

Council for the Isles of Scilly

Housing Needs Survey 2012

January 2013

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1 Executive summary

- 1.1.1 This report presents the findings from the Housing Needs Survey 2012 (HNS2012) for the Council of the Isles of Scilly. The survey follows a previous exercise completed in 2005 and aims to provide an up-to-date assessment of housing need for residents on the Isles of Scilly (IOS).
- 1.1.2 The survey was conducted during the summer and early autumn of 2012. The survey was available for completion in both online and hard copy formats. To supplement the information collected from the survey, in this report we also present relevant data collected from other sources such as the 2011 Census, Department for Communities and Local Government (DCLG), National Office of Statistics etc.
- 1.1.3 Although the survey elicited more than 80 responses, as only one response was allowed per household a number of responses were eliminated from our sample. The final sample size for the analysis was 70. This is significantly lower than the previous exercise in 2005 (which had a sample size of 299) and represents only 7.1% of the households on IOS. A number of reasons for the smaller sample size have been speculated including: the survey not being posted to households; the survey being completed over the summer period; a higher proportion of non-permanent residents on the IOS etc. Due to the small sample size, some care does need to be taken with the interpretation of the data.
- 1.1.4 Key findings of the survey include:
- 59% of respondents are satisfied with their current accommodation (at 64% satisfaction was highest on St Mary's)
 - 63% of council housing respondents and 43% of housing association respondents are satisfied with their accommodation
 - 35% of respondents stated that the need for more bedrooms was driving their dissatisfaction, followed by 26% of respondents who cited heating as being the main reason
 - 53% of respondents stated that they are currently looking for new accommodation, with 73% of those looking to move in the near future and 23% within the next three years
 - For those looking for new accommodation, 22% stated that they were keen to move into a property rented from the Council, a further 22% were looking to move into Duchy rented accommodation and 19% into a housing association property
 - 57% of respondents looking for a new property would like to move into a 2 bedroom property
 - Over 90% of respondents supported new housing either on their own or another island within IOS and 73% supported the need for new rented accommodation.
- 1.1.5 Although the response rate was lower than previous surveys that have been completed, these key findings alongside other areas detailed in this report provide a valuable source of data that can be used to help support the development of housing strategies to support the needs of residents on the islands.

2 Introduction

- 2.1.1 The on-going tough economic climate continues to add pressure to the affordability of housing across the UK. This is being driven by a combination of factors such as inflation, high levels of unemployment, decreases in the real value of earnings, higher energy and fuel prices and increasing cost of food and other essentials.
- 2.1.2 Specifically the Isles of Scilly (IOS) has its own unique housing situation. It is strongly influenced by a number of local factors that do not apply elsewhere in the UK. The entire archipelago is designated an Area of Outstanding Natural Beauty (AONB) and Conservation Area resulting in scarcity of land for housing and restrictive planning controls. The presence of the Duchy of Cornwall as a major landowner on the islands has a significant impact on what can be built. The lack of a competitive rental market in the private sector and the tendering process associated with some Duchy properties is very different from the mainland. As can be seen from the findings in this report, although housing on the IOS is expensive compared to regional and national prices, average income levels among residents are low. Together these factors present problems for IOS residents when trying to access the housing they need.
- 2.1.3 This report presents the findings of the Housing Needs Survey 2012 (HNS2012) for the Council of the Isles of Scilly (CIOS) along with an analysis of data from the 2011 Census and other publicly available sources. The aim of the survey was to provide an up-to-date assessment of housing need for residents on the IOS. It follows on from a similar exercise completed in 2005.
- 2.1.4 The survey was conducted during the summer and early autumn of 2012 and focused on collecting information from residents, including the following on:
- Levels of different tenure types on the IOS
 - Satisfaction levels with current accommodation
 - Need for different types of housing on the IOS
 - Housing affordability (rents and buying)
 - Support for new housing on the IOS.
- 2.1.5 The information collected in the HNS2012, used with additional data from other sources, can be used by CIOS to inform future housing strategies, policies and plans. In particular the information collected from this exercise can be used to assess the types of housing that should be built on the islands in the future.

3 Context for housing in Isles of Scilly

3.1.1 Before considering the findings of the HNS2012, it is worth taking time to assess the background context for housing on the IOS in 2012. To help with this we have been able to access data from a wide range of additional sources, including the 2011 Census.

3.2 2011 Census data and population

3.2.1 There will be more information available from the 2011 Census in future but to date outputs show the following main findings:

- The Isles of Scilly has a population of 2,203
- This compares with a population of 2,153 in the 2001 Census¹
- This is an increase of 2.2% from 2001
- There are 989 households on the IOS – up 1.1% from the 2001 Census
- 3.6% of people on the IOS live in communal establishments (i.e. residential / care homes / staying in hotels etc.)
- Just 0.45% of the population is defined as 'short term residents'.

3.2.2 During 2011/12, according to the Council's Local Development Framework Annual Monitoring Report 6² further properties were completed on the islands³.to add to the 989 households shown in the 2011 Census. Five of these units were built by housing associations and one by the Duchy of Cornwall. No other homes were started during the period.

3.2.3 The Census also has some key data on the age profile of residents on the IOS. This shows that around 23.0% of the IOS population is aged 65 and over, 6.6% higher than the national average.

3.2.4 A further breakdown of the age profile of residents on IOS can be found in Figure 1 below. This indicates that almost 32% of the population on Scilly is 60 or over.

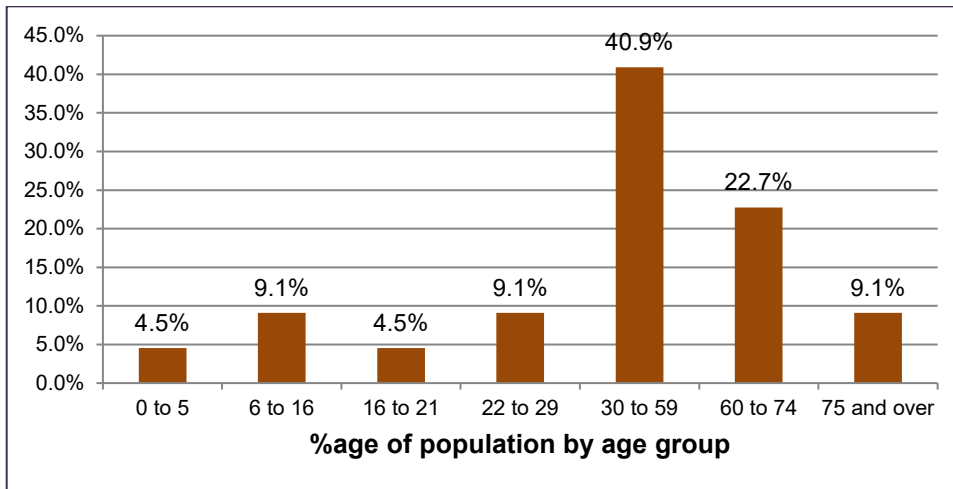
¹ Source Penzance and Isles of Scilly Strategic Investment Framework 2009

² Isles of Scilly Local Development Framework AMR April 2011 to March 2012. The six dwellings are 3 on St Agnes and 2 on St Martin's built by Cornwall Rural Housing Association and 1 at Watermill on St Mary's built by the Duchy of Cornwall. CRHA also completed 2 dwellings on Bryher in 2010/11). Please note that this figure differs from published data available on the DCLG website (details in the next footnote) which shows that 10 dwellings were built during 2011/12. This is thought to be a discrepancy in timing rather than actual figures.

³ Source - Department for Communities and Local Government -

<http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/housebuilding/livables/>

Figure 1: Census 2011 – Population distribution of Isles of Scilly

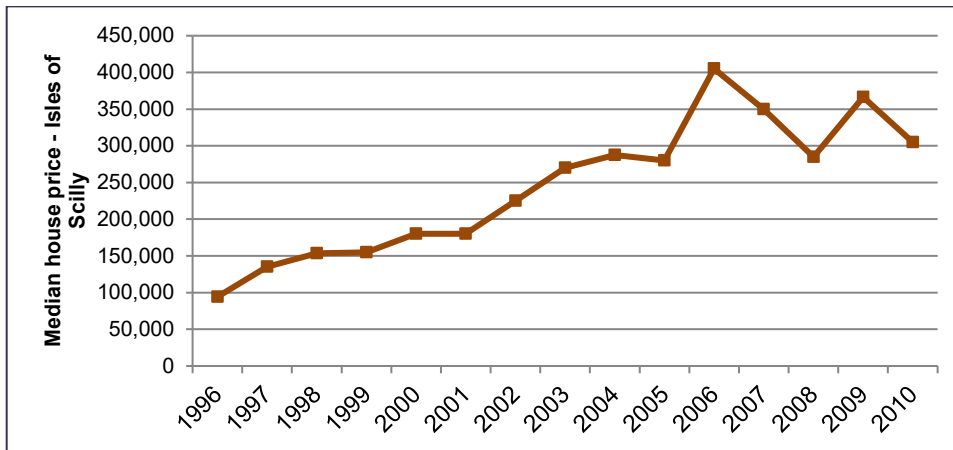


3.2.5 The Census 2011 data also shows that the population of the IOS is evenly split 50:50 by males and females.

3.3 House and rental prices

3.4 Using data available from the Department for Communities and Local Government (DCLG), Figure 2 below plots the changes in median house prices on Isles of Scilly over period from 1996 to 2010. This data is based on information provided to DCLG by the Land Registry.

