

ICMUnlimited..

Mayfields Housing Development

A report into public attitudes towards the proposals
for a new town in the Sussex area

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1. Executive summary

This report presents the findings from a survey into public attitudes toward proposals to build a new market town on an area of land between Sayers Common and Henfield, a site which falls across the Horsham and Mid Sussex district council areas.

The research was designed to assess support and opposition levels to the proposals, which call for up to 10,000 new homes being built, alongside associated community infrastructure including schools and shopping opportunities.

A total of 1,000 interviews were conducted with adults aged over the age of 18, equally split between people living in the Horsham District Council area (501), and the Mid Sussex District Council area (499). The research was carried out by telephone between 25th November and 1st December 2016. The sample was drawn at random, with quotas set to ensure that the contacted sample matched that of the eligible population according to updated Census statistics.

The data produced the following main headline findings:

- In a forced choice between development of 10,000 new homes on the fringes of existing towns or the same number of new homes in one location **seven in ten (69%) opt for a brand new town**, with only one in five (21%) preferring fringe development.
- There is an overwhelming view that **Mid Sussex and Horsham cannot sustain further housing without supporting infrastructure**. Nearly all (93%) agreed that schools and medical facilities must be built alongside new homes.
- Nearly as many (89%) believe that **house prices are too high** for most people to get on the housing ladder, with seven in ten (69%) agreeing that new homes must be built **to keep local people in the areas**. Fewer - but still a majority (55%) – agree that new homes should be built for newcomers as well as people already living in the area, although **the jury is out** on whether or not new homes would have a negative effect on their community (46% agree; 45% disagree).
- Appetite for further property development across the geography is waning, with only one in five (20%) wanting greater housing growth compared to that seen over the last five years. Twice as many (41%) want to see less, with a third (33%) wanting a comparable rate of growth.
- **Opposition to a new single town is strongly correlated with those living closer to it**. When asked to consider their views toward a new town of up to 10,000 homes based on living within 1-mile, 5-miles and 15-miles from it, opposition fell from 66% to 49% and 26% respectively.
- **Awareness of proposals to build the new market town is low**, with little over one-quarter (28%) of the public living within the district council areas which it would straddle having heard of it prior to the interview taking place.

2. Background and Objectives

Mayfields commissioned ICM to conduct a study of public attitudes toward housing development in the locality of the new market town proposal, a housing settlement of approximately 10,000 new homes of differing types, which could be bought outright, via shared ownership or via affordable renting. The proposed location is a site between Sayers Common and Henfield, just to the west of the A23 trunk road to Brighton and north of the South Downs national park.

This survey is the second commissioned by Mayfield Towns, the first being conducted by Ipsos-MORI in the summer of 2014.

This report presents findings from the second wave of research, conducted by telephone between 25th November and 1st December 2016. The purpose was to update understanding on public awareness of, and views toward the new town proposition amongst a representative sample of people living in the District Council areas potentially affected by it.

Questionnaire

The questionnaire was designed by ICM Unlimited in collaboration with Mayfields and Meeting Place Communications. Questions were premised on a major study conducted by ICM on behalf of South East County Councils (the South East Plan) on infrastructure development, and on assorted other planning and development research conducted by ICM over the last few years.

The final questionnaire took an average of 5-minutes to complete. Topics covered in the questionnaire include:

- Awareness of the new town proposals and assessment of support and opposition to them;
- An analysis of support/opposition based on geo-demographic hotspot mapping;
- More general attitudes toward housing development in the Sussex area;
- Assessment of future housing need among people living in the Sussex communities likely to be affected by proposals

Methodology

Sample

ICM used a telephone (CATI) interviewing technique in order to ensure high-quality representative data. The main premise of the survey was to generate a representative sample of people currently resident in each of the Horsham and Mid Sussex District Council areas.

A random location survey design was employed, with telephone numbers drawn at random from the full database of eligible numbers. Further, a modelled sample of mobile phone numbers was included within the sampling frame, to ensure that all sections of the community had a theoretical chance of selection proportionate to population distribution across the eligible geography, and in line with Census derived population statistics.

Sample size

The sample was set at 1,000 in order to ensure that data was accurate to at least plus or minus 3 percentage points (+/-3.2) at the 95% confidence interval from the sample result (i.e. we can be 95% certain that the 'true' value will fall within the range of +/-3.2).

Weighting

Under the quasi-random quota sampling method, researchers use a two stage process to ensure a representative sample. The first (as described above) involves setting quotas, in this case by age and gender. The second is data weighting, which corrects for any quotas being under or over achieved during fieldwork.

