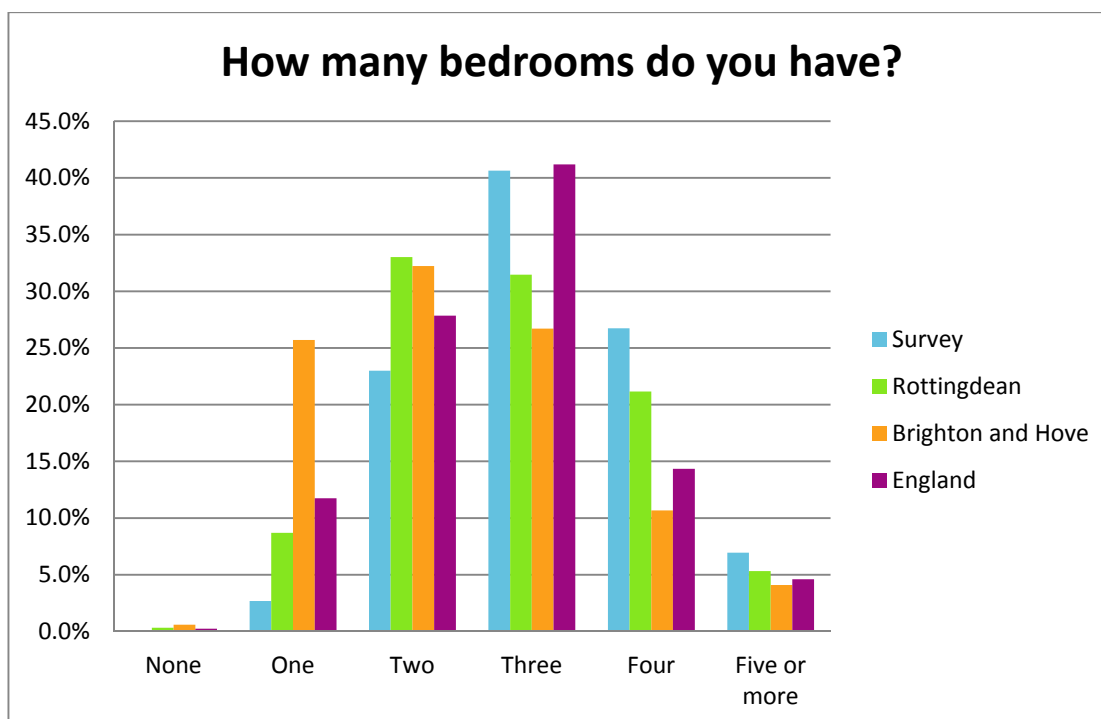


Figure 3: Number of bedrooms among survey respondents compared with Census 2011 data (Source: ONS, Census 2011)

47. 13.3% of survey respondents reported that their property had received adaptations to make it suitable for the needs of a household member. The range of adaptations mentioned by respondents included: handrails; internal and external ramps; level access showers, walk-in baths and

wetrooms; bath lifts; and stair lifts. One respondent said that they live in a new-build property built to Lifetime Homes standards.³

Affordability

48. Respondents were asked about their level of income and savings, and the maximum price that they would be willing to pay for their next property. A considerable proportion of respondents chose not to answer these questions. Of those who did, 42.7% said that they had an annual pre-tax household income of over £40,000. However, 35.5% had an income of less than £25,000, including 6.5% with less than £10,000 per annum. This indicates that income levels vary quite considerably across the parish. Similarly, although 63.0% said that they had savings of over £10,000, a notable proportion (10.2%) said that they had no savings at all.
49. When asked how much they would be willing to pay for their next property, however, 93.5% said that they would pay more than £250,000, including 49.5% who would pay up to £500,000; 30.8% who would pay up to £750,000; 10.3% who would pay up to £1 million; and 2.8% who would pay over £1m. Property market information for Rottingdean shows that the average property price in the area, as of June 2015, is £442,045⁴, suggesting that the aspirations of survey respondents are realistic relative to the local property market.
50. 51.6% of respondents said that they would not require a mortgage to achieve the cost of their next property, again reflecting the older age profile of both the parish and survey respondents. Of those that would require a mortgage, the amount that respondents would be willing to spend varied widely, from 6.7% who would pay up to £249 per month, to 20.0% who would pay £1,500 and over.

Q17: If you (or your whole family) were looking to buy your next home, what would be the maximum price, at today's prices that you would be willing to pay?