Figure 2: Changes in median house prices on Isles of Scilly – 1996 to 2011⁴



3.4.1 Figure 2 shows the rapid increase in ‘median’ (see below) house prices over the period. In 1996 the average cost of a home on Isles of Scilly was around £100k By 2010 that had increased to £305k having appeared to peak in 2006 at £400k.

3.4.2 This information includes larger and more expensive properties on the IOS, which will influence the ‘median’ (ie the midpoint between the highest and lowest priced properties). In comparison to the £305k median figure for IOS, the median for Cornwall and the wider South West is £190k and the median for England £184k.

3.4.3 Average weekly rental prices on the IOS⁵ in 2011/12 were:

⁴ Source – Department for Communities and Local Government

- £64.94 for council properties
- £79.85 for properties rented from housing associations
- £160 private rented and £130 Duchy.

3.4.4 Also according to DCLG at 1st April 2011 there were 79 households (7.7% of total) on the CIOS housing waiting list. This figure had increased to 87 by September 2012.⁶

3.5 Employment and other statistics

3.5.1 Data is also available, from NOMIS⁷ (Office for National Statistics, Official Labour Market Statistics), on the number of IOS residents claiming benefits. This information shows that:

- 1.1% of the working age population are claiming Job Seekers Allowance, pointing to high levels of employment on the islands
- 1.8% are claiming incapacity benefits
- 0.6% are claiming disability benefits,

3.5.2 The same source of information from NOMIS⁸ states that there are 1,200 jobs on IOS, made up of 800 full time and 400 part time roles. Of these 1,200 jobs, 300 are in the tourism industry itself while 900 are involved in wider service provision (i.e. transport, public sector, restaurants etc.)

⁵ Source - Department for Communities and Local Government - <http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/rentslettings/livables/> and the Council for private renting and Duchy rents (2012 figs)

⁶ Source – Draft Tenancy Strategy, 2012

⁷ <http://www.nomisweb.co.uk/reports/imp/la/2038431903/report.aspx>

⁸ Note this information is for 2008

4 Methodology for the Housing Needs Survey

4.1 Overview

4.1.1 Altair was commissioned by the CIOS to run the HNS 2012. This included the initial design of the survey form, collection and analysis of data and reporting.

4.1.2 The aims of the survey were to:

- Update the information collected in the previous Housing Needs Survey completed in 2005
- Provide an understanding of a range of housing related issues e.g.; satisfaction levels with current housing on the IOS, housing affordability, appetite for more housing on the islands
- Collect quantitative data to inform the development of a new tenancy strategy for CIOS.

4.1.3 Work on the HNS 2012 began in July 2012 and a draft report was provided in December 2012.

4.2 Design of the survey, promotion and collection of data

4.2.1 The design of the survey was largely based on the previous survey developed in 2005, with some updates and additional questions added. The full HNS 2012 can be found at Appendix A and in summary it covered the following:

- Contact details
- Current property details
- Ownership of property and residence
 - Housing Need - covering;
 - Satisfaction
 - Affordability
 - Future requirements – location, size etc., income and employment and appetite for more housing).

4.2.2 The survey was made available for completion in both hard copy and online (using Survey Monkey) formats. Hard copy responses were returned to CIOS officers and then passed onto Altair for analysis. Online responses were collated by Altair.

4.2.3 It was promoted to residents for completion through a number of channels, namely on the CIOS website, Radio Scilly and in CIOS offices and reception areas.

4.2.4 The survey was open to responses between 10th September 2012 and 19th October 2012.

4.3 Data cleansing and analysis

4.3.1 Having collected data through the online and hard copy surveys, it was then cleansed to ensure there were no duplications (i.e. one person completing it twice or more than one response from a single household) Any spoiled submissions were removed from the analysis

4.3.2 This single set of data was then analysed with the output findings detailed in Section 6 of this report.

4.4 **Additional data collection**

- 4.4.1 Throughout this report we make reference to other available data. This has the dual purpose of both validating information collected in the HNS 2012 and also providing further contextual information where required. This additional data includes information collected from sources such as including Census 2011, Office for National Statistics, Land Registry, CIOS, DCLG etc.
- 4.4.2 All additional data used to develop this report is appropriately referenced with full details of the data source included in footnotes.

5 Key characteristics of the sample

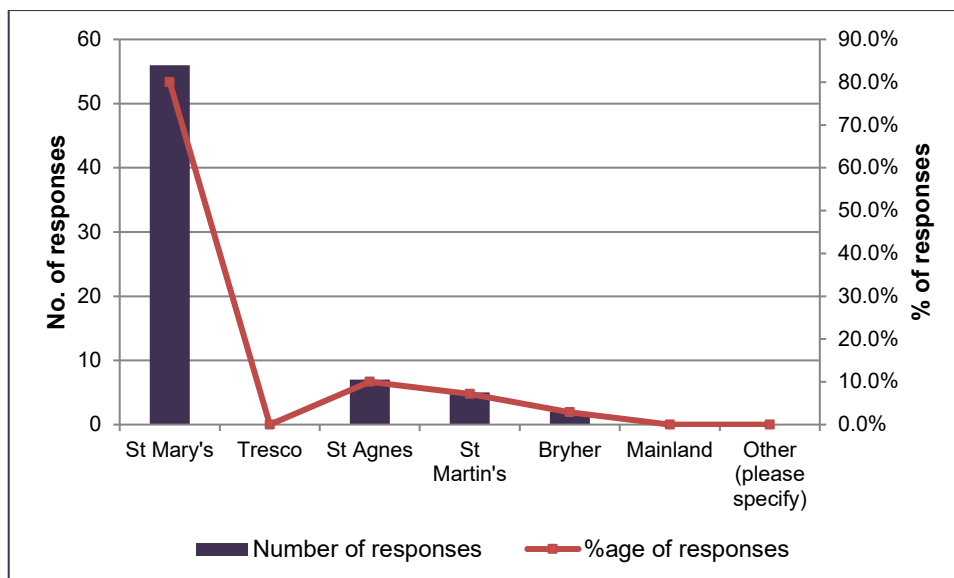
5.1 Sample size

- 5.1.1 The survey elicited more than 80 responses. These responses were collected through both online and hard copies.
- 5.1.2 A key requisite of the survey was that only one form per household should be returned. After all responses were collated, the data set was checked to identify any duplications or where more than one form had been returned from a single household.
- 5.1.3 After this task was completed the total sample size was reduced to 70 individual responses. Of these, 17 were provided by hard copy returns and 53 were submitted online.
- 5.1.4 The sample size of 70 compares against a total of 299 responses obtained for the Housing Needs Survey completed in 2005 (HNS2005), which was posted to all residents. This represents a significant drop in the response rate and based on a total of 989 households on the IOS. It represents a response rate of 7.1%.
- 5.1.5 This low response rate does raise some concerns. It will have an impact on the statistical reliability of the results. Care should therefore be taken with the findings detailed below and recognition given to the low sample sizes.

5.2 Key characteristics of the sample

- 5.2.1 Figure 3 below shows the breakdown of where survey respondents live on the Isles of Scilly. For each location the total number of responses is shown together with the number of responses as a percentage of the total sample size (70).

Figure 3: Breakdown of survey responses by location



- 5.2.2 A total of 80% (56) of the responses came from respondents living on St Mary's, 10% (7) from St Agnes, 7.1% (5) from St Martin's and 2.9% (2) from Bryher.
- 5.2.3 As the island with much the largest population, it is unsurprising that the majority of responses came from St Mary's. As the second most populated island, Tresco had only a tiny number of responses to HNS 2005. This time Tresco, which is run as a private estate with many seasonal workers, it had none.

5.2.4 The HNS2012 asked respondents to provide details about the ages of people living within their household. The results are shown in the below.

