APPENDIX D - SURVEY METHOD

1. THE SURVEY FRAMEWORK

The Isle of Wight Council Private Sector House Condition Survey was conducted within the guidelines laid down by the Department for Transport, Local Government and the Regions in their advice to English Local Authorities. This involved the selection of a random sample of private sector dwellings from the Council Tax Register and the completion of an internal and external physical survey at each address. In addition to the physical survey a short interview was completed with each resident household.

Using housing stock information from the Council Tax Register, all data in the survey has been grossed up to represent estimates of total private housing stock in the seven identified areas. This appendix outlines the survey and statistical processes underlying these estimates.

2. SAMPLING

The survey was based on a sample of circa 1400 dwellings across all private tenures. For the purposes of survey analysis seven areas were identified based on individual wards or groups of wards. The sample excluded dwellings owned by the Council or other public sector organisations.

Survey data has been "grossed up" to represent total private sector dwellings and households across the seven identified areas. To do this estimates must be made of the total private sector housing stock and resident households. While such estimates represent a bi-product of technical sampling processes they also form the critical base for all survey estimates and an important input to private sector housing planning given that the most recent measured housing counts relate to the 1991 Census of Population.

Housing and household estimates are computed in a series of stages and by combining outputs from the Council Tax Register with actual survey data collected through visits to sampled addresses.

The stages involved in estimating private sector dwellings are as follows :

STAGE 1 :   Conversion of Council Tax Register addresses to effective housing stock.   Initial addresses issued from the Council Tax Register are each assumed to represent one dwelling. The actual situation recorded during survey is used to adjust this assumption in one of two ways :

> **(a)   By removing ineffective addresses which do not form a part of the private sector housing stock eg retail, commercial. closed, ineligible tenure.**

> **(b)   By adjusting for the actual number of dwellings located at each address. This may be more than one where several self-contained flats are located**

at *one* building address, or less than one where several non self-contained units have individual addresses within the *one* building.

STAGE 2 : Estimation of private-sector housing stock. Private sector housing estimates are derived by applying the address/dwelling ratio to effective Council Tax addresses. This is completed on an area basis together with estimates of occupancy status.

STAGE 3 : Conversion of dwellings to Households. Household estimates are derived by examining levels of occupancy within the housing stock. The survey provides estimates of the number of households which are applied to the occupied housing stock.

3. FIELDWORK

Dwelling inspections were completed by experienced surveyors in our employ.

4. SURVEYOR VARIABILITY

The problem of surveyor variability in house condition surveys has received a considerable amount of attention in recent years. By surveyor variability we mean the extent to which the judgement of any individual surveyor varies from the standards established for the survey. It is impossible for complete uniformity to be achieved for many reasons including the work experience of the surveyors and the subjective nature of some of the assessment required. However, a number of steps can be introduced to minimise the potential bias that such variability introduces. The steps taken in the Isle of Wight include:

- **A detailed briefing and training exercise prior to survey implementation and involving all surveyors engaged in survey duties. The briefing included a full review of the techniques for completion of the physical survey form, the technical interpretation and application of the condition measures applied and a practical exercise involving the inspection of test dwellings chosen to be representative of a range of condition issues. Briefing also included instruction of the social interview.**

- **In addition to the briefing there was a programme of regular monitoring adopted. This involved, first, the appointment of a Technical Co-ordinator for the project. The Co-ordinator monitored ongoing returns from surveyors and conducted a 5% back check of completed inspections.**

- **All forms were inspected in detail for inconsistent and/or incomplete information as part of the normal survey administration process.**

- **Once the data had been prepared, and prior to the main analysis commencing, a detailed examination of the distribution of each surveyor's markings on key factors such as unfitness and repair scores was conducted. These distributions were examined in terms of dwelling age and location and were conducted with the view to identifying anomalies.**

5.   COMPUTATION OF REPAIR COSTS

For repair cost purposes, the full renewal costs for 35 dwelling classifications, deemed to be representative of the housing stock in the seven identified areas, were held on computer. Dwellings were classified by type, number of storeys, number of rooms and date of construction. (Table D1)

TABLE D1: DWELLING CLASSIFICATION FOR COSTING PURPOSES									
DWELLING TYPE	PRE-1919			1919-1939			POST-WAR		
	1Flr.	2Flrs.	3Flrs.	1Flr	2Flrs.	3Flrs.	1Flr.	2Flrs.	3Flrs.
Detached House	3rm	8rm	10rm	5rm	6rm	8rm	5rm	5rm	6rm
Semi-D/End Terr House	3rm	8rm	10rm	5rm	6rm	8rm	5rm	5rm	6rm
Mid Terrace House	3rm	8rm	10rm	5rm	6rm	8rm	5rm	5rm	6rm
Deck/Balcony Access Flat	3rm	-	-	4rm	-	-	5rm	-	-
Tower/Slab Flat	-	-	-	6rm	-	-	4rm	-	-
Converted Flat	4rm	-	-	4rm	-	-	4rm	-	-

 rm = Rooms

All costs are based on bespoke schedules of rates developed for the survey. Original pricing is based on the National Schedule of Rates published under the auspices of the Society of Chief Quantity Surveyors in Local Government and the Building Employers Confederation.

The costing process involves grouping dwellings into their appropriate classifications. The next step is to apply surveyor repair markings to the elemental renewal costs. This involves taking the set proportion of full renewal cost appropriate to the particular marking. Where the markings are on a five point scale by individual room they are converted to a per dwelling basis using weighting factors to reflect different room sizes. The surveyors markings generate elemental repair costs which range from 0% to 100% of full renewal cost. Finally, elemental repair costs are aggregated and, where appropriate, a scale reduction factor is applied to produce the total repair cost per dwelling, (costs over £5000). A number of refinements aimed at improving the accuracy of the cost estimating have been incorporated in the process.

- **The elemental renewal costs reflect the average quality of each dwelling classification in terms of specification, ornateness of detailing, etc. Where a dwelling is identified as being of superior quality when built, enhancement factors are automatically applied to the repair costs of the appropriate elements.**

- Decoration within a dwelling does not feature as a repair element in its own right. However, where the scope of internal repairs is such that redecoration, in whole or in part, would be required, then the cost of this is automatically added in.

- Where the repair requirement of elements is assessed on a five point scale, enhancement factors are applied to the lower readings to reflect the higher unit costs of small repairs.

- Other refinements built into the system include a reflection of the differences in the cost of repairing pitched or flat roofs, full or partial central heating installations, etc.