	Responses	Percentage of total
Up to £99,999	0	0.0%
£100,000 - £249,999	7	6.5%
£250 - £499,999	53	49.5%
£500,000 - £749,999	33	30.8%
£750,000 - £999,999	11	10.3%
£1 million and over	3	2.8%
<i>Total responses</i>		107

Table 4: Maximum price for next property

³ The Lifetime Homes standard is a set of 16 design criteria that can be used to design accessible homes that can be adaptable to future needs. For more information, see the website: <http://www.lifetimehomes.org.uk/> [accessed April 2015]

⁴ http://www.zoopla.co.uk/house-prices/browse/rottingdean/?category=residential&q=rottingdean&search_source=nav [accessed June 2015]

51. The majority of respondents (72.9%) said that they would not consider renting if they were unable or unwilling to buy in future. Shared ownership was less popular again, with the vast majority of respondents (90.8%) saying that they would not consider this option if it was available. Of those who would consider renting, nearly half (48.6%) would be willing to pay rent of over £1,000 a month. However, notable proportions of respondents said that they would be willing to pay considerably less: in total, 15.2% said that the maximum they could pay would be less than £600. Only 4.0% of respondents said that they would need housing benefit to achieve this monthly rent.

Future housing needs

52. Respondents were asked how likely it is that a member of their household will move away from the current property during the next five years. 33.4% of respondents said that it is likely or very likely that a household member will move away from the property. Of these respondents, 79.0% said that they or their family would be likely to be moving out, and 13.0% said that another household member would be moving. Just over quarter of respondents (26.2%) said that the household member would be looking to move as soon as possible. 24.6% said they would be likely to move in the next 1-2 years, 24.6% in the next 3-4 years, and 24.6% in the next five years.

53. Respondents were then asked what type of household member will be looking to move out. **Table 5** summarises responses. 14.3% of respondents said that a family with children would be moving, and 14.2% said that either a single older person or an older couple would be moving. This question allowed respondents to add comments, and several commented that they would need to move either to sheltered housing or to a care home due to particular health or care needs.

Q22: What type of household member will want, or need, to move out?

	Responses	Percentage of total
A single adult	27	42.9%
An adult couple	14	22.2%
A family with children	9	14.3%
A single older person	5	7.9%
An older couple	4	6.3%
Other	4	6.3%
<i>Total responses</i>		63

Table 5: What type of household member will want, or need, to move out?

54. Respondents gave a variety of reasons why the current property is unsuitable for the household member who may want or need to move out. **Table 6** summarises responses. The most common reasons were that the property is too big (14.0%); that it is unsuitable for health and/or mobility requirements (14.0%); and that the household member wants or needs to live independently (11.6%).

55. This question also allowed respondents to add comments. Respondents variously commented that they would need to move due to mobility requirements; that they would like to downsize to release capital; that they plan to buy a larger house in a more affordable area; that they can no longer afford their current mortgage; and that they plan to move overseas. A number of respondents said that they plan to move due to perceived problems in the Rottingdean area; principally traffic congestion and concerns over the future growth and development of the village.

56. A common theme to emerge was that a number of household members plan to move out so that they can live independently, which may indicate pent-up demand for shared ownership and rental properties as well as properties suitable for first-time buyers (this is discussed further in paragraphs 59 and 65 below). Census data supports this finding: 1.3% of households in the parish are classified as 'concealed', slightly above the Brighton and Hove rate of 1.2%.⁵ Respondents currently in private rented accommodation commented that they intend to move in order to find greater stability within the private rented sector.

Q24: Why is the current property unsuitable for the household member(s)?

	Responses	Percentage of total
Too big	12	14.0%
Too small	6	7.0%
Too expensive	6	7.0%
Too difficult/costly to maintain	9	10.5%
Unsuitable for health/mobility requirements	12	14.0%
End of tenancy	2	2.3%
Want/need to live independently	10	11.6%
Want/need to move for work reasons	3	3.5%
Want/need to be closer to family	7	8.1%
To go to university or college	4	4.7%
Other	15	17.4%
<i>Total responses</i>		86

Table 6: Why is the current property unsuitable?

⁵ The ONS defines a concealed family as 'one living in a multi-family household in addition to the primary family, such as a young couple living with parents.' For further information, see: <http://www.ons.gov.uk/ons/rel/census/2011-census-analysis/what-does-the-2011-census-tell-us-about-concealed-families-living-in-multi-family-households-in-england-and-wales/-sty-what-does-the-2011-census-tell-us-about-concealed-families.html>

Affordability

57. Respondents were asked how much a person leaving their household would be willing to pay for their next home. This question received only 22 responses, summarised in **Table 7**. Of those who responded, the largest group (36.4%) said that the maximum the moving household member could pay would be between £250,000 and £499,999. Eight respondents, or 36.4%, said that the maximum they could pay would be less than £250,000, again indicating pent-up demand for housing types that are suitable and affordable for first-time buyers.