Table 1: Ages of people living in households of HNS2012 respondents and 2011 Census data

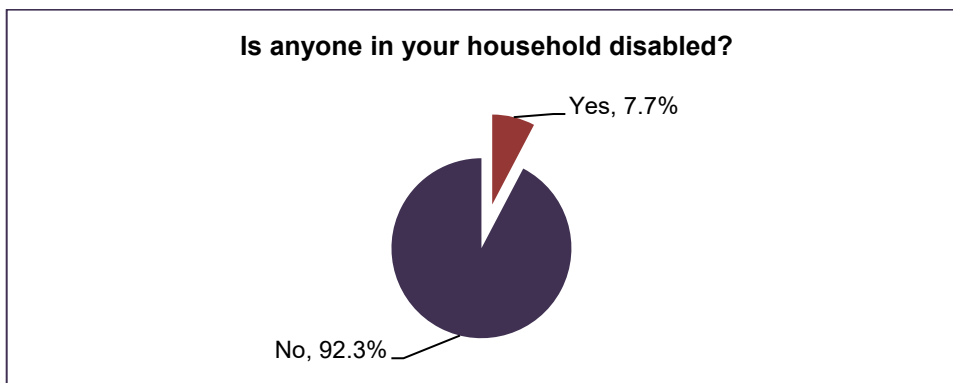
	0 - 5	6 - 16	16 - 21	22 - 29	30 - 59	60 - 74	75+	Total
Male	13	13	3	12	37	13	5	96
Female	9	9	7	13	45	6	2	91
Total	22	22	10	25	82	19	7	187
Total as % of all responses	11.8%	11.8%	5.3%	13.4%	43.9%	10.2%	3.7%	-
2011 Census	4.5%	5.1%	4.5%	9.1%	40.9%	22.7%	9.1%	-

5.2.5 This shows that the HNS2012 covers a total population of 187 residents living on the islands. This is around 8.5% of the total population found in the 2011 Census of 2,203.

5.2.6 Table 1 above includes the population distribution as found in the 2011 Census. Although there are some differences with the response rate to the HNS2012 (e.g. the young appear to be over represented and the 75+ age group under represented), the profile of who is represented by this survey does appear to broadly match the population distribution found in the census.

5.2.7 As can be seen Figure 4 below 7.7% of respondents stated that a member of their household was disabled.

Figure 4: Is anyone in the household disabled?

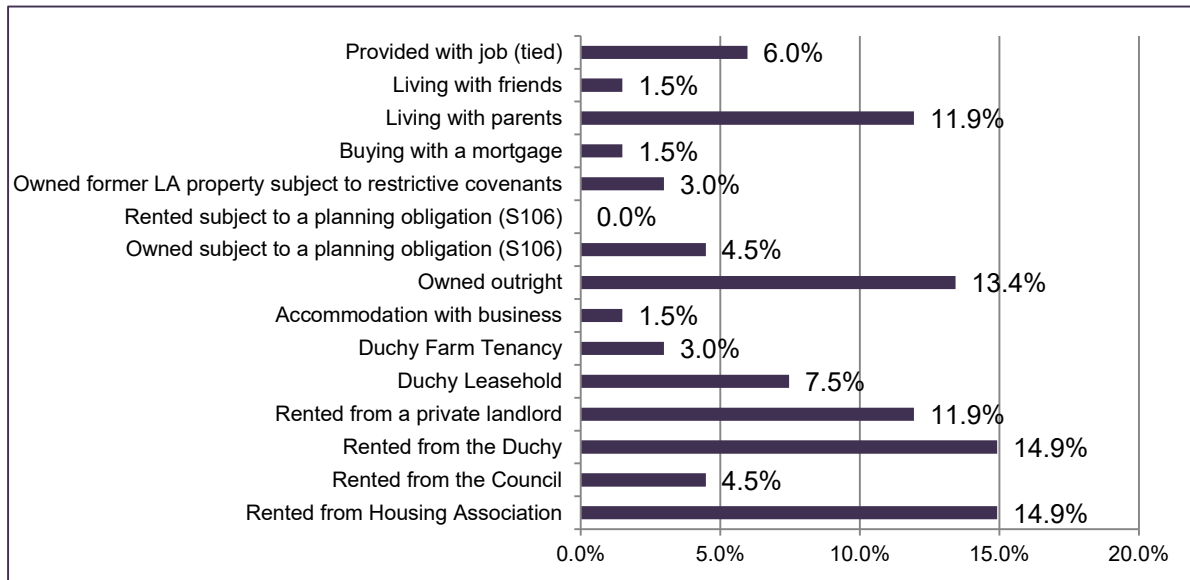


5.2.8 Unfortunately no external data was available on the number of disabled people living on IOS which could be used to validate this information.

5.3 Current property details

5.3.1 The HNS2012 asked respondents to provide details on their current tenure. The results are presented in Figure 5 below.

Figure 5: What best describes your current type of accommodation?



5.3.2 Nearly 15% of respondents either rent their current property from the Duchy or a housing association. 13.4% of respondents own their property outright and 11.9% either rent from a private landlord or are still living with their parents.

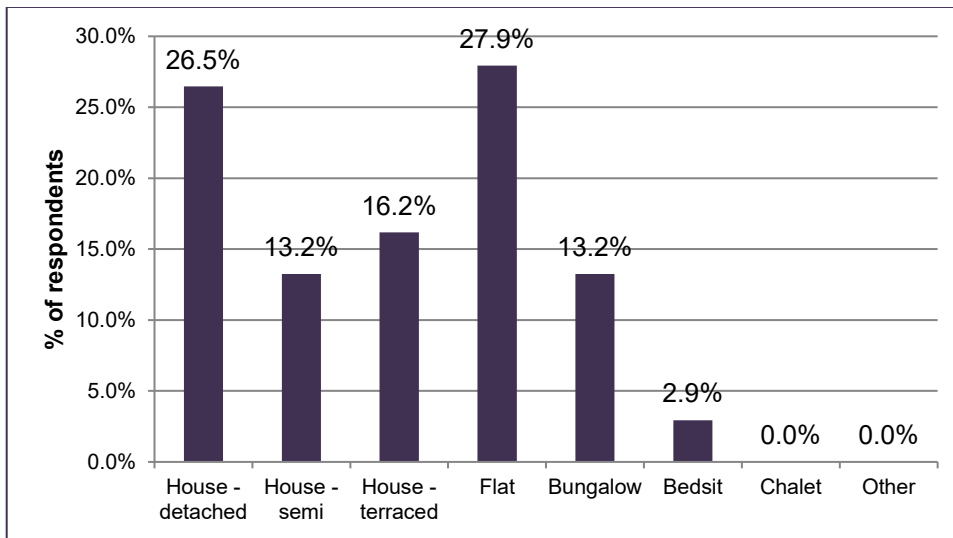
5.3.3 Only 4.5% of respondents currently rent their property from the CIOS.

5.3.4 A number of respondents also live in accommodation which has some link to their employment e.g.: 6.0% of respondents live in accommodation that is provided with their job, 1.5% live in accommodation that also houses a business and 3.0% live in a Duchy farm leasehold property.

5.3.5 This profile varies significantly from the HNS2005. In that exercise, nearly 45% of responses came from people who owned their house outright and 16% came from those who lived in the private rented sector. These response rates have switched considerably with the HNS2012 showing a far greater representation from the social housing sector (council and housing association residents) and from those whose properties are in some way linked to the Duchy. This may reflect that those who own their own property consider that they are adequately housed and did not see the need to respond to the survey.

5.3.6 In terms of property types, 27.9% of respondents currently live in a flat and 26.5% live in a detached house. Full details can be found in Figure 6 below.

Figure 6: Type of accommodation

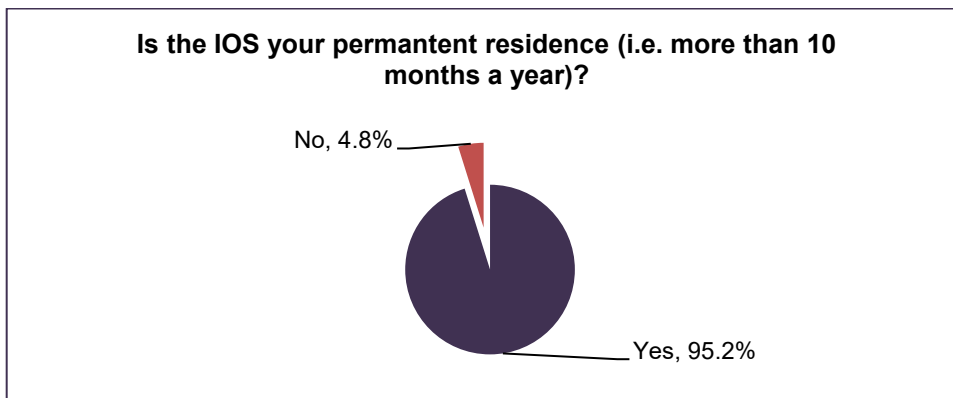


5.3.7 In the HNS2005 nearly 30% of responses came from people living in detached houses. The response rate to this exercise is fairly comparable. The most significant change is in the number of responses from people living in flats, in 2005 only 15.7% came from this type of accommodation and this has increased up 27.9% of respondents in this exercise.

5.4 **Permanent residency and length of time on the IOS**

5.4.1 As can be seen in Figure 7 below, 95.2% of respondents stated that the IOS was their permanent residence i.e. they lived on the islands for more than 10 months each year.