At the analysis stage, ICM weighted data to the known demographic profile of the area (using the variables: age, gender, work status and tenure), to correct any variables which were under or over represented.

3. Main report

Residency across the Horsham and Mid-Sussex area

The population of Horsham and Mid Sussex is well tenured, with three-quarters (74%) having lived in the area for at least eleven years.

There is a high degree of consistency in this observation, with most demographic sub-categories of people displaying 70%+ levels of residential longevity beyond eleven years in the area. Slightly more Mid Sussex residents (76%) have lived locally beyond the eleven year mark than Horsham residents (71%), but this only translates to an extra half year on average (12.67 years vs 12.04 years).

As we might expect, older people (55+: 82% for 11+ years) have lived locally to a greater degree than younger people (18-34: 63% for 11+ years).

One in ten residents have lived in the area for between 6-10 years (11%) or for between 2-5 years (11%). Newcomers are low in number, with only 5% of people claiming to have lived locally for two years or less.

Future demand for housing

One in three people (31%) believe that they will need to rent or buy a property in the Mid Sussex or Horsham area at some point over the next twenty years, which, when aggregated with the dependents with likely similar requirements implies that demand for new housing extends beyond half (56%) of the current community.

Demand is only a touch higher in Mid Sussex (57%) than it is in Horsham (54%) but rises significantly when age is factored in. Seven in ten (71%) of 18-34s expect themselves or their dependents to need a property down the line (including 61% of current 18-34s talking about themselves).

	Overall	18-34	35-54	55+	Working	Not working
Net: Yes	56%	71%	70%	32%	67%	37%
Net: Respondent	31%	61%	30%	12%	38%	17%
Yes – I am	17%	42%	11%	6%	21%	10%
Yes – dependents	25%	10%	40%	20%	29%	20%
Yes – both	14%	19%	18%	6%	18%	8%
No	39%	25%	22%	63%	27%	59%
Don't know	6%	4%	8%	4%	6%	4%

Being in work is also a strong factor in likely demand, with 67% of people in work likely to want to rent or buy a property for themselves or for their dependents to want to do so. This compares to only 37% of people not currently in work for any reason. In summary, twice as many respondents currently in

work (as opposed to not in work) will themselves require housing in the next twenty years, and as many as five times the number of young people will demand housing compared to older people.

People renting their current property demonstrate slightly higher demand for property (62% for themselves/their dependents) than those already owning property with or without a mortgage (55%), which indicates that there is likely to be a fluid future market rather than one underpinned by a generation of locked-out renters.

But need and growth do not necessarily equate

There is a difference, however, in recognising individual housing needs and being ready to accept unabated housing development.

Indeed, a full four in ten (41%) would prefer to see less development across Horsham and Mid Sussex than they have witnessed over the last few years. This is double the number who want to see greater housing growth (20%) and 8-points more than those who would prefer to see a steady and comparable rate of growth (33%).

This finding may well be a feature of environmental and emotional attachment to the area. While the previously identified age variation in response is also present to a degree in this question (although work status is not), the age variable does not explain the demand for lower growth to the extent that length of local residency does. It can clearly be seen that a strong correlation exists between preferences for lower levels of housing growth and having lived in the area for longer.

	Overall	<2 years	2-5 years	6-10 years	11+ years
Greater than seen over last few years	20%	31%	30%	21%	19%
About the same	33%	32%	40%	40%	31%
Less than that seen over last few years	41%	19%	33%	35%	44%
Don't know	6%	18%	7%	4%	5%

Indeed the reverse is also true – the less time that people have lived locally, the greater the chance they want to see faster paced housing development. A third (31%) of those who have lived in the area for less than two years want a rate of growth greater than that previously witnessed, compared to only one in five (19%) of those who have more than eleven years local occupancy.

Establishing that four in ten prefer a lower rate of housing growth does not imply, though, that demands for further growth are absent. Indeed, response to this question enables highly subjective and potentially contradictory – but still legitimate – positions to be taken.