Q19: If someone leaving your household were looking to buy their next home, what would be the maximum price, at today's prices that they would be willing to pay?

	Responses	Percentage of total
Up to £99,999	1	4.5%
£100,000 - £249,999	7	31.8%
£250 - £499,999	8	36.4%
£500,000 - £749,999	3	13.6%
£750,000 - £999,999	2	9.1%
£1 million and over	1	4.5%
<i>Total responses</i>		22

Table 7: Maximum price for next property of someone leaving the household

58. Respondents were asked what the maximum mortgage would be for someone leaving their household. Again, responses varied considerably. Four respondents (22.2% of the 18 who responded to this question) said that the person leaving the household would be mortgage free, and five (27.8%) would be willing to pay over £1,000 a month. However, there was also a number of respondents who would be willing to pay smaller amounts: four (22.2%) said that their maximum they could pay would be less than £600 a month.

59. Half of the 38 respondents who responded said that the person leaving their household would be willing to consider renting, and 32.4% said that they would consider shared ownership if it were available. The maximum rents that household members would be willing to pay again varied, with four (28.6% of 14 respondents) willing to pay more than £1,000 a month, and six (48.6%) saying that the maximum they could pay would be less than £600 a month. Five respondents (13.5%) said that they would require housing benefit to achieve the monthly rent.

60. Property market information for Rottingdean shows that the average property rent in the area, as of June 2015, is £1,571 per calendar month⁶, suggesting that there may be unmet demand for more affordable rental properties in the parish. As of June 2015, there are 22 properties on the market with monthly rents above £1,000, nine properties with rents between £500 and £1,000, and no properties with rents below £500.

⁶ www.home.co.uk/for_rent/rottingdean/current_rents?location=rottingdean [accessed June 2015]

Location

61. Respondents were asked whether the person looking to move out of the property was planning to move out of Rottingdean. 55.7% (34 out of 61 respondents to this question) said that they would be moving out of the parish. However, more than half (52.9%) said that they were planning to move less than five miles away, with only 11.8% planning to move more than ten miles.

Housing type and tenure

62. Respondents were asked what type of property would be most suitable for the household member planning to move. The question allowed respondents to indicate which property type would be their first, second and third choice. **Table 8** summarises responses. The most popular first choice property types were a house, a bungalow, and a flat or apartment, each of which was chosen by 27.8% of respondents. Bungalows were a popular second choice, with 38.9% of respondents selecting this option.

63. Sheltered or retirement housing was chosen by seven respondents as their first choice, two as their second choice, and one as their third choice, and two respondents selected extra care housing. Along with the popularity of bungalows, this suggests that there is demand in Rottingdean for housing types that are suitable for the needs of older people.

Q26: What type of property would be most suitable for the household member(s) planning or needing to move?	First choice		Second choice		Third choice	
House	15	27.8%	4	22.2%	1	10.0%
Bungalow	15	27.8%	7	38.9%	0	0.0%
Flat/apartment	15	27.8%	4	22.2%	7	70.0%
Sheltered/ retirement housing	7	13.0%	2	11.1%	1	10.0%
Extra care housing	1	1.9%	0	0.0%	1	10.0%
Other	1	1.9%	1	5.6%	0	0.0%
<i>Total responses</i>	54		18		10	

Table 8: Most suitable housing type

64. In terms of size, the majority of respondents said that a two (32.3%) or three (38.5%) property would be most suitable. Just 4.6% said that a property with four or more bedrooms would be most suitable. A considerable proportion of respondents preferred smaller properties, with 13.8% saying that a one bedroom property would be most suitable, and 10.8% a bedsit or studio apartment. The popularity of smaller properties – particularly bedsits and studio apartments – suggests that there may be demand driven by older people looking to downsize from larger properties or move into sheltered accommodation, as well as younger people hoping to buy their first property.

65. Respondents were again asked to indicate their first, second, and third choice of tenure. The majority (76.6%) chose said that their first choice would be to own their property, either outright or with a mortgage. Shared ownership was more popular as a second or third choice than as a first

choice. With regards to the rented sector, more respondents indicated that they would prefer to rent privately or from a housing association or social provider than from a local authority. Some respondents commented that other tenures of housing, including care or nursing homes and student accommodation, would be most suitable.