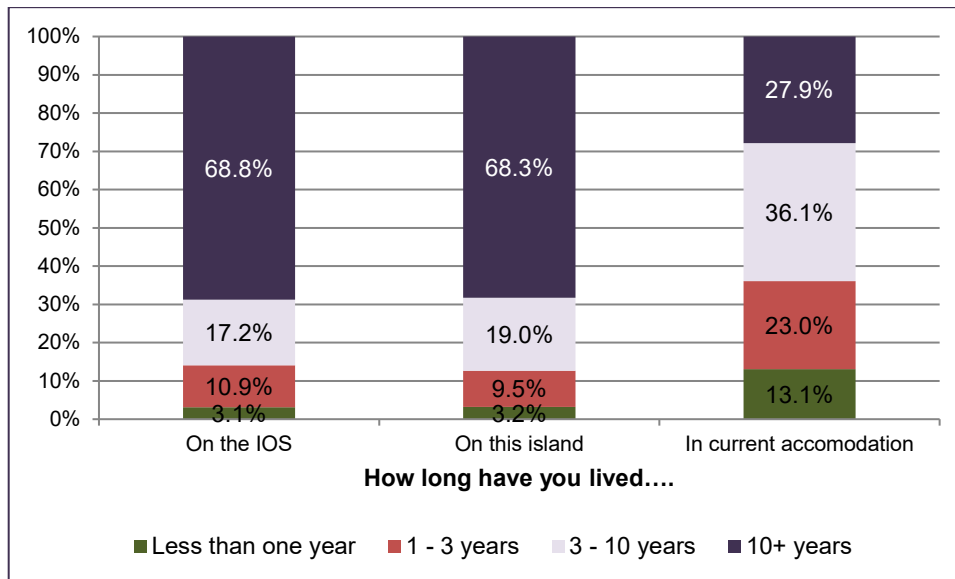
Figure 7: What best describes your current type of accommodation?



5.4.2 Of those respondents who stated that the IOS wasn't their main residence, one stated that they were temporarily living with parents on the islands and another commented that they were currently renting their accommodation on IOS and were unsure where they would live once that lease came to an end.

5.4.3 Figure 8 below presents the findings from a question in the HNS2012 which asked respondents to indicate how long they have lived on IOS, on their current island and in their current accommodation.

Figure 8: How long have respondents lived on IOS, on their current island and in their current accommodation?



5.4.4 As can be seen in Figure 8 a majority of respondents (68.8%) have lived on IOS for more than 10 years and a similar sized majority (68.3%) have lived on their current island for more than 10 years. Only around 3% of respondents have lived on IOS for less than one year.

5.4.5 Most respondents have also lived in their current accommodation for a lengthy period of time. 27.9% have lived in their current accommodation for more than 10 years and a further 36.1% have lived in their current property for between 3 and 10 years. Only 13.1% have lived in their current home for less than 1 year.

5.4.6 These results suggest that there is only a small amount of population migration onto the islands and point to a stable population.

5.4.7 Where respondents had moved to the IOS, we also asked where they were born. This question elicited an interesting response and shows that the population of IOS is made up of residents from a diverse range of locations found within other parts of the UK. Places of birth include: Edinburgh, Exeter, Leeds, Liverpool, London, Manchester Nottingham, Skegness, Sheffield and Southampton and counties as diverse as Buckinghamshire and Staffordshire.

5.4.8 Two respondents also stated that they were born outside of the UK.

5.5 Housing ownership on Isles of Scilly

5.5.1 As detailed in Figure 5 above only 13.4% of respondents own the property that they currently live in. A further 1.5% of respondents are buying with a mortgage and 4.5% own their property subject to a planning obligation.

5.5.2 The HNS2012 also sought to find out if respondents owned any additional properties that they do not live in. These questions found:

- 4.7% of respondents (3 from a total of 64 that answered this question) do own another property on the IOS. Of these 3 people, one would be willing to let the property out at locally affordable rents
- 9.5% of respondents (9 from 63 that answered the question) own accommodation in another location.

5.5.3 These figures compare to a national average of 66% of homes being owner occupied⁹. The lower level of owner occupation found in this survey may suggest one of two things: either home ownership rates on IOS are significantly lower than regional and national rates, or those who do not own their accommodation experience more problems with their properties, have higher levels of dissatisfaction and are more motivated to participate in surveys such as this. Further information on this can be found in Section 6.2.

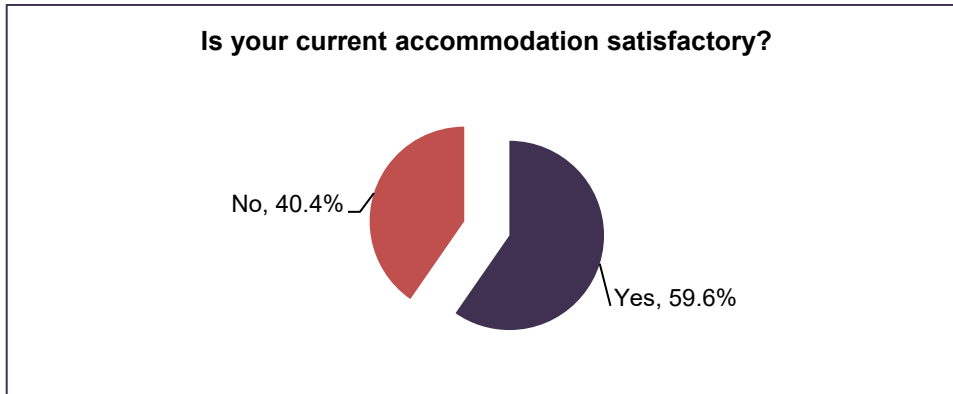
⁹ Source – Department for Communities and Local Government - https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6748/2173483.pdf

6 Satisfaction with housing and housing need

6.1 Satisfaction with existing housing

6.1.1 A key question in the HNS2012 was to ask respondents whether the current accommodation they lived in was satisfactory. The results are presented in Figure 9 below.

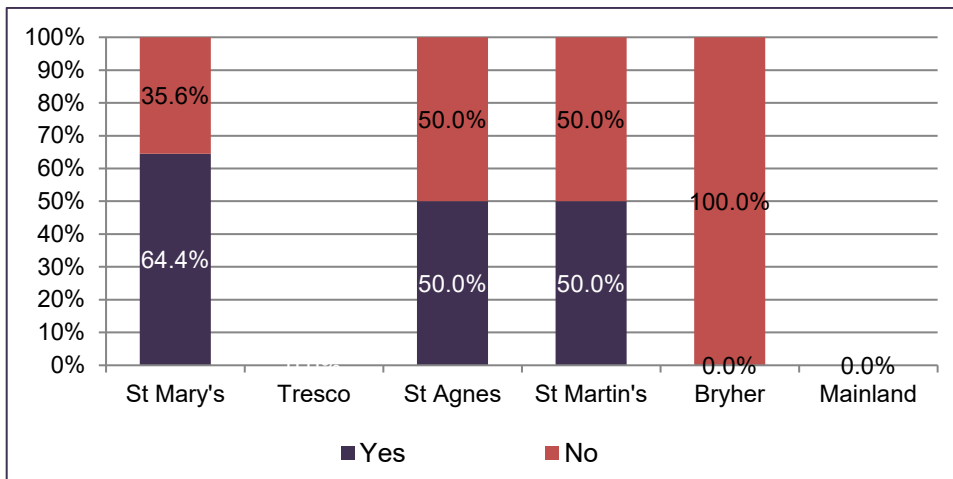
Figure 9: Is your current accommodation satisfactory?



6.1.2 As can be seen, a considerable proportion (40.4%) of respondents are dissatisfied with their current accommodation. It also marks an increase from the 20% of respondents who expressed dissatisfaction in the 2005 Housing Needs Survey.

6.1.3 We have completed further analysis on this question to determine whether there are any differences in satisfaction rates on the different islands or when comparing tenure types. Figure 10 below presents the analysis of satisfaction rates with accommodation, broken down by island.

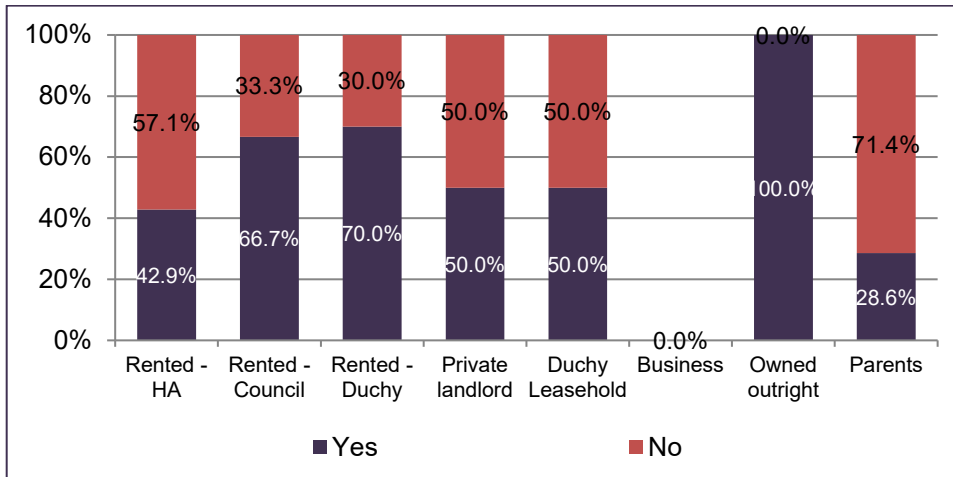
Figure 10: Satisfaction with accommodation, by island



6.1.4 As can be seen above, there is a difference between satisfaction rates with accommodation across the different islands. On St Mary's nearly two thirds of respondents were satisfied whereas on St Agnes and St Martin's they were evenly split at 50:50. Some care should be taken with the 100% of respondents on Bryher dissatisfied with their accommodation as this is based on a sample size of just 2.

