

# Rural Affordable Housing Needs Survey



## The Vale of Glamorgan

Final Report  
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*Fordham*  
RESEARCH



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# Executive summary

## Introduction

- S1 This report will provide a detailed analysis of the extent of housing need in the communities of the rural Vale of Glamorgan (the rural Vale) following the approach set out in the Welsh Assembly Government (WAG) *Local Housing Market Assessment (LHMA) Guide* of March 2006 and as required by *Technical Advice Note 2 (TAN2): Planning and Affordable Housing* (June 2006). The results from this study will provide evidence to support the development of affordable housing in appropriate rural locations within the County.

## Data collection

- S2 This report is primarily based on survey data collected via a postal survey which obtained responses from 4,954 households. The survey data was grossed up to an estimated total of 22,071 households across the rural Vale. The data was also weighted by a wide range of economic and social household characteristics, estimated from a variety of secondary data sources, to be as representative as possible of the households in the rural Vale.

## Background information

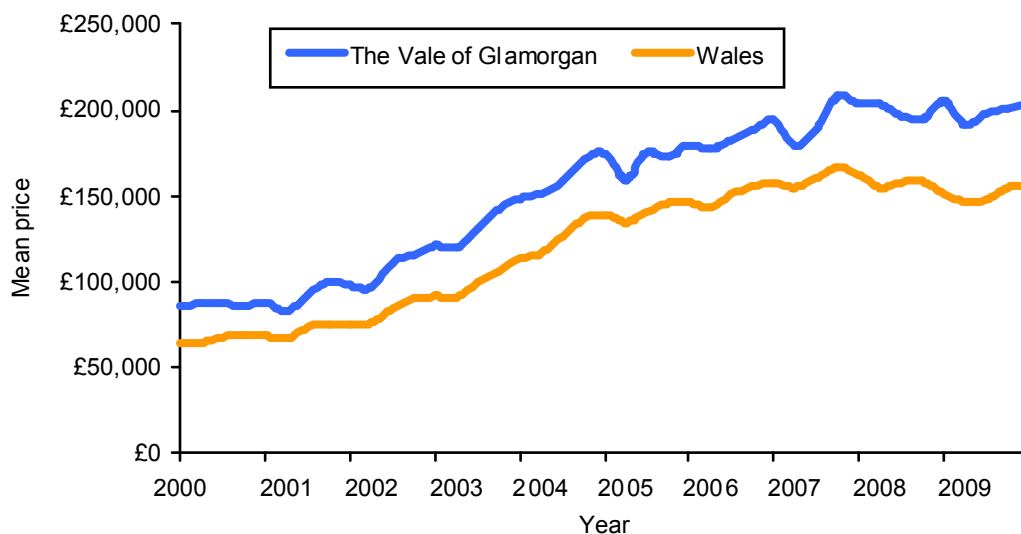
- S3 The household survey collected a significant amount of data about the resident household population. Some 83.5% of households in the rural Vale are owner-occupiers, with 10.5% private renters and 6.0% social renters. Pendoylan and St. Athan record notably high levels of social renting households, whilst almost a third of households in St. Georges-super-Ely reside in the private rented sector.
- S4 Some 44.3% of households in the study area reside in a detached property, much higher than the County average of 26.7%. Over half of households in Pendoylan live in a semi-detached house. The communities of Dinas Powys, Llandough, Llantwit Major and St. Athan also contain relatively few detached properties.
- S5 Almost a third (32.5%) of households contain older person(s) only, whilst 28.5% contain children. The highest proportions of older person's only households are found in Cowbridge with Llanblethian, Peterston-super-Ely and Dinas Powys, whilst Pendoylan, Welsh St. Donats and Llancafarn contain the highest proportion of households containing children.
- S6 Overall 60.8% of households contain at least one employed person. The largest proportions of employed residents are found in Welsh St. Donats, Ewenny, Llancafarn and Penllyn with the lowest in Cowbridge with Llanblethian, Dinas Powys and Peterston-super-Ely.

- S7 Overcrowding in the rural Vale is very low, at 0.8%, compared to the County average of 1.5%. Conversely under-occupation is higher than the figure for the Vale of Glamorgan as a whole (54.4% compared to 45.1%).
- S8 Across the study area 17.4% of households contain a resident with support needs. Wick and St. Georges-super-Ely contain the highest proportion of households with a support need.
- S9 Some 11.3% of households in the study area have moved to their current home in the last two years. St. Athan and St. Brides Major show the highest levels of turnover in the last two years.

### Local housing market

- S10 Information from the Land Registry indicates that the average sale price of a dwelling in the Vale of Glamorgan was £124,848 in the fourth quarter of 2009, above the national average. Although prices have not yet recorded a large decrease in response to the economic downturn, the number of dwellings sold is still small compared to historic levels.

**Figure S1 Changes in mean residential property prices: Q4 1999 – Q4 2009**



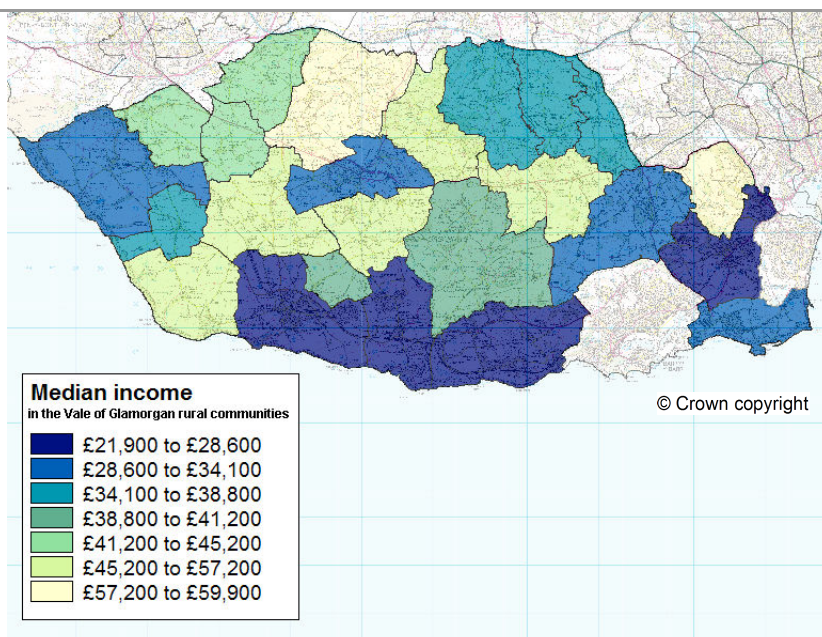
Source: Land Registry / CLG (Q4 1999- Q4 2009)

- S11 Three price markets were identified for owner-occupation in the rural Vale. It was found that entry-level prices ranged around £118,500 for a two bedroom home in the Coastal sub-market, up to £350,000 for a four bedroom property in the East and Rural sub-market. Entry-level rents in the private sector varied from £104 per week for a one bedroom home up to £183 per week for a four bedroom property. Social rents were significantly lower than this at an average of £59 per week for a one bedroom property rising to £72 for a four bedroom property.

## Financial information

- S12 Median annual gross household income (including non-housing benefits) in the rural Vale was found to be £28,637, rising to £38,623 when considering only households containing at least one employed person. The average conceals a wide variation, with 8.0% of households having a total income of less than £10,000. Savings vary similarly: although the median level of savings/debt in the rural Vale is £6,951, 22.3% of households have more than £40,000 in savings available to them.

**Figure S2 Median household income in the rural Vale**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Housing need

- S13 Following the steps of the needs assessment model specified by the Welsh Assembly Government Local Housing Market Assessment Guide results in a net need estimate of 250 affordable dwellings per year in the rural Vale.
- S14 An analysis of gross need for affordable housing by household type suggests that 12.0% of households with children are in housing need compared to 0.7% of multi-adult households without children.
- S15 In terms of the type of affordable accommodation required, further analysis suggests that around 25% could be intermediate (priced at the mid-point between entry-level market and social rents) and the remaining 75% social rented.

### Issues relating to locality

- S16 The survey assessed the accessibility of facilities across the rural Vale. Generally a post office was found to be the easiest to access and a hospital the most difficult. Some 1,097 households that intend to move in the next five years indicated that they have a local connection to a different community. The most common reason for a connection to a different community was close family being resident there.
- S17 Overall 1,213 households indicated that a member of their family had to move out of the community to find a suitable home, which represents 5.5% of all households in the rural Vale. Households in Penllyn were particularly likely to indicate that this had occurred.



# 1. Introduction

## Background

- 1.1 The Rural Housing Survey for the Vale of Glamorgan Council profiles in detail the housing situation of residents living in its rural settlements and assesses the extent of housing need in each individual rural community to inform future housing provision.
- 1.2 The Vale of Glamorgan has a population in excess of 125,000 residents in over 54,000 households. The County contains both urban and rural communities; however, this study is only concerned with the part of the population resident in rural areas. This is because the recent Local Housing Market Assessment (LHMA) report<sup>1</sup> provides an overview of the whole of the Vale of Glamorgan, but had insufficient data to examine the situation at an individual community level. This study has been commissioned to produce the more localised housing needs information in accordance with *Technical Advice Note 2 (TAN2): Planning and Affordable Housing* and *Technical Advice Note 6 (TAN6): Planning for Sustainable Rural Communities*. TAN6 states in paragraph 2.1.2 that:
- The Local Housing Market Assessment (LHMA), supplemented by community assessments of housing need, provide information on the future requirement for affordable and market housing [in rural communities].*
- 1.3 The study focuses on the rural communities of the Vale of Glamorgan (the rural Vale), which for the purposes of this study, are the parts of the County outside of the large towns of Barry and Penarth. In total there are 25 rural communities in the Vale of Glamorgan, which are listed on Figure 1.1 illustrating their location.

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<sup>1</sup> An update of this Local Housing Market Assessment report has been undertaken alongside this report using the additional primary data collected to re-assess the outputs currently.



## Summary

- 1.7 This report will provide a detailed analysis of the extent of housing need in the communities of the rural Vale following the approach set out in the Local Housing Market Assessment Guide. The results from this study will provide evidence to support the development of affordable housing in appropriate rural locations within the County.



## 2. Data collection

### Introduction

- 2.1 The primary data was collected through a postal survey; all households in the rural Vale were sent a questionnaire to give everyone an opportunity to respond and to try to maximise the return achieved. Over 22,000 questionnaires were sent out; a copy of the questionnaire is provided in Appendix A6. The sample for the survey was drawn from the Council Tax register covering all tenure groups.
- 2.2 In total, 4,594 responses to the survey were received. This number of responses provides sufficient data to allow complete, accurate and detailed analysis of needs across the rural Vale. Overall a response was achieved from 20.8% of all households in the study area, a much higher figure than is generally achieved for this form of study (typically only 5% of the household population is successfully surveyed). Despite the high proportion of households that responded it is necessary to caveat the results from some of the very small communities due to the small overall sample achieved there (even where this constitutes a large proportion of the total population). The communities for which the results should be treated with caution are Michaelston and St. Donats. These are indicated by astrisks in each table and figure in the report. Further detail on the number of responses achieved in each community is found in Appendix A1.
- 2.3 Prior to analysis, the data as a whole was weighted in order to take account of any measurable bias. The procedure for doing this is presented in the following section.

### Base household figures and weighting procedures

- 2.4 Firstly, the total number of households is estimated. This is necessary in order to gross up the data to represent the entire household population. Information from the Welsh Assembly Government Statistical Directorate and the Council Tax Register suggest that there are 22,071 households resident in the rural Vale currently.
- 2.5 Table 2.1 shows an estimate of the current tenure split in the rural Vale along with the sample achieved in each group. The table shows that some 83.5% of households in the study area currently own their home with 6.0% resident in the social rented sector and 10.5% living in private rented accommodation.

**Table 2.1 Number of households in each tenure group**

<i>Tenure</i>	<i>Total number of households</i>	<i>% of households</i>	<i>Number of returns</i>	<i>% of returns</i>
Owner-occupied (no mortgage)	9,321	42.2%	2,336	50.8%
Owner-occupied (with mortgage)	9,105	41.3%	1,709	37.2%
Social rented	1,333	6.0%	217	4.7%
Private rented	2,311	10.5%	332	7.2%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>	<b>4,594</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

2.6 As a result of the differences between these distributions it is necessary to ‘rebalance’ the data to correctly represent the population being analysed via ‘weighting’. Weighting is a method of compensating for lower response rates amongst certain groups, significantly reducing bias. This is widely recognised as a valid statistical method, for example, being recommended by the Welsh Assembly Government for household surveys.

2.7 In this study, the data has been weighted to be in line with the estimated distribution of households for each of the following topics:

- Dwelling type (e.g. detached, terraced houses)
- Car ownership
- Ethnicity of household head
- Household type
- Age of resident population
- Community
- Council Tax Band
- Tenure (as shown in Table 2.1 above)

2.8 Further information on this process is presented in Appendix A1.

### **Additional qualitative research**

2.9 The quantitative analysis of all households in the rural Vale facilitated by the household survey is supplemented by some qualitative research on the issue of affordable housing, conducted at a local level. Firstly a Creating Rural Communities questionnaire was sent to all rural communities to determine the attitude to more affordable housing locally. The results of this research are presented in Appendix A2. In addition a separate consultation event was run with residents in the community of Llanfair to obtain more detailed opinion on how large an area affordable housing in the community should serve. The results of this research are presented in Appendix A4.

## Summary

- 2.10 This report is primarily based on survey data collected via a postal survey which obtained responses from 4,954 households. The survey data was grossed up to an estimated total of 22,071 households across the rural Vale.
- 2.11 The data was also weighted by a wide range of economic and social household characteristics, estimated from a variety of secondary data sources, to be as representative as possible of the households in the rural Vale. Full details of these are provided in Appendix A1.





## 3. Background information

### Introduction

- 3.1 This chapter records some of the basic outputs of the survey, to profile the dwelling stock and resident population present in each community and the whole rural area. The chapter also shows the spatial variation in overcrowding levels and dwelling turnover. Figures are also presented for the Vale of Glamorgan as a whole for comparison. Community maps are provided for some key variables.

### Tenure

- 3.2 The overall proportion of owner-occupation in the rural Vale is high, at 83.5%, compared to the Vale of Glamorgan as a whole (59.0%). Only 6.0% of households in the study area are resident in the social rented sector, whilst over a quarter of households in the entire County inhabit this tenure. The rural area also records a lower level of private renting than is found across the Vale of Glamorgan.
- 3.3 Tenure patterns varied across the study area, as can be seen in Table 3.1. Pendoylan and St. Athan record notably high levels of social renting households, whilst almost a third of households in St. Georges-super-Ely reside in the private rented sector. Peterston-super-Ely and Wenvoe are the communities that record the highest proportion of owner-occupiers with no mortgage.

### Accommodation type

- 3.4 Some 44.3% of households in the rural Vale reside in a detached property compared to just over a quarter of households across the County, with just 7.0% of properties being flats. Of the communities where a reasonable sample was achieved, Llanmaes has the highest proportion of detached properties, although the communities of Colwinston and Penllyn also record more than 80% of households as resident in a detached home.
- 3.5 Over half of households in Pendoylan live in a semi-detached house and this property type is also the most common in Dinas Powys, Llandough, Llantwit Major and St. Athan. Terraced properties are most commonly found in St. Athan, Dinas Powys, Llandough and Llantwit Major. Four communities record over a tenth of households as resident in flats (Cowbridge with Llanblethian, Dinas Powys, Sully and Wick) and in Llandough almost a quarter of households live in flats.

Table 3.1 Tenure						
Community	Owner-occ'd (no mortgage)	Owner-occ'd (with mortgage)	Social rented	Private rented	Total	
					%	number
Colwinston	52.3%	39.7%	3.4%	4.6%	100%	174
Cowbridge with Llanblethian	52.4%	28.8%	6.2%	12.5%	100%	1,938
Dinas Powys	45.9%	40.2%	8.4%	5.5%	100%	3,175
Ewenny	52.8%	42.7%	0.0%	4.6%	100%	307
Llancarfan	47.0%	45.2%	0.0%	7.8%	100%	282
Llandough	35.2%	40.6%	6.8%	17.5%	100%	854
Llandow	43.1%	44.1%	1.4%	11.4%	100%	282
Llanfair	42.6%	46.5%	0.0%	10.9%	100%	231
Llangan	47.8%	50.0%	2.2%	0.0%	100%	277
Llanmaes	50.5%	43.4%	3.3%	2.7%	100%	181
Llantwit Major	40.0%	39.8%	9.2%	11.0%	100%	4,077
*Michaelston	70.5%	22.7%	0.0%	6.8%	100%	132
Pendoylan	39.2%	27.7%	18.7%	14.5%	100%	166
Penllyn	35.7%	50.8%	0.0%	13.6%	100%	589
Peterston-super-Ely	55.2%	40.7%	1.1%	3.1%	100%	360
Rhose	34.5%	49.5%	6.2%	9.8%	100%	2,528
St. Athan	24.0%	41.7%	12.8%	21.6%	100%	1,494
St. Brides Major	42.8%	42.1%	3.8%	11.2%	100%	890
*St. Donats	34.0%	23.6%	6.9%	35.4%	100%	144
St. Georges-super-Ely	35.9%	26.3%	4.8%	32.9%	100%	168
St. Nicholas and Bonvilston	48.8%	39.6%	6.1%	5.5%	100%	325
Sully	43.0%	47.1%	0.0%	9.8%	100%	2,196
Welsh St. Donats	44.4%	55.6%	0.0%	0.0%	100%	197
Wenvoe	58.4%	34.9%	2.0%	4.7%	100%	802
Wick	48.0%	40.4%	6.0%	5.6%	100%	301
<b>Total for the rural VoG</b>	<b>42.2%</b>	<b>41.3%</b>	<b>6.0%</b>	<b>10.5%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>26.7%</b>	<b>32.3%</b>	<b>26.5%</b>	<b>14.5%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Table 3.2 Accommodation type						
Community	Detached	Semi-detached	Terraced	Flat or maisonette	Total	
					%	number
Colwinston	80.5%	19.5%	0.0%	0.0%	100%	174
Cowbridge with Llanblethian	49.1%	26.3%	12.9%	11.6%	100%	1,938
Dinas Powys	23.2%	41.0%	25.3%	10.5%	100%	3,175
Ewenny	66.2%	26.6%	5.2%	1.9%	100%	307
Llancarfan	79.5%	15.2%	5.3%	0.0%	100%	282
Llandough	17.9%	33.3%	24.1%	24.7%	100%	854
Llandow	73.4%	22.0%	4.6%	0.0%	100%	282
Llanfair	62.6%	28.7%	7.4%	1.3%	100%	231
Llangan	60.1%	36.3%	3.6%	0.0%	100%	277
Llanmaes	86.2%	11.0%	2.8%	0.0%	100%	181
Llantwit Major	33.6%	33.9%	28.6%	3.9%	100%	4,077
*Michaelston	64.4%	23.5%	12.1%	0.0%	100%	132
Pendoylan	47.0%	51.2%	0.0%	1.8%	100%	166
Penllyn	83.7%	12.2%	1.5%	2.5%	100%	589
Peterston-super-Ely	57.9%	27.9%	11.7%	2.5%	100%	360
Rhoose	45.6%	31.6%	15.5%	7.3%	100%	2,528
St. Athan	24.4%	39.1%	32.1%	4.4%	100%	1,494
St. Brides Major	70.3%	22.3%	3.4%	4.0%	100%	890
*St. Donats	51.4%	34.7%	5.6%	8.3%	100%	144
St. Georges-super-Ely	57.7%	26.8%	11.3%	4.2%	100%	168
St. Nicholas and Bonvilston	58.8%	28.3%	11.7%	1.2%	100%	325
Sully	53.4%	29.1%	7.1%	10.4%	100%	2,196
Welsh St. Donats	53.3%	46.7%	0.0%	0.0%	100%	197
Wenvoe	65.1%	27.9%	6.5%	0.5%	100%	802
Wick	53.5%	30.6%	4.7%	11.3%	100%	301
<b>Total for the rural VoG</b>	<b>44.3%</b>	<b>31.7%</b>	<b>17.0%</b>	<b>7.0%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>26.7%</b>	<b>32.3%</b>	<b>26.5%</b>	<b>14.5%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Accommodation size

- 3.6 Some 44.2% of households in the study area live in a three bedroom home with a further 27.3% living in a two bedroom dwelling. The Vale of Glamorgan as a whole records a higher level of one bedroom properties and a smaller proportion of homes with five or more bedrooms. Overall the average number of bedrooms in the rural Vale is 3.2 compared to 3.0 across the whole County.
- 3.7 The largest average property size is found in Llancafán (4.2 bedrooms) with the smallest in Llandough (2.7 bedrooms). Over a quarter of households live in a home with five or more bedrooms in each of Llancafán, Llandow, Penllyn and Welsh St. Donats.

Table 3.3 Accommodation size

Community	Average	1 bed	2 bed	3 bed	4 bed	5+ bed	Total	
							%	number
Colwinston	3.9	0.0%	8.0%	23.0%	46.6%	22.4%	100%	174
Cowbridge with Llanblethian	3.2	6.8%	14.9%	38.8%	29.3%	10.2%	100%	1,938
Dinas Powys	3.1	3.7%	17.7%	51.9%	20.6%	6.1%	100%	3,175
Ewenny	3.7	1.3%	9.1%	32.6%	41.7%	15.3%	100%	307
Llancafán	4.2	0.0%	7.8%	20.1%	31.4%	40.6%	100%	282
Llandough	2.7	3.6%	39.3%	40.6%	15.0%	1.4%	100%	854
Llandow	3.9	0.0%	5.7%	33.6%	32.9%	27.9%	100%	282
Llanfair	3.5	1.3%	8.2%	38.1%	39.8%	12.6%	100%	231
Llangan	3.7	0.0%	0.0%	43.3%	44.8%	11.9%	100%	277
Llanmaes	3.7	2.7%	8.2%	31.3%	40.7%	17.0%	100%	181
Llantwit Major	3.0	2.9%	20.6%	52.6%	20.0%	4.0%	100%	4,077
*Michaelston	3.7	0.0%	3.1%	32.1%	57.3%	7.6%	100%	132
Pendoylan	3.6	0.0%	5.4%	51.5%	27.5%	15.6%	100%	166
Penllyn	4.0	3.1%	2.0%	16.0%	50.9%	28.0%	100%	589
Peterston-super-Ely	3.7	1.4%	6.1%	36.5%	42.1%	13.9%	100%	360
Rhoose	3.1	1.3%	28.7%	35.1%	29.4%	5.5%	100%	2,528
St. Athan	3.0	2.9%	24.5%	51.8%	17.0%	3.7%	100%	1,494
St. Brides Major	3.3	0.0%	15.8%	44.3%	32.7%	7.2%	100%	890
*St. Donats	3.3	8.4%	4.9%	49.0%	23.1%	14.7%	100%	144
St. Georges-super-Ely	3.4	0.0%	16.7%	38.1%	33.9%	11.3%	100%	168
St. Nicholas and Bonvilston	3.7	0.0%	8.6%	37.1%	31.0%	23.3%	100%	325
Sully	3.0	7.1%	27.0%	30.0%	32.5%	3.4%	100%	2,196
Welsh St. Donats	4.0	0.0%	6.6%	15.7%	46.0%	31.8%	100%	197
Wenvoe	3.2	2.5%	15.2%	48.8%	25.9%	7.6%	100%	802
Wick	3.3	0.0%	16.3%	43.2%	36.5%	4.0%	100%	301
<b>Total for the rural VoG</b>	<b>3.2</b>	<b>3.2%</b>	<b>19.3%</b>	<b>42.2%</b>	<b>27.3%</b>	<b>8.0%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>3.0</b>	<b>6.6%</b>	<b>23.9%</b>	<b>44.1%</b>	<b>19.6%</b>	<b>5.9%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Household type

- 3.8 Almost a third (32.5%) of households contain older person(s) only, whilst 28.5% contain children. Over 30% of households are multi-adult households without children and 8.3% contain a single person below pensionable age. The rural Vale contains more pensioner households and fewer households with children than the County as a whole. The study area also has fewer households containing a single person below pensionable age.
- 3.9 The highest proportions of older person only households are found in Cowbridge with Llanblethian, Peterston-super-Ely and Dinas Powys, where over 40% of the population are pensioner households. The lowest proportion of older person only households are in Pendoylan, followed by Welsh St. Donats. These two communities alongside Llancarfan record the greatest proportion of households with children (over 45%). Less than a fifth of households in Ewenny and Cowbridge with Llanblethian contain children.
- 3.10 The communities of Sully, St. Athan, Wick and Rhoose contain the largest proportion of single non-pensioner households, whilst Ewenny records the highest level of multi-adult households without children.

### Household size

- 3.11 Almost a quarter (24.4%) of households in the study area contain only one person and 41.6% contain two people. The average household size in the rural Vale is 2.4 persons, which compares to 2.3 persons across the whole of the County.
- 3.12 One person households are most common in Cowbridge with Llanblethian and Sully and least prevalent in Welsh St. Donats and Pendoylan. There are three communities in which over a tenth of households contain more than four people; Llancarfan, Llanfair and St. Nicholas and Bonvilston. The largest households are found in Llancarfan, with an average household size of 3.1 people. The smallest average household size is in Cowbridge with Llanblethian and Sully.