4 Conclusions

Key findings

66. Our analysis of the survey results concentrates on selected aspects of the returns, and recognises the potential for further cross-tabulation and analysis of the data, potentially through wider sharing and circulation of the results with appropriate partners such as the City Council and relevant care services.
67. Rottingdean has a relatively aged population, which is reflected in a higher than average proportion of residents who experience a long-term limiting health problem or disability. 7.5% of respondents said that they or a family member receives care at home, and 13.5% reported that their property has been adapted to make it suitable for the needs of a household member.
68. The parish has a high rate of owner-occupation. However, there was a very low response rate from residents in private or social rented accommodation, indicating that the needs of these groups may be under-represented in the survey findings. There was also a lower rate of response from residents of smaller properties, which may have affected the reliability of findings regarding size of property and how far this is sufficient for household needs.
69. Among survey respondents, average household incomes and the amounts that respondents would be willing to pay for a property are relatively high. A high proportion of households are mortgage-free, reflecting the age profile of the parish, and over 40% of respondents would be willing to pay over £500,000 for their next property. However, this conceals smaller proportions with lower incomes and who would be willing to spend considerably less. Again, it is likely that demand for more affordable housing in the parish is under-represented due to the low level of response from residents in rented and smaller properties.
70. It could be assumed that households in genuine need of affordable housing would be more willing than average to respond to a housing needs survey. The relatively low proportion of respondents who indicated that they were in need of affordable housing could therefore be taken as a reflection of a genuinely low level of need in the Rottingdean area. However, evidence from the survey suggests that there may be pent-up demand for housing in the parish, including unmet demand for more affordable rented properties.
71. Around a third of respondents said that it is likely or very likely that a member of their household would be looking to move out in the next five years. Respondents gave a variety of reasons for needing to move, including health and care needs, mobility requirements, affordability, and to release capital. 14.0% said that their current property is too big, indicating a demand for properties suitable for down-sizing.
72. Others said that their property is too small, and comments suggest that there may also be demand for larger properties suitable for growing families. A further theme to emerge was that a number of household members plan to move out so that they can live independently, indicating pent-up demand for rental properties as well as properties suitable for first-time buyers.

73. The amount that moving household members would be willing to pay for a property varies considerably. Although some respondents reported that they would be willing to pay a relatively large sum for a property, others said that they would be willing to pay considerably less, again indicating pent-up demand for properties suitable for first-time buyers or lower income retirees. Half of respondents said that the moving household member would consider renting, and around a third would consider shared ownership if this option were available. 55.7% of moving household members would be looking to move out of the parish. However, it is not clear whether this is to be nearer work, members of their own family or because of housing costs in the area.

74. The majority of moving household members would prefer to own their property, either outright or with a mortgage. There is demand for houses, bungalows, and flats and apartments, as well as some more limited demand for specialist sheltered or retirement housing. Over 70% of moving household members would prefer a two or three bedroom property, but there is also demand for smaller properties including bedsits and studios, as well as one bedroom apartments. This suggests that there is demand driven by older people looking to downsize from larger properties or move into sheltered accommodation, as well as younger people hoping to buy their first property.

Characteristics of housing demand

75. The findings set out above indicate that, based on the responses of those household members filling out the survey, demand for housing in Rottingdean arises principally from four key demographic groups:

- **Families with children looking to move to larger properties.** Evidence from the survey suggests that some households in this category would consider moving away from Rottingdean to more affordable areas, but that some would prefer to remain in Rottingdean and extend their existing property if possible.
- **Young adults who want to live independently and/or buy their own home.** The evidence suggests that there is pent-up demand for housing suitable for this group, including both rental properties and properties suitable for first-time buyers.
- **Older people looking to downsize to smaller and more manageable properties.** Survey responses suggest that there is significant demand for properties suitable for downsizing. The data indicates that a high proportion of residents are mortgage-free, and it is likely that this reflects the relatively older age profile of the parish. This group includes older people looking to move for lifestyle or financial reasons, rather than health or mobility requirements.
- **Older people looking to move due to particular health, care or mobility requirements.** Survey responses suggest that there are a number of households within the parish who consider that they need to move, perhaps to specialist sheltered or retirement housing, due to specific needs.

76. While these four groups capture many of the key trends that emerged from the survey analysis, it should be noted that they do not account for every facet of housing demand and housing need within the parish.

Policy recommendations

77. Based on the survey results, which indicate that demand for housing in Rottingdean arises from four key demographic groups, some policy recommendations can be formulated to ensure the neighbourhood plan is able to contribute to meeting their needs. These appear in Table 9 below.