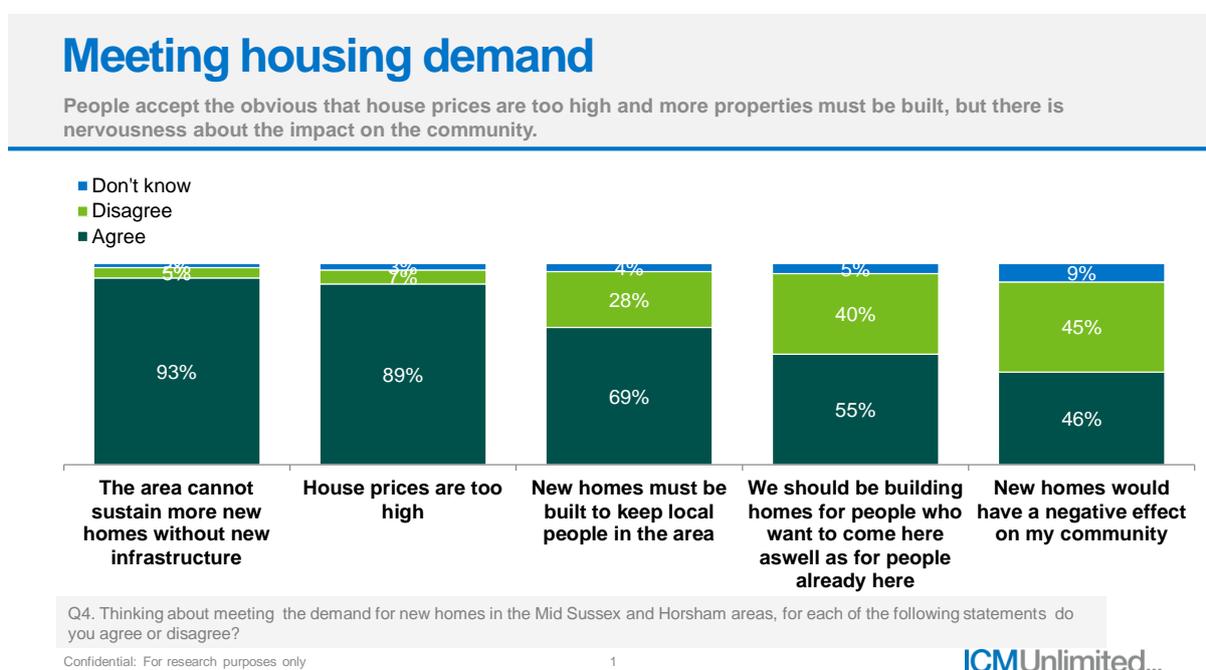
Aggregating the one in five (20%) who do actually want to see greater levels of development than previously seen with the one in three (33%) who are content with building rates at present levels gives a majority (53%) in favour of housing growth *at least* at the current level. Contrary to that is the 74% (33% plus 41%) who would prefer *no more than* the current level. Self-evidently, more people fall into the latter category, but for both sides in this planning process, the data provides succour to their

position and neither could justifiably claim to have public opinion exclusively lined up in favour or against them.

Attitudes toward new homes in Horsham and Mid Sussex

What can be determined, with considerable clarity, are the views that house prices are too high (89% agreement), and that further property development is unsustainable without new infrastructure – including schools and medical facilities – being built alongside it (93%). Furthermore, there is a strong majority in favour of the idea that new homes must be built to keep local people in the area (69%) and a weak majority in favour of building homes for newcomers (55%).

There is no inherent contradiction in observing these findings in context of a plurality view against a higher rate of home building. It is perfectly reasonable for people to accept that house prices have risen too far, or indeed to accept that there should be more development, just for a sizable number to believe that it should not continue at the rate they’ve previously seen.



But there is still a need to recognise that a core number of people are resolute in their opposition to further housing development in the Sussex area under consideration. It is fair to assume that the 28% who don’t think that new homes are needed to keep people here is as good a numerical base assessment (floor) as the survey is capable of delivering, with the 40% who don’t think new homes should be built to attract new comers the ceiling for their number. Irrespective of which number is considered a ‘representative view’, it is materially less than whatever sized majority is chosen to reflect overall demand for further housing, with the use of the word ‘majority’ largely irrefutable in the context of these data outcomes.

Reflected within these findings are genuine causes for concern. The view that housing development cannot continue without associated additional infrastructure built alongside it is strongly embedded within the public’s collective consciousness – not only at top line level but within all population sub-

groups. Rarely does the level of agreement drop below the nine in ten mark, with only (perhaps) the “property-desperate” 18-34s (88%), those in rented accommodation (86%) and those in favour of town fringe development rather than a whole new town build (89%) showing any willingness to compromise the need for associated infrastructure in favour of their own desire to be a property owner.