Table 3.4 Household type

Community	Single older person	2+ older persons	Single (non-older person)	2+ adults, no children	Lone parent family	2+ adults, 1 child	2+ adults, 2+ children	Total	
								%	No.
Colwinston	10.3%	14.9%	1.7%	35.6%	6.3%	14.9%	16.1%	100%	174
Cowbridge with Llanblethian	22.5%	22.2%	8.7%	27.3%	0.7%	10.2%	8.4%	100%	1,938
Dinas Powys	20.9%	20.5%	5.8%	28.3%	4.3%	11.0%	9.2%	100%	3,175
Ewenny	5.9%	21.8%	5.2%	47.2%	0.0%	4.6%	15.3%	100%	307
Llancarfan	8.5%	15.5%	5.3%	24.7%	2.8%	16.3%	26.9%	100%	282
Llandough	18.9%	12.6%	7.7%	25.6%	15.9%	10.8%	8.4%	100%	854
Llandow	9.9%	12.4%	3.5%	41.7%	2.5%	8.8%	21.2%	100%	282
Llanfair	9.6%	17.4%	8.7%	43.9%	0.0%	7.8%	12.6%	100%	231
Llangan	9.7%	21.9%	2.9%	37.8%	3.6%	12.9%	11.2%	100%	277
Llanmaes	15.5%	13.3%	5.0%	38.7%	0.0%	9.4%	18.2%	100%	181
Llantwit Major	18.6%	14.9%	9.0%	28.1%	8.3%	12.1%	9.0%	100%	4,077
*Michaelston	10.6%	22.0%	7.6%	47.7%	0.0%	12.1%	0.0%	100%	132
Pendoylan	2.4%	12.7%	0.0%	35.2%	33.3%	7.9%	8.5%	100%	166
Penllyn	5.8%	14.7%	6.9%	34.7%	6.1%	7.8%	23.9%	100%	589
Peterston-super-Ely	15.8%	26.0%	4.2%	29.1%	3.0%	12.7%	9.1%	100%	360
Rhose	10.9%	14.2%	11.0%	33.0%	8.1%	10.2%	12.6%	100%	2,528
St. Athan	11.8%	7.2%	12.5%	25.6%	14.0%	15.9%	12.9%	100%	1,494
St. Brides Major	15.2%	18.5%	3.8%	39.4%	2.8%	12.2%	8.0%	100%	890
*St. Donats	15.3%	5.6%	4.9%	41.7%	0.0%	7.6%	25.0%	100%	144
St. Georges-super-Ely	18.9%	14.8%	0.0%	41.4%	0.0%	11.2%	13.6%	100%	168
St. Nicholas and Bonvilston	18.5%	16.0%	2.8%	24.4%	3.1%	16.7%	18.5%	100%	325
Sully	17.6%	15.5%	13.7%	30.2%	4.5%	10.5%	8.0%	100%	2,196
Welsh St. Donats	2.0%	14.7%	0.0%	30.5%	8.6%	19.3%	24.9%	100%	197
Wenvoe	16.3%	21.1%	5.9%	35.4%	5.1%	6.2%	10.0%	100%	802
Wick	15.0%	14.0%	11.3%	33.9%	0.0%	9.6%	16.3%	100%	301
<b>Total for the rural VoG</b>	<b>16.1%</b>	<b>16.4%</b>	<b>8.3%</b>	<b>30.7%</b>	<b>6.2%</b>	<b>11.2%</b>	<b>11.1%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>16.3%</b>	<b>12.0%</b>	<b>12.6%</b>	<b>28.8%</b>	<b>8.7%</b>	<b>11.5%</b>	<b>10.1%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Table 3.5 Household size

Community	Average	1 person	2 people	3 people	4 people	5 people	6 or more people	Total	
								%	number
Colwinston	2.7	12.1%	43.7%	13.2%	25.9%	5.2%	0.0%	100%	174
Cowbridge with Llanblethian	2.2	31.3%	42.3%	10.9%	10.6%	3.3%	1.7%	100%	1,938
Dinas Powys	2.3	26.7%	42.7%	11.9%	14.7%	3.5%	0.5%	100%	3,175
Ewenny	2.6	11.1%	51.8%	10.5%	21.0%	3.9%	1.6%	100%	307
Llancarfan	3.1	13.8%	26.5%	20.8%	21.2%	12.7%	4.9%	100%	282
Llandough	2.2	26.6%	44.7%	12.4%	13.2%	3.0%	0.0%	100%	854
Llandow	2.8	13.5%	39.4%	14.9%	23.4%	4.3%	4.6%	100%	282
Llanfair	2.5	18.2%	50.6%	10.8%	6.9%	13.4%	0.0%	100%	231
Llangan	2.5	12.2%	45.3%	26.6%	14.0%	1.8%	0.0%	100%	277
Llanmaes	2.4	20.9%	45.1%	14.3%	14.3%	5.5%	0.0%	100%	181
Llantwit Major	2.3	27.6%	40.4%	14.4%	13.5%	3.3%	0.9%	100%	4,077
*Michaelston	2.5	18.0%	54.9%	7.5%	12.8%	0.0%	6.8%	100%	132
Pendoylan	2.6	2.4%	51.8%	30.7%	9.6%	5.4%	0.0%	100%	166
Penllyn	2.7	12.6%	37.9%	19.7%	23.9%	4.4%	1.5%	100%	589
Peterston-super-Ely	2.4	19.7%	46.9%	12.8%	13.1%	7.5%	0.0%	100%	360
Rhosee	2.4	21.9%	44.2%	13.1%	14.8%	4.5%	1.6%	100%	2,528
St. Athan	2.5	24.4%	31.9%	24.6%	13.3%	4.7%	1.2%	100%	1,494
St. Brides Major	2.3	19.0%	48.8%	16.2%	13.2%	2.8%	0.0%	100%	890
*St. Donats	2.7	20.1%	31.3%	13.2%	30.6%	4.9%	0.0%	100%	144
St. Georges-super-Ely	2.7	19.0%	36.9%	15.5%	17.3%	6.5%	4.8%	100%	168
St. Nicholas and Bonvilston	2.7	21.2%	28.3%	18.8%	20.3%	9.8%	1.5%	100%	325
Sully	2.2	31.3%	39.5%	13.2%	12.5%	1.9%	1.7%	100%	2,196
Welsh St. Donats	2.8	2.0%	53.5%	14.6%	24.2%	5.6%	0.0%	100%	197
Wenvoe	2.3	22.2%	46.0%	12.0%	18.2%	1.7%	0.0%	100%	802
Wick	2.5	26.2%	34.4%	12.9%	22.8%	1.7%	2.0%	100%	301
<b>Total for the rural VoG</b>	<b>2.4</b>	<b>24.4%</b>	<b>41.6%</b>	<b>14.4%</b>	<b>14.7%</b>	<b>3.8%</b>	<b>1.1%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>2.3</b>	<b>28.9%</b>	<b>38.5%</b>	<b>14.6%</b>	<b>13.1%</b>	<b>3.8%</b>	<b>1.1%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Age band of household head

- 3.13 The average age of household heads in the study area is 56 and only 11.8% of households are headed by someone under 36. Overall household heads are older in the rural Vale than the County as a whole (20.1% of households across the Vale of Glamorgan are headed by someone under 36).
- 3.14 Some 22.5% of households in Cowbridge with Llanblethian are aged over 75, whilst over a fifth of household heads in Llandough are under 36. Cowbridge with Llanblethian has the highest average age of household heads, at 61. The lowest average age of household heads (50) is found in Welsh St. Donats and St. Athan.

Table 3.6 Age band of household head

Community	Average age	16-25	26-35	36-45	46-55	56-65	66-75	76+	Total	
									%	number
Colwinston	56	0.0%	2.3%	20.1%	24.1%	31.0%	11.5%	10.9%	100%	174
Cowbridge with Llanblethian	61	0.4%	7.7%	12.1%	15.2%	24.0%	18.0%	22.5%	100%	1,938
Dinas Powys	59	1.6%	7.5%	14.9%	17.4%	19.3%	19.7%	19.6%	100%	3,175
Ewenny	58	0.0%	3.6%	16.3%	22.5%	31.3%	16.6%	9.8%	100%	307
Llancarfan	56	0.0%	3.5%	18.4%	37.9%	15.2%	16.7%	8.2%	100%	282
Llandough	53	0.0%	21.7%	18.8%	11.0%	21.6%	16.4%	10.6%	100%	854
Llandow	55	0.0%	6.0%	15.2%	31.2%	27.0%	15.2%	5.3%	100%	282
Llanfair	56	3.5%	4.3%	17.4%	18.3%	31.3%	16.5%	8.7%	100%	231
Llangan	58	0.0%	4.0%	15.5%	24.5%	27.3%	18.7%	10.1%	100%	277
Llanmaes	58	0.0%	0.0%	18.8%	18.8%	37.0%	20.4%	5.0%	100%	181
Llantwit Major	56	1.7%	11.7%	17.5%	20.1%	17.9%	15.3%	15.8%	100%	4,077
*Michaelston	60	0.0%	6.8%	12.1%	15.2%	33.3%	12.9%	19.7%	100%	132
Pendoylan	54	0.0%	10.2%	24.7%	24.7%	18.1%	14.5%	7.8%	100%	166
Penllyn	53	7.5%	2.7%	22.4%	21.4%	26.4%	11.6%	8.0%	100%	589
Peterston-super-Ely	60	0.0%	3.3%	16.1%	19.2%	21.7%	21.9%	17.8%	100%	360
Rhose	52	4.4%	13.6%	18.3%	20.6%	20.0%	13.3%	9.8%	100%	2,528
St. Athan	50	5.0%	13.9%	25.4%	18.6%	19.4%	10.7%	7.2%	100%	1,494
St. Brides Major	57	0.0%	9.7%	15.2%	16.9%	29.4%	17.9%	11.0%	100%	890
*St. Donats	52	0.0%	28.5%	12.5%	10.4%	18.8%	24.3%	5.6%	100%	144
St. Georges-super-Ely	57	0.0%	10.7%	16.7%	20.8%	20.8%	16.1%	14.9%	100%	168
St. Nicholas and Bonvilston	56	0.0%	11.3%	18.4%	23.0%	20.6%	11.0%	15.6%	100%	325
Sully	56	0.2%	10.0%	17.3%	21.0%	23.6%	14.5%	13.4%	100%	2,196
Welsh St. Donats	50	0.0%	13.6%	24.7%	19.2%	25.8%	16.7%	0.0%	100%	197
Wenvoe	59	0.0%	6.7%	16.6%	14.7%	26.2%	23.9%	11.8%	100%	802
Wick	56	0.0%	9.9%	23.5%	20.9%	18.5%	9.9%	17.2%	100%	301
<b>Total for the rural VoG</b>	<b>56</b>	<b>1.7%</b>	<b>10.1%</b>	<b>17.4%</b>	<b>19.1%</b>	<b>21.8%</b>	<b>16.0%</b>	<b>13.9%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>53</b>	<b>5.3%</b>	<b>14.8%</b>	<b>17.5%</b>	<b>17.8%</b>	<b>18.3%</b>	<b>13.1%</b>	<b>13.3%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)



## Employment

- 3.15 The classification scheme used to determine the employment status of households is shown in Table 3.7. Overall 60.8% of households in the study area are employed, 34.6% retired, 2.2% unemployed, with the remainder (2.5%) in the 'other' category. In comparison with the Vale of Glamorgan as a whole, the rural area contains more retired households and fewer unemployed and 'other' households.

Table 3.7 Employment status – classification of households	
<i>Classified as</i>	<i>Description of household</i>
Employed	At least one employed person.
Retired	No employed people, but at least one retired person.
Unemployed	No employed or retired people, but at least one unemployed person.
Other	No employed, retired or unemployed people. An example of this could be a household containing only students, or those with a long-term limiting illness.

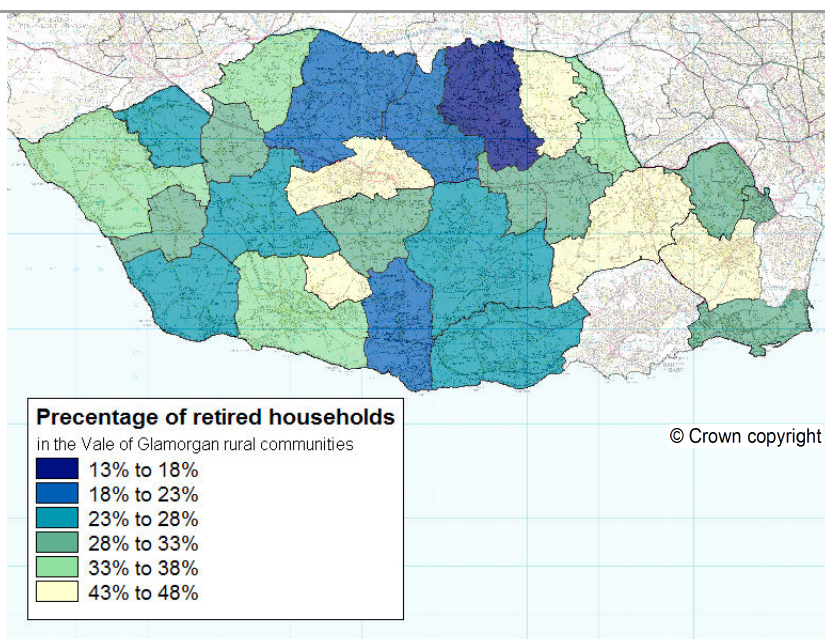
Source: Fordham Research (2010)

- 3.16 The largest proportions of employed residents are found in Welsh St. Donats, Ewenny, Llanccarfan and Penllyn with the lowest in Cowbridge with Llanblethian, Dinas Powys and Peterston-super-Ely. These three communities along with Llanmaes record the highest level of retired households. Unemployment is highest in Pendoylan and St. Athan. The 'Other' group, which includes residents that classify themselves as permanently sick or disabled, is largest in St. Athan and Llandough.

Table 3.8 Household employment status

Community	Employed	Retired	Unemployed	Other	Total	
					%	number
Colwinston	69.0%	29.3%	0.0%	1.7%	100%	174
Cowbridge with Llanblethian	51.0%	47.2%	0.5%	1.3%	100%	1,938
Dinas Powys	53.7%	43.5%	1.5%	1.3%	100%	3,175
Ewenny	72.3%	26.7%	0.0%	1.0%	100%	307
Llancarfan	72.3%	25.5%	2.1%	0.0%	100%	282
Llandough	60.1%	32.4%	2.5%	5.0%	100%	854
Llandow	67.7%	27.0%	1.4%	3.9%	100%	282
Llanfair	68.0%	32.0%	0.0%	0.0%	100%	231
Llangan	66.2%	33.8%	0.0%	0.0%	100%	277
Llanmaes	55.2%	44.8%	0.0%	0.0%	100%	181
Llantwit Major	59.5%	35.7%	2.5%	2.2%	100%	4,077
*Michaelston	69.7%	30.3%	0.0%	0.0%	100%	132
Pendoylan	68.7%	13.9%	17.5%	0.0%	100%	166
Penllyn	71.4%	21.6%	2.6%	4.4%	100%	589
Peterston-super-Ely	54.0%	45.1%	0.8%	0.0%	100%	360
Rhoose	64.3%	27.4%	4.2%	4.2%	100%	2,528
St. Athan	65.5%	20.3%	6.3%	7.9%	100%	1,494
St. Brides Major	59.7%	37.1%	0.8%	2.4%	100%	890
*St. Donats	75.5%	24.5%	0.0%	0.0%	100%	144
St. Georges-super-Ely	66.7%	33.3%	0.0%	0.0%	100%	168
St. Nicholas and Bonvilston	67.1%	32.9%	0.0%	0.0%	100%	325
Sully	64.6%	32.8%	1.2%	1.4%	100%	2,196
Welsh St. Donats	77.0%	20.4%	0.0%	2.6%	100%	197
Wenvoe	55.7%	43.0%	0.0%	1.2%	100%	802
Wick	62.1%	31.9%	2.0%	4.0%	100%	301
<b>Total for the rural VoG</b>	<b>60.8%</b>	<b>34.6%</b>	<b>2.2%</b>	<b>2.5%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>60.4%</b>	<b>30.6%</b>	<b>4.1%</b>	<b>4.8%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

**Figure 3.1 Proportion of retired households**

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Overcrowding and under-occupation

- 3.17 For this measure, households were classified according to the bedroom standard, endorsed by the Welsh Assembly Government. Overall overcrowding in the study area is very low, at 0.8%, compared to the figure for the whole of the Vale of Glamorgan of 1.5%. Due to the small proportion of households in this group, clear trends were difficult to discern at community level, although the highest proportions (at about 2%) are in Rhoose and Wick.
- 3.18 A larger proportion of households are classified as under-occupied (with more than one spare bedroom) in the rural Vale than the whole of the County (54.4% compared to 45.1%). Over three-quarters of households are under-occupied in Penllyn, Welsh St. Donats and Llanfair. The lowest proportions are found in St. Athan and Llandough.

Table 3.9 Overcrowding and under-occupation

Community	Overcrowded	Neither overcrowded nor under-occupied	Under-occupied	Total	
				%	number
Colwinston	0.0%	26.4%	73.6%	100%	174
Cowbridge with Llanblethian	0.5%	38.6%	60.9%	100%	1,938
Dinas Powys	0.1%	46.4%	53.5%	100%	3,175
Ewenny	0.0%	27.8%	72.2%	100%	307
Llancarfan	1.8%	28.3%	70.0%	100%	282
Llandough	1.9%	60.2%	37.9%	100%	854
Llandow	0.0%	27.6%	72.4%	100%	282
Llanfair	0.0%	23.9%	76.1%	100%	231
Llangan	0.0%	31.8%	68.2%	100%	277
Llanmaes	0.0%	27.1%	72.9%	100%	181
Llantwit Major	0.3%	49.5%	50.1%	100%	4,077
*Michaelston	6.8%	18.2%	75.0%	100%	132
Pendoylan	0.0%	50.0%	50.0%	100%	166
Penllyn	0.0%	17.3%	82.7%	100%	589
Peterston-super-Ely	0.0%	30.6%	69.4%	100%	360
Rhosee	2.3%	49.6%	48.0%	100%	2,528
St. Athan	1.3%	62.0%	36.7%	100%	1,494
St. Brides Major	0.7%	35.1%	64.3%	100%	890
*St. Donats	0.0%	43.8%	56.3%	100%	144
St. Georges-super-Ely	0.0%	55.4%	44.6%	100%	168
St. Nicholas and Bonvilston	1.5%	36.0%	62.5%	100%	325
Sully	1.5%	50.3%	48.2%	100%	2,196
Welsh St. Donats	0.0%	21.3%	78.7%	100%	197
Wenvoe	0.0%	36.8%	63.2%	100%	802
Wick	2.0%	40.3%	57.7%	100%	301
<b>Total for the rural VoG</b>	<b>0.8%</b>	<b>44.8%</b>	<b>54.4%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>1.5%</b>	<b>53.4%</b>	<b>45.1%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

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## Support needs

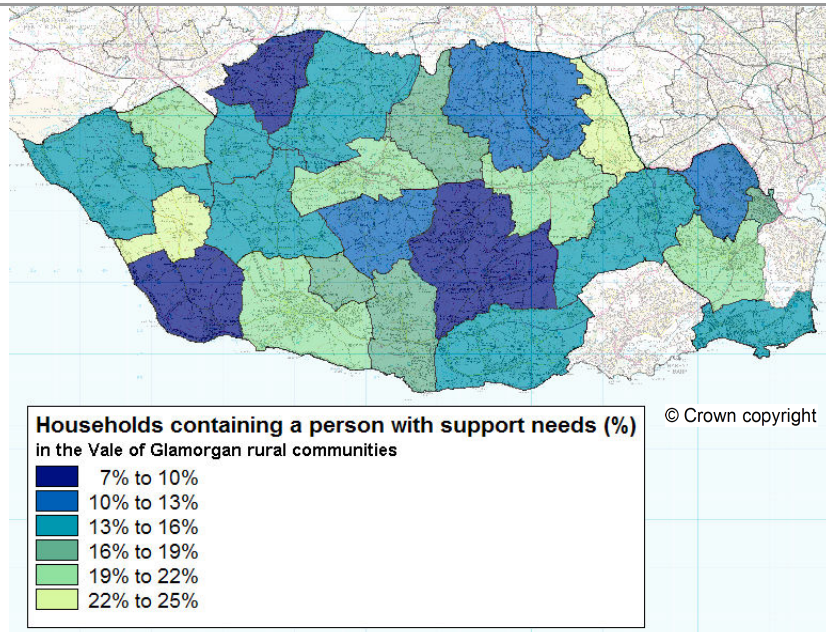
- 3.19 Information collected through the survey enables us to identify whether any household members have a support need. The survey looked at whether household members fell into one or more of a range of groups. Whilst these represent the larger client groups covered in Supporting People Operational Plan, they are not exhaustive.
- 3.20 The groups covered were:
- Frail elderly
  - Persons with a medical condition
  - Persons with a physical disability
  - Persons with a learning difficulty
  - Persons with a mental health problem
  - Persons with a sensory disability
  - Other
- 3.21 Overall there are an estimated 3,840 households in the rural Vale with one or more members in an identified support needs group – this represents 17.4% of all households. Households where a respondent has a support need are less prevalent in the study area than in the Vale of Glamorgan as a whole. Some 8.4% of households contain someone with multiple support needs and 2.8% of households have more than one person with a support need. Please note that the rows in the support needs tables do not sum to 100% as respondents can have more than one support need.
- 3.22 Wick and St. Georges-super-Ely contain the highest proportion of households with a support need, (almost a quarter). Households where a respondent has a support need are least prevalent in the communities of Llancarfan and Llangan.
- 3.23 Persons with a medical condition account for the most common type of support need (11.1% of all households), followed by persons with a physical disability (8.9%) and the frail elderly (5.3%). The frail elderly is the only support needs group more prevalent in the rural Vale than the County as a whole. Households where the respondent/s are frail elderly, have a medical condition and/or a physical disability are common in Wick. Welsh St. Donats also records a high proportion of households where a respondent has a physical disability.
- 3.24 Those households with a member with support needs were asked to indicate if there was a need for improvements to their current accommodation and/or services. The most commonly requested service across the rural Vale by households with support needs is help with maintaining the home, reported by 1,253 households. The main physical alterations to the dwelling required are low level shower units and extra handrails, needed by 651 and 606 households respectively.

**Table 3.10 Support needs households**

<i>Community</i>	<i>Containing people with support need</i>	<i>Containing people with multiple needs</i>	<i>Containing 2+ people with support need</i>	<i>Total households in community</i>
Colwinston	15.5%	6.9%	0.0%	174
Cowbridge with Llanblethian	20.3%	11.4%	3.6%	1,938
Dinas Powys	19.0%	10.5%	2.9%	3,175
Ewenny	21.2%	11.1%	5.5%	307
Llancarfan	8.8%	5.0%	1.4%	282
Llandough	16.8%	8.0%	1.6%	854
Llandow	13.1%	6.4%	0.0%	282
Llanfair	11.3%	3.0%	4.3%	231
Llangan	9.0%	2.2%	1.4%	277
Llanmaes	18.2%	9.4%	0.0%	181
Llantwit Major	20.6%	9.5%	3.4%	4,077
*Michaelston	11.4%	5.3%	2.3%	132
Pendoylan	12.7%	6.6%	0.0%	166
Penllyn	13.9%	7.0%	2.2%	589
Peterston-super-Ely	10.6%	7.0%	3.1%	360
Rhosee	15.1%	7.6%	3.0%	2,528
St. Athan	18.7%	9.2%	3.3%	1,494
St. Brides Major	13.6%	6.6%	1.5%	890
*St. Donats	7.0%	7.0%	0.0%	144
St. Georges-super-Ely	24.4%	10.1%	0.0%	168
St. Nicholas and Bonvilston	19.1%	8.9%	5.8%	325
Sully	15.4%	6.1%	3.1%	2,196
Welsh St. Donats	18.2%	11.1%	0.0%	197
Wenvoe	15.2%	8.7%	2.0%	802
Wick	24.9%	15.9%	0.0%	301
<b>Total for the rural VoG</b>	<b>17.4%</b>	<b>8.7%</b>	<b>2.8%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>20.3%</b>	<b>9.4%</b>	<b>3.6%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

**Figure 3.2 Proportion of households containing someone with a support need**



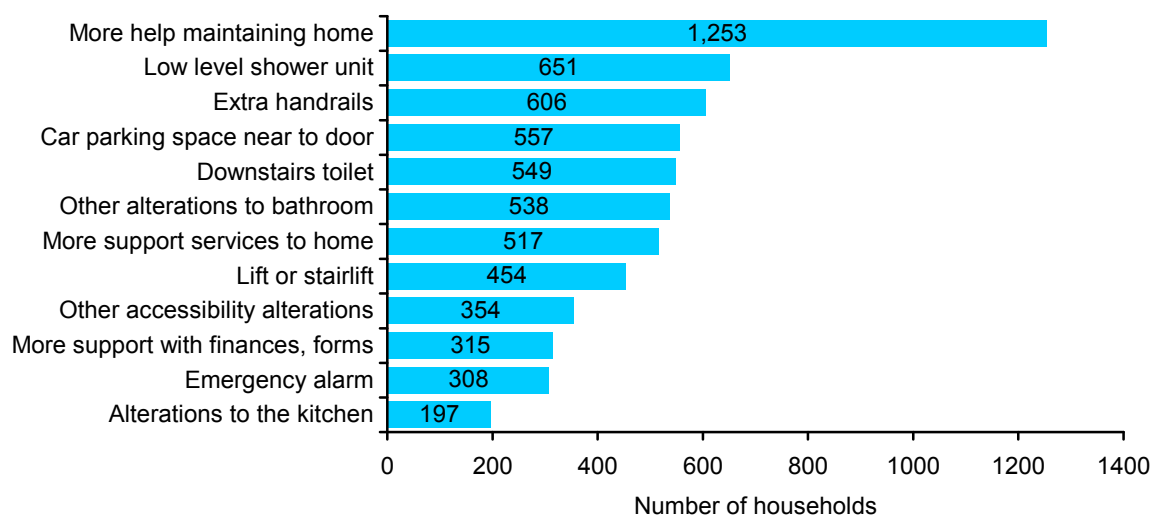
Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Table 3.11 Support needs categories

<i>Community</i>	<i>Frail elderly</i>	<i>Medical condition</i>	<i>Physical disability</i>	<i>Learning difficulty</i>	<i>Mental health</i>	<i>Sensory disability</i>	<i>Other</i>	<i>Total h'holds in community</i>
Colwinston	5.7%	9.2%	3.4%	0.0%	2.3%	1.7%	0.0%	174
Cowbridge with Llanblethian	8.5%	12.6%	11.5%	0.9%	1.3%	2.5%	1.4%	1,938
Dinas Powys	6.4%	13.0%	11.1%	1.7%	1.7%	1.7%	0.4%	3,175
Ewenny	5.5%	16.3%	13.0%	1.0%	1.0%	0.0%	1.0%	307
Llancarfan	3.9%	5.7%	2.5%	0.7%	1.4%	0.0%	0.0%	282
Llandough	5.2%	10.7%	8.5%	0.0%	2.5%	0.6%	0.0%	854
Llandow	2.8%	7.1%	7.8%	2.5%	0.0%	0.0%	0.0%	282
Llanfair	1.7%	6.1%	4.3%	0.9%	1.7%	0.0%	0.0%	231
Llangan	6.1%	3.6%	2.9%	0.0%	2.2%	0.0%	0.0%	277
Llanmaes	3.3%	13.3%	9.4%	0.0%	5.0%	0.0%	0.0%	181
Llantwit Major	6.5%	11.8%	9.9%	2.2%	2.8%	1.8%	0.4%	4,077
*Michaelston	5.3%	7.6%	9.1%	0.0%	2.3%	5.3%	0.0%	132
Pendoylan	7.2%	6.6%	5.4%	0.0%	1.2%	0.0%	0.0%	166
Penllyn	0.5%	8.8%	9.3%	0.7%	2.4%	1.2%	0.0%	589
Peterston-super-Ely	5.0%	10.0%	5.0%	0.0%	0.0%	0.0%	1.1%	360
Rhosee	3.9%	10.7%	7.5%	1.9%	2.6%	1.7%	0.4%	2,528
St. Athan	3.1%	13.3%	7.8%	4.1%	4.0%	2.0%	1.1%	1,494
St. Brides Major	4.2%	11.2%	4.7%	0.0%	1.5%	0.6%	0.6%	890
*St. Donats	0.0%	7.0%	7.0%	0.0%	0.0%	7.0%	0.0%	144
St. Georges-super-Ely	3.6%	9.5%	11.9%	4.8%	0.0%	4.8%	4.2%	168
St. Nicholas and Bonvilston	7.7%	8.6%	8.6%	0.0%	3.1%	1.8%	3.1%	325
Sully	4.4%	8.7%	5.6%	0.5%	1.8%	2.6%	1.4%	2,196
Welsh St. Donats	0.0%	11.1%	18.2%	0.0%	0.0%	0.0%	0.0%	197
Wenvoe	5.2%	7.6%	9.7%	0.6%	2.7%	1.0%	0.6%	802
Wick	13.3%	21.9%	18.9%	0.0%	0.0%	0.0%	0.0%	301
<b>Total for the rural VoG</b>	<b>5.3%</b>	<b>11.1%</b>	<b>8.9%</b>	<b>1.4%</b>	<b>2.2%</b>	<b>1.7%</b>	<b>0.7%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>5.0%</b>	<b>12.1%</b>	<b>10.0%</b>	<b>1.7%</b>	<b>3.1%</b>	<b>1.9%</b>	<b>1.0%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)



**Figure 3.3 Support needs households: improvements to accommodation**

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Ethnicity

3.25 Due to the very small Black and Minority Ethnic population in the rural Vale, it is not possible to produce community level estimates for ethnicity, although some information can be derived from the survey. Overall, across the study area, it is estimated that about 2.3% of households are headed by someone White but not White British, while 1.8% are in a non-White ethnic group. Within the Vale of Glamorgan as a whole, 91.4% of households are headed by someone White British, 6.5% by someone White but not White British and 2.1% are in a non-White ethnic group.

**Table 3.12 Ethnicity of households**

<i>Ethnic group</i>	<i>Percentage</i>	<i>Numbers</i>
White British	95.9%	21,174
White Irish / Other	2.3%	484
Other Groups	1.8%	413
<b>Total</b>	<b>100.0%</b>	<b>22,071</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Key workers

3.26 For the purposes of analysis, key workers were defined as people working in any one of three categories. These were:

- Nurses and other NHS staff
- Teachers
- Police officers, probation service staff and fire-fighters

3.27 Across the study area 17.0% of households contain a key worker and 11.5% are headed by a key worker. Key workers are more prevalent in the rural Vale than the County as a whole. The largest proportions of key worker households are in Llandough, Llangan, Llandow and Llanmaes and the lowest in St. Georges-super-Ely and St. Athan.