6.1.5 Figure 11 below presents the analysis of satisfaction rates with accommodation, broken down by tenure type.

Figure 11: Satisfaction with accommodation, by tenure type

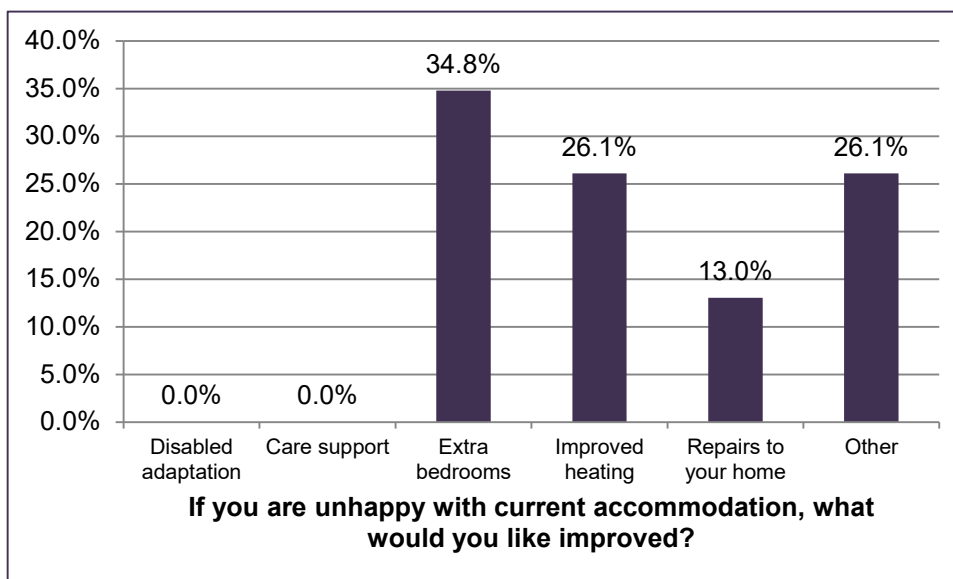


6.1.6 Dividing satisfaction rates by tenure type presents some interesting differences for example; 100% of respondents who own their properties are happy with their accommodation. This drops to 66.7% for those renting from the Council and 42.9% for those renting from a housing association.

6.1.7 Only 28.6% of respondents living with their parents are happy with their accommodation which is most likely a reflection of problems with size and space, rather than problems with maintenance, repairs etc.

6.1.8 To gain a further insight into what might be driving this dissatisfaction with existing accommodation, we asked those respondents who answered ‘no’ to the above question, to provide further details on what they would like improved. The results are presented in Figure 12 below.

Figure 12: What would you like improved in your current accommodation?



6.1.9 With 34.8% responses, an improvement in the number of bedrooms was the most popular answer from those respondents who expressed dissatisfaction with their

existing accommodation. This was followed by improved heating / insulation with 26.1% of responses and repairs with 13.0% of responses.

6.1.10 26% of respondents also cited improvements other than those listed in Figure 12 above. These open responses included:

- Office space to enable home working
- Better damp proofing
- Better sound proofing
- Poor access routes
- Some / more outdoor space
- No smoking in communal areas of flats
- Currently living in accommodation with shared kitchen / bathroom etc. – require own private accommodation.

6.1.11 Although only based on small sample sizes, we can analyse the data collected in the HNS2012 to determine whether there are any specific issues driving dissatisfaction with any particular tenure type. For example, of the 57.1% of housing association respondents that expressed dissatisfaction with their property – the main improvements that were cited as being needed were; improved heating / insulation and repairs being completed.

6.1.12 Individuals living in council housing properties, who cited dissatisfaction, did not provide additional information on the reasons.

6.2 Housing need

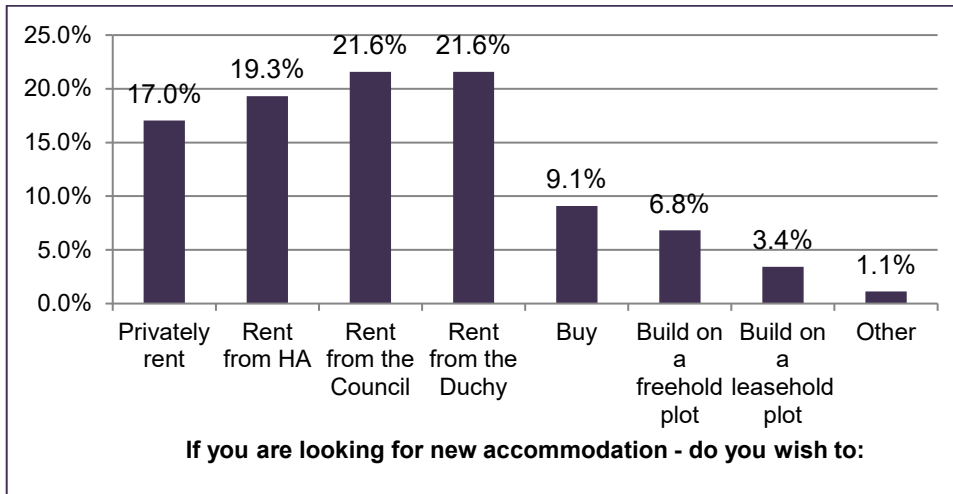
6.2.1 Closely linked to the findings on levels of dissatisfaction with current accommodation, the HNS2012 survey also found that 52.7% of respondents are currently looking for alternative accommodation.

6.2.2 Unsurprisingly, as can be seen in Figure 13 below, of those respondents who stated that they were currently looking for new accommodation 73.3% commented that they are aiming to move in the near future.

6.2.3 A further 23.3% are aiming to move within 3 years and a minority of 3.3% hope to move within 10 years.

6.2.4 To further explore the needs of those respondents who stated that they were currently looking for new accommodation, the HNS2012 asked a further question on what accommodation those individuals were looking to move into. The results of this question are detailed in Figure 13 below.

Figure 13: What type of accommodation are you looking for?



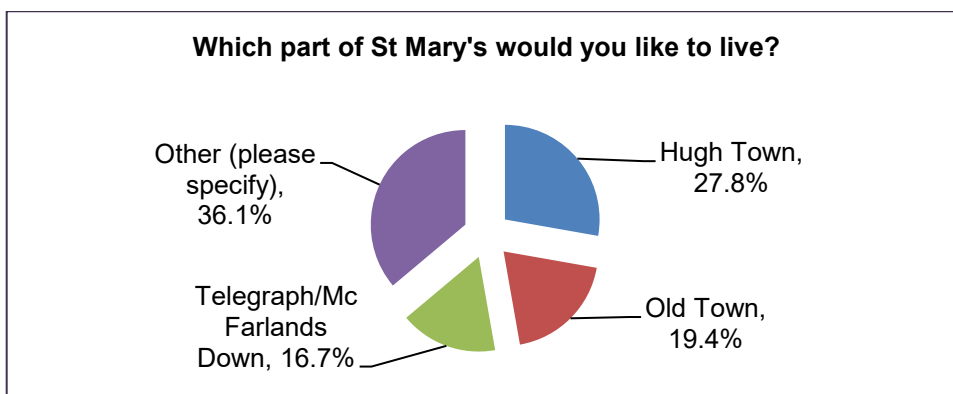
6.2.5 Figure 14 shows that the two most popular types of accommodation for those looking to move are properties that are either rented from the Duchy or from the Council. Both these options attracted 21.6% of respondents. A further 19.3% of respondents are keen to rent from a housing association and 17.0% are keen to access privately rented accommodation.

6.2.6 We also asked where those looking to move, would like to move to. We found:

- 77.8% of respondents would like to move into accommodation on St Mary's
- 11.1% to St Agnes
- 4.4% to Bryher and 4.4% to St Martin's
- 2.2% would move to any island
- No respondents stated they would like to move to Tresco or the mainland.

6.2.7 St Mary's is clearly the preferred destination of respondents (with 35 respondents stating that is their preferred place to live) to the HNS2012. This perhaps also reflects the fact that 80.0% of the survey respondents already live on St Mary's. Of those 77.8% of respondents who stated that they'd like to move to accommodation on St Mary's, there was a fairly even split as to where on the island they would like to live, as can be seen in Figure 8 below.