There is also a material level of concern about the kind of impact that more new homes would have on the local community. There is an equal split between those who agree (46%) and disagree (45%) on there being negative consequences (46%) associated with additional housing, with some previously observed demographic splits re-emerging on this matter. For example, agreement increases with age (18-34: 38%; 55+: 49%), and length of local residency (<2 years: 32%; 11+ years: 48%) while it is also strongly correlated with hopes about the speed of future housing growth. Unsurprisingly, fewer people have concerns about the impact on the community if they want to see greater levels of development (27%) compared to those want the same rate of housing growth (36%) or those who want the rate of growth slowed down (65%).

There is no substantive split in opinion on this by support for fringe development (44% agree that there would be a negative community impact) or for a new town (46% agree).

The new town proposals

Just over one in four people (28%) claimed to be aware of the proposals to build a new town, with seven in ten (70%) not having previously heard of them. Awareness is slightly higher in the Mid Sussex area (30%) than in Horsham (25%), with older people almost twice as likely to be aware compared to their younger counterparts (18-34: 19% aware; 55+: 36% aware).

Again, it can be observed that living in the area for longer has an important impact on a survey variable. Only 13% of those who have lived locally for up to two years are aware, compared to 31% of those with between 2-5 years residency (awareness then tails off to 25% and 28% respectively for the two longest resident cohorts, but remains materially higher in comparison to the area’s most recent arrivals).

So what do people think of single town versus multiple fringe development proposals? In the absence of widespread and informed awareness, it was inevitably incumbent upon the question framers (ICM) to offer some explanation of competing alternatives, based on fact as far as possible. This was helped somewhat by the primary objective of the commissioning client simply being to ascertain whether a single town development or multitudinous and wide spread developments on town fringes were the preferred way of home building in the area - irrespective of new home numbers or indeed the actual location of the new town proposal. In short, the purpose of the survey was not to generate a view on the new town *per se*, but on the concept of a single new large town versus piecemeal fringe development.

In order to achieve this, a forced-choice question between two alternatives was framed:

- 1. New homes built in several new housing estates on the edge of many different existing towns and villages in the Mid Sussex and Horsham areas, which would rely on existing schools and services;**
- 2. The same number of new homes in a new development, which is in one place, separated from the main towns and villages in your local authority area and serviced by its own schools, shops and health centres.**

Respondents were deliberately not verbally offered the opportunity to say “neither” or “both equally” although such responses were permitted if insisted upon. It was noted from the previous survey that a sizable chunk of interviews were lost to ambivalent response, which was considered theoretically unhelpful in the event of proposed development in the Sussex area itself being comprised of an either/or choice.

It should also be noted that the use of a forced choice question out of context of the new town development’s scale or indeed location was considered helpful in obviating accusations of leading, loading or biasing questions.

In the event of a forced choice between the two competing housing development alternatives, a preference for a single town development was decisively recorded. By a margin of three to one, 69% opted for a single town development, compared to several new housing estates on current town and village fringes (21%). In excluding other answers (Both equally: 1%; Neither: 4% and Don’t Know: 5%) and rebasing only on those expressing a forced choice, 77% prefer a single town development compared to 23% who prefer fringe estates on the edge of numerous towns.

The preference for a single town is slightly greater in Horsham (71%) than Mid Sussex (68%), and preferred by more women (72%) than men (66%). As we might predict, younger people (18-34: 75%) shown a significantly greater preference for it than older people (55+: 63%, a sizable 7% of whom opt for no development at all). Perhaps what is not so obvious is that people with longer residency in the area marginally opt for a single town over more dispersed developments with 70% of people who have lived locally for both of 6-10 years and 11+ years saying so, compared to 66% of people who have lived locally for less than two years. We might speculate that their apparent concern for environmental and character considerations is felt (by a few) to be better served by a large single settlement than by many green fringe areas being further developed.

As noted in the previous section, awareness of the new town proposals do shape views. A majority (57%) of people who know of it do still prefer a single town, but this is materially lower than the 74% who prefer it but who have no knowledge of Mayfields proposals. Approximately half of the seventeen point difference between these two numbers can be explained by the 9% who reject any further housing development in the area.

	Overall	18-34	35-54	55+	Aware proposals	Unaware proposals
New homes in several new housing estates on the edge of many different existing towns...rely largely on existing schools and services	21%	22%	19%	22%	29%	18%
Same number of new homes in Mayfields, which is in one place...serviced by its own new schools etc	69%	75%	72%	63%	57%	74%
Both equally/Neither/DK	10%	3%	9%	15%	14%	8%

With only one in five (21%) preferring fringe development, it is difficult to conclude any other way than to say that in the event of an either/or proposition, the public across Horsham and Mid Sussex would opt for a focussed development of one new larger town with self-serving facilities, rather than piecemeal homes being built across the districts. Having offered some information about the new town proposal and its alternative, this outcome may imply that current opposition is premised more on the organised and principled defiance of a relatively small group but vocal group, than on widespread but as yet latent general views.