Table 9: Policy recommendations by key demographic group based on survey findings

Key demographic group	Conclusion	Policy recommendation
Families with children looking to move to larger properties	Evidence from the survey suggests that some households in this category would consider moving away from Rottingdean to more affordable areas, but that some would prefer to remain in Rottingdean and extend their existing property if possible.	For this demographic group, providing more family housing is likely to help, as this is likely to help reduce affordability pressures. The policy could state 'Developments will normally be expected to include a proportion of medium-sized and larger (3-4 + bedroom dwellings) suitable for families'
Young adults who want to live independently and/or buy their own home	The evidence suggests that there is pent-up demand for housing suitable for this group, including both rental properties and properties suitable for first-time buyers.	Although housing tenure (rental or owner-occupied) cannot normally be specified through policy, an appropriate policy response could be to state 'Developments that comprise or include smaller dwellings (1-2 bedrooms) designed as starter homes for younger homebuyers, will be supported.'
Older people looking to downsize to smaller and more manageable properties	Survey responses suggest that there may be demand for properties suitable for downsizing. The data indicates that a high proportion of residents are mortgage-free, and it is likely that this reflects the relatively older age profile of the parish. This group includes older people looking to move for lifestyle or financial reasons, rather than health or mobility requirements.	Appropriate policy response could be 'Developments comprising or including smaller dwellings (1-2 bedrooms), including units suitable for independent living for older people, such as bungalows or ground floor flats, will be strongly supported.'
Older people looking to move due to particular health, care or mobility requirements	Survey responses suggest that there are a number of households within the parish who consider that they need to move, perhaps to specialist sheltered or retirement housing, due to specific needs.	In general, settlements like Rottingdean (i.e. a village or small town, but with a range of local services) are appropriate for specialist housing for older people as long as well-located. As such, an appropriate policy response could be 'Housing developments specifically designed for the elderly, including but not limited to sheltered housing, assisted living, retirement villages and nursing homes will be encouraged in locations within walking distance of services and facilities'

5 Appendix 1 – Survey Results

Q1: Do you live in Rottingdean?	Count	Percentage
Yes	187	98.9%
No	2	1.1%
<i>Total responses</i>		189

Q3: Do you own or rent your property?		Count	Percentage
Own	Outright (no mortgage)	128	69.6%
	With a mortgage	46	25.0%
	Shared ownership	1	0.5%
	<i>Total</i>	175	95.1%
Rent	Local authority	0	0.0%
	Housing association/social housing provider	0	0.0%
	Privately	9	4.9%
	<i>Total</i>	9	4.9%
Other		0	0.0%
<i>Total responses</i>			184

Q4: Is your property a:	Count	Percentage
House	116	62.4%
Bungalow	49	26.3%
Flat/apartment	20	10.8%
Sheltered/retirement housing	0	0.0%
Room in shared house	0	0.0%
Caravan/mobile home	0	0.0%
Other	1	0.5%
<i>Total responses</i>		186

Q5: How many bedrooms do you have?	Count	Percentage
None	0	0.0%
One	5	2.7%
Two	43	23.0%
Three	76	40.6%
Four	50	26.7%
Five or more	13	7.0%
<i>Total responses</i>		187

Q6: Is the number of bedrooms you have currently sufficient for your needs?	Count	Percentage
Yes	181	96.8%
No	6	3.2%
<i>Total responses</i>		<i>187</i>

Q7: Has the property had any adaptations to make it suitable for the needs of a household member?	Count	Percentage
Yes	25	13.3%
No	163	86.7%
<i>Total responses</i>		<i>188</i>

Q8: How long have you lived at this address?	Count	Percentage
Less than a year	10	5.4%
1-2 years	17	9.1%
3-4 years	27	14.5%
5 years or more	132	71.0%
<i>Total responses</i>		<i>186</i>

Q9: How many people in each age group currently live at your address?	Count				Percentage			
	0	1	2	3	0	1	2	3
0-15	173	13	4		91.1%	6.8%	2.1%	0.0%
16-24	178	6	3	1	93.7%	3.2%	1.6%	0.5%
25-44	164	10	15		86.3%	5.3%	7.9%	0.0%
45-64	145	30	15		76.3%	15.8%	7.9%	0.0%
65-84	147	25	17		77.4%	13.2%	8.9%	0.0%
65-74	137	33	18		72.1%	17.4%	9.5%	0.0%
75-84	146	29	14	1	76.8%	15.3%	7.4%	0.5%
85 and over	165	22	2		86.8%	11.6%	1.1%	0.0%