**Table 3.13 Key worker households**

Community	Households headed by a key worker	Households containing at least one key worker	Total	
			%	number
Colwinston	18.4%	24.5%	100%	174
Cowbridge with Llanblethian	10.2%	15.6%	100%	1,938
Dinas Powys	9.8%	16.0%	100%	3,175
Ewenny	8.9%	23.3%	100%	307
Llancarfan	5.4%	14.1%	100%	282
Llandough	22.8%	27.7%	100%	854
Llandow	20.1%	26.3%	100%	282
Llanfair	12.3%	22.1%	100%	231
Llangan	21.2%	27.6%	100%	277
Llanmaes	17.5%	26.2%	100%	181
Llantwit Major	9.8%	14.1%	100%	4,077
*Michaelston	16.1%	25.3%	100%	132
Pendoylan	5.5%	13.5%	100%	166
Penllyn	14.1%	19.9%	100%	589
Peterston-super-Ely	10.7%	14.8%	100%	360
Rhose	10.7%	16.3%	100%	2,528
St. Athan	9.0%	11.0%	100%	1,494
St. Brides Major	9.6%	14.2%	100%	890
*St. Donats	17.9%	21.6%	100%	144
St. Georges-super-Ely	10.9%	10.9%	100%	168
St. Nicholas and Bonvilston	11.8%	20.2%	100%	325
Sully	12.4%	19.5%	100%	2,196
Welsh St. Donats	15.9%	20.5%	100%	197
Wenvoe	14.9%	20.6%	100%	802
Wick	9.6%	15.2%	100%	301
<b>Total for the rural VoG</b>	<b>11.5%</b>	<b>17.0%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>10.2%</b>	<b>15.0%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

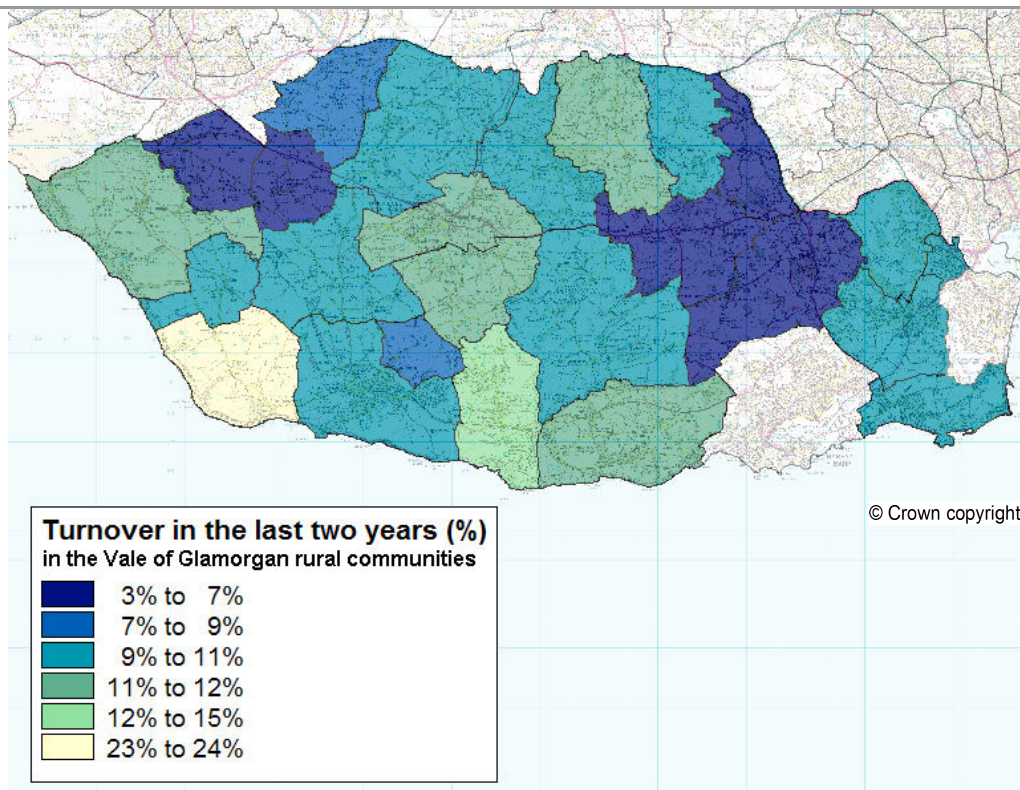
## Household mobility

3.28 Overall, 11.3% of residents in the rural Vale have moved to their current home in the last two years, while 71.6% have stayed in the same property for more than five years. Household mobility in the rural Vale is notably lower than the County as a whole. St. Athan and St. Brides Major show the highest levels of turnover in the last two years, whilst households in Llangan, Wenvoe and Wick are most likely to lived in their home for at least five years.

Community	Less than two years	Two to five years	More than five years	Total	
				%	number
Colwinston	4.6%	13.2%	82.2%	100%	174
Cowbridge with Llanblethian	13.2%	15.3%	71.5%	100%	1,938
Dinas Powys	10.6%	13.8%	75.6%	100%	3,175
Ewenny	3.6%	15.4%	81.0%	100%	307
Llancarfan	10.2%	7.8%	82.0%	100%	282
Llandough	10.4%	17.8%	71.7%	100%	854
Llandow	11.0%	12.0%	77.0%	100%	282
Llanfair	12.6%	15.2%	72.3%	100%	231
Llangan	7.9%	6.5%	85.6%	100%	277
Llanmaes	8.8%	13.3%	77.9%	100%	181
Llantwit Major	11.6%	18.6%	69.8%	100%	4,077
*Michaelston	9.9%	9.9%	80.2%	100%	132
Pendoylan	13.3%	12.0%	74.7%	100%	166
Penllyn	9.8%	19.5%	70.6%	100%	589
Peterston-super-Ely	11.1%	12.8%	76.0%	100%	360
Rhose	12.9%	20.8%	66.2%	100%	2,528
St. Athan	15.8%	17.8%	66.4%	100%	1,494
St. Brides Major	13.8%	17.2%	69.0%	100%	890
*St. Donats	23.8%	34.3%	42.0%	100%	144
St. Georges-super-Ely	4.8%	16.1%	79.2%	100%	168
St. Nicholas and Bonvilston	3.1%	21.5%	75.5%	100%	325
Sully	11.0%	22.2%	66.8%	100%	2,196
Welsh St. Donats	10.2%	14.2%	75.6%	100%	197
Wenvoe	3.7%	13.5%	82.8%	100%	802
Wick	9.0%	8.6%	82.4%	100%	301
<b>Total for the rural VoG</b>	<b>11.3%</b>	<b>17.1%</b>	<b>71.6%</b>	<b>100%</b>	<b>22,071</b>
<b>Total for the whole VoG</b>	<b>17.2%</b>	<b>19.0%</b>	<b>63.8%</b>	<b>100%</b>	<b>54,050</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

**Figure 3.3 Turnover of property: proportion of households moved in the last two years**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Summary

3.29 The household survey collected a significant amount of data about the resident household population. Some of the main findings are:

- Some 83.5% of households in the rural Vale are owner-occupiers, with 10.5% private rented and 6.0% social rented. Pendoylan and St. Athan record notably high levels of social rented households, whilst almost a third of households in St. Georges-super-Ely reside in the private rented sector.
- Some 44.3% of households in the study area reside in a detached property, much higher than the County average of 26.7%. Over half of households in Pendoylan live in a semi-detached house. The communities of Dinas Powys, Llandough, Llantwit Major and St. Athan also contain relatively few detached properties.
- Almost a third (32.5%) of households contain older person(s) only, whilst 28.5% contain children. The highest proportions of older person only households are found in Cowbridge with Llanblethian, Peterston-super-Ely and Dinas Powys, whilst Pendoylan, Welsh St. Donats and Llancafarn contain the highest proportion of households containing children.
- Overall 60.8% of households contain at least one employed person. The largest proportions of employed residents is found in Welsh St. Donats, Ewenny, Llancafarn and Penllyn with the lowest in Cowbridge with Llanblethian, Dinas Powys and Peterston-super-Ely.

- Overcrowding in the rural Vale is very low, at 0.8%, compared to the County average of 1.5%. Conversely under-occupation is higher than the figure for the Vale of Glamorgan as a whole (54.4% compared to 45.1%).
- Across the study area 17.4% of households contain a resident with support needs. Wick and St. Georges-super-Ely contain the highest proportion of households with a support need.
- Some 11.3% of households in the study area have moved to their current home in the last two years. St. Athan and St. Brides Major show the highest levels of turnover in the last two years.



## 4. Local housing market

### Introduction

- 4.1 This chapter uses data from the Land Registry to compare prices in the Vale of Glamorgan with the national average. The chapter also summarises information from an online search of estate and letting agents on the entry-level costs of housing in the rural Vale.

### Sub-regional market position

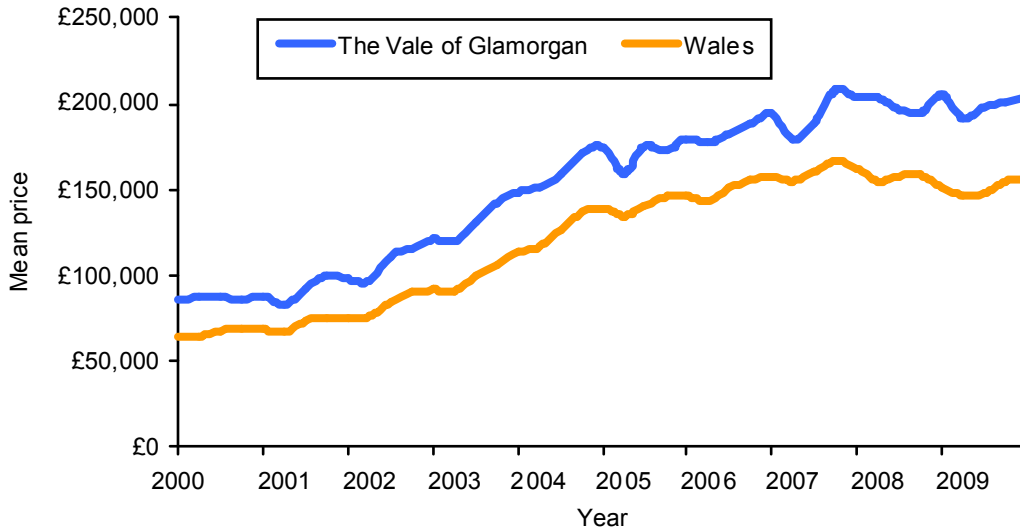
- 4.2 Table 4.1 shows average property prices in the fourth quarter of 2009 for the Vale of Glamorgan compared to the national figure. The table shows that average prices in the area are well above the national average.

Area	Average price	Comparison with Wales
Wales	£156,286	-
The Vale of Glamorgan	£203,511	+30.2%

Source: Land Registry / CLG (Q4 2009)

- 4.3 Figure 4.1 shows the change in average price in the Vale of Glamorgan over the last ten years compared with the national figures. The figure suggests that the housing market downturn has slowed the increase in property prices recorded previously but has not resulted in a sustained decrease in prices for both the Vale of Glamorgan and Wales. Over the last ten years mean prices in the Vale of Glamorgan have risen by 138.2%; nationally the figure is similar at 140.9%.

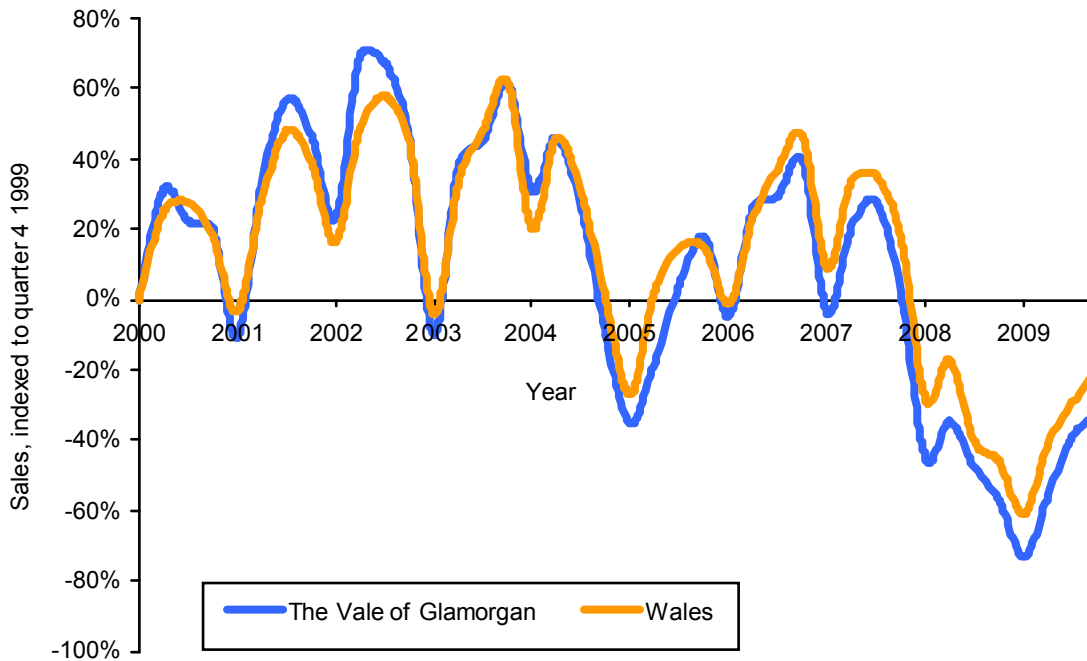
**Figure 4.1 Changes in mean residential property prices: Q4 1999 – Q4 2009**



Source: Land Registry / CLG (Q4 1999- Q4 2009)

4.4 Figure 4.2 shows the change in property sales in the Vale of Glamorgan over the last ten years compared with the national figures. The figure shows that until mid-2007 sales fluctuated according to season, however since the market downturn sales levels dropped notably and are only now showing signs of recovery. It is worth noting that the number of dwellings sold in the Vale of Glamorgan Council area in the fourth quarter of 2009 was just 404, compared to 837 in the fourth quarter of 2006.

**Figure 4.2 Changes in residential property sales: Q4 1999 – Q4 2009**



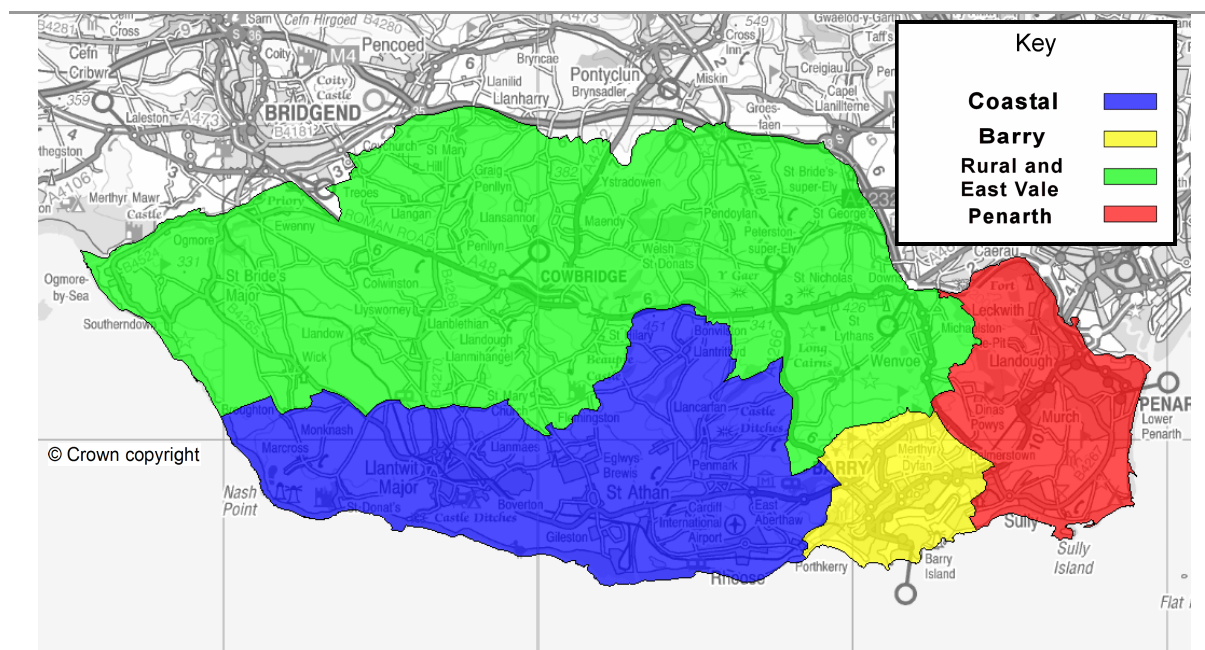
Source: Land Registry / CLG (Q1 1999- Q1 2010)



### Entry-level market costs

- 4.5 Entry-level market costs for the rural Vale were derived from an online survey of estate agents, qualified by brief face-to-face interviews with local estate and letting agents. The survey of prices covered the whole of the Vale of Glamorgan and identified four property sub-markets across the County. These are illustrated in Figure 4.3. The communities included in this study of the rural Vale are located within the sub-markets of Penarth, Coastal, and Rural and East Vale.

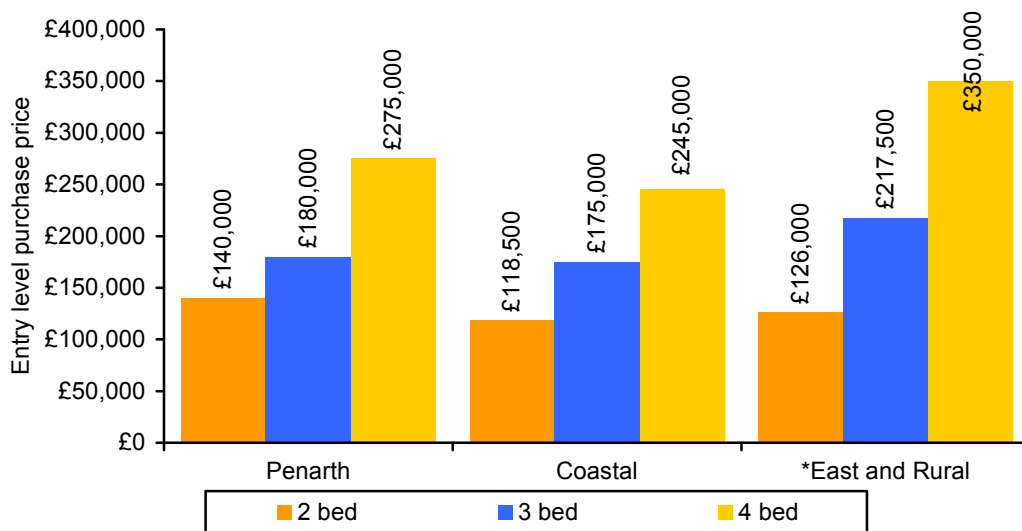
**Figure 4.3 Location of property sub-markets in the Vale of Glamorgan**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research 2010

- 4.6 For the purposes of this study, and as suggested by the Welsh Assembly Government Local Housing Market Assessment Guide, the lower quartile of properties of each bedroom size available on the market was taken to represent the entry-level price. The entry-level prices for owner-occupied property across the sub-markets of the Vale of Glamorgan are presented in Figure 4.4.
- 4.7 The figure indicates that entry-level prices in the Vale of Glamorgan range from around £118,500 for a two bedroom home in the Coastal sub-market up to £350,000 for a four bedroom property in the East and Rural sub-market. One bedroom properties to purchase were found to be in relatively short supply across the rural Vale, therefore two bedroom dwellings are considered to be the smallest property found to be widely available.

**Figure 4.4 Entry-level property prices by size and market area**



\* Small sample size for 2 and 3 bed properties in East and Rural

Source: Online estate agents survey 10.05.10

4.8 The cost of private renting was also assessed using the same method. A single rental market was found across the rural Vale and the County as a whole. The entry-level price for private rented accommodation is presented in Table 4.2. The table indicates that entry-level rents in the rural Vale range from £104 per week for a one bedroom home up to £183 per week for a four bedroom home.

Table 4.2 Entry-level rents in the Vale of Glamorgan 2010	
Accommodation size	Weekly rent
1 bedroom	£104
2 bedrooms	£115
3 bedrooms	£144
4 bedrooms	£183

Source: Online survey of rental levels 10.05.10

### Affordable housing

4.9 To complete the housing cost profile in the local market it is appropriate to present information on the cost of social rented housing. The cost of social rented accommodation by property size in the Vale of Glamorgan can be obtained from the Council's WHO15 return. Table 4.3 illustrates the rental cost for lettings to new social rented properties in the Vale of Glamorgan in 2008/09.

Table 4.3 Social rented cost in the Vale of Glamorgan			
Bedrooms	2009 rent		
	RSL	LA	Overall
1 bed	£57	£60	£59
2 bed	£63	£63	£63
3 bed	£70	£67	£70
4+ bed	£82	£67	£72

Source: Welsh Housing Statistics

### Comparison of prices

- 4.10 Tables 4.4 to 4.6 show a comparison of the entry-level costs of buying and renting in each sub-market for the Vale of Glamorgan, by presenting the cost as a weekly figure. The price to purchase a home is converted into a weekly cost to permit comparison with rental costs. This is done by applying the median fixed rate available for mortgages currently to the cost of the home to derive the weekly payment required.
- 4.11 The price of intermediate housing is based on the mid-point between the cost of social rented and the cost of entry-level market housing. This is referred to as the 'usefully affordable' point, as it represents a cost at which it is feasible to produce intermediate housing that will be affordable to a reasonable proportion of households unable to access the market, therefore providing a genuine step on the housing ladder. The intermediate housing can be rented or an ownership product as long as the weekly cost to the occupier meets the 'usefully affordable' point. The current HomeBuy units proposed on Barry Waterfront at 70% ownership share are considered affordable as they are available at a weekly cost lower than entry-level private rent<sup>2</sup> (although they are not as low as the usefully affordable point).

<sup>2</sup> One bedroom unit priced at £90,000 with a weekly cost of £83 for the first five years and £92 thereafter, two bedroom unit priced at £110,000 with a weekly cost of £99 for the first five years and £110 thereafter, three bedroom unit priced at £145,000 with a weekly cost of £126 for first the five years and £141 thereafter, four bedroom unit priced at £170,000 with a weekly cost of £147 for the first five years and £164 thereafter. Costs based on 70% equity share and nothing payable on the remaining value for the first five year with interest of 1.75% payable on the remaining value thereafter.

**Table 4.4 Weekly entry-level costs of housing in the rural Vale:  
Penarth sub-market**

	<i>Social rent</i>	<i>Intermediate</i>	<i>Private rent</i>	<i>Buy (resale)</i>
1 bed	£59	£82	£104	£173
2 bed	£63	£89	£115	£173
3 bed	£70	£107	£144	£222
4 bed	£72	£133	£183	£340

Sources: Social rent: Welsh Housing Statistics (2008/09)

Private rent & buy: Online survey of prices and rental levels 10.05.10, Fordham Research (2010)

**Table 4.5 Weekly entry-level costs of housing in the rural Vale:  
Coastal sub-market**

	<i>Social rent</i>	<i>Intermediate</i>	<i>Private rent</i>	<i>Buy (resale)</i>
1 bed	£59	£82	£104	£146
2 bed	£63	£89	£115	£146
3 bed	£70	£107	£144	£216
4 bed	£72	£133	£183	£303

Sources: Social rent: Welsh Housing Statistics (2008/09)

Private rent & buy: Online survey of prices and rental levels 10.05.10, Fordham Research (2010)

**Table 4.6 Weekly entry-level costs of housing in the rural Vale:  
East and Rural sub-market**

	<i>Social rent</i>	<i>Intermediate</i>	<i>Private rent</i>	<i>Buy (resale)</i>
1 bed	£59	£82	£104	£156
2 bed	£63	£89	£115	£156
3 bed	£70	£107	£144	£269
4 bed	£72	£133	£183	£432

Sources: Social rent: Welsh Housing Statistics (2008/09)

Private rent & buy: Online survey of prices and rental levels 10.05.10, Fordham Research (2010)

## Summary

- 4.12 Information from the Land Registry indicates that the average sale price of a dwelling in the Vale of Glamorgan was £124,848 in the fourth quarter of 2009, above the national average. Although prices have not yet recorded a large decrease in response to the economic downturn, the number of dwellings sold is still small compared to historic levels.
- 4.13 Three price markets were identified for owner-occupation in the rural Vale. It was found that entry-level prices ranged around £118,500 for a two bedroom home in the Coastal sub-market up to £350,000 for a four bedroom property in the East and Rural sub-market. Entry-level rents in the private sector varied from £104 per week for a one bedroom home up to £183 per week for a four bedroom property. Social rents were significantly lower than this at an average of £59 per week for a one bedroom property rising to £72 for a four bedroom property.



## 5. Financial information

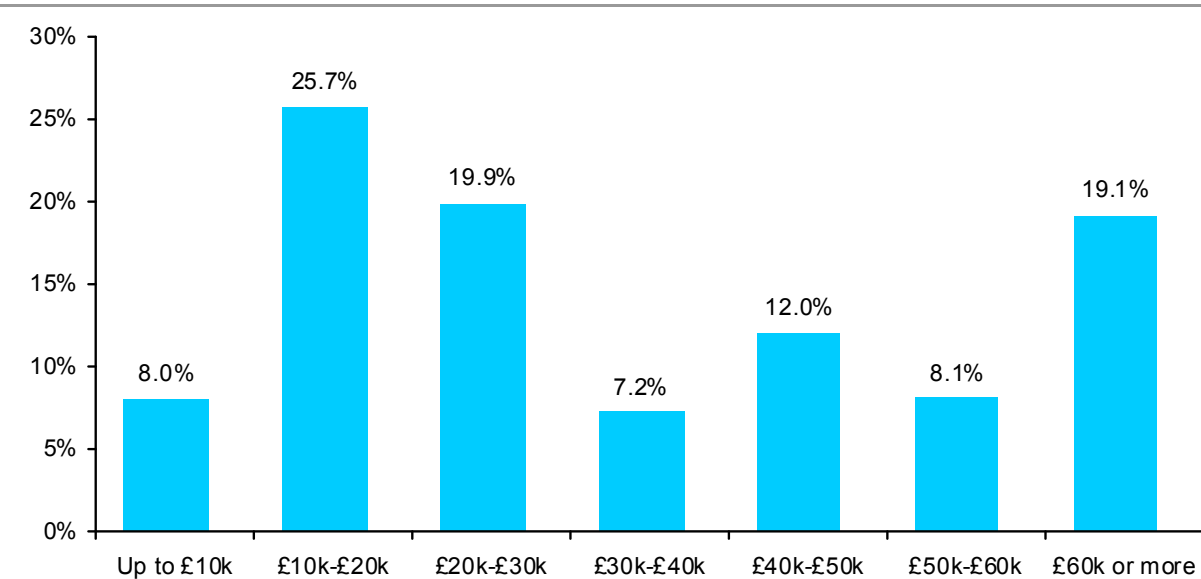
### Introduction

- 5.1 A key component of the housing needs assessment model is a detailed profile of the financial situation of households. Data was therefore collected in the survey looking at a range of financial information. This chapter contains the analysis of the survey results with regard to households' financial situation.

### Household income

- 5.2 The response to the survey income question was good with 84.3% of respondents answering this question. Survey results for household income in the rural Vale estimate the median annual household income to be £28,637 per annum, excluding any housing related benefits. The mean figure is £37,402. It is worth noting that households containing at least one person in current employment have a median income of £38,623. Figure 5.1 shows the distribution of income among households in the study area.

**Figure 5.1 Distribution of gross household income**



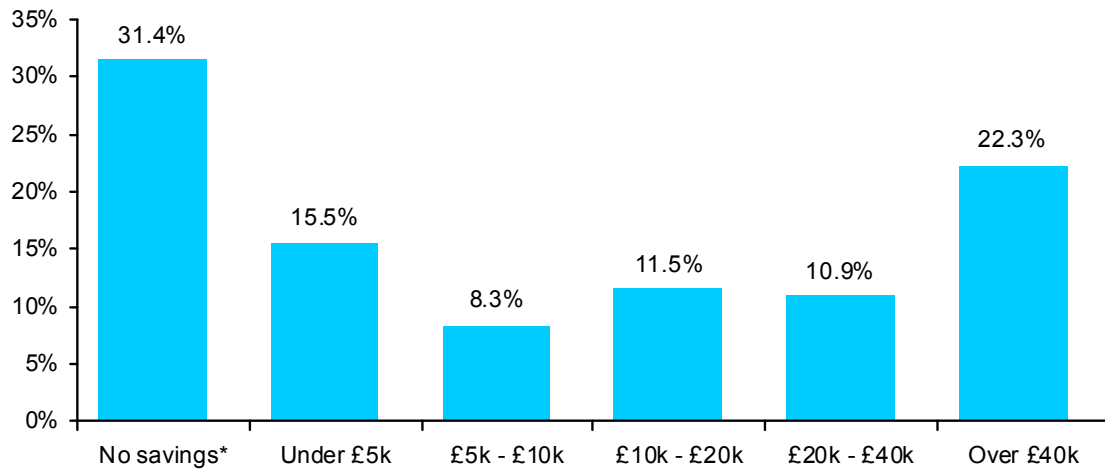
Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Household savings and equity

- 5.3 The response to the survey savings/debt question was also good with 78.9% of respondents answering this question. The median level of household savings is £6,951, with the mean figure much higher at £43,940. Figure 5.2 shows the distribution of savings in the rural Vale.

5.4 It can be seen that a large number of households have no savings, but that those that do frequently have access to a significant amount.

**Figure 5.2 Distribution of household savings**



\*Includes households in debt

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

5.5 The survey also collected information about the amount of equity owner-occupiers have in their property. The median amount of equity that all owner-occupiers (both those with and without mortgages) have is estimated to be £183,233. The mean value is £222,447. Among owner-occupied households in the rural Vale about 1.1% (204) were found to be in negative equity.