The proximity of opposition

There is little doubt that the closer someone lives to a large scale brand new housing development, the greater the chance that they will oppose it. In the use of a three-stage question which hypothetically placed respondents within 1-mile, 5-miles and 15-miles of a new town, opposition outstripped support in both of the closer proximities, although 15-miles is considered far enough way for support to be forthcoming.

	Within 1-mile	Within 5-miles	Within 15-miles
NET: Support	18%	34%	50%
Strongly support	9%	15%	23%
Tend to support	9%	19%	28%
Neither support nor oppose	13%	15%	20%
Tend to oppose	13%	13%	8%
Strongly oppose	53%	36%	18%
NET: Oppose	66%	49%	26%
Don't know	3%	2%	3%

Two in three (66%) object to a single new town being built within a mile of their property, with the *intensity* of opposition also strong (53% strongly oppose). Only among 18-34s, people in rented accommodation and those who want to see higher levels of housing growth than witnessed over the last few years is opposition more subdued, but in each case it still (if marginally) outstrips support.

A hot spot map (map #1) of support and opposition to the new town based on an approximate postcode of its actual location is included in the appendix, based on the 1-mile distance support/opposition variable. Although the current rurality of the location means that nobody interviewed is *actually* resident within a mile of it, the proliferation of (red) 'opposed' responses (to a development within a mile away of anywhere) confirms visually that hardly anyone would be prepared to accept its construction so close to their home.

There is less certainty about the level of opposition if the development were within 5-miles of people's homes, but again, many more people would oppose (49%) rather than support (34%) it. The same demographic groups identified (immediately above) do, however, tip into supportive territory ('net support' based on support minus opposition) on the basis of greater distance between their home and the development, with people with less than two years residence in the area added to the list (45% support vs 35% opposition, giving a net support level of +10).

Hot spot map (#2) is based on support/opposition based on the 5-mile distance. Some support does emerge from respondents actually living within 5-miles of the proposed development, with support creeping into Hurstpierpoint, Burgess Hill, and Partridge Green communities. Opposition in the more nearby Henfield and fringes of Sayers Common remains resolute, though.

Finally, respondents were asked of their views if a proposed new town was up to 15-miles distant from their home. Overall support does in this case outweigh opposition, with exactly half (50%) prepared to support such a development, with a quarter (26%) opposed. The hot spot map based on 15-miles (map #3) from the approximate postcode does, however, indicate that opposition is hardened to a new town in the areas which in actual fact might well be much closer to it. Opposition to a new town up to 15-miles away does not melt away in Henfield or the western fringes of Hurstpierpoint, which would, of course, be much closer to the proposed new town than 15 miles in reality, if planning permission were achieved.

It is likely, of course, that residents in the Henfield and surrounding areas are more aware of the proposals than people elsewhere, and as a result are unwilling to support a development even if it were hypothetically farther away from them than the actual proposal calls for.

It should also be noted that the 15-mile distance asked about is more distant than many of the more sizable towns actually are from the proposed development. Horsham, for example, is approximately 12-miles away rather than 15-miles away, which implies that the swathe of 'green support' in the hot-spot map may overstate actual support for a new town which is slightly closer to them than the survey question implied. The same applies to Haywards Heath, which is approximately 7-8 miles away rather than 15-miles, and is mostly opposed to a new town based up to 5-miles away (hot spot map #2).

HORSHAM & MID SUSSEX QUESTIONNAIRE - FINAL

Hello, I am telephoning on behalf of ICM, the independent social research organisation. We are conducting a research project that requires us to talk to a representative sample of people living in the Mid Sussex and Horsham areas about issues that affect all people living locally. We have selected your telephone number purely at random and would greatly appreciate your help for a few minutes to answer some simple questions.

⇒ **IF RESPONDENT SOUNDS LIKE THEY WANT TO REFUSE SAY.....**

For the purposes of our research project it is most important that we talk to a representative cross section of all people. Therefore, your views are extremely important to us and the interview should only take 5-minutes of your time.