Q10: If you moved into the parish at any point, where was the last place that you lived before Rottingdean?	Count	Percentage
Elsewhere in Brighton and Hove	90	50.8%
London	31	17.5%
Elsewhere in Sussex	9	5.1%
Elsewhere in the South-East	34	19.2%
Elsewhere in England	4	2.3%
Elsewhere in the UK	2	1.1%
Outside the UK	7	4.0%
<i>Total responses</i>		177

Q11: Do you currently work in Rottingdean?	Count	Percentage
Yes	22	11.9%
No	163	88.1%
<i>Total responses</i>		185

Q12: Do you currently have family living in Rottingdean (other than those living in this property)?	Count	Percentage
Yes	32	17.2%
No	154	82.8%
<i>Total responses</i>		186

Q13: Is any member of your household currently on the housing register?	Count	Percentage
Yes	2	1.1%
No	184	98.9%
<i>Total responses</i>		186

Q14: Does any member of your household currently receive any support or care at home?	Count	Percentage
Yes	14	7.5%
No	173	92.5%
<i>Total responses</i>		<i>187</i>
Q14a: Approximately how many hours of care are received each week?		
1-19 hours	12	80.0%
20-40	0	0.0%
40 hours or more	3	20.0%
<i>Total responses</i>		<i>15</i>
Q14b: Is this support or care provided by:		
Family	6	40.0%
Agency	3	20.0%
Combination	6	40.0%
<i>Total responses</i>		<i>186</i>

Q15: What is your current annual household income, before tax and not including any housing benefit?	Count	Percentage
Up to £9,999	8	4.4%
£10,000 to £17,999	19	10.4%
£18,000 to £24,999	17	9.3%
£25,000 to £29,999	9	4.9%
£30,000 to £34,999	6	3.3%
£35,000 to £39,999	6	3.3%
£40,000 and above	53	29.1%
Don't know	6	3.3%
Prefer not to say	58	31.9%
<i>Total responses</i>		<i>182</i>

Q16: What level of savings do you have?	Count	Percentage
None	11	6.0%
Up to £1,000	8	4.4%
£1,000 to £4,999	6	3.3%
£5,000 to £10,000	11	6.0%
Over £10,000	68	41.0%
Don't know	4	2.2%
Prefer not to say	75	41.0%
<i>Total responses</i>		<i>183</i>

Q17: If you (or your whole family) were looking to buy your next home, what would be the maximum price, at today's prices that you would be willing to pay?	Count	Percentage
Up to £99,999	0	0.0%
£100,000 - £249,999	7	6.5%
£250 - £499,999	53	49.5%
£500,000 - £749,999	33	30.8%
£750,000 - £999,999	11	10.3%
£1 million and over	3	2.8%
<i>Total responses</i>		107
Q17a: What would be the maximum mortgage you would be willing to pay?		
None/mortgage free	48	51.6%
Up to £249	3	3.2%
£249 - £449	5	5.4%
£450 - £599	6	6.5%
£600 - £749	7	7.5%
£750 - £999	9	9.7%
£1,000 - £1,499	6	6.5%
£1,500 and over	9	9.7%
<i>Total responses</i>		93
Q17b: If you were unwilling to buy, would you consider renting?		
Yes	38	27.1%
No	102	72.9%
<i>Total responses</i>		140
Q17c: Would you consider shared ownership if it was available?		
Yes	13	9.2%
No	129	90.8%
<i>Total responses</i>		142
Q17d: What would be the maximum monthly rent you would be willing to pay?		
Up to £249	2	5.7%
£249 - £449	3	8.6%
£450 - £599	1	2.9%
£600 - £749	2	5.7%
£750 - £999	10	28.6%
£1,000 and over	17	48.6%
<i>Total responses</i>		35
Q17e: Would you receive housing benefit to achieve this?		
Yes	5	4.0%
No	121	96.0%
<i>Total responses</i>		126

Q18: Do you live alone or with others?	Count	Percentage
Alone	58	41.7%
With others	81	58.3%
<i>Total responses</i>		<i>139</i>

Q19: If someone leaving your household were looking to buy their next home, what would be the maximum price, at today's prices that they would be willing to pay?	Count	Percentage
Up to £99,999	1	4.5%
£100,000 - £249,999	7	31.8%
£250 - £499,999	8	36.4%
£500,000 - £749,999	3	13.6%
£750,000 - £999,999	2	9.1%
£1 million and over	1	4.5%
<i>Total responses</i>		<i>22</i>

Q19a: What would be the maximum mortgage they would be willing to pay?		
None/mortgage free	4	22.2%
Up to £249	0	0.0%
£249 - £449	1	5.6%
£450 - £599	3	16.7%
£600 - £749	1	5.6%
£750 - £999	4	22.2%
£1,000 - £1,499	4	22.2%
£1,500 and over	1	5.6%
<i>Total responses</i>		<i>18</i>