### Household characteristics and income

5.6 Table 5.1 shows median income, savings/debt and equity by tenure. Households in the social rented sector record the lowest median incomes and social rented and private rented households both record very low median savings. Whilst owner-occupiers with no mortgage have an average household income considerably lower than those with a mortgage, this group contains many older people who are not working but have redeemed their mortgages. These households therefore have much higher levels of savings and equity.

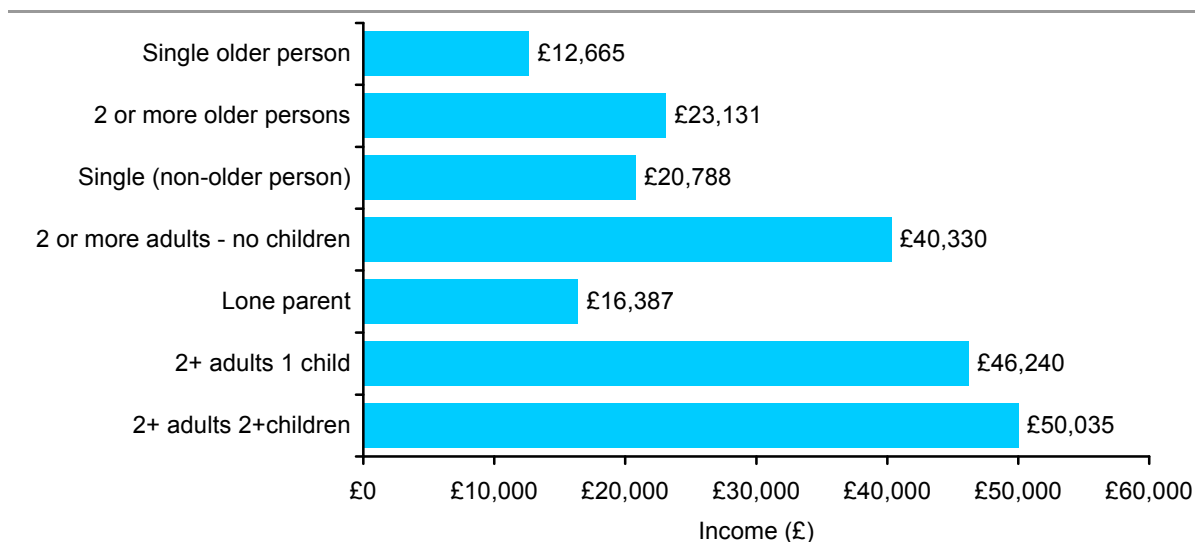


**Table 5.1 Household financial information by tenure**

<i>Tenure</i>	<i>Median income</i>	<i>Median savings/debt</i>	<i>Median equity</i>
Owner-occupied (no mortgage)	£23,961	£34,540	£242,094
Owner-occupied (with mortgage)	£42,676	£2,551	£115,898
Social rented	£10,775	£53	-
Private rented	£20,395	£200	-
All households	£28,637	£6,951	£183,233

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

- 5.7 Figure 5.3 looks at median incomes by household type. As might be expected, households containing two or more adults of working age have by far the highest incomes. Households containing single older people have the lowest incomes, although lone parent households also typically have lower incomes than average.

**Figure 5.3 Median incomes by household type**

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Geographical variation in financial situation

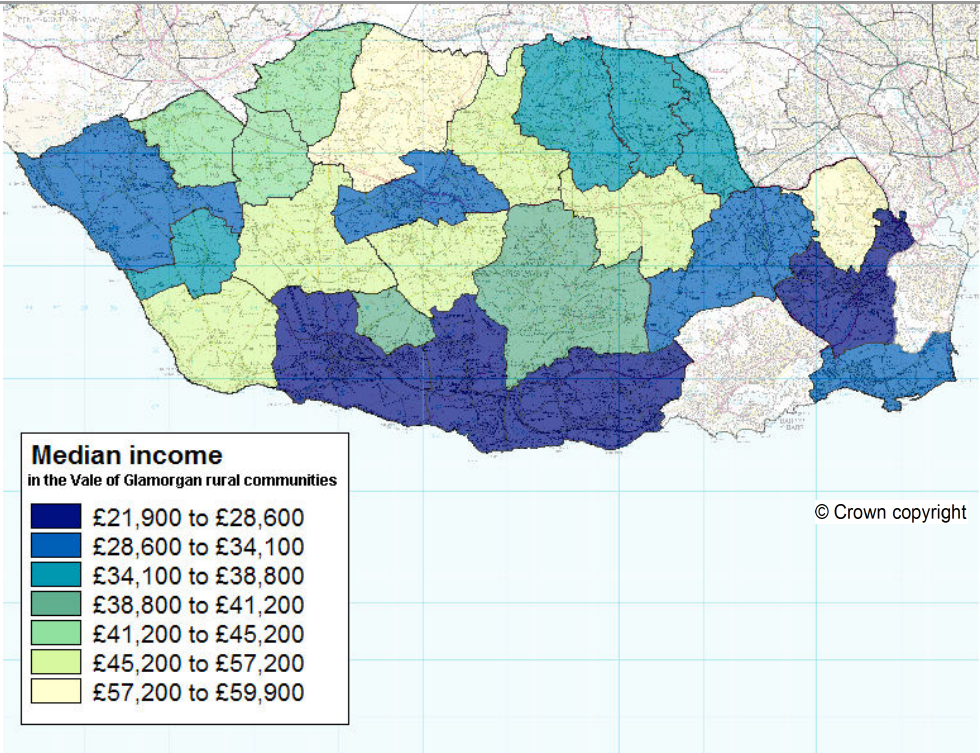
- 5.8 Table 5.2 shows how median household income, savings/debt and equity (of owner-occupiers) vary by community within the study area. Figures 5.4 and 5.5 show this information on a map. The data shows that the communities of Penllyn and Welsh St. Donats record the highest average household incomes and St. Athan and Llandough the lowest.
- 5.9 The highest median savings are recorded in the communities of Peterston-super-Ely and Llandow with the lowest in St. Athan. Owner-occupiers in the community of Llancarfan recorded the highest median equity, whilst those in St. Athan recorded the lowest.

**Table 5.2 Household financial information by community**

<i>Community</i>	<i>Median income</i>	<i>Median savings/debt</i>	<i>Median equity of owner-occupiers</i>
Colwinston	£41,969	£31,655	£367,587
Cowbridge with Llanblethian	£31,764	£21,759	£274,634
Dinas Powys	£26,127	£8,583	£164,622
Ewenny	£41,239	£23,792	£261,729
Llancarfan	£38,847	£15,981	£415,075
Llandough	£23,772	£2,287	£137,942
Llandow	£47,974	£33,099	£376,436
Llanfair	£48,403	£28,692	£298,428
Llangan	£41,210	£6,181	£232,242
Llanmaes	£39,029	£20,299	£248,364
Llantwit Major	£24,070	£3,798	£142,334
*Michaelston	£57,279	£54,004	£390,008
Pendoylan	£36,348	£12,056	£318,165
Penllyn	£59,834	£28,029	£341,675
Peterston-super-Ely	£35,154	£34,239	£314,088
Rhose	£25,045	£2,039	£130,964
St. Athan	£21,964	£624	£84,844
St. Brides Major	£32,514	£15,703	£228,322
*St. Donats	£45,510	£25,405	£329,129
St. Georges-super-Ely	£34,108	£7,754	£301,572
St. Nicholas and Bonvilston	£45,216	£27,691	£338,151
Sully	£28,613	£10,078	£170,810
Welsh St. Donats	£52,058	£23,118	£284,916
Wenvoe	£30,397	£12,107	£221,569
Wick	£34,459	£5,015	£209,868
<b>Total for the rural VoG</b>	<b>£28,637</b>	<b>£6,951</b>	<b>£183,233</b>
<b>Total for the whole VoG</b>	<b>£22,858</b>	<b>£2,682</b>	<b>£153,534</b>

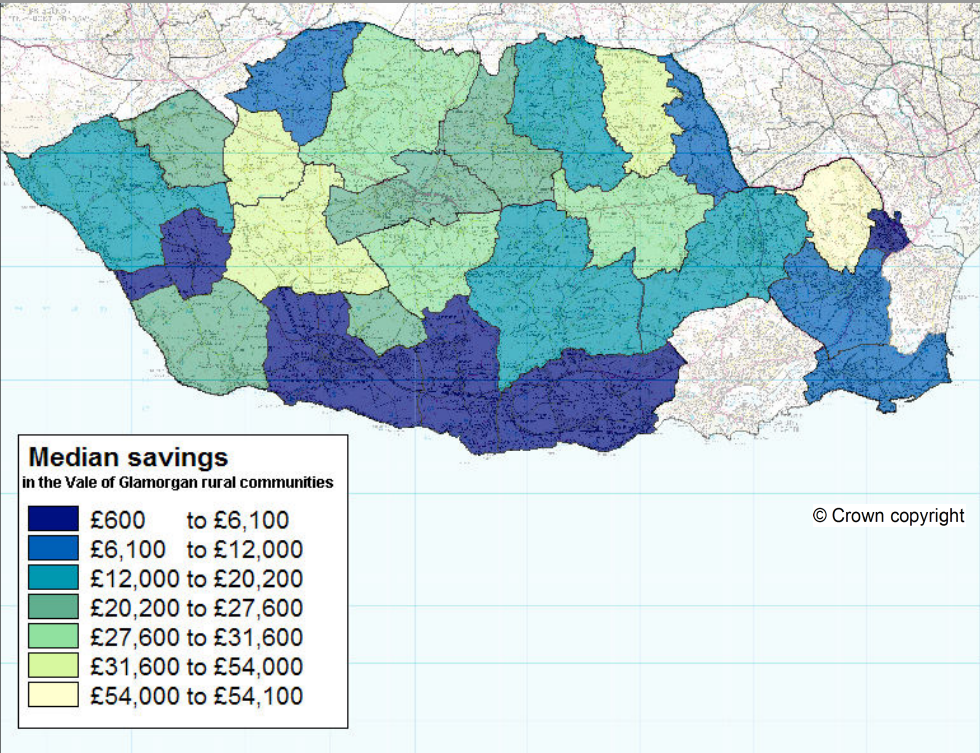
Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Figure 5.4 Median household income in the rural Vale



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Figure 5.5 Median household savings/debt in the rural Vale



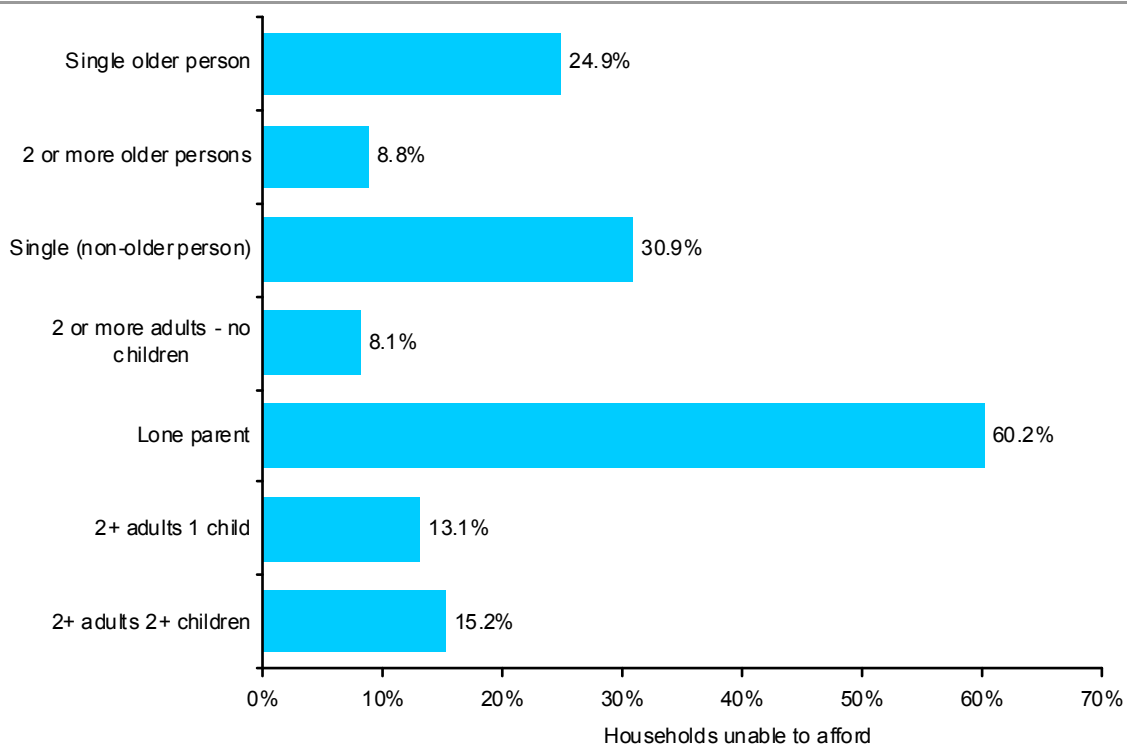
Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Other financial information

- 5.10 In addition to the information collected about income, savings/debt and equity the survey form asked households whether they have access to any other financial resources which might be able to be used towards a deposit on a property (and if so – how much). The great majority of households in the rural Vale (83.1%) stated that they had no further access to financial resources other than those already analysed.
- 5.11 Despite the majority having no access to financial resources, the minority that do have access to a median level of £35,719 from sources other than savings and equity (e.g. borrowing from relatives), and about 1,827 households have more than £50,000 available. It is therefore possible that such additional funds will be able to help a small number of households in the rural Vale to afford suitable market housing without the need for any subsidy.

## Assessing the ability to afford housing

- 5.12 This information on the full financial situation is necessary to accurately assess the ability of households to afford market accommodation in the rural Vale. This financial information is used alongside data on the cost of entry-level housing in the study area (presented in the previous chapter) to examine the ability of households to afford an appropriately sized market property based on the affordability criteria set out in the Welsh Assembly Government Local Housing Market Assessment Guide (and presented in the glossary).
- 5.13 All households are tested for their ability to afford either a mortgage or private rented housing in the local area. These two measures are then combined to estimate the number of households unable to afford either form of private sector housing. Overall it is estimated that 17.4% of households within the rural Vale would be unable to afford market accommodation if they were to move now.
- 5.14 Figure 5.6 shows the current affordability of households by household type. This is the theoretical affordability of households as the analysis considers all households in the study area and does not take into account their intention of moving.
- 5.15 The data indicates that 60.2% of lone parent households in the rural Vale would be unable to afford market housing (if they were to move home now). Single person households are also relatively unlikely to be able to afford market housing. Households that contain two or more adults and no children are most likely to be able to afford market housing in the study area.

**Figure 5.6 Theoretical affordability of market housing in the rural Vale**

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

5.16 Table 5.3 shows the current affordability of households by community. The data indicates that all households in Welsh St. Donats would be able to afford market housing in the rural Vale were they to move now with affordability being also good in a number of other small communities. Some 38.9% of households in St. Athan would be unable to afford a market home if they were to move home now with over 20% of households in the communities of Pendoylan, Llantwit Major, St. Georges-super-Ely, Rhose and Llandough also unable to afford.

<b>Table 5.3 Theoretical affordability of market housing by community</b>			
<i>Community</i>	<i>Number of households unable to afford market housing</i>	<i>All households</i>	<i>Proportion unable to afford market housing</i>
Colwinston	6	174	3.6%
Cowbridge with Llanblethian	208	1,938	10.7%
Dinas Powys	531	3,175	16.7%
Ewenny	11	307	3.7%
Llancarfan	13	282	4.4%
Llandough	174	854	20.3%
Llandow	17	282	5.9%
Llanfair	11	231	4.6%
Llangan	6	277	2.0%
Llanmaes	15	181	8.4%
Llantwit Major	976	4,077	23.9%
*Michaelston	5	132	4.1%
Pendoylan	44	166	26.7%
Penllyn	50	589	8.6%
Peterston-super-Ely	15	360	4.2%
Rhosee	562	2,528	22.2%
St. Athan	580	1,494	38.9%
St. Brides Major	106	890	11.9%
*St. Donats	17	144	12.0%
St. Georges-super-Ely	39	168	23.0%
St. Nicholas and Bonvilston	28	325	8.5%
Sully	306	2,196	13.9%
Welsh St. Donats	0	197	0.0%
Wenvoe	82	802	10.2%
Wick	42	301	14.0%
<b>Total for the rural VoG</b>	<b>3,844</b>	<b>22,071</b>	<b>17.4%</b>
<b>Total for the whole VoG</b>	<b>13,816</b>	<b>54,050</b>	<b>25.6%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Summary

- 5.17 Median annual gross household income (including non-housing benefits) in the rural Vale was found to be £28,637, rising to £38,623 when considering only households containing at least one employed person. The average conceals a wide variation, with 8.0% of households having a total income of less than £10,000.
- 5.18 Savings vary similarly; although the median level of savings/debt in the rural Vale is £6,951, 22.3% of households have more than £40,000 in savings available to them.

## 6. Housing need

### Introduction

- 6.1 Housing need is a term first used in the mid-1990s to help provide a means-tested estimate of the requirement for affordable housing in an area. The annex to TAN2 (June 2006) defines housing need as *'households lacking their own housing or living in housing which is judged to be inadequate or unsuitable, who are unlikely to be able to meet their needs in the housing market without some financial assistance.'*
- 6.2 This chapter presents the results of the four stages of the needs assessment table. The four stages identified in the Welsh Assembly Government Local Housing Market Assessment Guide are: current need, available stock to offset need, newly arising need and supply of affordable units. Each will be dealt with individually. Within each of the four stages there are a number of detailed calculations (22 in total), many of which themselves have a number of components. This chapter will calculate the size of the housing need in the rural Vale, as well as considering the types of households in need and their ability to afford intermediate housing. Where possible, information is presented at community level.

### Stage 1: Current need (gross)

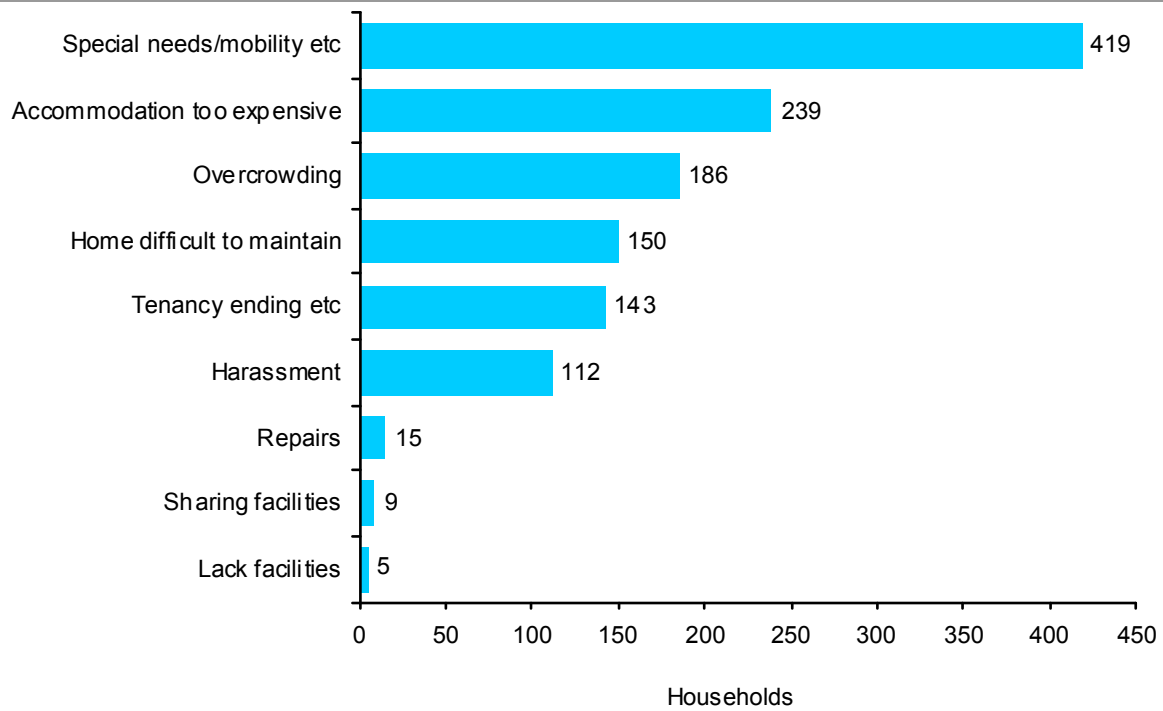
- 6.3 This section considers current need: the first stage of the housing needs assessment model. This includes an assessment of housing suitability and affordability and also considers homeless households before arriving at a total current need estimate (gross).

#### ***Unsuitable housing***

- 6.4 A key element of housing need is an assessment of the suitability of a household's current housing. The Welsh Assembly Government Local Housing Market Assessment Guide sets out a series of nine criteria for unsuitable housing – which has been followed in this report. In the rural Vale it is estimated that a total of 997 households are living in unsuitable housing (this represents 4.5% of all households in the study area).
- 6.5 Figure 6.1 shows a summary of the numbers of households living in unsuitable housing (ordered by the number of households in each category). It should be noted that the overall total of reasons for unsuitability shown in the figure is greater than the total number of households with unsuitability, as some households have more than one reason for unsuitability. The main reason for unsuitable housing is 'special needs/mobility' followed by 'accommodation too expensive'.



**Figure 6.1 Summary of unsuitable housing categories**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

6.6 Tables 6.1 and 6.2 show the number of households in each community in each of the nine unsuitable housing categories, followed by the total number and percentage of unsuitably housed households. Llantwit Major has the highest number of unsuitably housed households, whilst Wick and Ewenny have the highest levels of unsuitable housing. There were no unsuitably housed households in the community of St. Georges-super-Ely.



Table 6.1 Unsuitable housing and community						
<i>Community</i>	<i>Tenancy ending etc</i>	<i>Too expensive</i>	<i>Over-crowding</i>	<i>Difficult to maintain</i>	<i>Sharing facilities</i>	<i>Special needs</i>
Colwinston	0	0	0	0	0	4
Cowbridge with Llanblethian	5	11	10	7	0	9
Dinas Powys	0	19	3	16	0	62
Ewenny	0	9	0	0	0	22
Llancarfan	0	0	5	3	0	0
Llandough	9	6	16	6	0	5
Llandow	0	4	0	0	0	0
Llanfair	4	4	0	0	0	10
Llangan	0	0	0	0	0	4
Llanmaes	0	4	0	7	0	0
Llantwit Major	25	52	13	0	4	64
*Michaelston	0	0	9	0	0	0
Pendoylan	13	0	0	0	0	0
Penllyn	3	19	0	0	0	27
Peterston-super-Ely	0	0	0	0	0	0
Rhosee	0	7	59	15	0	72
St. Athan	53	45	19	33	0	52
St. Brides Major	0	15	6	25	0	17
*St. Donats	0	7	0	0	0	10
St. Georges-super-Ely	0	0	0	0	0	0
St. Nicholas and Bonvilston	0	4	5	0	0	0
Sully	19	27	34	12	5	37
Welsh St. Donats	0	0	0	0	0	5
Wenvoe	11	7	0	5	0	12
Wick	0	0	6	21	0	7
<b>Total for the rural VoG</b>	<b>143</b>	<b>239</b>	<b>186</b>	<b>150</b>	<b>9</b>	<b>419</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Table 6.2 Unsuitable housing and community cont'd

Community	Lack facilities	Repairs	Harassment	No. unsuitably housed	Total no. of households	% unsuitably housed
Colwinston	0	0	0	4	174	2.3%
Cowbridge with Llanblethian	0	0	0	43	1,938	2.2%
Dinas Powys	0	4	16	86	3,175	2.7%
Ewenny	0	0	0	30	307	9.9%
Llancarfan	0	0	0	7	282	2.6%
Llandough	0	0	0	28	854	3.2%
Llandow	0	0	0	4	282	1.5%
Llanfair	0	0	0	10	231	4.4%
Llangan	0	0	0	4	277	1.4%
Llanmaes	0	0	0	7	181	4.1%
Llantwit Major	0	0	11	146	4,077	3.6%
*Michaelston	0	0	0	9	132	7.0%
Pendoylan	0	0	0	13	166	7.8%
Penllyn	0	0	0	49	589	8.4%
Peterston-super-Ely	0	0	0	0	360	0.0%
Rhosee	0	0	38	176	2,528	7.0%
St. Athan	0	0	41	126	1,494	8.4%
St. Brides Major	0	11	6	44	890	5.0%
*St. Donats	0	0	0	18	144	12.3%
St. Georges-super-Ely	0	0	0	0	168	0.0%
St. Nicholas and Bonvilston	5	0	0	14	325	4.2%
Sully	0	0	0	105	2,196	4.8%
Welsh St. Donats	0	0	0	5	197	2.7%
Wenvoe	0	0	0	35	802	4.4%
Wick	0	0	0	31	301	10.4%
<b>Total for the rural VoG</b>	<b>5</b>	<b>15</b>	<b>112</b>	<b>997</b>	<b>22,071</b>	<b>4.5%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### ***'In-situ' solutions***

- 6.7 The survey has highlighted that 997 households are in unsuitable housing. However it is most probable that some of the unsuitability can be resolved in the households' current accommodation. Households living in housing deemed unsuitable for the following reasons were not considered to have an in-situ solution: end of tenancy, accommodation too expensive, overcrowding, sharing facilities, harassment.
- 6.8 The survey data therefore estimates that of the 997 households in unsuitable housing, 576 (or 57.8%) do not have an in-situ solution and therefore require a move to alternative accommodation.

**Affordability**

- 6.9 These 576 households in unsuitable housing and requiring a move to alternative accommodation are tested for their ability to afford market housing in the area. Overall 64.8% (373 households) are unable to afford market housing. These 373 households that cannot afford market housing and are living in unsuitable housing (and require a move to alternative accommodation) are considered to be in housing need. This represents 1.7% of all existing households in the rural Vale.
- 6.10 For the purposes of the housing needs assessment (specifically stage 2.1), the number of households considered to be in housing need who are current occupiers of affordable housing (this includes occupiers of social rented and shared ownership accommodation) is required. It is estimated that some 82 households in need currently live in affordable housing.
- 6.11 Table 6.3 shows the number of households by community for each of the steps outlined in paragraphs 6.7 to 6.10. There were found to be households in current need in 14 of the 25 communities, with Pendoylan containing the largest proportion of households in current need. The remaining 11 communities were not found to contain any households in current need, i.e. they did not contain any unsuitably housed households without an in-situ solution who could not afford market housing (the test described above).

**Table 6.3 Households in current need by community**

<i>Community</i>	<i>No. unsuitably housed</i>	<i>No. without in situ sol'n</i>	<i>No. in need</i>	<i>No. In need in affordable h'ing*</i>	<i>Total no. of households</i>	<i>% in need</i>
Colwinston	4	0	0	0	174	0.0%
Cowbridge with Llanblethian	43	27	22	0	1,938	1.1%
Dinas Powys	86	34	30	27	3,175	0.9%
Ewenny	30	9	0	0	307	0.0%
Llancarfan	7	5	5	0	282	1.8%
Llandough	28	23	0	0	854	0.0%
Llandow	4	4	4	0	282	1.4%
Llanfair	10	4	4	0	231	1.7%
Llangan	4	0	0	0	277	0.0%
Llanmaes	7	4	0	0	181	0.0%
Llantwit Major	146	96	54	16	4,077	1.3%
*Michaelston	9	9	0	0	132	0.0%
Pendoylan	13	13	13	0	166	7.8%
Penllyn	49	23	15	0	589	2.5%
Peterston-super-Ely	0	0	0	0	360	0.0%
Rhose	176	103	75	17	2,528	3.0%
St. Athan	126	88	74	7	1,494	5.0%
St. Brides Major	44	20	15	0	890	1.7%
*St. Donats	18	7	0	0	144	0.0%
St. Georges-super-Ely	0	0	0	0	168	0.0%
St. Nicholas and Bonvilston	14	9	9	9	325	2.8%
Sully	105	75	48	0	2,196	2.2%
Welsh St. Donats	5	0	0	0	197	0.0%
Wenvoe	35	18	0	0	802	0.0%
Wick	31	6	6	6	301	2.0%
<b>Total for the rural VoG</b>	<b>997</b>	<b>576</b>	<b>373</b>	<b>82</b>	<b>22,071</b>	<b>1.7%</b>

\*Required for step 2.1 of the model

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### **Homeless households**

- 6.12 The assessment of housing need is a 'snapshot' that assesses housing need at a particular point in time. There will, in addition to the existing households in need, be some homeless households who were in need at the time of the survey and should also be included within any assessment of current need.