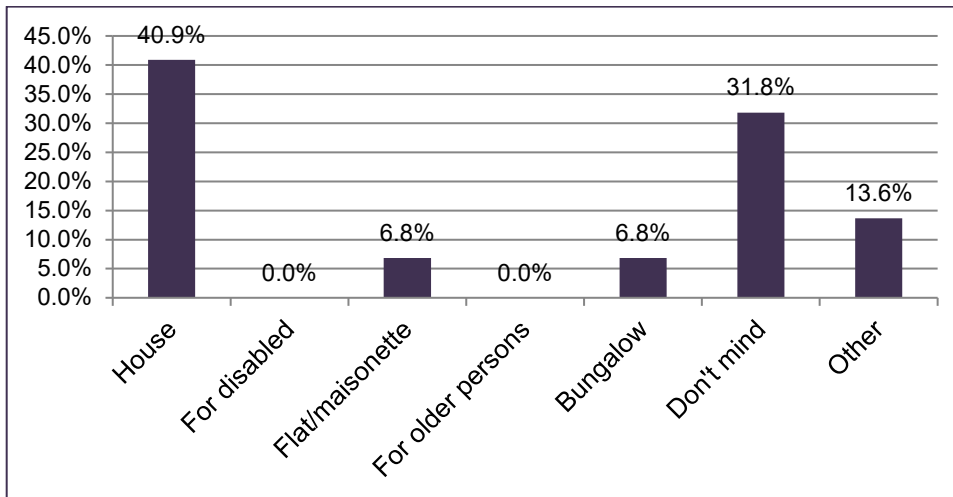
Figure 15: Which part of St Mary's would respondents like to live?



6.2.8 Of the 36.1% of respondents who stated ‘Other’ to the above, the majority backed that up with a statement saying that they would be happy to live anywhere on St Mary’s. A few commented that they’d prefer somewhere out of town and two stated that they’d like to live in Holy Vale.

6.2.9 Figure 16 below presents the findings from a specific question, to those who are looking for new accommodation, on which type of property they require.

Figure 16: What type of property do you require?



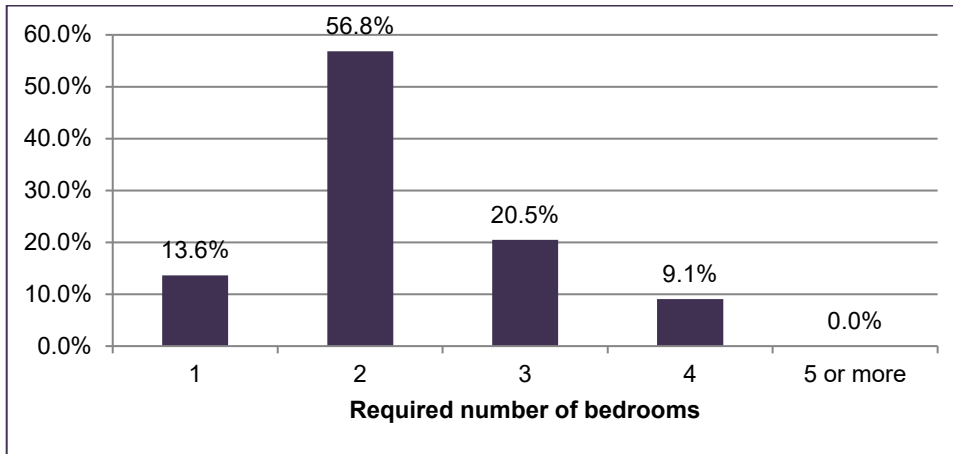
6.2.10 40.9% of respondents who want to move to St Mary’s, would like to move into a house, 31.8% stated that they had no specific preference for the type of property they’d like to live in. A minority of respondents selected the flat / maisonette and bungalow options.

6.2.11 Perhaps surprisingly no respondents stated that they have a specific need for housing that is appropriate for a disabled or older person. This may be a reflection of the small sample size.

6.2.12 Four of the six respondents who answered ‘Other’ to the above, stated that they’d be happy with either a house or a bungalow. One respondent stated that they would like somewhere with a garden. The final respondent would like a property with space to store a pram at ground level.

6.2.13 Finally the HNS2012 also asked respondents what size of property they would like to move into. The results are presented in Figure 17 below.

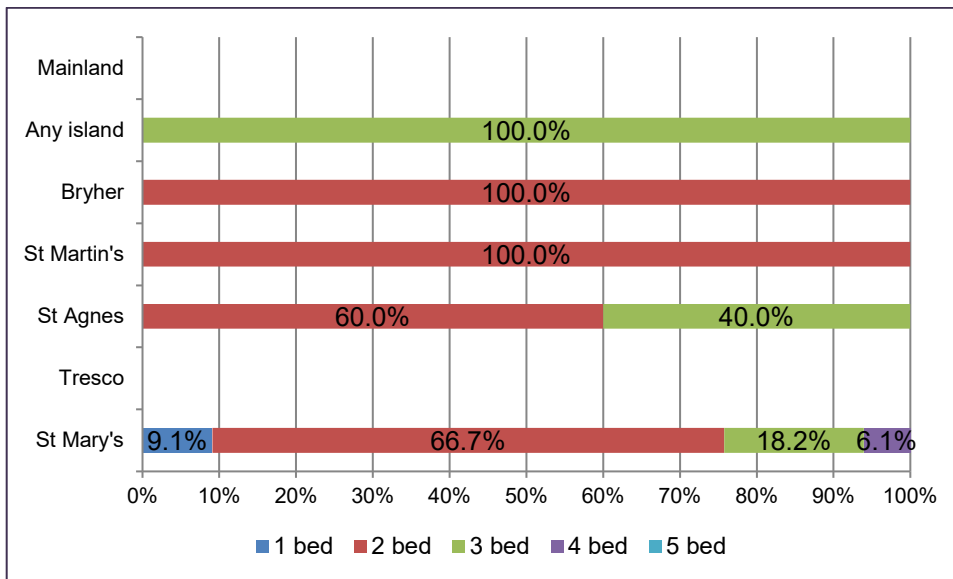
Figure 17: What size of property would you like to move into?



6.2.14 Demand appears to be highest for two bedroom properties, with 56.8% of respondents stating that they'd like a property with at least two bedrooms.

6.2.15 We have completed some further analysis on the data to determine what sized properties respondents would like to move into on each of the islands. Figure 18 below plots the number of bedrooms respondents would like to move in to, broken down by their preferred location to live in.

Figure 18: Number of bedrooms by location



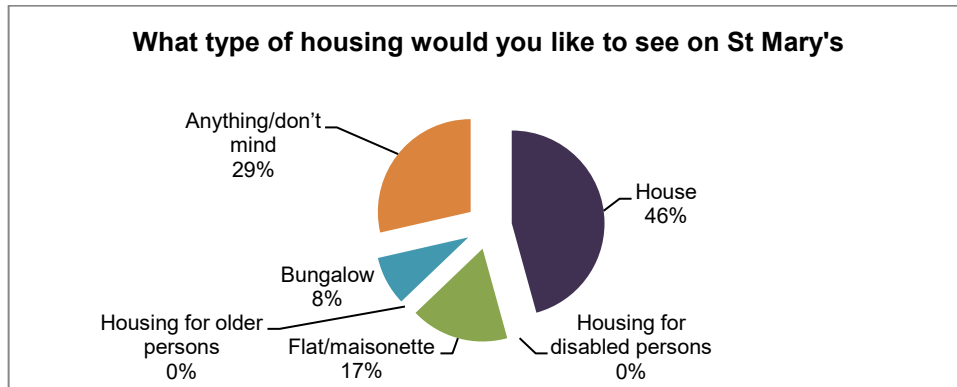
6.2.16 Some care should be taken with the data presented in Figure * above as the sample sizes for Bryher, St Martin's and St Agnes are small. The data for St Mary's is however based on 35 responses, so will be slightly more robust.

6.2.17 This analysis does show a clear need or desire for properties with 2 bedrooms on St Mary's. The second most desirable property type is 3 bedrooms. This fits with comments made elsewhere in the survey that suggest there is a need for more housing appropriate for the needs of young families or possibly for older people downsizing.

6.2.18 We can complete similar analysis to determine what type of properties people would like to see on each of the islands. As above however, the low sample sizes for the off

islands limit the usefulness of this analysis. Figure 19 does though present the analysis for St Mary's and is based on a sample size of 35.

Figure 19: Type of properties required on St Mary's



6.2.19 With 46% of the responses, the need for more houses on St Mary's appears to be strongest. A further 29% of respondents did however state a preference for 'Anything' suggesting a further and potential deeper need for any type of housing on the IOS.