Q19b: If they were unwilling to buy, would they consider renting?		
Yes	19	50.0%
No	19	50.0%
<i>Total responses</i>		<i>38</i>

Q19c: Would they consider shared ownership if it was available?		
Yes	12	32.4%
No	25	67.6%
<i>Total responses</i>		<i>37</i>

Q19d: What would be the maximum monthly rent you would be willing to pay?		
Up to £249	0	0.0%
£249 - £449	2	14.3%
£450 - £599	4	28.6%
£600 - £749	1	7.1%
£750 - £999	3	21.4%
£1,000 and over	4	28.6%

<i>Total responses</i>		14
Q19e: Would you receive housing benefit to achieve this?		
Yes	5	13.5%
No	32	86.5%
<i>Total responses</i>		37

Q20: How likely is it that you (or your family) or someone in your household will move away from this home over the next five years?	Count	Percentage
Very Likely	29	16.7%
Likely	29	16.7%
Unlikely	59	33.9%
Very unlikely	57	32.8%
<i>Total responses</i>		174

Q21: Who is likely to be moving out?	Count	Percentage
You (and your family)	49	79.0%
Another family member	13	21.0%
Someone else in your household	0	0.0%
<i>Total responses</i>		62

Q22: What type of household member will want, or need, to move out?	Count	Percentage
A single adult	27	42.9%
An adult couple	14	22.2%
A family with children	9	14.3%
A single older person	5	7.9%
An older couple	4	6.3%
Other	4	6.3%
<i>Total responses</i>		63

Q23: When will the household member(s) be looking to move?	Count	Percentage
Now/ as soon as possible	16	26.23%
1-2 years	15	24.59%
3-4 years	15	24.59%
5 years	15	24.59%
<i>Total responses</i>		61

Q24: Why is the current property unsuitable for the household member(s)?	Count	Percentage
Too big	12	14.0%
Too small	6	7.0%
Too expensive	6	7.0%
Too difficult/ costly to maintain	9	10.5%
Unsuitable for health/ mobility requirements	12	14.0%
End of tenancy	2	2.3%
Want/ need to live independently	10	11.6%
Want/ need to move for work reasons	3	3.5%
Want/ need to be closer to family	7	8.1%
To go to university or college	4	4.7%
Other	15	17.4%
<i>Total responses</i>		86

Q25: Is the household member(s) planning to move out of Rottingdean?	Count	Percentage
Yes	34	55.7%
No	27	44.3%
<i>Total responses</i>		61
Q25a: How far from Rottingdean are they planning or needing to move to?		
Up to 5 miles	18	52.9%
5 to 10 miles	4	11.8%
10 to 30 miles	2	5.9%
More than 30 miles	2	5.9%
Don't know	8	23.5%
<i>Total responses</i>		34

Q26: What type of property would be most suitable for the household member(s) planning or needing to move?	First choice		Second choice		Third choice	
House	15	27.8%	4	22.2%	1	10.0%
Bungalow	15	27.8%	7	38.9%	0	0.0%
Flat/apartment	15	27.8%	4	22.2%	7	70.0%
Sheltered/ retirement housing	7	13.0%	2	11.1%	1	10.0%
Extra care housing	1	1.9%	0	0.0%	1	10.0%
Other	1	1.9%	1	5.6%	0	0.0%
<i>Total responses</i>	54		18		10	

Q27: What size of property would be most suitable for the household member(s) planning or needing to move?	Count	Percentage
Bedsit/ studio apartment	7	10.8%
One bedroom	9	13.8%
Two bedrooms	21	32.3%
Three bedrooms	25	38.5%
Four bedrooms	2	3.1%
Five bedrooms	1	1.5%
More than five bedrooms	0	0.0%
<i>Total responses</i>		65

Q28: What tenure of property would be most suitable for the household member(s) planning or needing to move?	First choice		Second choice		Third choice	
Own outright (i.e. no mortgage)	33	51.6%	0	0.0%	0	0.0%
Own with a mortgage	16	25.0%	7	38.9%	0	0.0%
Shared ownership	2	3.1%	3	16.7%	3	27.3%
Rent from the local authority	1	1.6%	3	16.7%	1	9.1%
Rent from a housing association/other social housing provider	4	6.3%	2	11.1%	3	27.3%
Rent privately	5	7.8%	3	16.7%	3	27.3%
Other	3	4.7%	0	0.0%	1	9.1%
<i>Total responses</i>		64		18		11