- 6.13 To assess the number of homeless households we have used information contained in the WHO12 returns – Table 7: ‘Homeless households accommodated by your authority at the end of the Quarter’. This is important given the snapshot nature of the survey.
- 6.14 Data from the Council’s WHO12 return from the fourth quarter of 2009-10 (Jan-March 2010) indicates that there were 41 homeless households in housing stock that does not form part of the Council Tax Register on which the household survey was based (hostels, refuges, bed and breakfast accommodation). Applying this pro-rata suggests that in the rural Vale there are 17 households in temporary accommodation who should be counted as additional need for the purpose of the Housing Needs Assessment.

### **Total current need (gross)**

- 6.15 Table 6.4 summarises the first stage of the overall assessment of housing need as set out by the Welsh Assembly Government Local Housing Market Assessment Guide. Step 1 is the number of existing households in unsuitable housing without an in-situ solution identified in paragraph 6.8. Step 2 is the number of homeless households requiring affordable accommodation set out in paragraph 6.14. Step 3 is the number of existing households in unsuitable housing without an in-situ solution that can afford market accommodation and is implied in paragraph 6.9 (576-373). Step 4 is the sum of steps 1 and 2, with step 3 deducted. Step four data shows that there are an estimated 390 households in need.

<b>Table 6.4 Stage 1: Current housing need (gross)</b>		
<i>Step</i>	<i>Notes</i>	<i>Output</i>
1. Existing households in need of accommodation		576
2. <i>Plus</i> current non-households in need of affordable housing		17
3. <i>Minus</i> cases where they can afford to meet their need in the market		203
<b>4. Equals total current housing need (gross)</b>	<b>1+2-3</b>	<b>390</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### **Stage 2: Available stock to offset need**

- 6.16 Stage 2 considers the stock available to offset the current need. This includes stock from current occupiers of affordable housing in need, surplus stock from vacant properties and committed supply of new affordable units. Units to be taken out of management are then deducted.

### ***Affordable dwellings occupied by households in need***

- 6.17 It is important when considering net need levels to discount households already living in affordable housing. This is because the movement of such households within affordable housing will have an overall nil effect in terms of housing need. As stated in paragraph 6.10, there are currently 82 households in need already living in affordable housing in the rural Vale. (The number of households in need in affordable housing in each community is provided in Table 6.3).

### ***Surplus stock***

- 6.18 A certain level of vacant dwellings is normal as this allows for transfers and for work on properties to be carried out. The Welsh Assembly Government Local Housing Market Assessment Guide suggests that if the vacancy rate in the affordable stock is in excess of 3% then these should be considered as surplus stock which can be included within the supply to offset needs. The most recent data from Data Unit Wales (March 2009) records a vacancy rate across the County of 1.7% in the Council rented stock and 1.0% for RSL stock. It is presumed that the vacancy rate for the social rented stock in the rural Vale is also below 3% and therefore no supply will be considered from this source.

### ***Committed supply of new affordable units***

- 6.19 The Welsh Assembly Government Local Housing Market Assessment Guide recommends that this part of the assessment includes '*new social rented and intermediate housing which are already planned to be built over the time period of the assessment*'. The October 2009 Vale of Glamorgan Council Affordable Housing Delivery Statement will be used to inform this step of the model. This suggests that the existing planned affordable housing developments will deliver 16 units in the rural Vale, therefore a figure of 16 has been used in this step of the model. The Affordable Housing Delivery Statement also indicates that all 16 units will be provided in the community of St. Athan.

### ***Units to be taken out of management***

- 6.20 The Welsh Assembly Government Local Housing Market Assessment Guide states that this stage '*involves estimating the numbers of social rented or intermediate units that will be taken out of management*'. The main component of this step will be properties which are expected to be demolished (or replacement schemes that lead to net losses of stock). The Council have indicated that there are three affordable units to be demolished in the rural Vale. In terms of the location of these three units, one is in the community of Cowbridge with Llanblethian, one is in Dinas Powys and one is in Rhose.

### ***Total available stock to offset current need***

- 6.21 Having been through a number of detailed stages in order to assess the total available stock to offset need in the rural Vale we shall now bring together all pieces of data to complete Stage 2 of the needs assessment table set out in the Welsh Assembly Government Local Housing Market Assessment

Guide. The data shows that there are an estimated 95 properties available to offset the current need (see step 9).

- 6.22 The current level of net need is calculated in steps 10-12 of the needs assessment table. Step 10 removes the estimate of available stock to offset need (step 9) from the total number of households in current need (step 4); the net need level is 295 dwellings (step 10). However, the Welsh Assembly Government Local Housing Market Assessment Guide recommends that current need is addressed over a five-year period, hence this figure has been divided by five (step 11) to give a figure of 59. This figure of 59 is the number of affordable units required per year to reduce current need.

Table 6.5 Stage 2: Available stock to offset need		
Step	Notes	Output
5. Current occupiers of affordable housing in need		82
6. <i>Plus</i> surplus stock		0
7. <i>Plus</i> committed supply of new affordable units		16
8. <i>Minus</i> planned units to be taken out of management		3
9. <i>Equals</i> total stock available to meet current need	5+6+7-8	95
<b>10. <i>Equals</i> total current need (net)</b>	<b>4-9</b>	<b>295</b>
11. <i>Times</i> annual quota for the reduction of current need		20%
12. <i>Equals</i> annual requirement of units to reduce current need	10×11	59

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010); various secondary sources

- 6.23 Table 6.6 summarises the elements of Stage 2 at a community level. Rhose and St. Athan contain the highest number of households in current need. In 13 of the 25 communities there are no households found to be in current need.

Table 6.6 Stage 2 summary by community

<i>Community</i>	<i>Current occupiers of affordable housing in need</i>	<i>Committed supply of new affordable units</i>	<i>Planned units to be taken out of management</i>	<i>Total stock available to meet current need</i>	<i>Total current need* (net)</i>	<i>Annual requirement of units to reduce current need</i>
Colwinston	0	0	0	0	0	0
Cowbridge with Llanblethian	0	0	1	-1	24	5
Dinas Powys	27	0	1	26	5	1
Ewenny	0	0	0	0	0	0
Llancarfan	0	0	0	0	5	1
Llandough	0	0	0	0	0	0
Llandow	0	0	0	0	4	1
Llanfair	0	0	0	0	4	1
Llangan	0	0	0	0	0	0
Llanmaes	0	0	0	0	0	0
Llantwit Major	16	0	0	16	40	8
*Michaelston	0	0	0	0	0	0
Pendoylan	0	0	0	0	14	3
Penllyn	0	0	0	0	16	3
Peterston-super-Ely	0	0	0	0	0	0
Rhose	17	0	1	16	62	12
St. Athan	7	16	0	23	54	11
St. Brides Major	0	0	0	0	16	3
*St. Donats	0	0	0	0	0	0
St. Georges-super-Ely	0	0	0	0	0	0
St. Nicholas and Bonvilston	9	0	0	9	0	0
Sully	0	0	0	0	50	10
Welsh St. Donats	0	0	0	0	0	0
Wenvoe	0	0	0	0	0	0
Wick	6	0	0	6	0	0
<b>Total for the rural VoG</b>	<b>82</b>	<b>16</b>	<b>3</b>	<b>95</b>	<b>295</b>	<b>59</b>

\*The 17 homeless households in current need in the rural Vale (step 2) have been assumed to be located in the same location as other households in current need to calculate the distribution of gross need (step 4) at a community level.

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010); various secondary sources



### Stage 3: Newly arising need

- 6.24 In addition to the current needs discussed so far in this chapter there will be future (or newly arising) need. This is split into two main categories; newly forming households (× proportion unable to buy or rent in market) and existing households falling into need.

#### ***New household formation***

- 6.25 The estimate of the number of newly forming households in need of affordable housing is based on an assessment of households that have formed over the past two years. Such an approach is preferred to studying households stating likely future intentions as it provides more detailed information on the characteristics of these households contributing to this element of newly arising need.
- 6.26 An estimated 2,490 households moved in the rural Vale within the last two years (1,245 per annum), of which 179 (per annum) were newly forming households. Of these 179 newly forming households, it is estimated that 85 households per annum (47.5%) were unable to afford market housing without some form of subsidy – this represents the annual estimate of the number of newly forming households falling into need. The affordability profile presented is based on assessing each household that is potentially in need for their ability to afford market accommodation of an appropriate size using the information for their particular financial circumstances.
- 6.27 This information is shown at community level in Table 6.7. As the sample of households potentially in need is small in some communities the affordability percentages at community level should be treated with caution. St. Athan has the largest number of newly forming households in need. In 19 of the 25 communities, the survey identified no newly forming households in need.

**Table 6.7 Newly arising need from newly forming households (per annum) by community**

<i>Community</i>	<i>No. of moving households</i>	<i>No. who were newly-forming households</i>	<i>% unable to afford</i>	<i>No. in need</i>
Colwinston	4	0	-	0
Cowbridge with Llanblethian	128	9	0.0%	0
Dinas Powys	168	27	55.6%	15
Ewenny	6	0	-	0
Llancarfan	14	0	-	0
Llandough	45	4	0.0%	0
Llandow	15	9	0.0%	0
Llanfair	15	0	-	0
Llangan	11	0	-	0
Llanmaes	8	0	-	0
Llantwit Major	237	35	37.1%	13
*Michaelston	7	0	-	0
Pendoylan	11	0	-	0
Penllyn	29	14	85.7%	12
Peterston-super-Ely	20	0	-	0
Rhose	163	31	32.3%	10
St. Athan	118	34	91.2%	31
St. Brides Major	61	8	0.0%	0
*St. Donats	17	0	-	0
St. Georges-super-Ely	4	0	-	0
St. Nicholas and Bonvilston	5	0	-	0
Sully	121	8	50.0%	4
Welsh St. Donats	10	0	-	0
Wenvoe	15	0	-	0
Wick	14	0	-	0
<b>Total for the rural VoG</b>	<b>1,245</b>	<b>179</b>	<b>47.5%</b>	<b>85</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### ***Existing households falling into need***

- 6.28 This is an annual estimate of the number of existing households who will fall into housing need. The basic information for this is households who have moved home within the last two years (which is then annualised) and affordability. A household will fall into need if it has to move home and is unable to afford to do this within the private sector (examples of such a move would be because of the end of a tenancy agreement). A household unable to afford market rent prices but moving to private rented accommodation may have to either claim Local Housing Allowance or spend more than a quarter of their gross income on housing, which is considered unaffordable (or indeed a combination of both).

- 6.29 Households previously living with parents, relatives or friends are excluded as these will double-count with the newly forming households already considered in Table 6.7. The data also excludes moves between social rented properties. Households falling into need in the social rented sector have their needs met through a transfer to another social rented property, hence releasing a social rented property for someone else in need. The number of households falling into need in the social rented sector should therefore, over a period of time, roughly equal the supply of 'transfers' and so the additional needs arising from within the social rented stock will be net zero.
- 6.30 Of the estimated 2,490 households that moved in the rural Vale within the last two years (1,245 per annum), 1,066 (per annum) were existing households. Removing households who transferred between affordable dwellings leaves 1,046 households potentially in need per annum. Using the standard affordability test it is estimated that 20.7% of these 1,046 potentially in need households cannot afford market housing. Therefore our estimate of the number of existing households falling into need (excluding transfers) is 217 households per annum.
- 6.31 This information is shown at community level in Table 6.8. As the sample of households potentially in need is small in some communities the affordability percentages at community level should be treated with caution. Rhoose has the largest number of existing households in newly arising need. In 14 of the 25 communities, there were no existing households in need.

**Table 6.8 Newly arising need from existing households (per annum) by community**

<i>Community</i>	<i>No. of moving households</i>	<i>No. who were existing h'holds</i>	<i>No. not transferring</i>	<i>% unable to afford</i>	<i>No. in need</i>
Colwinston	4	4	4	0.0%	0
Cowbridge with Llanblethian	128	119	116	15.5%	18
Dinas Powys	168	141	128	10.9%	14
Ewenny	6	6	6	0.0%	0
Llancarfan	14	14	14	0.0%	0
Llandough	45	41	41	31.7%	13
Llandow	15	6	6	33.3%	2
Llanfair	15	15	15	20.0%	3
Llangan	11	11	11	0.0%	0
Llanmaes	8	8	8	0.0%	0
Llantwit Major	237	202	199	21.6%	43
*Michaelston	7	7	7	0.0%	0
Pendoylan	11	11	11	0.0%	0
Penllyn	29	15	15	0.0%	0
Peterston-super-Ely	20	20	20	25.0%	5
Rhosee	163	133	133	53.4%	71
St. Athan	118	84	84	41.7%	35
St. Brides Major	61	54	54	9.3%	5
*St. Donats	17	17	17	0.0%	0
St. Georges-super-Ely	4	4	4	0.0%	0
St. Nicholas and Bonvilston	5	5	5	0.0%	0
Sully	121	113	113	7.1%	8
Welsh St. Donats	10	10	10	0.0%	0
Wenvoe	15	15	15	0.0%	0
Wick	14	14	10	0.0%	0
<b>Total for the rural VoG</b>	<b>1,245</b>	<b>1,066</b>	<b>1,046</b>	<b>20.7%</b>	<b>217</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

***Potential out-migrants unable to afford market housing***

- 6.32 The Welsh Assembly Government Local Housing Market Assessment Guide suggests that households in current need who have not had their needs met through affordable housing and who plan to leave the County within the next year should be removed from this stage of the calculation. This applied to 39 households in the rural Vale.
- 6.33 Table 6.9 shows the location of these 39 households. The table indicates that these households were only found in five communities, with the highest number recorded in Pendoylan.

<b>Table 6.9 Potential out-migrants unable to afford market housing by community</b>		
<i>Community</i>	<i>No. of out-migrants</i>	<i>No. of out-migrants in current need</i>
Colwinston	8	0
Cowbridge with Llanblethian	14	0
Dinas Powys	12	0
Ewenny	4	0
Llancarfan	7	5
Llandough	4	0
Llandow	5	0
Llanfair	0	0
Llangan	3	0
Llanmaes	2	0
Llantwit Major	64	0
*Michaelston	5	0
Pendoylan	10	13
Penllyn	11	0
Peterston-super-Ely	4	0
Rhose	46	0
St. Athan	48	5
St. Brides Major	12	9
*St. Donats	3	0
St. Georges-super-Ely	4	0
St. Nicholas and Bonvilston	0	0
Sully	31	8
Welsh St. Donats	4	0
Wenvoe	15	0
Wick	5	0
<b>Total for the rural VoG</b>	<b>321</b>	<b>39</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### ***Total newly arising need***

6.34 The data from each of the above sources can now be used to complete Stage 3 as is shown in Table 6.10. Of the 179 newly forming households per annum, 85 (47.5%) are unable to access market housing. This is added to the annual newly arising need figure for existing households (217). Taking into account out-migrants unable to afford market housing (-39), this results in additional need arising from a total of 263 households per annum in the rural Vale.

Table 6.10 Stage 3: Gross newly arising need (per annum)		
Step	Notes	Output
13. New household formation (gross per year)		179
14. <i>Times</i> proportion of new households unable to buy or rent in the market		47.5%
15. <i>Plus</i> existing households falling into need and unable to afford market housing		217
16. <i>Minus</i> potential out-migrants unable to afford market housing		39
17. <i>Plus</i> in-migrants unable to afford market housing	(included in steps 13-15)	-
<b>18. Equals total newly arising housing need (gross per year)</b>	<b>(13x14)+15-16</b>	<b>263</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

- 6.35 The total number and proportion of households in future need in each community is shown in Table 6.11. Rhoose contains the highest number of households in future need, but St. Athan has the largest proportion of households in need. In 11 of the 25 communities, there were no households found to be in newly arising need and in three there was a negative needs figure.

<b>Table 6.11 Total newly arising need (per annum) by community</b>			
<i>Community</i>	<i>No. of households in Future Need</i>	<i>Total no. of households</i>	<i>% in Future Need</i>
Colwinston	0	174	0.0%
Cowbridge with Llanblethian	18	1,938	0.9%
Dinas Powys	29	3,175	0.9%
Ewenny	0	307	0.0%
Llancarfan	-5	282	-1.8%
Llandough	13	854	1.5%
Llandow	2	282	0.7%
Llanfair	3	231	1.3%
Llangan	0	277	0.0%
Llanmaes	0	181	0.0%
Llantwit Major	56	4,077	1.4%
*Michaelston	0	132	0.0%
Pendoylan	-13	166	-7.8%
Penllyn	12	589	2.0%
Peterston-super-Ely	5	360	1.4%
Rhoose	81	2,528	3.2%
St. Athan	61	1,494	4.1%
St. Brides Major	-4	890	-0.4%
*St. Donats	0	144	0.0%
St. Georges-super-Ely	0	168	0.0%
St. Nicholas and Bonvilston	0	325	0.0%
Sully	4	2,196	0.2%
Welsh St. Donats	0	197	0.0%
Wenvoe	0	802	0.0%
Wick	0	301	0.0%
<b>Total for the rural VoG</b>	<b>263</b>	<b>22,071</b>	<b>1.2%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Stage 4: Supply of affordable units per year

- 6.36 Calculating the future supply of affordable units requires estimating the annual supply of re-lets from the current social rented and intermediate stock. The following section deals with this in detail.

### ***The future supply of social rented housing***

- 6.37 Step 19 of the model is an estimate of likely future re-lets from the social rented stock (excluding transfers within the social rented sector). The Welsh Assembly Government Local Housing Market Assessment Guide suggests that this should be based on past trend data which can be taken as a prediction for the future. The Welsh Assembly Government Local Housing Market Assessment Guide also suggests the use of a three year average. However in this instance we have looked at trend data for the past two years only. This is done simply to allow consistency with the newly arising need section (Stage 2) where figures were all calculated on an annual basis based on trends over the past two years.
- 6.38 Table 6.12 shows the number of social rented lettings in the rural Vale over the last two years based on data supplied by the Council. The average number of lettings over the two-year period was 72 per annum.



<b>Table 6.12 Re-lets of social rented dwellings (per annum) by community</b>			
<i>Community</i>	<i>2008</i>	<i>2009</i>	<i>Average re-lets</i>
Colwinston	0	0	0
Cowbridge with Llanblethian	9	5	7
Dinas Powys	18	17	17
Ewenny	0	0	0
Llancarfan	0	0	0
Llandough	0	0	0
Llandow	0	1	1
Llanfair	0	0	0
Llangan	0	0	0
Llanmaes	0	0	0
Llantwit Major	21	28	24
*Michaelston	0	0	0
Pendoylan	0	0	0
Penllyn	0	0	0
Peterston-super-Ely	0	1	1
Rhose	8	16	12
St. Athan	9	5	7
St. Brides Major	2	0	1
*St. Donats	0	0	0
St. Georges-super-Ely	0	0	0
St. Nicholas and Bonvilston	0	0	0
Sully	1	1	1
Welsh St. Donats	0	0	0
Wenvoe	1	0	1
Wick	0	0	0
<b>Total for the rural VoG</b>	<b>69</b>	<b>74</b>	<b>72</b>

Source: The Vale of Glamorgan Council 2010 (figures are averaged over the two years 2007, 2008)

### ***Intermediate supply***

- 6.39 This step calculates the number of re-lets likely to arise from the intermediate stock. Whilst across the Vale of Glamorgan as a whole there is a notable stock of intermediate housing, the Council has indicated that there is no intermediate stock within the rural Vale. The figure for this step of the model is therefore 0.

### ***Annual future supply of affordable housing***

- 6.40 This step is the sum of the previous two. The total future supply is estimated to be 72, comprised of 72 units of social re-lets and 0 units of intermediate housing. This is shown in the Table 6.13.

**Table 6.13 Stage 4: Supply of affordable units (per annum)**

<i>Step</i>	<i>Notes</i>	<i>Output</i>
19. Annual supply of social re-lets (net)		72
20. <i>Plus</i> annual supply of intermediate housing available for re-let or resale at sub-market levels		0
<b>21. Equals annual supply of affordable housing</b>	<b>19+20</b>	<b>72</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Estimate of net annual housing need

- 6.41 The Welsh Assembly Government Local Housing Market Assessment Guide outlines the 22 steps that must be completed to obtain all of the information required to calculate the annual estimate of housing need. Table 6.14 presents the results for each of the 22 steps outlined by the LHMA Guide.

<b>Table 6.14 Detailed affordable housing requirement table for the rural Vale</b>		
<i>Stage and step in calculation</i>	<i>Notes</i>	<i>Output</i>
<b>STAGE 1: CURRENT NEED (Gross)</b>		
1. Existing households in need of accommodation		576
2. <i>Plus</i> current non-households in need of affordable housing		17
3. <i>Minus</i> cases where they can afford to meet their need in the market		203
4. <i>Equals</i> total current housing need (gross)	1+2-3	390
<b>STAGE 2: AVAILABLE STOCK TO OFFSET NEED</b>		
5. Current occupiers of affordable housing in need		82
6. <i>Plus</i> surplus stock		0
7. <i>Plus</i> committed supply of new affordable units		16
8. <i>Minus</i> planned units to be taken out of management		3
9. <i>Equals</i> total stock available to meet current need	5+6+7-8	95
10. <i>Equals</i> total Current need	4-9	295
11. <i>Times</i> annual quota for the reduction of current need		20%
12. <i>Equals</i> annual requirement of units to reduce current need	10×11	59
<b>STAGE 3: NEWLY ARISING NEED</b>		
13. New household formation (gross per year)		179
14. <i>Times</i> proportion of new households unable to buy or rent in the market		47.5%
15. <i>Plus</i> existing households falling into need and unable to afford market housing		217
16. <i>Minus</i> potential out-migrants unable to afford market housing		39
17. <i>Plus</i> in-migrants unable to afford market housing	(included in steps 13-15)	-
18. <i>Equals</i> total newly arising housing need (gross per year)	(13×14)+15-16	263
<b>STAGE 4: SUPPLY OF AFFORDABLE UNITS per year</b>		
19. Annual supply of social re-lets (net)		72
20. <i>Plus</i> annual supply of intermediate housing available for re-let or resale at sub-market levels		0
21. <i>Equals</i> annual supply of affordable housing	19+20	72
<b>NET SHORTFALL OF AFFORDABLE UNITS</b>		
<b>22. Overall shortfall (per annum)</b>	<b>12+18-21</b>	<b>250</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010); various secondary sources

6.42 The figure for newly arising need (step 18) is 263 and the estimated future supply to meet this need is 72 units per year. In addition the current need assessment suggests a (net) need for 59 units per year (step 12). This therefore leaves an annual requirement of 250 units per year in the rural Vale (263-72+59=250).

- 6.43 Table 6.15 shows gross housing need by community. Overall the gross annual need is calculated by adding the newly arising need of 263 (step 18) with the annualised gross current need of 78 (step 4 value of 360 divided by 5). The gross annual need for the rural Vale is therefore 341, which represents 1.5% of households in the study area.
- 6.44 Rhoose has the highest number of households in need (97), representing 28.4% of all households in need in the rural Vale, followed by St. Athan and Llantwit Major. These three communities account for over 70% of (gross) housing need in the rural Vale. St. Athan has the highest proportion of households in need (5.1% of households in this community were in need).

**Table 6.15 Gross need (per annum) by community**

<i>Community</i>	<i>No. of h'holds in</i>	<i>Total no. of</i>	<i>% of h'holds in</i>	<i>As a % of all</i>
Colwinston	0	174	0.0%	0.0%
Cowbridge with Llanblethian	23	1,938	1.2%	6.6%
Dinas Powys	35	3,175	1.1%	10.3%
Ewenny	0	307	0.0%	0.0%
Llancarfan	-4	282	-1.4%	0.0%
Llandough	13	854	1.5%	3.8%
Llandow	3	282	1.0%	0.8%
Llanfair	4	231	1.7%	1.1%
Llangan	0	277	0.0%	0.0%
Llanmaes	0	181	0.0%	0.0%
Llantwit Major	67	4,077	1.7%	19.7%
*Michaelston	0	132	0.0%	0.0%
Pendoylan	-10	166	-6.2%	0.0%
Penllyn	15	589	2.6%	4.4%
Peterston-super-Ely	5	360	1.4%	1.5%
Rhoose	97	2,528	3.8%	28.4%
St. Athan	76	1,494	5.1%	22.4%
St. Brides Major	-1	890	-0.1%	0.0%
*St. Donats	0	144	0.0%	0.0%
St. Georges-super-Ely	0	168	0.0%	0.0%
St. Nicholas and Bonvilston	2	325	0.6%	0.6%
Sully	14	2,196	0.6%	4.1%
Welsh St. Donats	0	197	0.0%	0.0%
Wenvoe	0	802	0.0%	0.0%
Wick	1	301	0.4%	0.4%
<b>Total for the rural VoG</b>	<b>341</b>	<b>22,071</b>	<b>1.5%</b>	<b>100.0%</b>

\*The 17 homeless households in current need in the rural Vale (step 2) have been assumed to be located in the same location as other households in current need to calculate the distribution of gross annual current need (step 4/5) at a community level.

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010).

- 6.45 It is possible to combine the gross need figures for each community with estimated community-level supply figures in order to derive an estimated net need for affordable housing within each community. This is presented in Table 6.16. The gross supply is calculated by adding the future supply of 72 (step 21) with the annualised current stock available of 19 (step 9 value of 95 divided by 5). The gross annual supply in the rural Vale is therefore 91.
- 6.46 Rhoose, St. Athan and Llantwit Major have the largest net need for affordable dwellings. The data suggests that there is no requirement for affordable dwellings in ten of the 25 communities, and that there are small surpluses of affordable dwellings in a further four communities.

<b>Table 6.16 Net housing need (per annum) by community</b>			
<i>Community</i>	<i>No. of h'holds in need (gross)</i>	<i>Annual supply (gross)</i>	<i>Net need estimate</i>
Colwinston	0	0	0
Cowbridge with Llanblethian	23	7	16
Dinas Powys	35	22	13
Ewenny	0	0	0
Llancarfan	-4	0	-4
Llandough	13	0	13
Llandow	3	1	2
Llanfair	4	0	4
Llangan	0	0	0
Llanmaes	0	0	0
Llantwit Major	67	27	40
*Michaelston	0	0	0
Pendoylan	-10	0	-10
Penllyn	15	0	15
Peterston-super-Ely	5	1	4
Rhoose	97	15	81
St. Athan	76	12	65
St. Brides Major	-1	1	-2
*St. Donats	0	0	0
St. Georges-super-Ely	0	0	0
St. Nicholas and Bonvilston	2	2	0
Sully	14	1	13
Welsh St. Donats	0	0	0
Wenvoe	0	1	-1
Wick	1	1	0
<b>Total for the rural VoG</b>	<b>341</b>	<b>91</b>	<b>250</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Types of households in need

6.47 Table 6.17 gives a breakdown of households in gross need, by broad household type. The table shows that 12.0% of households with children are in housing need compared to 0.7% of multi-adult households without children. Households with children account for more than half of all households in need.

Table 6.17 Gross annual need requirement by household type				
	<i>No. of h'holds in need (gross)</i>	<i>Total no. of households</i>	<i>% of h'hold type in need</i>	<i>As a % of those in need</i>
Older person	63	7,183	1.8%	18.5%
Single (non-older person)	39	1,827	2.2%	11.6%
Multi-adult (no children)	50	6,778	0.7%	14.7%
Household with children	188	6,283	12.0%	55.3%
<b>Total</b>	<b>341</b>	<b>22,071</b>	<b>16.6%</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

6.48 This information is broken down by community in Table 6.18. Dinas Powys has the highest number of older person households in gross need (19 households). Penllyn and Llantwit Major have the highest number of single (non-older person) households in gross need (12 households). Cowbridge with Llanblethian and Llantwit Major have the highest number of multi-adult (no children) households in gross need (9 households) and Rhoose the highest number of households with children in gross need (72 households).