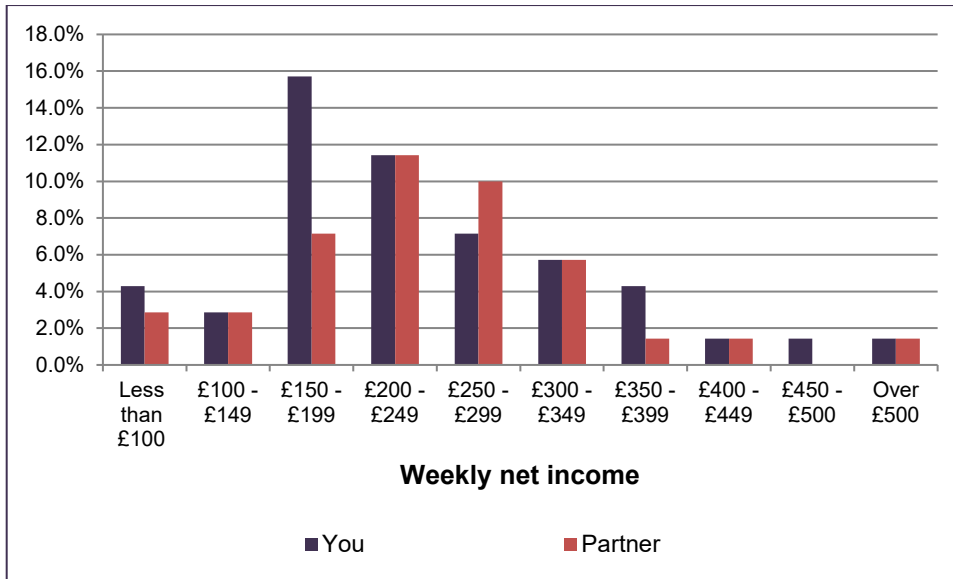
6.2.20 No responses in this survey suggested that there is a need for housing for disabled people on St Mary's. This however is most likely due to the overall small response rate for the survey and more specific research on this area is recommended.

7 Income and employment, housing costs and the housing register

7.1 Income and employment

7.1.1 In an attempt to understand levels of current income and affordability on IOS a series of questions were asked related to respondent’s employment and income.

7.1.2 Figure 20 below plots the levels of weekly net income (after tax, national insurance etc.) received by respondents and their partners.



7.1.3 A majority of respondents to the survey have a weekly net income of less than £300. This income will be needed to cover all costs such as; housing, fuel, food, clothing, children, healthcare etc.

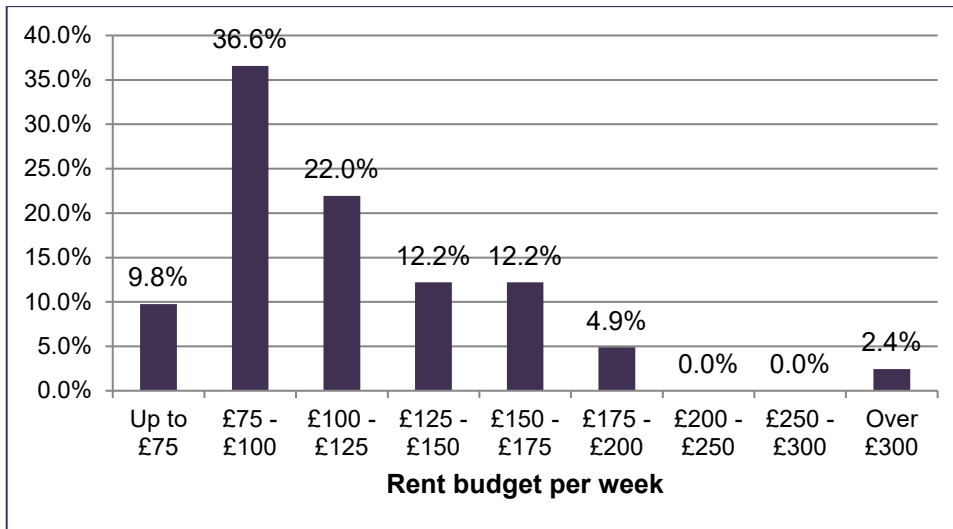
7.1.4 A large number of respondents stated that they worked for the public sector (e.g. in education or local government) A number also stated that they worked in the tourism industry.

7.1.5 95.6% of respondents stated that they were able to find employment on IOS. 74.1% stated that they would remain on the IOS if they were unable to find any employment on the islands.

7.2 Housing costs

7.2.1 As can be seen in Figure 21 below, 46.4% of respondents could afford rents of up to £100 per week (9.8% could afford up to £75 per week and 36.6% could afford £75 - £100).

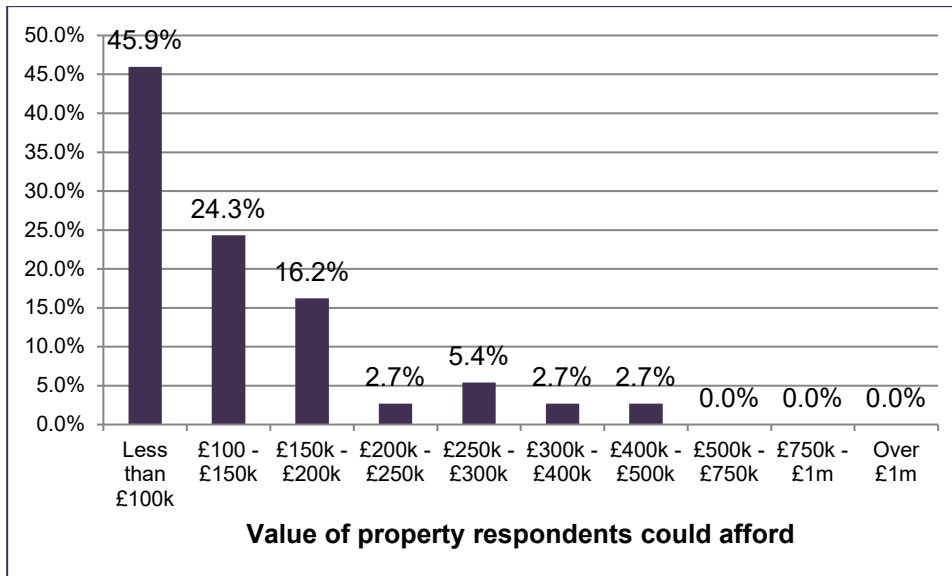
Figure 21: What level of rent can you afford?



- 7.2.2 Over 90% of the respondents could afford rents of up to £175 per week, with only 7.3% able to fund rents over £175 per week.
- 7.2.3 Data from the DCLG suggests that average weekly rental value for a council house on the IOS is £65 and a housing association property is £79. These appear to be within the budgets available to most respondents of the survey. This information does not however enable further analysis around the rental values for different sized properties and comparison with what is needed by the respondents to this survey.
- 7.2.4 Average weekly rents for private rented properties on the IOS are around £150¹⁰. It should be noted that this figure is based on analysis completed of advertised properties on IOS in November 2012, where the sample was significantly impacted by most advertised properties having 3 bedrooms. This does however suggest that family sized properties in the private rented sector on the IOS will be out of the reach 80.4% of the respondents of this survey, meaning that many are likely to need to access accommodation from the social housing sector.
- 7.2.5 The HNS2012 also asked respondents what level of deposit they could afford to put down if they were buying a property:
- 44.7% stated that they could afford a deposit of up to £2.5k
 - 18.4% could afford between £2.5k and £5.0k
 - 10.5% up to £10.0k
 - 13.2% up to £15.0k
 - Only 13.2% of respondents stated that they could afford to put a deposit of more than £15k on a property.
- 7.2.6 Building on this information on deposits, we asked respondents what property value they believed they could afford to buy.

¹⁰ Based on analysis of advertised properties on rental site Zoopla

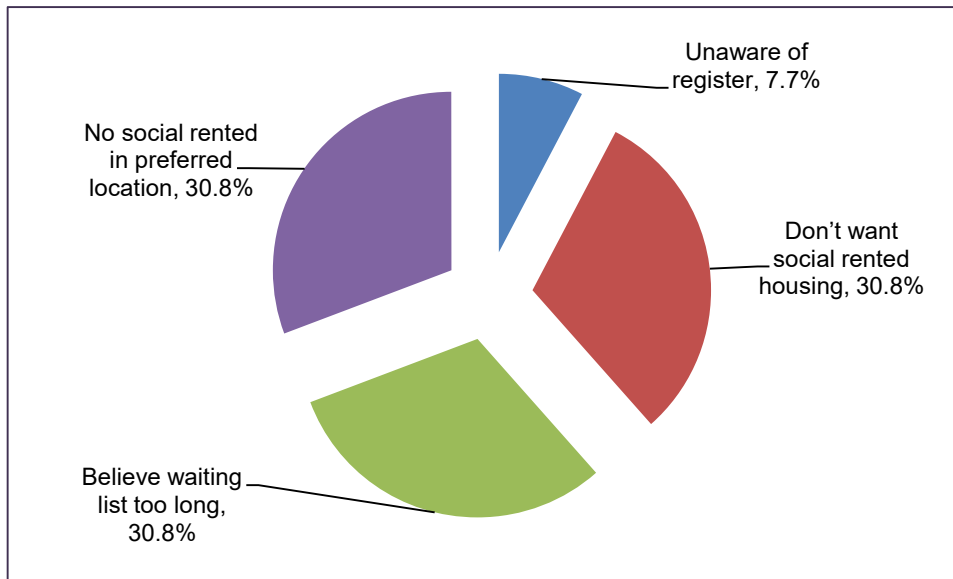
Figure 22: What value property could you afford to buy?