Equality and diversity monitoring questions

Q29: What age are you?	Count	Percentage
0-15	0	0.0%
16-24	0	0.0%
25-44	19	10.9%
45-64	59	33.7%
65-84	61	34.9%
85 and over	11	14.3%
Prefer not to say	25	14.3%
<i>Total responses</i>		175

Q30: What gender are you?	Count	Percentage
Male	68	39.5%
Female	99	57.6%
Other	1	0.6%
Prefer not to say	4	2.3%
<i>Total responses</i>		172

Q31: What is your ethnic group?		Count	Percentage
White	English/ Welsh/ Scottish/ Northern Irish	162	92.6%
	Irish	3	1.7%
	Gypsy or Traveler	0	0.0%
	Any other White background	5	2.9%
	<i>Total</i>	170	97.1%
Mixed or multiple ethnic groups	White and Black Caribbean	0	0.0%
	White and Black African	0	0.0%
	White and Asian	0	0.0%
	Other Mixed Groups	0	0.0%
	<i>Total</i>	0	0.0%
Asian/Asian British	Indian	0	0.0%
	Pakistani	0	0.0%
	Bangladeshi	0	0.0%
	Chinese	0	0.0%
	Any other Asian background	1	0.6%
	<i>Total</i>	1	0.6%
Black/Black British	African	0	0.0%
	Caribbean	0	0.0%
	Any other Black background	0	0.0%
	<i>Total</i>	0	0.0%
Other ethnic group	Arab	0	0.0%
	Any other ethnic group	1	0.6%
	<i>Total</i>	1	0.6%
Prefer not to say		3	1.7%
<i>Total responses</i>			175

Q32: Which of the following best describes your sexual orientation?	Count	Percentage
Heterosexual / Straight	144	87.3%
Lesbian / Gay woman	3	1.8%
Gay man	7	4.2%
Bisexual	4	2.4%
Other	0	0.0%
Prefer not to say	7	4.2%
<i>Total responses</i>		165

Q33: What is your religion or belief?	Count	Percentage
I have no particular religion	40	23.4%
Buddhist	3	1.8%
Christian	88	51.5%
Hindu	0	0.0%
Jain	0	0.0%
Jewish	2	1.2%
Muslim	0	0.0%
Pagan	1	0.6%
Sikh	0	0.0%
Agnostic	6	3.5%
Atheist	17	9.9%
Other	4	2.3%
Other philosophical belief	4	2.3%
Prefer not to say	6	3.5%
<i>Total responses</i>		171

Q34: Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?	Count	Percentage
Yes a little	25	14.7%
Yes a lot	16	9.4%
No	125	73.5%
Prefer not to say	4	2.4%
<i>Total responses</i>		<i>170</i>
Q34a: Please state the type of impairment which applies to you.		
Physical impairment	33	61.1%
Sensory impairment	7	13.0%
Learning disability / difficulty	0	0.0%
Long-standing illness	8	14.8%
Mental health condition	0	0.0%
Developmental condition	1	1.9%
Other	5	9.3%
<i>Total responses</i>		<i>54</i>

Q35: Are you a carer who provides unpaid support to family or friends who are ill, frail, disabled or have mental health or substance misuse problems?	Count	Percentage
Yes	24	15.1%
No	129	81.1%
Prefer not to say	6	3.8%
<i>Total responses</i>		<i>159</i>
Q35a: If yes, do you care for a:		
Parent	12	48.0%
Child with special needs	3	12.0%
Other family member	2	8.0%
Partner / spouse	5	20.0%
Friend	3	12.0%
Other	0	0.0%
<i>Total responses</i>		<i>25</i>

Q36: Are you currently serving in the UK Armed Forces?	Count	Percentage
Yes	1	0.8%
No	132	99.2%
<i>Total responses</i>		133
Q36a: Have you ever served in the UK Armed Forces?		
Yes	21	15.2%
No	117	84.8%
<i>Total responses</i>		138
Q36b: Are you a member of a current or former serviceman or woman's immediate family / household?		
Yes	9	7.0%
No	119	93.0%
<i>Total responses</i>		128

AECOM (NYSE: ACM) is a global provider of professional technical and management support services to a broad range of markets, including transportation, facilities, environmental, energy, water and government. With approximately 45,000 employees around the world, AECOM is a leader in all of the key markets that it serves. AECOM provides a blend of global reach, local knowledge, innovation, and collaborative technical excellence in delivering solutions that enhance and sustain the world's built, natural, and social environments. A Fortune 500 company, AECOM serves clients in more than 100 countries and has annual revenue in excess of \$6 billion.

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