Table 6.18 Gross need (per annum) – household type by community

<i>Community</i>	<i>Older person</i>	<i>Single (non-older person)</i>	<i>Multi-adult (no children)</i>	<i>Household with children</i>	<i>Total no. of h'holds in need</i>
Colwinston	0	0	0	0	0
Cowbridge with Llanblethian	7	0	9	6	22
Dinas Powys	19	3	6	8	36
Ewenny	0	0	0	0	0
Llancarfan	0	0	0	-4	-4
Llandough	0	0	0	13	13
Llandow	1	0	2	0	3
Llanfair	0	3	0	1	4
Llangan	0	0	0	0	0
Llanmaes	0	0	0	0	0
Llantwit Major	11	12	9	35	67
*Michaelston	0	0	0	0	0
Pendoylan	0	0	0	-10	-10
Penllyn	0	12	0	3	15
Peterston-super-Ely	0	0	0	5	5
Rhose	8	9	8	72	97
St. Athan	10	2	8	55	76
St. Brides Major	3	0	1	-5	-1
*St. Donats	0	0	0	0	0
St. Georges-super-Ely	0	0	0	0	0
St. Nicholas and Bonvilston	0	0	1	1	2
Sully	5	-2	6	6	14
Welsh St. Donats	0	0	0	0	0
Wenvoe	0	0	0	0	0
Wick	0	0	0	1	1
<b>Total for the rural VoG</b>	<b>63</b>	<b>39</b>	<b>50</b>	<b>188</b>	<b>341</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Type of affordable accommodation required

- 6.49 The type of affordable products available to meet this housing need can be grouped into two broad categories – social rented housing and intermediate products. Intermediate housing can include any product that fits in with the Technical Advice Note 2 Planning and Affordable Housing definition for intermediate housing and can therefore include shared ownership, shared equity and HomeBuy. Households in need were tested for their ability to afford intermediate housing priced at the ‘usefully affordable’ point. Households were deemed able to afford intermediate housing where the intermediate housing cost was less than a quarter of their gross household income. Any household that is unable to afford intermediate housing is assumed to require social rented accommodation.
- 6.50 Account was also taken of the likely supply of these products and a net requirement for each product type was calculated. This information is presented in Table 6.19. There is currently no intermediate housing supply in the rural Vale.

<b>Table 6.19 Social rented and intermediate housing requirements in the rural Vale</b>			
	<i>Intermediate</i>	<i>Social rented</i>	<i>Total</i>
Total gross annual need	61	280	341
Total gross annual supply	0	91	91
Net annual need	61	189	250
<b>% of net shortfall</b>	<b>24.4%</b>	<b>75.6%</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010); various secondary sources

- 6.51 The table shows that 61 (17.9%) households in housing need are able to afford intermediate housing in the study area. However all of the supply comes from the social rented sector. The table suggests that of the total additional affordable housing to be provided in the rural Vale to meet housing need, almost a quarter should be intermediate products. However, this finding is dependent on intermediate products being available at the ‘usefully affordable point’.
- 6.52 It is worth noting that 44 households in gross housing need would be able to afford the HomeBuy units proposed for Barry Waterfront at 70% ownership share described in paragraph 4.11 (based on the cost during the first five years when no interest payment is required on the outstanding equity).
- 6.53 Table 6.20 shows the gross requirement for social rented and intermediate housing products within each community, following the same methodology described above. Intermediate products would be suitable for one or more households in need in nine of the 13 communities in which households are in gross need. In the remaining communities (Cowbridge with Llanblethian, Penllyn, Peterston-super-Ely and Wick) social rented housing would be the only type of affordable housing suitable for households in need.



- 6.54 All of the communities where intermediate housing could meet need with the exception of Llanfair and St. Nicholas and Bonvilston, would also be suitable for HomeBuy priced at the same level as the proposed scheme on Barry Waterfront at 70% ownership share.

<b>Table 6.20 Gross social rented and intermediate housing requirements by community</b>			
<i>Community</i>	<i>Intermediate</i>	<i>Social rented</i>	<i>Total</i>
Colwinston	0	0	0
Cowbridge with Llanblethian	0	22	22
Dinas Powys	5	31	36
Ewenny	0	0	0
Llancarfan	0	-4	-4
Llandough	13	0	13
Llandow	2	1	3
Llanfair	1	3	4
Llangan	0	0	0
Llanmaes	0	0	0
Llantwit Major	7	60	67
*Michaelston	0	0	0
Pendoylan	0	-10	-10
Penllyn	0	15	15
Peterston-super-Ely	0	5	5
Rhose	17	80	97
St. Athan	10	66	76
St. Brides Major	0	-1	-1
*St. Donats	0	0	0
St. Georges-super-Ely	0	0	0
St. Nicholas and Bonvilston	1	1	2
Sully	5	9	14
Welsh St. Donats	0	0	0
Wenvoe	0	0	0
Wick	0	1	1
<b>Total for the rural VoG</b>	<b>61</b>	<b>280</b>	<b>341</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

- 6.55 Table 6.21 shows the net requirement for social rented and intermediate housing products within each community. This is derived by deducting the affordable housing supply distribution recorded in Table 6.16 from the gross need for social rented accommodation in each community (as there is no intermediate supply in the rural Vale). The table indicates that there is a greater need for intermediate rather than social rented housing in three communities with the reverse true in nine communities.

**Table 6.21 Net social rented and intermediate housing requirements by community**

<i>Community</i>	<i>Intermediate</i>	<i>Social rented</i>	<i>Total</i>
Colwinston	0	0	0
Cowbridge with Llanblethian	0	16	16
Dinas Powys	5	9	13
Ewenny	0	0	0
Llancarfan	0	-4	-4
Llandough	13	0	13
Llandow	2	0	2
Llanfair	1	3	4
Llangan	0	0	0
Llanmaes	0	0	0
Llantwit Major	7	33	40
*Michaelston	0	0	0
Pendoylan	0	-10	-10
Penllyn	0	15	15
Peterston-super-Ely	0	4	4
Rhose	17	65	82
St. Athan	10	54	64
St. Brides Major	0	-2	-2
*St. Donats	0	0	0
St. Georges-super-Ely	0	0	0
St. Nicholas and Bonvilston	1	-1	0
Sully	5	8	13
Welsh St. Donats	0	0	0
Wenvoe	0	-1	-1
Wick	0	0	0
<b>Total for the rural VoG</b>	<b>61</b>	<b>189</b>	<b>250</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010); various secondary sources

## Summary

- 6.56 Following the steps of the needs assessment model specified by the Welsh Assembly Government Local Housing Market Assessment Guide results in a net need estimate of 250 affordable dwellings per year in the rural Vale.
- 6.57 An analysis of gross need for affordable housing by household type suggests that 12.0% of households with children are in housing need compared to 0.7% of multi-adult households without children.
- 6.58 In terms of the type of affordable accommodation required, further analysis suggests that around 25% could be intermediate (priced at the mid-point between entry-level market and social rents) and the remaining 75% social rented.



## 7. Issues relating to locality

### Introduction

- 7.1 This chapter will present a range of information relating to the locality of the households who completed the Rural Housing Survey. The survey sought to establish the connection of households with the community they are resident in. This chapter will present the results of these questions. The survey also asked questions about the accessibility of particular facilities for households. This chapter shall initially focus on the responses to these questions.

### Accessibility of facilities

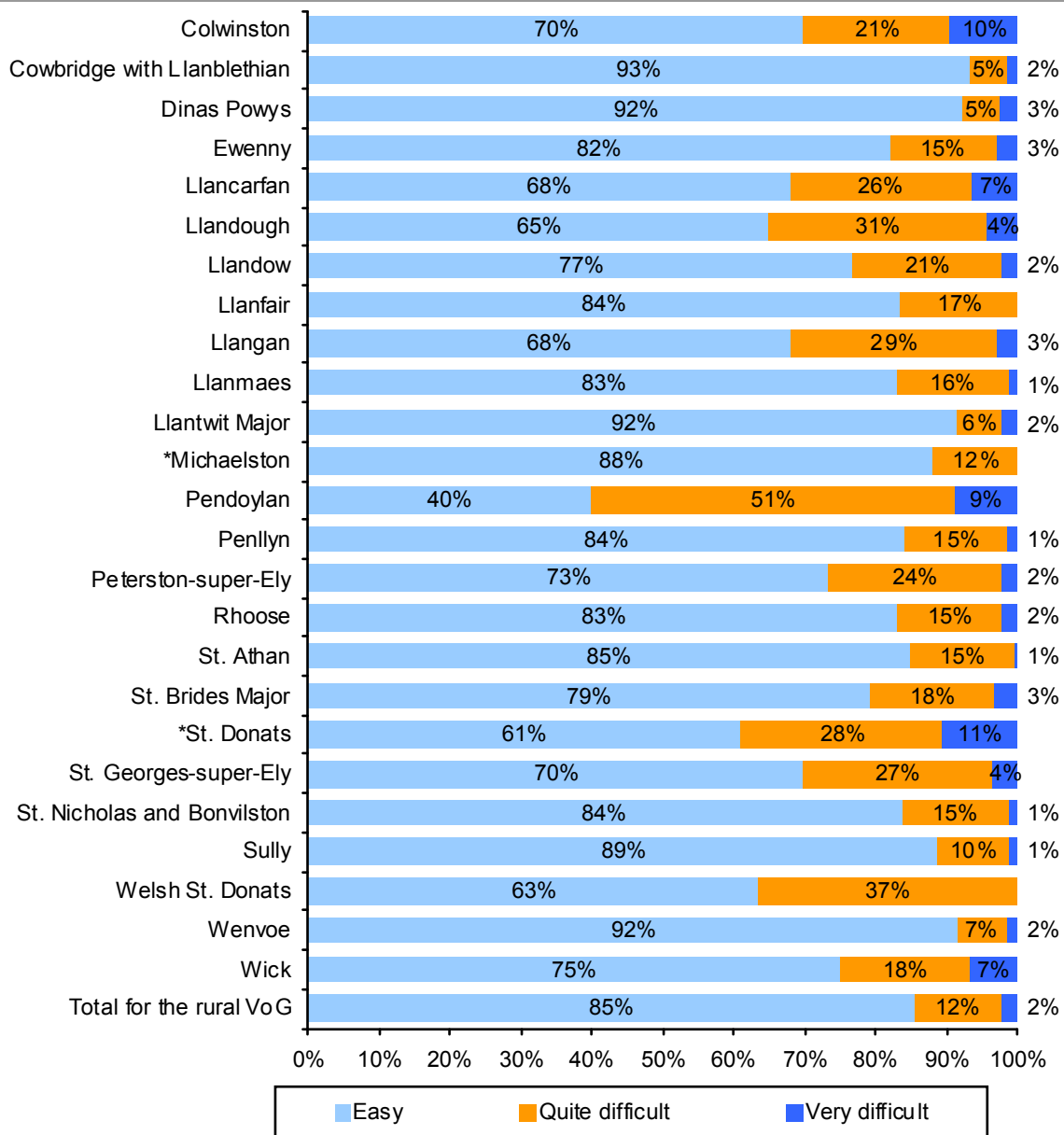
- 7.2 Households were asked to indicate their ability to access a range of facilities. Table 7.1 shows the ease with which households in the rural Vale are able to access grocery shops. The data indicates that over 85% of households are able to access grocery shops easily and less than 3% found it very difficult to get to them.

Table 7.1 Ease of access of grocery shops		
<i>Accessibility</i>	<i>Number of households</i>	<i>Percentage of households</i>
Easy	18,842	85.4%
Quite difficult	2,713	12.3%
Very difficult	515	2.3%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

- 7.3 Figure 7.1 shows how these results vary by community. The figure indicates that households in Pendoylan are most likely to have difficulty accessing grocery shops, whilst households in Cowbridge with Llanblethian are most likely to find it easy to access these types of shop.

**Figure 7.1 Ease of access of grocery shops by community**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

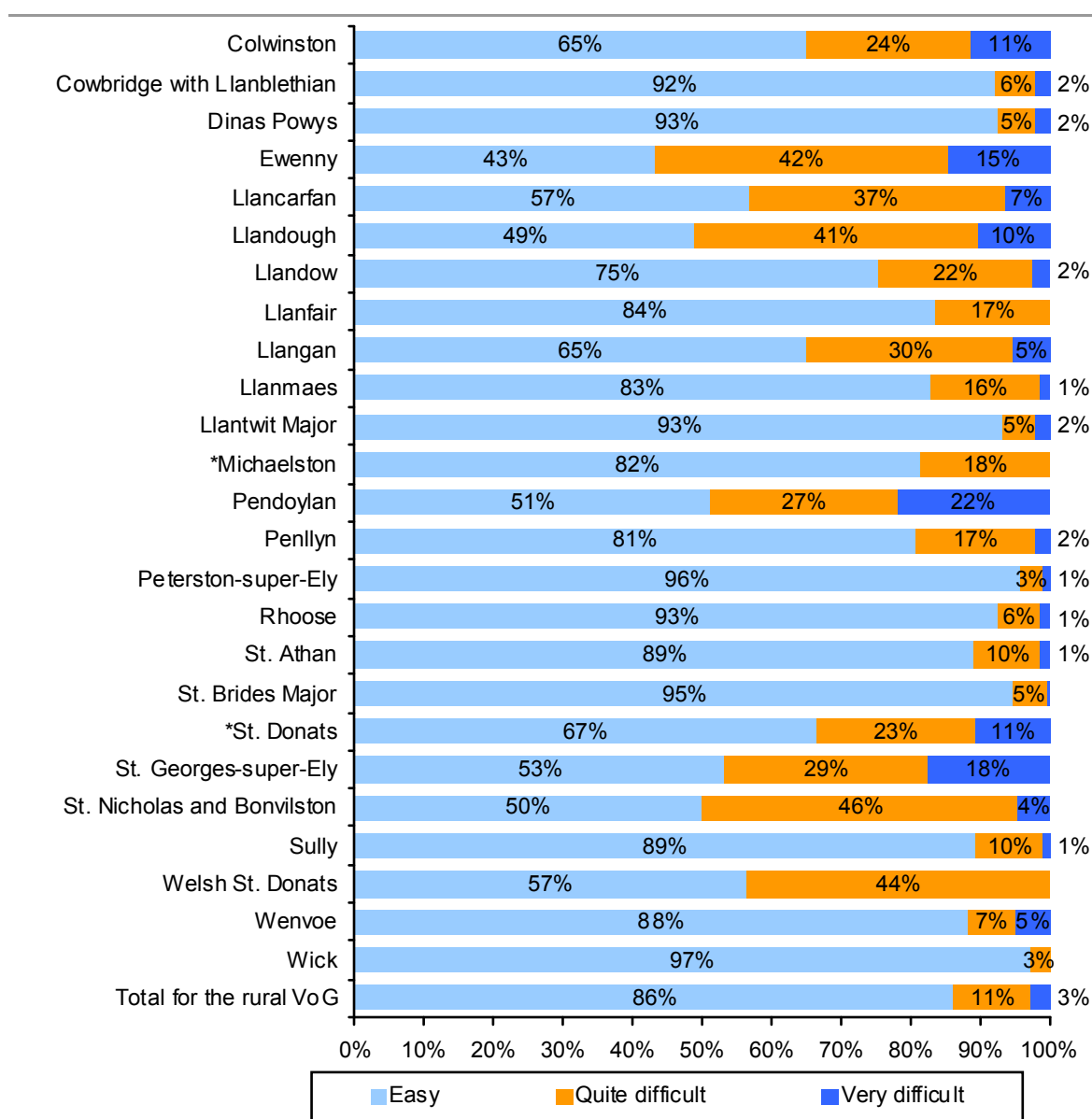
7.4 Table 7.2 shows the ease with which households in the rural Vale are able to access a Post Office. The data indicates that some 86.3% of households are able to access a Post Office easily and less than 3% found it very difficult to get to one. Overall Post Offices are more accessible to households in the rural Vale than grocery shops.

Accessibility	Number of households	Percentage of households
Easy	19,055	86.3%
Quite difficult	2,405	10.9%
Very difficult	611	2.8%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

7.5 Figure 7.2 shows how these results vary by community. The figure indicates that households in Ewenny are most likely to record difficulty in getting to a Post Office, whilst households in Peterston-super-Ely are the most likely to find it easy.

Figure 7.2 Ease of access of Post Office by community



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

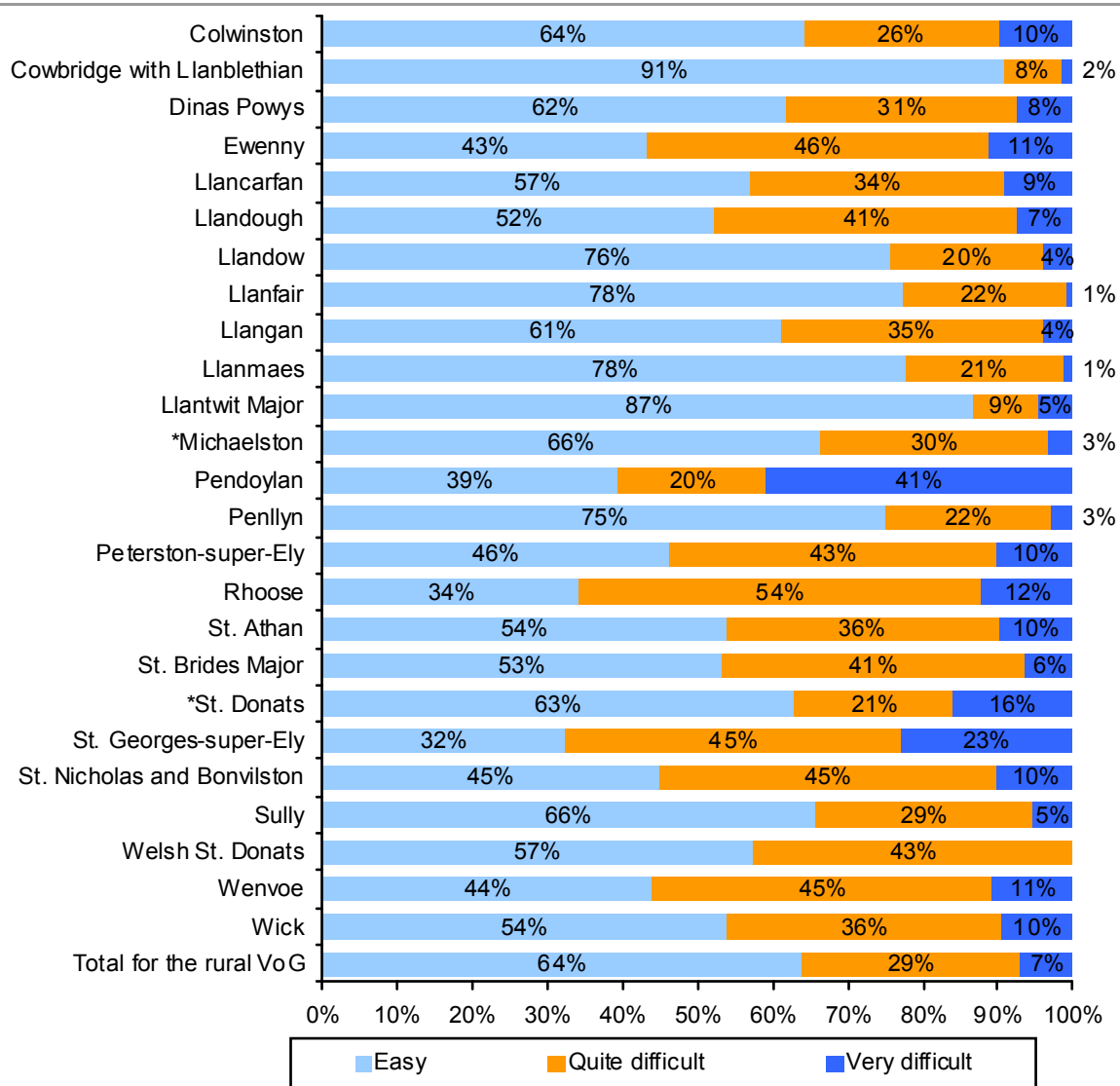
7.6 Table 7.3 shows the ease with which households in the rural Vale are able to access a bank/building society. The data indicates that some 63.7% of households are able to access a bank/building society easily and over 7% found it very difficult to get to one. Overall a bank/building society is much less accessible to households in the rural Vale than grocery shops and a Post Office.

<b>Table 7.3 Ease of access of bank/building society</b>		
<i>Accessibility</i>	<i>Number of households</i>	<i>Percentage of households</i>
Easy	14,067	63.7%
Quite difficult	6,408	29.0%
Very difficult	1,595	7.2%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

7.7 Figure 7.3 shows how these results vary by community. The figure indicates that households in St. Georges-super-Ely are most likely to record difficulty in getting to a bank/building society, whilst households in Cowbridge with Llanblethian are the most likely to find it easy.



**Figure 7.3 Ease of access of bank/building society by community**

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

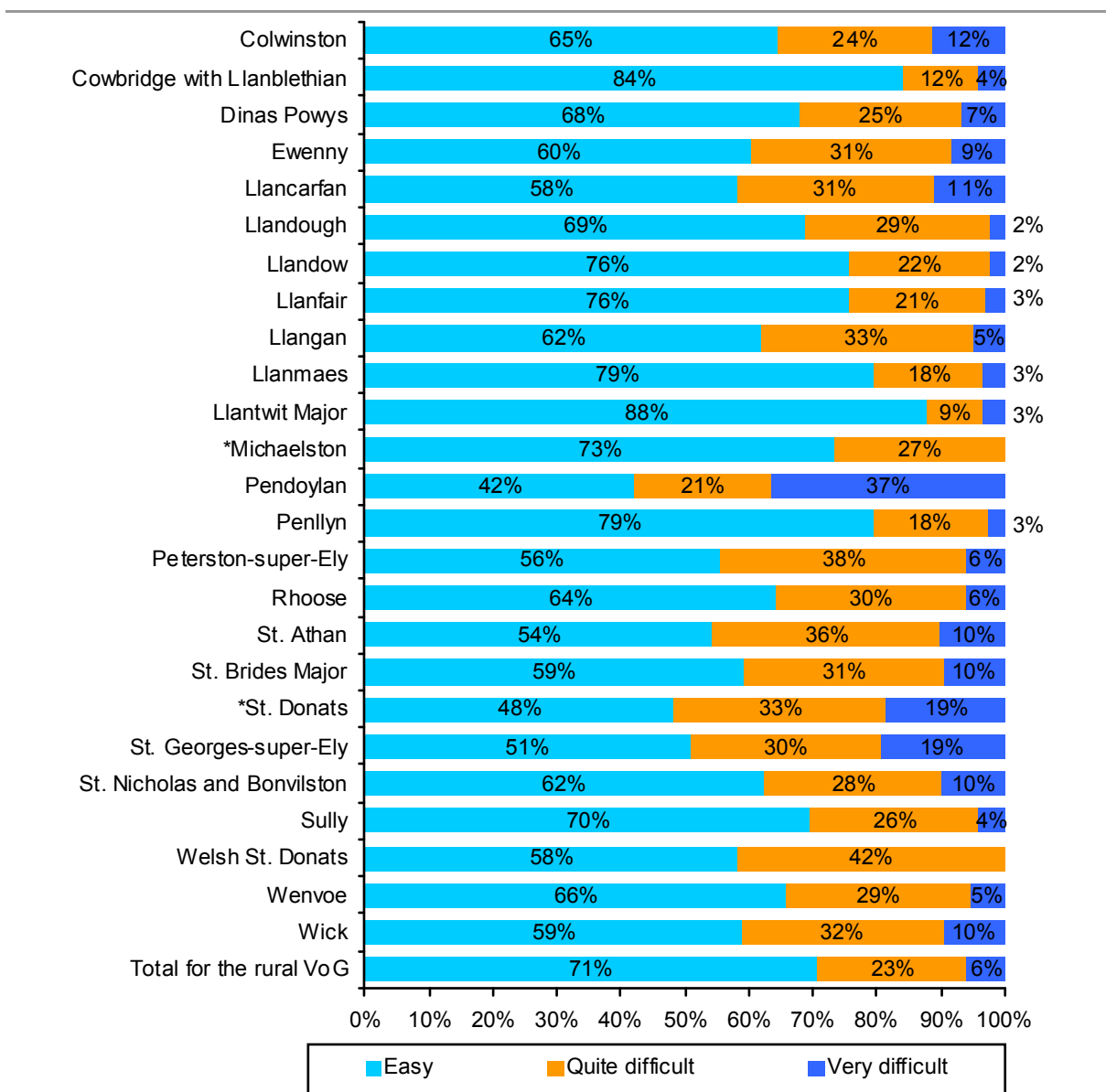
- 7.8 Table 7.4 shows the ease with which households in the rural Vale are able to access leisure facilities. The data indicates that some 70.8% of households are able to access leisure facilities easily and almost 6% found it very difficult to get to them. Overall leisure facilities are more accessible than a bank/building society but less accessible than grocery shops and a Post Office.

Table 7.4 Ease of access of leisure facilities		
Accessibility	Number of households	Percentage of households
Easy	15,633	70.8%
Quite difficult	5,130	23.2%
Very difficult	1,307	5.9%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

7.9 Figure 7.4 shows how these results vary by community. The figure indicates that households in Pendoylan are most likely to record difficulty in getting to leisure facilities, whilst households in Llantwit Major are the most likely to find it easy.

**Figure 7.4 Ease of access to leisure facilities by community**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

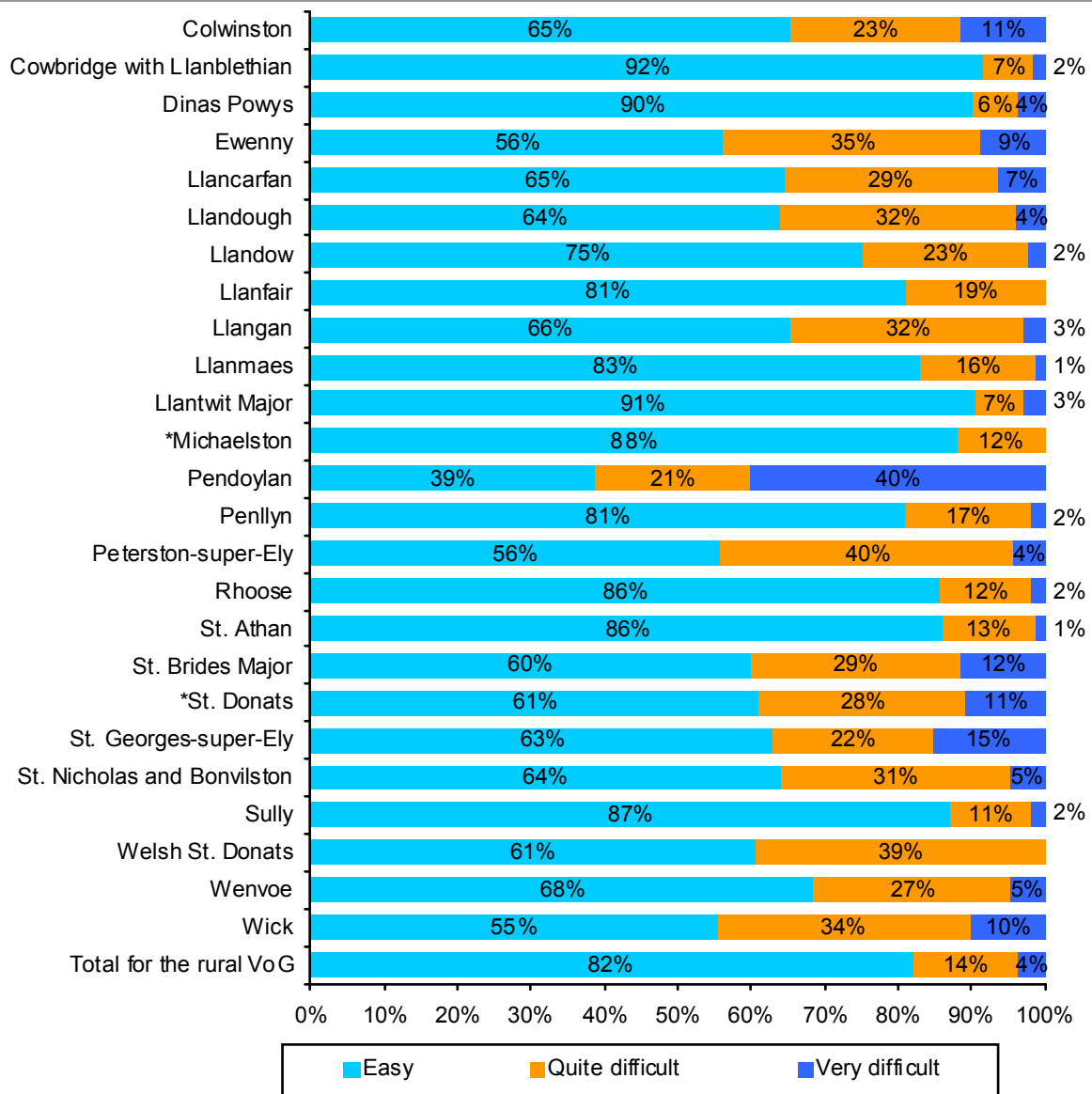
- 7.10 Table 7.5 shows the ease with which households in the rural Vale are able to access a doctor. The data indicates that over 80% of households are able to access a doctor easily and some 3.7% found it very difficult to get to one. Overall a doctor is more accessible to households in the rural Vale than leisure facilities and a bank/building society, but less accessible than grocery shops and a Post Office.