- 7.2.7 Clearly the majority of respondents stated that they would be looking to buy properties of lower value. 45.9% stated that they could afford a property of up to £100k and a further 24.3% stated they could afford a property of up to £150k. Only 13.5% of respondents believe they could afford a property worth over £200k.
- 7.2.8 We also asked respondents what the maximum monthly mortgage repayments they could afford would be. 25 people responded to the question and we found an average maximum monthly mortgage repayment to be £568. This was against a range of £400 to £1,000.
- 7.2.9 As stated in Section 3 the average value of a property on IOS is now £305k. Based on the data presented in Figure 23 above only 5.4% of the respondents could afford to buy an average valued property. This is further compounded by the low deposit values that could be raised by respondents to the survey, meaning that a large majority would find it difficult to access any mortgage funding from banks at this time.

7.3 Council housing register

- 7.3.1 Of the total responses to the HNS2012, 59.1% stated that they had applied to be on the council housing register.
- 7.3.2 Figure 24 below summarise the reasons stated by those who have not applied to be on the council housing register.

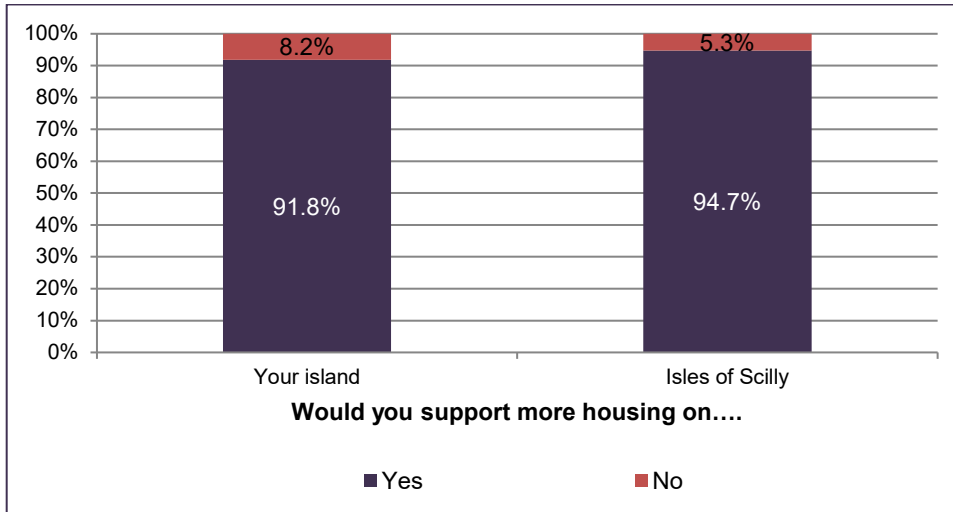
Figure 24: Why are you not on the council housing register?

7.3.3 There were a number of additional responses (e.g. free hand text responses written directly onto the survey form) from individual who also stated that they hadn't joined the housing register because they already had a property (this wasn't an option in the survey).

8 Future housing on Isles of Scilly

8.1.1 As can be seen in Figure 25 below, there appears to be strong support from current residents for more housing on IOS.

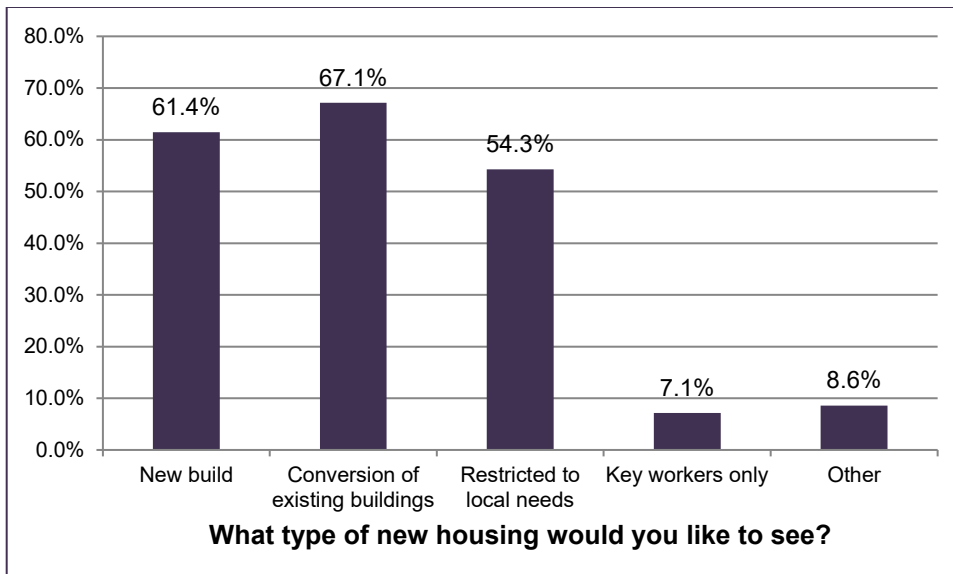
Figure 25: What is the support for more housing on IOS?



8.1.2 Although based on a small sample size, these results appear to indicate a strong level of support for new housing, with over 90% supporting the creation of new properties on their own island or overall on the IOS.

8.1.3 Figure 26 provides further details on what types of properties current residents would like to see on IOS.

Figure 26: What type of new housing would you like to see?



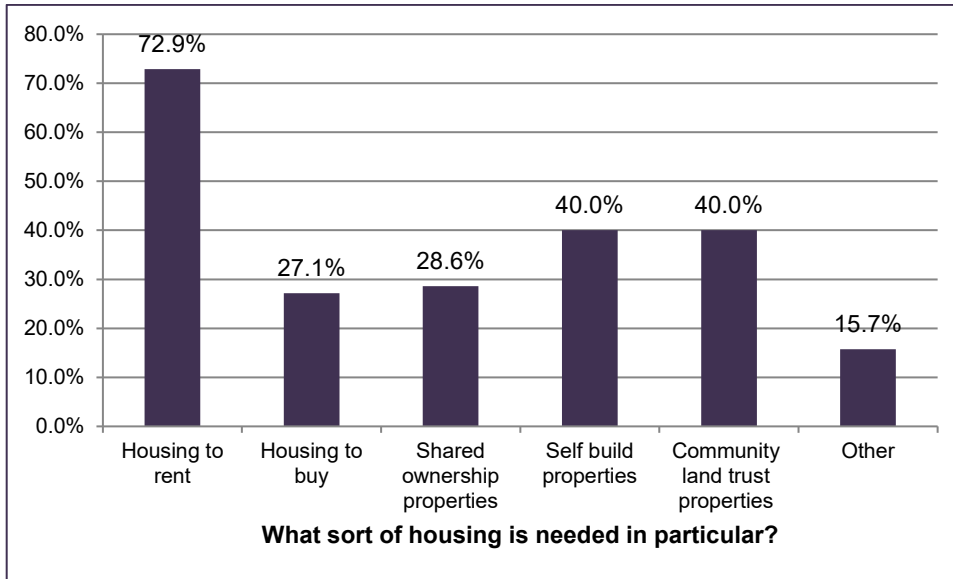
8.1.4 Based on the findings shown in Figure 26 over 50% of respondents would be happy to see new build properties, conversion of existing buildings and housing that was restricted to meeting the needs of local people only.

8.1.5 In terms of the supporting comments made by people who stated 'Other' these included:

- Housing for vulnerable adults
- Attractive yet affordable
- Accommodation for young people / young families / recently married.

8.1.6 Finally the HNS2012 included a question on what type of housing in particular respondents thought the IOS needed.

Figure 27: What sort of housing is needed in particular?



8.1.7 As can be seen in Figure 27 above 72.9% of respondents would like to see more housing that was available for rent, 40.0% would like to see more self-build properties and 40.0% would also like to see housing built through community land trusts.

8.1.8 Comments behind those who responded by saying 'Other' mirrored the comments made against what type of housing individual would like to see (i.e. housing for young families, affordable properties etc.).

9 Conclusions

- 9.1.1 As a designate Conservation Area and Area of Outstanding Natural Beauty, and with large parts of land owned by the Duchy of Cornwall, the IOS has a housing situation which is unique to the rest of the UK.
- 9.1.2 Although the response rate was lower than previous surveys that have been completed, the results of the HNS2012 provide a valuable source of data that can be used to help support the development of housing strategies to support the needs of residents on the islands.
- 9.1.3 Key findings within the survey show that around 59% of respondents are currently satisfied with their accommodation. This does, however, mean that 41% have expressed dissatisfaction, with the main drivers appearing to be too few bedrooms, problems with heating or a need for specific improvements to be made (e.g. sound proofing, tackling damp problems etc.)
- 9.1.4 A high percentage of respondents to the survey also stated that they are currently looking for new accommodation. Of these individuals, moving into either accommodation rented from the Council or Duchy were the most popular choices, followed by a home rented from a housing association. Demand appears to be strongest for two bedroom properties.
- 9.1.5 There also appears to be strong support from respondents for new homes on IOS. The demand for more rented accommodation appears to be strongest with 72% of respondents stating that they believe there is a need for more rented accommodation. Over 90% of respondents would support new homes being created on either their own or another island. Over 60% of respondents would also support either newly built homes or converted accommodation.

Appendix A – Survey