⇒ **IF RESPONDENT STILL SOUNDS LIKE THEY WANT TO REFUSE SAY....**

If you cannot spare the time at the moment I would really appreciate it if we could call you back at your own convenience over the next few days. As I say your own views are very important to us.

QS1 Just so we can be sure which questions to ask you, can I start by checking your postcode?

QS3 And can I confirm, do you live in one of the following local authority (council) areas?

WEST SUSSEX	
Horsham District Council	50%
Mid Sussex District Council	50%
No	CLOSE

To make sure that we talk to a cross-section of people, I'd like to start by asking some questions about you.

SEX:		
	Male	48%
	Female	52%
AGE:		
	18-24	10%
	25-34	14%
	35-44	14%
	45-54	22%
	55-64	14%
	65+	24%
WORKING STATUS:		
	Full time (30+ hours)	45%
	Part time (9-29 hours)	18%
	Unemployed - seeking	2%
	Unemployed – not seeking	3%
	Retired	25%
	Not working - student	2%
	Other/ref	5%

Q1. First of all, can I ask how long you have lived in the local area?

	Less than two years	5%
	Between 2-5 years	11%
	Between 6-10 years	11%
	11+ years	74%
	Don't know	*%

Q2 Are you or any of your dependents likely to want or need to buy or rent a home in the Mid Sussex or Horsham areas during the next 20 years?

	Yes – I am	17%
	Yes – dependents	25%
	Yes - both	14%
	No	39%
	Don't know	6%

Q3. Do you think that housing growth in and around Mid Sussex and Horsham should be..... READ OUT. CODE ONE. ROTATE START

	Greater than that seen over the last few years	20%
	About the same as that seen over the last few years	33%
	Less than that seen over the last few years	41%
	Don't know	6%

Q4. Thinking about meeting the demand for new homes in the Mid Sussex and Horsham areas, for each of the following statements do you agree or disagree? ROTATE. READ OUT. CODE ONE FOR EACH

1 – Agree

2 – Disagree

	Agree	Disagree	DK
House prices are too high in this area for most people to get on the housing ladder, or climb up it	89%	7%	3%
New homes must be built to keep local people in the area	69%	28%	4%
The area cannot sustain more new homes unless new infrastructure in the form of schools, medical facilities etc are built with it	93%	5%	2%
New homes would have a negative effect on my community	46%	45%	9%
We should be building new homes for the people who want to come and live here as well as the people already living here	55%	40%	5%

Q5. Have you ever heard about proposals for a new market town development, called “Mayfields”?

Yes	28%
No	70%
Don't know	2%

READ OUT: Mayfield Market Towns propose to build a new housing settlement of approximately 10,000 new homes in the Mid Sussex and Horsham area, potentially comprising different types of housing such as houses and flats - which could be bought outright, bought via shared ownership or via affordable renting.

Q6. Regardless of your view about whether this is the right amount of new homes or where they should be built, if you were forced to choose please tell me which one of these two options you yourself would prefer? READ OUT. CODE ONE

New homes built in several new housing estates on the edge of many different existing towns and villages in the Mid Sussex and Horsham areas, which would rely largely on existing schools and services	21%
The same number of new homes in Mayfields, which is in one place, separated from the main towns and villages in your local authority area and serviced by its own new schools, shops and health centres	69%
DO NOT READ OUT: Both equally	1%
DO NOT READ OUT: Neither	4%
Don't know	5%

Q7. If a decision were taken to build a single new town of up to 10,000 new homes, with the location being within 1/5/15 miles of where you live, to what extent would you support or oppose the proposal?

	Within 1-mile	Within 5-miles	Within 15-miles
NET: Support	18%	34%	50%
Strongly support	9%	15%	23%
Tend to support	9%	19%	28%
Neither support nor oppose	13%	15%	20%
Tend to oppose	13%	13%	8%
Strongly oppose	53%	36%	18%
NET: Oppose	66%	49%	26%
Don't know	3%	2%	3%

OTHER CLASSIFICATION

TENURE:		
Own outright		39%
Own with mortgage		35%
Council rent		2%
Housing association rent		9%
Shared ownership		1%
Private rent/other		12%
SOCIAL CLASS:		
	AB	44%
	C1	16%
	C2	13%
	DE	17%
ADULTS 18+ IN HOUSEHOLD		
	One	19%
	Two	56%
	Three	14%
	Four	7%
	Five +	2%
CHILDREN IN HOUSEHOLD		
	No	60%
	Yes – aged under 5	12%
	Yes – aged 5-10	13%
	Yes – aged 11-15	14%
	Yes – 16-18	8%