<b>Table 7.5 Ease of access to doctor</b>		
<i>Accessibility</i>	<i>Number of households</i>	<i>Percentage of households</i>
Easy	18,070	81.9%
Quite difficult	3,188	14.4%
Very difficult	812	3.7%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

- 7.11 Figure 7.5 shows how these results vary by community. The figure indicates that households in Pendoylan are most likely to record difficulty in getting to a doctor, whilst households in Cowbridge with Llanblethian are the most likely to find it easy.

**Figure 7.5 Ease of access of doctor by community**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

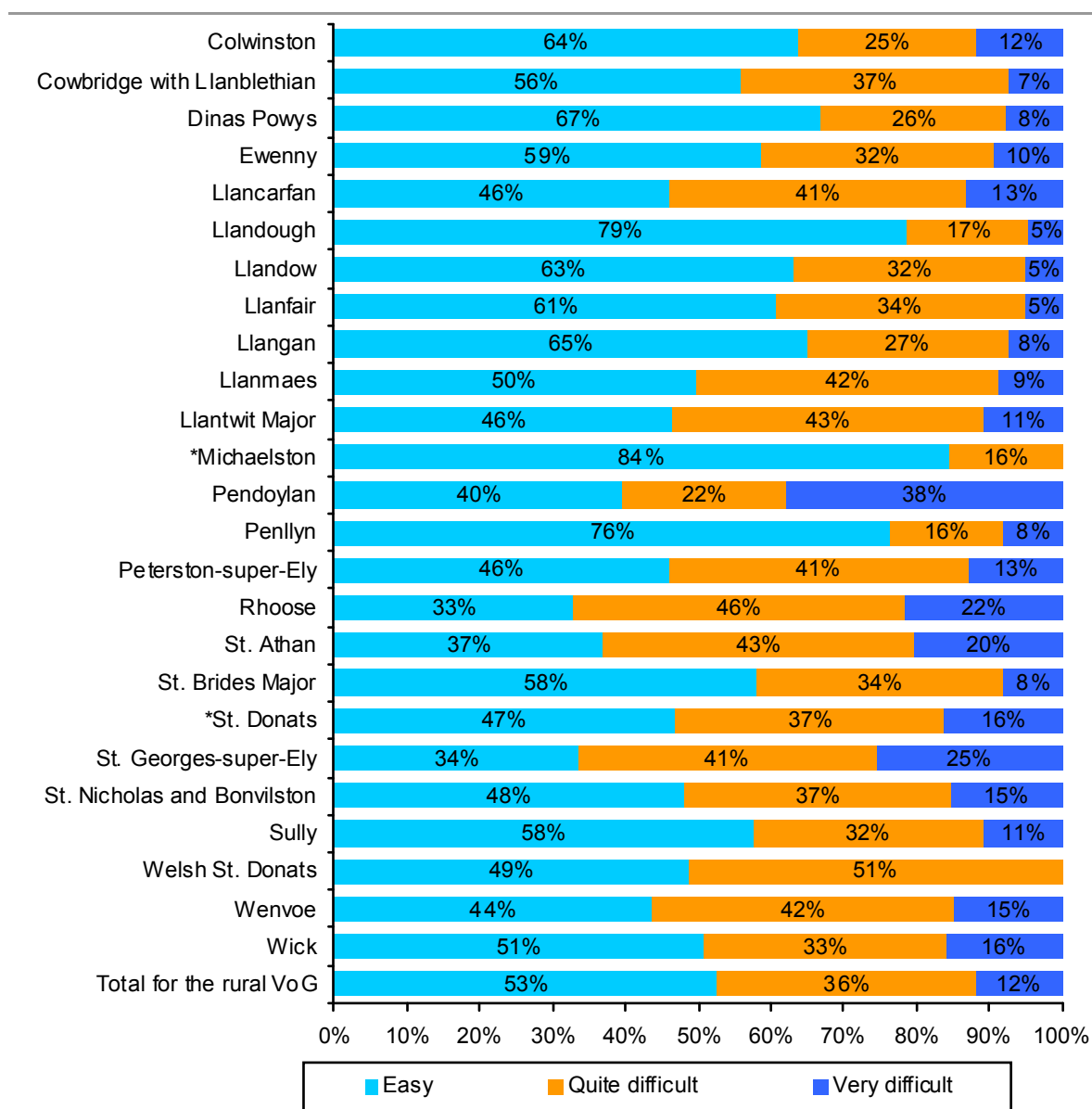
7.12 Table 7.6 shows the ease with which households in the rural Vale are able to access a hospital. The data indicates that just over half of households are able to access a hospital easily and some 11.8% found it very difficult to get to one. Overall a hospital is the facility which is least accessible to households in the rural Vale.

Accessibility	Number of households	Percentage of households
Easy	11,615	52.6%
Quite difficult	7,852	35.6%
Very difficult	2,603	11.8%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

7.13 Figure 7.6 shows how these results vary by community. The figure indicates that households in Rhoose are most likely to record difficulty in getting to a hospital, whilst households in Llandough are the most likely to find it easy.

Figure 7.6 Ease of access of hospital by community



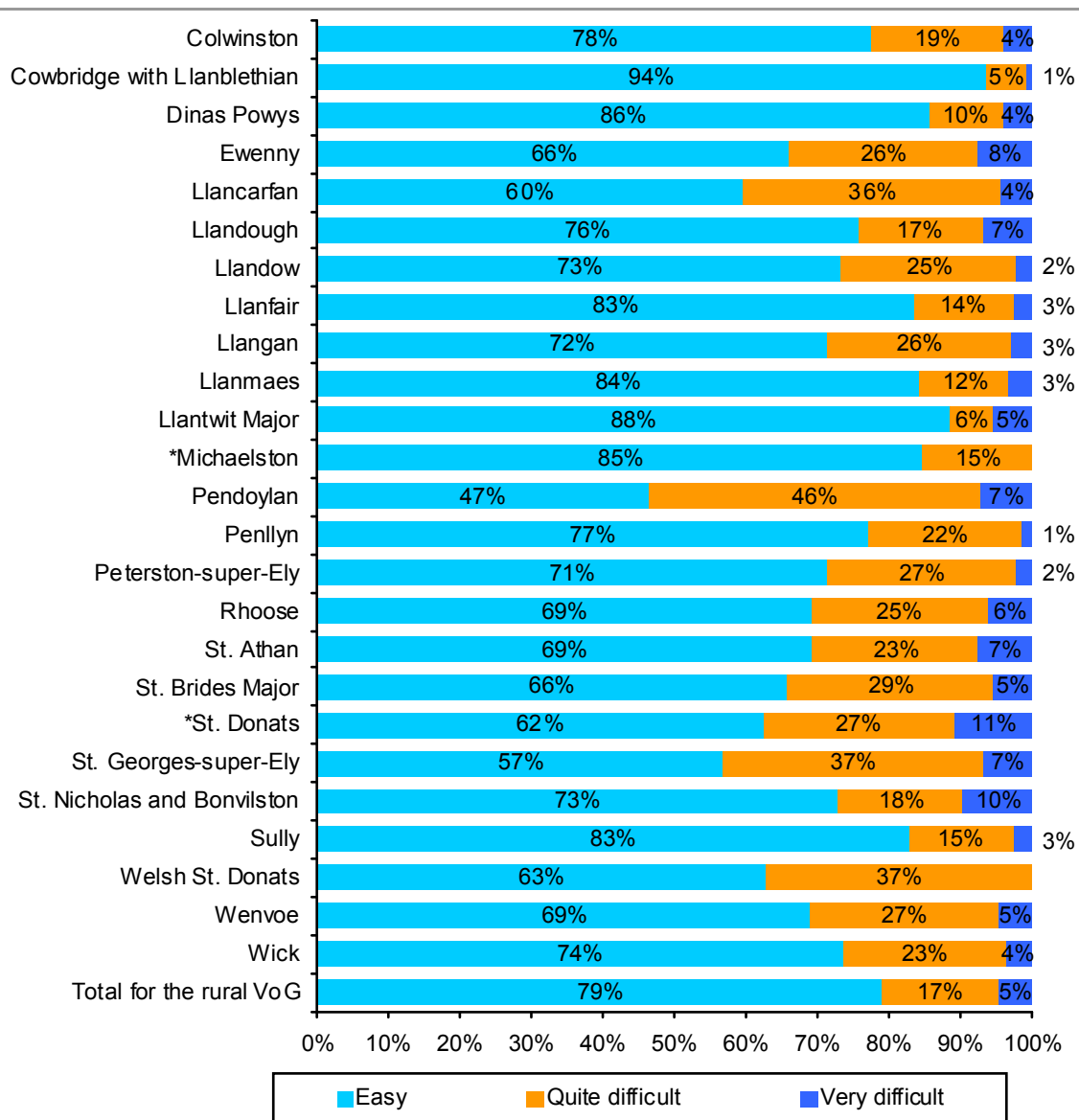
Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

7.14 Table 7.7 shows the ease with which households in the rural Vale are able to access a school, educational or training facilities. The data indicates that almost 80% of households are able to access a school, educational or training facilities easily and 4.5% found it very difficult to get to them.

<b>Table 7.7 Ease of access of school, educational or training facilities</b>		
<i>Accessibility</i>	<i>Number of households</i>	<i>Percentage of households</i>
Easy	17,441	79.0%
Quite difficult	3,637	16.5%
Very difficult	993	4.5%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

7.15 Figure 7.7 shows how these results vary by community. The figure indicates that households in Pendoylan are most likely to record difficulty in getting to school, educational or training facilities, whilst households in Cowbridge with Llanblethian are the most likely to find it easy.

**Figure 7.7 Ease of access of school, educational or training facilities by community**

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Connection to other communities

- 7.16 Households that stated that they need and/or are likely to move home in the next two years were asked to indicate whether they have a strong local connection to a different rural community in the Vale of Glamorgan to the one they currently reside in. Overall some 3,293 households in the rural Vale need and/or would like to move in the next two years.
- 7.17 Of these 3,293 households, 1,097 stated that they have a local connection to a different community. This represents 33.3% of all households that need and/or are likely to move in the next two years.

7.18 Table 7.8 illustrates the reasons for the connection to the other community in the Vale of Glamorgan given by these 1,097 households. The figures sum to more than 1,097 as households were able to cite more than one reason. The data suggests that the most common reason for a strong connection with another community in the rural Vale is due to having close family relatives living in the community.

<b>Table 7.8 Reasons for strong connection with another Vale of Glamorgan community</b>		
<i>Reasons for community connection</i>	<i>Number of households</i>	<i>Percentage of households</i>
Have close family relatives living in community	600	54.7%
Work or are moving to work in community	318	29.0%
Other	286	26.1%

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

7.19 Unfortunately, the reduced sample of households that need and/or are likely to move home in the next two years means that it is not possible to consider how this analysis varies geographically across the study area.

### **Inaccessibility of housing in the community**

7.20 Respondents were asked to indicate whether a member of their family had to move out of the community to find a suitable home. Overall some 1,213 households indicated that this had occurred, which represents 5.5% of the household population of the study area.

7.21 Table 7.9 shows how this result varies by community. The table indicates that in Pendoylan some 17.6% of resident households indicated that a family member was forced to move from the community to find suitable accommodation. This situation was also relatively common in the communities of Wick and Colwinston.



Table 7.9 Locations where insufficient suitable homes to support local population

<i>Community</i>	<i>No of h'holds with family member that moved due to insufficient local housing</i>	<i>All households</i>	<i>Proportion with a family member that moved</i>
Colwinston	16	174	8.9%
Cowbridge with Llanblethian	117	1,938	6.0%
Dinas Powys	180	3,175	5.7%
Ewenny	23	307	7.6%
Llancarfan	15	282	5.2%
Llandough	46	854	5.4%
Llandow	16	282	5.8%
Llanfair	14	231	6.1%
Llangan	16	277	5.8%
Llanmaes	5	181	3.0%
Llantwit Major	276	4,077	6.8%
*Michaelston	3	132	2.5%
Pendoylan	29	166	17.6%
Penllyn	28	589	4.8%
Peterston-super-Ely	10	360	2.8%
Rhose	66	2,528	2.6%
St. Athan	78	1,494	5.2%
St. Brides Major	51	890	5.8%
*St. Donats	14	144	9.9%
St. Georges-super-Ely	4	168	2.3%
St. Nicholas and Bonvilston	16	325	4.8%
Sully	125	2,196	5.7%
Welsh St. Donats	5	197	2.4%
Wenvoe	32	802	4.0%
Wick	28	301	9.2%
<b>Total for the rural VoG</b>	<b>1,213</b>	<b>22,071</b>	<b>5.5%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Summary

- 7.22 The chapter showed that the accessibility of facilities varies considerably across the rural Vale, however generally a Post Office was found to be the easiest to access and a hospital the most difficult.
- 7.23 Some 1,097 households that intend to move in the next two years indicated that they have a local connection to a different community. The most common reason for a connection to a different community was close family being resident there.
- 7.24 Overall 1,213 of households indicated that a member of their family had to move out of the community to find a suitable home, which represents 5.5% of all households in the rural Vale. Households in Pendoylan were particularly likely to indicate that this had occurred.

# Glossary

## **Affordability**

A measure of whether households can access and sustain the cost of private sector housing. There are two main types of affordability measure: mortgage and rental. Mortgage affordability assesses whether households would be eligible for a mortgage; rental affordability measures whether a household can afford private rental. Mortgage affordability is based on standard lending multipliers (3.5 times income). Rental affordability is defined as the rent being less than a proportion of a household's gross income (in this case 25% of gross income).

## **Affordable housing**

Affordable housing includes social rented and intermediate housing, provided to specified eligible households whose needs are not met by the market. Affordable housing should be at a cost which is below the costs of housing typically available in the open market and be available at a sub-market price in perpetuity (or income generated from the full sale of a shared ownership property recycled to provide replacement affordable housing).

## **Annual need**

The combination of the net future need plus an allowance to deal progressively with part of the net current need.

## **Average**

The term 'average' when used in this report is taken to be a mean value unless otherwise stated.

## **Bedroom standard**

The bedroom standard is calculated as follows: a separate bedroom is allocated to each co-habiting couple, any other person aged 21 or over, each pair of young persons aged 10-20 of the same sex, and each pair of children under 10 (regardless of sex). Unpaired young persons aged 10-20 are paired with a child under 10 of the same sex or, if possible, allocated a separate bedroom. Any remaining unpaired children under 10 are also allocated a separate bedroom. The calculated standard for the household is then compared with the actual number of bedrooms available for its sole use to indicate deficiencies or excesses. Bedrooms include bed-sitters, box rooms and bedrooms which are identified as such by respondents even though they may not be in use as such.

### **Concealed household**

A household that currently lives within another household but has a preference to live independently and is unable to afford appropriate market housing.

### **Current need**

Households whose current housing circumstances at a point in time fall below accepted minimum standards. This would include households living in overcrowded conditions, in unfit or seriously defective housing, families sharing, and homeless people living in temporary accommodation or sharing with others.

### **Disaggregation**

Breaking a numerical assessment of housing need and supply down, either in terms of size and/or type of housing unit, or in terms of geographical sub-areas within the County.

### **Financial capacity**

This is defined as household income+savings+equity (the value of the property owned by owner-occupiers, typically the family home, net of mortgage). This provides an indication, when put on a capital basis, of the amount which the household could afford to pay for housing. Since equity is now a substantial part of the overall financial capacity of the large fraction of owner-occupiers it is essential to use this measure rather than the old price/income ratio to measure the activity of a housing market.

### **Forecast**

Either of housing needs or requirements is a prediction of numbers which would arise in future years based on a model of the determinants of those numbers and assumptions about (a) the behaviour of households and the market and (b) how the key determinants are likely to change. It involves understanding relationships and predicting behaviour in response to preferences and economic conditions.

### **Grossing-up**

Converting the numbers of actual responses in a social survey to an estimate of the number for the whole population. This normally involves dividing the expected number in a group by the number of responses in the survey.

### **Headship rates**

Measures the proportion of individuals in the population, in a particular age/sex/marital status group, who head a household. Projected headship rates are applied to projected populations to produce projected numbers of households.

### **Household**

One person living alone or a group of people who have the address as their only or main residence and who either share one meal a day or share a living room.

### **Household formation**

The process whereby individuals in the population form separate households. 'Gross' or 'new' household formation refers to households which form over a period of time, conventionally one year. This is equal to the number of households existing at the end of the year which did not exist as separate households at the beginning of the year (not counting 'successor' households, when the former head of household dies or departs).

### **Household living within another household**

Is a household living as part of another household of which they are neither the head nor the partner of the head.

### **Households sharing**

Are households (including single people) who live in non-self-contained accommodation but do not share meals or a living room (e.g. five adults sharing a house like this constitute five one-person households).

### **Housing market area**

The geographical area in which a substantial majority of the employed population both live and work, and where most of those changing home without changing employment choose to stay.

### **Housing need**

Housing need is defined as the number of households lacking their own housing or living in housing which is judged to be inadequate or unsuitable, who are unlikely to be able to meet their needs in the housing market without some financial assistance.

### **Housing register**

A database of all individuals or households who have applied to a local authority or RSL for a social tenancy or access to some other form of affordable housing. Housing registers, often called waiting lists, may include not only people with general needs but people with support needs or requiring access because of special circumstances, including homelessness.

### **Housing size**

Measured in terms of the number of bedrooms, habitable rooms or floorspace. This report uses the number of bedrooms.

### **Housing type**

Refers to the type of dwelling, for example, flat, house, specialist accommodation.

### **Income**

Income means gross household income unless otherwise qualified

### **Intermediate housing**

TAN2 defines intermediate housing as *'housing at prices and rents above those of social rent but below market prices or rents. This can include equity sharing schemes (for example HomeBuy)' [but not low cost market housing]*.

### **Lending multiplier**

The number of times a household's gross annual income a mortgage lender will normally be willing to lend. The most common multipliers quoted are 3.5 times income for a single-income household and 2.9 times total income for dual-income households.

**LHMA (Local Housing Market Assessment)**

LHMA derives from government guidance suggesting that the 'evidence base' required for the good planning of an area should be the product of a process rather than a technical exercise.

**Lower quartile**

The value below which one quarter of the cases falls. In relation to house prices, it means the price of the house that is one quarter of the way up the ranking from the cheapest to the most expensive.

**Mean**

The mean is the most common form of average used. It is calculated by dividing the sum of a distribution by the number of incidents in the distribution.

**Median**

The median is an alternative way of calculating the average. It is the middle value of the distribution when the distribution is sorted in ascending or descending order.

**Migration**

The movement of people between geographical areas, primarily defined in this context as the local authority county area. The rate of migration is usually measured as an annual number of households, living in the County at a point in time, who are not resident in that county one year earlier.

**Net need**

The difference between need and the expected supply of available affordable housing units (e.g. from the re-letting of existing social rented dwellings).

**Newly arising need**

New households which are expected to form over a period of time and are likely to require some form of assistance to gain suitable housing together with other existing households whose circumstances change over the period so as to place them in a situation of need (e.g. households losing accommodation because of loss of income, relationship breakdown, eviction, or some other emergency).

### **Non-self-contained accommodation**

Where households share a kitchen, bathroom or toilet with another household, or they share a hall or staircase that is needed to get from one part of their accommodation to another.

### **Overcrowding**

An overcrowded dwelling is one which is below the bedroom standard. (See 'Bedroom Standard' above).

### **Primary data**

Information that is collected from a bespoke data collection exercise (e.g. surveys, focus groups or interviews) and analysed to produce a new set of findings.

### **Potential households**

Adult individuals, couples or lone parent families living as part of other households of which they are neither the head nor the partner of the head and who need to live in their own separate accommodation, and/or are intending to move to separate accommodation rather than continuing to live with their 'host' household.

### **Projection**

Either of housing needs or requirements is a calculation of numbers expected in some future year or years based on the extrapolation of existing conditions and assumptions. For example, household projections calculate the number and composition of households expected at some future date(s) given the projected number of residents, broken down by age, sex and marital status, and an extrapolation of recent trends in the propensity of different groups to form separate households.

### **Random sample**

A sample in which each member of the population has an equal chance of selection.

### **Re-lets**

Social rented housing units which are vacated during a period and become potentially available for letting to new tenants.



**Rounding error**

Totals in tables may differ by small amounts (typically one) due to the fact that fractions have been added together differently. Thus a table total may say 2011, and if the individual cell figures are added the total may come to 2012. This is quite normal and is a result of the computer additions made. Figures should never be taken to be absolutely accurate. No such state exists. The figures in this document are robust estimates not absolutely precise ones. The usual practice is to use the stated total (in the above case 2011) rather than the figure of 2012 to which the individual figures sum. That is because the total will have resulted from a rounding after all the fractions are taken fully into account.

**Sample survey**

Collects information from a known proportion of a population, normally selected at random, in order to estimate the characteristics of the population as a whole.

**Sampling frame**

The complete list of addresses or other population units within the survey area which are the subject of the survey.

**Secondary data**

Existing information that someone else has collected. Data from administrative systems and some research projects are made available for others to summarise and analyse for their own purposes (e.g. Census, national surveys).

**Shared equity schemes**

Provide housing that is available part to buy (usually at market value). There is the option for the other part to be rented.

**Social rented housing**

TAN2 defines social rented housing as housing *'provided by local authorities and registered social landlords where rent levels have regard to the Assembly Government's guideline rents and benchmark rents.'*

### **Stratified sample**

A sample where the population or area is divided into a number of separate sub-sectors ('strata') according to known characteristics based, for example, on sub-areas and applying a different sampling fraction to each sub-sector.

### **Specialised housing**

Refers to housing that has been specially designed for a particular client group to meet their particular needs (such as accommodation that is accessible to people with a physical disability, extracare housing where care services are provided on site, hostels, refuges or group homes) or housing specifically designated for particular groups (such as older people, people with physical disabilities, learning difficulties or mental health issues). This is characterised as housing that includes special design features and/or access to support to assist people to live independently for as long as possible in their own home.

### **Support needs**

Relating to people who have specific needs: such as those associated with a disability.

### **Under-occupation**

An under-occupied dwelling is one which exceeds the bedroom standard by two or more bedrooms.

### **Unsuitably housed households**

All circumstances where households are living in housing which is in some way unsuitable, whether because of its size, type, design, location, condition or cost. Households can have more than one reason for being in unsuitable housing, and so care should be taken in looking at the figures: a total figure is presented for households with one or more unsuitability reason, and also totals for the numbers with each reason.

# Appendix A1 Supporting information

## Non-response and missing data

- A1.1 Missing data is a feature of all housing surveys: mainly due to a respondent's refusal to answer a particular question (e.g. income). For all missing data in the survey imputation procedures were applied. In general, throughout the survey the level of missing data was minimal. The main exception to this was in relation to financial information, where there was an appreciable (although typical) level of non-response.
- A1.2 Non-response can cause a number of problems:
- The sample size is effectively reduced so that applying the calculated weight will not give estimates for the whole population
  - Variables which are derived from the combination of a number of responses each of which may be affected by item non-response (e.g. collecting both respondent and their partner's income separately) may exhibit high levels of non-response
  - If the amount of non-response substantially varies across sub-groups of the population this may lead to a bias of the results
- A1.3 To overcome these problems missing data was 'imputed'. Imputation involves substituting for the missing value, a value given by a suitably defined 'similar' household, where the definition of similar varies depending on the actual item being imputed.
- A1.4 The specific method used was to divide the sample into sub-groups based on relevant characteristics and then 'Probability Match' where a value selected from those with a similar predicted value was imputed. The main sub-groups used were tenure, household size and age of respondent.

## Weighting data

- A1.5 The survey data was weighted to estimated profiles of households based on various secondary sources of information, principally the council tax register, Data Unit Wales data, Welsh Assembly Government household and population projections and the LHMA.
- A1.6 Tables A1.1 to A1.8 show the final estimates of the number of households in each group along with the number of actual survey responses. Although in some cases it is clear that the proportion of survey responses is close to the 'expected' situation there are others where it is clear that the weighting of data was necessary to ensure that the results as presented are reflective of the household population of the rural Vale.

<b>Table A1.1 Tenure</b>				
<i>Tenure</i>	<i>Estimated households</i>	<i>% of households</i>	<i>Number of returns</i>	<i>% of returns</i>
Owner occupied (no mortgage)	9,321	42.2%	2,336	50.8%
Owner occupied (w/ mortgage)	9,105	41.3%	1,709	37.2%
Social rented	1,333	6.0%	217	4.7%
Private rented	2,311	10.5%	332	7.2%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>	<b>4,594</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

<b>Table A1.2 Accommodation Type</b>				
<i>Accommodation Type</i>	<i>Estimated households</i>	<i>% of households</i>	<i>Number of returns</i>	<i>% of returns</i>
Detached	9,785	44.3%	2,433	53.0%
Semi-detached	6,989	31.7%	1,281	27.9%
Terraced	3,753	17.0%	659	14.3%
Flat or maisonette	1,543	7.0%	221	4.8%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>	<b>4,594</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

<b>Table A1.3 Car Ownership</b>				
<i>Car Ownership</i>	<i>Estimated households</i>	<i>% of households</i>	<i>Number of returns</i>	<i>% of returns</i>
No cars	2,512	11.4%	405	8.8%
One car	9,006	40.8%	1,877	40.9%
Two cars	8,228	37.3%	1,831	39.9%
Three or more cars	2,325	10.5%	481	10.5%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>	<b>4,594</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

<b>Table A1.4 Household Type</b>				
<i>Household Type</i>	<i>Estimated households</i>	<i>% of households</i>	<i>Number of returns</i>	<i>% of returns</i>
One person	5,391	24.4%	1,089	23.7%
Two adults	8,427	38.2%	1,997	43.5%
Three or more adults	1,970	8.9%	540	11.8%
Lone parent	1,367	6.2%	100	2.2%
Two adults one child	1,505	6.8%	238	5.2%
Other households with children	3,410	15.5%	630	13.7%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>	<b>4,594</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Table A1.5 Ethnicity				
<i>Ethnic Group</i>	<i>Estimated households</i>	<i>% of households</i>	<i>Number of returns</i>	<i>% of returns</i>
White	21,613	97.9%	4,552	99.1%
BME	457	2.1%	42	0.9%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>	<b>4,594</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Table A1.6 Community				
<i>Community</i>	<i>Estimated households</i>	<i>% of households</i>	<i>Number of returns</i>	<i>% of returns</i>
Colwinston	174	0.8%	44	1.0%
Cowbridge with Llanblethian	1,938	8.8%	465	10.1%
Dinas Powys	3,175	14.4%	687	15.0%
Ewenny	307	1.4%	82	1.8%
Llancarfan	282	1.3%	71	1.5%
Llandough	854	3.9%	159	3.5%
Llandow	282	1.3%	73	1.6%
Llanfair	231	1.0%	72	1.6%
Llangan	277	1.3%	66	1.4%
Llanmaes	181	0.8%	43	0.9%
Llantwit Major	4,077	18.5%	850	18.5%
*Michaelston	132	0.6%	26	0.6%
Pendoylan	166	0.8%	32	0.7%
Penllyn	589	2.7%	129	2.8%
Peterston-super-Ely	360	1.6%	94	2.0%
Rhose	2,528	11.5%	476	10.4%
St. Athan	1,494	6.8%	249	5.4%
St. Brides Major	890	4.0%	190	4.1%
*St. Donats	144	0.7%	18	0.4%
St. Georges-super-Ely	168	0.8%	34	0.7%
St. Nicholas and Bonvilston	325	1.5%	73	1.6%
Sully	2,196	10.0%	397	8.6%
Welsh St. Donats	197	0.9%	34	0.7%
Wenvoe	802	3.6%	173	3.8%
Wick	301	1.4%	57	1.2%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>	<b>4,594</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

**Table A1.7 Council Tax Band**

<i>Household Type</i>	<i>Estimated households</i>	<i>% of households</i>	<i>Number of returns</i>	<i>% of returns</i>
A, B	1,225	5.6%	181	3.9%
C	3,234	14.7%	500	10.9%
D	3,782	17.1%	700	15.2%
E	4,419	20.0%	928	20.2%
F	3,928	17.8%	924	20.1%
G	3,363	15.2%	888	19.3%
H, I, U	2,119	9.6%	473	10.3%
<b>Total</b>	<b>22,071</b>	<b>100.0%</b>	<b>4,594</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

**Table A1.8 Population Age Bands**

<i>Age band</i>	<i>Estimated population</i>	<i>% of population</i>	<i>Number of people on returns</i>	<i>% of people on returns</i>
15 or under	10,032	19.3%	1,614	15.2%
16 to 30	6,801	13.1%	1,216	11.5%
31 to 45	9,107	17.5%	1,667	15.7%
46 to 60	11,493	22.1%	2,536	23.9%
61 to 75	10,240	19.7%	2,684	25.3%
76 or over	4,239	8.2%	901	8.5%
<b>Total</b>	<b>51,912</b>	<b>100.0%</b>	<b>10,618</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

# Appendix A2 Creating rural communities

## Introduction

- A2.1 This appendix summarises the responses received to the Creating Rural Communities questionnaire sent to all communities in the rural Vale. The questionnaire initially asked respondents to provide an overview of the community; the population, local industry and advantages and disadvantages of being resident. It then went on to ascertain the impression of current affordable provision in the community before collecting detail on the amount, type, size and tenure of new affordable housing required and whom this should be available to. Overall six questionnaires were returned. Each will be summarised in this appendix.

## Cowbridge

- A2.2 Cowbridge was described as having a mostly White, middle-class population. The community contains a notable number of residents who commute to work in Cardiff, with local employment principally being farming and in retail. Residents find Cowbridge attractive to live in because of the community spirit and the location, although it was acknowledged that some people have to leave because housing is too expensive.
- A2.3 In terms of the attitudes to more affordable housing locally it was felt that there is a need for additional affordable housing in the community area, although there may be some opposition to its development. The preference is for shared ownership properties and houses rather than flats. There is also a need for housing products for older residents. It was felt that the local community should be given first opportunity to live in a new affordable home and that 'local' equated to the Vale of Glamorgan Council area.
- A2.4 It was felt that young people are most marginalised in the current market as housing costs force them out of the area. It is also difficult for separating couples to both remain in the area. Finally it was felt that the Council does not provide enough information on the types of affordable housing products available in the Vale of Glamorgan.

## Llandow

- A2.5 Llandow was described as having a mix of families and retired people, with few BME residents. Most families stay in the area for a long-time. The community contains a number of younger residents who commute to work in Cardiff, with local employment principally being farming and on Llandow Business Park and Llandow Industrial Estate. Residents find Llandow attractive to live in because of the good schools, good opportunities and that it is well connected. The disadvantage is the public transport is poor.
- A2.6 In terms of the attitudes to more affordable housing locally it was felt that there is a need for additional affordable housing in the community area, as long as the development is in proportion to the existing stock. The preference is for shared ownership or shared equity properties and houses rather than flats. There is also a need for housing products for older residents. It was felt that the local community should be given first opportunity to live in a new affordable home and that 'local' equated to the community area and its adjacent community areas.
- A2.7 No particular group was identified as being especially marginalised from the current housing market with affordable housing required generally. Finally it was felt that the Council does not provide enough information on the types of affordable housing products available in the Vale of Glamorgan.

## Dinas Powys

- A2.8 Dinas Powys was described as having a mixed demographic population, although few BME residents. Most residents stay in the area for a long time. The main local employment in the community is farming. Residents find Dinas Powys attractive to live in because of the community spirit and the good schools.
- A2.9 In terms of the attitudes to more affordable housing locally it was felt that there is no need for additional affordable housing in the community area. If it were to be provided then the preference is for houses and bungalows rather than flats. There is also a need for housing products for older residents. It was felt that the local community should be given first opportunity to live in a new affordable home and that 'local' equated to the community area.
- A2.10 No particular group was identified as being especially marginalised from the current housing market. Finally it was felt that the Council does provide enough information on the types of affordable housing products available in the Vale of Glamorgan.



### St. Brides Major

- A2.11 Employment in St. Brides Major is principally farming, retail and some tourism. It is felt that the housing in St. Brides Major is too expensive for young people and that there is little opportunity for older people to downsize.
- A2.12 In terms of the attitudes to more affordable housing locally it was felt that there is a need for additional affordable housing in the community area. The preference is for shared ownership and shared equity properties and houses and bungalows rather than flats. There is also a need for housing products for older residents and smaller private dwellings. It was felt that the local community should be given first opportunity to live in a new affordable home and that 'local' equated to the community area.
- A2.13 No particular group was identified as being especially marginalised from the current housing market with affordable housing required generally. Finally it was felt that the Council does not provide enough information on the types of affordable housing products available in the Vale of Glamorgan.

### St. Georges-super-Ely

- A2.14 St. Georges-super-Ely was described as having a mix of ages and household types with a very small BME population. Most residents stay in the area for a long-time. The community contains a notable number of residents who commute to work in Cardiff, with local employment principally being farming and in agricultural support. Residents find St. Georges-super-Ely attractive to live in because it is very rural but has good access to the motorway and shops, although it was acknowledged that some people have to leave because housing is too expensive, whilst others move for work opportunities. Much of the local housing is bought by people new to the area.
- A2.15 In terms of the attitudes to more affordable housing locally it was felt that there is a need for additional affordable housing in the community area. The preference is for shared ownership and shared equity properties and bungalows rather than flats. There is also a need for housing products for older residents. It was felt that the local community should be given first opportunity to live in a new affordable home and that 'local' equated to the community area and its adjacent community areas.
- A2.16 No particular group was identified as being especially marginalised from the current housing market. Finally it was felt that the Council does provide enough information on the types of affordable housing products available in the Vale of Glamorgan.

## Peterston-super-Ely

- A2.17 Peterston-super-Ely was described as having a mix of ages and household types with a small BME population. Most residents stay in the area for a long-time, although there are some wealthy residents that move every two years or so due to their employment. The community contains a notable number of residents who commute to work elsewhere, with local employment principally being farming and temporary agricultural work. Residents find Peterston-super-Ely attractive to live in because of the stock profile and population, although it was acknowledged that housing is expensive.
- A2.18 In terms of the attitudes to more affordable housing locally it was felt that there is no need for additional affordable housing in the community area. If it were to be provided then the preference is for social rented dwellings and houses and bungalows rather than flats. There is also a need for housing products for older residents. It was felt that the local community should be given first opportunity to live in a new affordable home and that 'local' equated to the community area.
- A2.19 No particular group was identified as being especially marginalised from the current housing market. It was felt that the vacant new developments in other nearby towns should be occupied before any affordable housing is required in Peterson-super-Ely, however the local population is affluent so there is little need for affordable housing.

## Appendix A3 Expected future movers

### Introduction

- A3.1 The survey questionnaire collected information about households' future needs, expectations and aspirations. Information was collected about both existing households and newly forming households.
- A3.2 It is important to distinguish aspiration from expectation ('what would you like'/'what would you expect'). The results of such questions show a remarkably rational difference from aspiration and the much more realistic expectations.

### Future moves – existing households

- A3.3 Table A3.1 shows estimates of the number and proportion of households who would consider themselves to need or expect to move home over the next two years by tenure. The data shows that 14.9% of households state a need or likelihood of moving home over the next two years. Households living in the private rented sector are particularly likely to be future movers.

Table A3.1 Households who need or are likely to move in next two years by tenure			
<i>Tenure</i>	<i>Number who need/likely to move</i>	<i>Total number of households</i>	<i>% need/likely to move</i>
Owner-occupied (no mortgage)	726	9,321	7.8%
Owner-occupied (with mortgage)	1,348	9,105	14.8%
Social rented	161	1,333	12.1%
Private rented	1,058	2,311	45.8%
<b>Total</b>	<b>3,293</b>	<b>22,071</b>	<b>14.9%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

- A3.4 The survey moved on to look at where households would both like and expect to move. Table A3.2 suggests that the majority of moving households (70.3%) would like to remain in the Vale of Glamorgan, however a smaller proportion expect to remain in the Vale of Glamorgan (64.9%). More households expect to move to Cardiff or another surrounding local authority than would like to.
- A3.5 More households would like to move within their current community than expect to and more households expressed a preference to live in Penarth than expect to move there. In contrast a greater number of households expect to move to Barry than would like to move there.

Table A3.2 Where households would like and expect to move		
<i>Location of next home</i>	<i>Like</i>	<i>Expect</i>
Same community	36.2%	30.3%
Different rural community	22.0%	21.5%
Barry	2.0%	5.7%
Penarth	10.1%	7.4%
In the Cardiff area	5.4%	7.4%
In an another surrounding Council area	3.4%	4.5%
Elsewhere in Wales	7.1%	7.3%
Elsewhere in the UK	10.8%	12.5%
Abroad	3.0%	3.5%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

A3.6 Households were similarly asked about what tenure they would both like and expect to move to; the results are shown in Table A3.3. The results suggest that over four-fifths (80.9%) of households would like to move to owner-occupation, however, only two-thirds (66.6%) expect to secure this type of accommodation. Conversely, more than three times as many households expect to live in the private rented sector than would like to (20.5% compared with 6.1% respectively). Some 13.0% of households would like to live in social rented accommodation; very similar to the proportion who would expect to.

Table A3.3 Housing tenure aspirations and expectations		
<i>Tenure</i>	<i>Like</i>	<i>Expect</i>
Buy own home	80.9%	66.6%
Social rented	13.0%	12.9%
Private rented	6.1%	20.5%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

A3.7 Table A3.4 shows cross-tabulations between current tenure and future tenure preference as well as future tenure expectations. The table shows that generally households would like to remain in the same tenure as they currently live. The exception to this is the private rented sector. The majority of households in this sector want to move to owner-occupation.

Table A3.4 Current tenure and tenure preference				
Current tenure	Tenure preference			
	Owner-occupied	Social rented	Private rented	Total
Owner-occupied (no mortgage)	622	50	54	726
Owner-occupied (with mortgage)	1,274	42	32	1,348
Social rented	23	138	0	161
Private rented	746	198	113	1,057
<b>Total</b>	<b>2,665</b>	<b>428</b>	<b>199</b>	<b>3,292</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

Table A3.5 Current tenure and tenure expectations				
Current tenure	Tenure expectation			
	Owner-occupied	Social rented	Private rented	Total
Owner-occupied (no mortgage)	608	35	84	727
Owner-occupied (with mortgage)	1,150	80	117	1,347
Social rented	13	137	11	161
Private rented	422	173	463	1,058
<b>Total</b>	<b>2,193</b>	<b>425</b>	<b>675</b>	<b>3,293</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

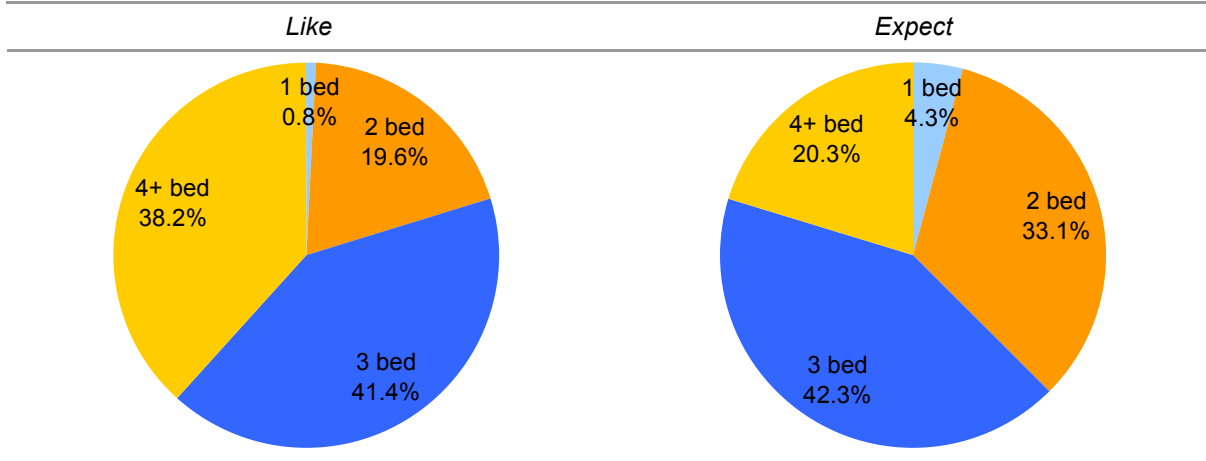
A3.8 Table A3.6 shows the type of dwellings households would like and expect to move to. Unsurprisingly a large proportion of households would like detached houses (60.4%) but a smaller proportion would expect to move to such accommodation (32.3%). Overall more households expect to move to a flat/maisonette, terraced house or semi-detached house than is their preference.

Table A3.6 Housing type aspirations and expectations		
Type of home	Like	Expect
Detached house	60.4%	32.3%
Semi-detached house	17.2%	30.7%
Terraced house	2.4%	13.7%
Bungalow	16.1%	10.7%
Flat/maisonette	3.9%	12.6%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

A3.9 In terms of the sizes of accommodation required, the main difference between preferences and expectations is found amongst four bedroom properties; some 38.2% would like to move to this size accommodation but only 20.3% expect to do so. The reverse is true of one and two bedroom dwellings.

**Figure A3.1 Size of accommodation preferred and expected**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Future moves – newly forming households

A3.10 A similar analysis can be carried out for newly forming households. The survey estimates that there are 4,064 households who need or are likely to form from households in the rural Vale over the next two years.

A3.11 Table A3.7 suggests that newly forming households are less likely to want to remain in the Vale of Glamorgan Council area than existing households. In total 49.7% of newly forming households would like to remain in the area and 44.4% expect to do so (these figures compare with 70.3% and 64.9% respectively for existing households). Notably fewer potential households expect to remain in their current community than would like to do so.

**Table A3.7 Where newly forming households would like and expect to move**

<i>Location of next home</i>	<i>Like</i>	<i>Expect</i>
Same community	14.5%	7.9%
Different rural community	31.1%	28.9%
Barry	1.8%	6.6%
Penarth	2.3%	1.0%
In the Cardiff area	18.1%	17.5%
In an another surrounding Council area	2.3%	6.5%
Elsewhere in Wales	8.5%	8.9%
Elsewhere in the UK	19.4%	21.5%
Abroad	2.0%	1.0%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

A3.12 In terms of tenure preferences and expectations, Table A3.8 shows some interesting results. In total an estimated 63.2% of newly forming households would like to move to owner-occupied accommodation, however less than a quarter expect to secure such accommodation (23.0%). In total only 23.5% want to move to private rented accommodation but some 59.5% expect to do so.

<b>Table A3.8 Housing tenure aspirations and expectations – newly forming households</b>		
<i>Tenure</i>	<i>Like</i>	<i>Expect</i>
Buy own home	63.2%	23.0%
Social rented	13.3%	17.5%
Private rented	23.5%	59.5%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

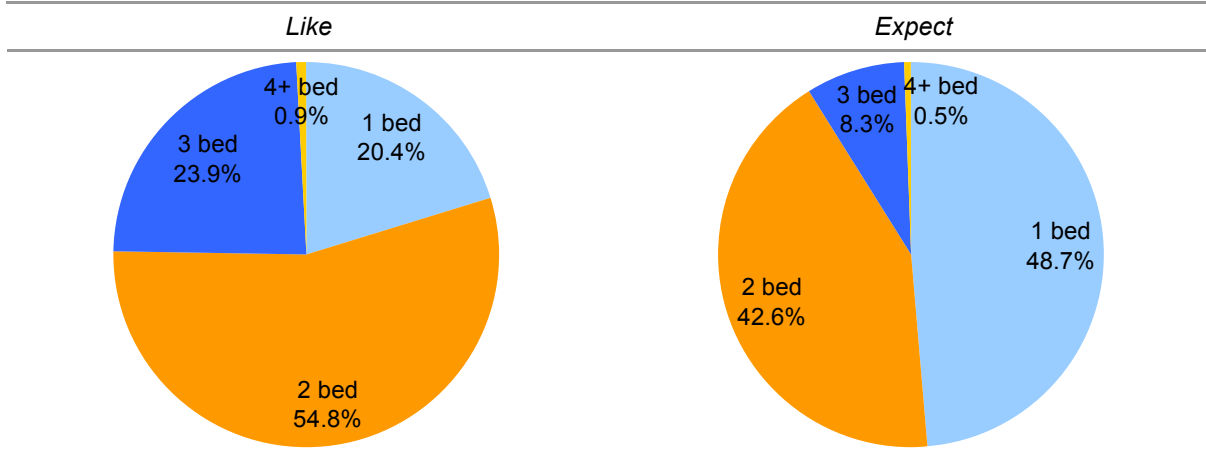
A3.13 Table A3.9 shows the type of dwellings newly forming households would like and expect to move to. Compared with the results for existing households the figures show that there is a greater preference and expectation of flatted accommodation amongst newly forming households. In total 32.8% of newly forming households would like a flat (compared with 3.9% of existing households) whilst 61.9% expect to secure this type of accommodation.

<b>Table A3.9 Housing type aspirations and expectations of newly forming households</b>		
<i>Type of home</i>	<i>Like</i>	<i>Expect</i>
Detached house	21.3%	3.1%
Semi-detached house	30.5%	12.2%
Terraced house	14.6%	22.2%
Bungalow	0.9%	0.6%
Flat/maisonette	32.8%	61.9%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

A3.14 In terms of the sizes of accommodation required, the largest proportion of households would like two-bedroom accommodation (54.8%). Some 23.9% would like a three-bedroom home, but only 8.3% expect to secure this. Almost half of newly forming households expect to move to a one bedroom home; only 20.4% expressed this as a preference.

**Figure A3.2 Size of accommodation preferred and expected**



Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Summary

- A3.15 An estimated 14.9% of existing households state a need or likelihood of moving home over the next two years (3,293 households).
- A3.16 Some 70.3% of these households would like to remain in the Vale of Glamorgan however a smaller proportion would expect to do so (64.9%). More households would like to move within their current community than expect to. In contrast a greater number of households expect to move to Barry than would like to move there.
- A3.17 More moving households would like owner-occupied accommodation than expect it. Similarly, many more moving households would like a detached home than expect it.
- A3.18 The survey estimates that there are 4,064 households who need or are likely to form from households in the rural Vale over the next two years.
- A3.19 In total an estimated 63.2% of newly forming households would like to move to owner-occupied accommodation; however, only 23.0% expect to secure this type of accommodation.



# Appendix A4 Llanfair consultation

## Summary

- A4.1 Whilst primary household survey data was being collected a consultation event was conducted with residents of the community of Llanfair. The consultation included a presentation on the purpose of the survey and a discussion of the issues likely to be covered in order to stimulate debate about affordable housing development there should land become available. The debate centred on what constitutes local, if affordable housing within the community is to be reserved for those with a local connection.
- A4.2 During the discussion the consensus amongst the participants was that local meant a fairly small area largely confined to the community of Llanfair. However the participants were also invited to indicate on a map of the communities of the Vale of Glamorgan and surrounding south Wales areas, where they thought the boundary of whom should be entitled to affordable housing in Llanfair ought to be. The boundaries drawn were generally larger than had been suggested during the discussion, suggesting that actually affordable housing in Llanfair could serve residents of nearby villages and communities as well.
- A4.3 Although the lines drawn did not always follow the community boundaries the broad results of the mapping exercise are presented in Table A4.1.

**Table A4.1 Boundaries of which areas should be considered as local in Llanfair  
(for affordable housing access)**

<i>Boundary</i>	<i>Number of participants</i>
Llanfair only	2
Llanfair with Llanmaes	2
Llanfair with Cowbridge	2
Llanfair with Llantwit Major	1
Llanfair with all neighbouring communities	4
All of the Vale of Glamorgan excluding the coastal towns	1
All of the Vale of Glamorgan	1

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)



# Appendix A5 Improving market balance over the longer term

## Introduction

- A5.1 In addition to the housing needs assessment model, the LHMA update report for the Vale of Glamorgan as a whole (produced alongside this report), contains a model that identifies what accommodation is required to provide housing market balance over the long-term. The model uses secondary data in combination with the household survey dataset to compare the current housing stock against the stock of housing required in the future. The purpose of this model is to identify the new accommodation required to adequately house the future population and ensure that the housing market is balanced. In addition to results for the Vale of Glamorgan as a whole, this model also produces outputs for each of the five sub-areas identified within the County (presented in Appendix A1 of the LHMA update). For completeness, this analysis is reproduced for the rural Vale within this Appendix. The results presented are for the base twenty-year model as this is the most useful for long-term planning and produces the most viable results.

## Demographic projections

- A5.2 The most recently published population projections available at a local level are the 2008-based data from the Welsh Assembly Government. These projections when applied to the rural Vale indicate that the population within the study area is projected to increase by 12.3% between 2010 and 2030 (an increase of 6,371 people). The data also indicates a significant increase in the number of people aged 60 or over within the rural Vale over the 20 year period – with the proportion of people aged 75 and over expected to increase by 80%.
- A5.3 The Welsh Assembly Government household projections suggest that the number of households in the rural Vale will increase by 5,008 (22.7%) over the same 20 year period, although this increase is not uniform across different household groups. The number of (non-lone parent) households with more than one child is expected to decrease by 15.9%, whilst the number of lone parent households is expected to increase by 58.0%. The number of single pensioner households is also expected to increase by some 66.5%.
- A5.4 These population and household projections have been applied to the household survey dataset to provide an estimated household profile for 20 years time. Before the accommodation requirements of the future population are calculated it is important to describe the approach used to create an accommodation profile adequate for each of these household types.

## Adequacy of the housing stock

- A5.5 For the purpose of this model, the housing market is considered balanced if the local population is adequately accommodated. It is therefore initially appropriate to assess the adequacy of the current accommodation to house the residents of the rural Vale. This is determined through response to the household survey.
- A5.6 A household is considered currently adequately housed unless the household has indicated that they need to move home now because the accommodation is inadequate for the household. This is ascertained from the reason cited for the household moving. Households whose moves are caused by the accommodation size, cost, form and services available within it being currently unsuitable for the resident are considered to be inadequately housed and to require alternative accommodation. The type, tenure and size of dwelling these households expect to achieve when they move are presumed to represent the nature of the accommodation that they require.
- A5.7 Some further adjustments are also made to remove over the long-term any undesirable elements of market imbalance that exist currently:
- Households that are overcrowded are assumed to require a property large enough for overcrowding not to take place
  - Households in social rented accommodation that can afford market or intermediate accommodation are assumed to require this to ensure that the stock is being most appropriately and efficiently used
  - Households resident in the private rented sector on Housing Benefit<sup>3</sup> are assumed to move into the form of affordable accommodation that they can afford (intermediate or social rented) as this is the tenure they would be more appropriately housed in. The private rented sector on Housing Benefit is not an adequate long-term equivalent to affordable housing – analysis of survey data shows there is not the same security of tenure or quality of housing within the private rented Housing Benefit stock as within the social rented sector
  - Households resident in the private rented sector without Housing Benefit that identified that the cost of their current housing was a severe problem are assigned to a tenure that they can afford according to the Welsh Assembly Government Local Housing Market Assessment Guide affordability test
- A5.8 Table A5.1 shows the proportion of each household type currently requiring alternative accommodation in order to be adequately housed. The table shows that some 6.0% of households are classified as inadequately housed currently. Lone parents are the household group least likely to reside in adequate accommodation, whilst households containing two or more pensioners are most likely to be adequately housed.

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<sup>3</sup> Housing Benefit has now become Local Housing Allowance.

Table A5.1 Types of households inadequately housed currently

<i>Household type</i>	<i>Number inadequately housed</i>	<i>All households</i>	<i>Proportion inadequately housed</i>
Single pensioners	244	3,564	6.8%
2 or more pensioners	114	3,619	3.1%
Single non-pensioners	126	1,827	6.9%
2 or more adults – no children	291	6,778	4.3%
Lone parent	307	1,367	22.5%
2+ adults, 1 child	97	2,473	3.9%
2+ adults, 2+ children	148	2,442	6.1%
<b>Total</b>	<b>1,326</b>	<b>22,071</b>	<b>6.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

### Tenure of housing required

- A5.9 Rather than prescribing the accommodation required to address the current mismatch between the household population and the current stock, the profile of suitable accommodation for each household type is applied to the household population in 20 years time. The model therefore assumes that the pattern of accommodation required by each household type remains constant.
- A5.10 Table A5.2 shows the ideal tenure profile in the rural Vale in 20 years time (if all households are to be adequately housed). The data shows that in 2030 the housing market should comprise 88.5% of market dwellings, 1.5% intermediate and 10.0% social rented.

Table A5.2 Ideal tenure profile in 2030

<i>Tenure</i>	<i>Number of households</i>	<i>Percentage of households</i>
Market	23,965	88.5%
Intermediate	409	1.5%
Social rented	2,704	10.0%
<b>Total</b>	<b>27,078</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

- A5.11 Table A5.3 shows the tenure profile required by households resident in the rural Vale in 20 years time in comparison to the tenure profile recorded currently. The difference between these two distributions is the change required to the housing stock over this period. The results show that 5,008 additional homes are required in the rural Vale over the next 20 years. The table also indicates that 65.2% of new dwellings should be market properties with 7.4% intermediate housing and 27.4% social rented accommodation.

**Table A5.3 Tenure of new accommodation required in Vale of Glamorgan over the next 20 years**

<i>Tenure</i>	<i>Current tenure profile</i>	<i>Tenure profile 2030</i>	<i>Change required</i>	<i>% of change required</i>
Market	20,699	23,965	+3,266	65.2%
Intermediate	39	409	+370	7.4%
Social rented	1,333	2,704	+1,372	27.4%
<b>Total</b>	<b>22,071</b>	<b>27,078</b>	<b>+5,008</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

A5.12 This profile of new accommodation can theoretically be achieved in the rural Vale over the next 20 years and it is recommended that this is what the Council should pursue in order to provide a more balanced housing stock. The model is able to also provide detail on the size of new dwellings required within each of these three tenures.

### Size of housing required within each tenure

A5.13 Table A5.4 presents the size of market accommodation required by households resident in the rural Vale in 20 years time in comparison to the size profile recorded in the sector currently. The implied change to the housing stock is also presented. The table shows that some 52.4% of new market dwellings should be three bedroom properties, with 24.8% containing two bedrooms, 19.3% four or more bedrooms and 3.5% one bedroom.

**Table A5.4 Size of new market accommodation required in Vale of Glamorgan over the next 20 years**

<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2030</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	447	561	+114	3.5%
Two bedrooms	3,802	4,613	+811	24.8%
Three bedrooms	8,689	10,401	+1,712	52.4%
Four or more bedrooms	7,761	8,391	+630	19.3%
<b>Total</b>	<b>20,699</b>	<b>23,965</b>	<b>+3,266</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

A5.14 This analysis can be repeated for intermediate housing and is presented in Table A5.5. The data indicates that of the 370 additional intermediate dwellings required within the rural Vale, over half should be three bedroom properties with a quarter two bedroom accommodation. This analysis of intermediate housing requirements is based on a small sample and should therefore be viewed with caution.

**Table A5.5 Size of new intermediate accommodation required in Vale of Glamorgan over the next 20 years**

<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2030</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	0	45	+45	12.0%
Two bedrooms	17	110	+93	25.3%
Three bedrooms	19	214	+195	52.8%
Four or more bedrooms	3	40	+37	9.9%
<b>Total</b>	<b>39</b>	<b>409</b>	<b>+370</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

A5.15 Table A5.6 shows the equivalent results for the social rented sector. The table shows that of the 1,372 additional social rented units required within the rural Vale over the next twenty years, 54.3% should be two bedroom properties, 28.1% three bedroom accommodation, 13.2% one bedroom dwellings and 4.4% properties with four or more bedrooms. The relatively large requirement for one bedroom social rented accommodation reflects the large projected growth in single pensioner households within the tenure. If future occupation patterns require that these households have an additional bedroom for a potential carer then the one bedroom requirement would become a two bedroom requirement.

**Table A5.6 Size of new social rented accommodation required in Vale of Glamorgan over the next 20 years**

<i>Dwelling size</i>	<i>Current size profile</i>	<i>Size profile 2030</i>	<i>Change required</i>	<i>% of change required</i>
One bedroom	250	431	+181	13.2%
Two bedrooms	442	1,187	+745	54.3%
Three bedrooms	616	1,002	+386	28.1%
Four or more bedrooms	24	84	+60	4.4%
<b>Total</b>	<b>1,333</b>	<b>2,704</b>	<b>+1,372</b>	<b>100.0%</b>

Source: The Vale of Glamorgan Rural Housing Survey, Fordham Research (2010)

## Summary

- A5.16 The Welsh Assembly Government demographic projections suggest that there will be a notable aging of the resident population over the next twenty years with a significant increase in the number of people aged 75 or over. In addition there are projected to be large increases in the number of single person and lone parent family households.
- A5.17 In terms of the accommodation required to provide housing market balance over the long-term, our model which is based on secondary data in combination with the household survey data and considers a range of factors including the adequacy of current housing suggests that:
- Around 65% of the requirement for new housing is for market accommodation
  - Over 70% of new market housing should have three or four bedrooms
  - The majority of new intermediate housing should have two or three bedrooms
  - Around two-thirds of new social rented accommodation should have one and two bedrooms, and a third should have three and four bedrooms



# Appendix A6 Survey questionnaires