

Teignbridge District Council

New Development Customer Satisfaction

Post Occupancy Survey 2015



Teignbridge New Development Post Occupancy Survey 2015

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EXECUTIVE SUMMARY

- This report presents findings from Teignbridge District Council's annual survey of residents of recently completed new housing development. A survey is carried out annually to monitor percent satisfaction with new development in the area which is a Council Plan "Wellbeing" objective.
- For the 2015 survey, the annual survey was expanded to include a broader range of questions related to satisfaction with the new dwellings and with broader development and neighbourhood, relocation and commuting, and infrastructure questions. This survey was the largest to date (955 surveys posted) and had the highest response rate to date (29.7%).
- Overall 75.5% of households reported being satisfied or very satisfied with recent development in their area. This represents a slight improvement on the 2014 survey.
- There were high levels of satisfaction with the dwelling, internal space, allocated parking and private gardens. There were very low levels of satisfaction with parking, traffic and access to facilities. More than 51% of households were dissatisfied / very dissatisfied with general parking on the development.
- 80% of the households responding had moved into their new home from the TQ and EX postcodes and a further 7% were from elsewhere in the Southwest (primarily Plymouth, Cornwall, and Taunton).
- The respondent households had an average of 2.24 people per dwelling. 68% of households had working residents, 31% had retired residents and 25.5% of households had children present.
- 89% of households responding had a car with 75% of households having at least one commuter travelling by car. However households also had significant number of commutes by bus (18.8%) and walking (22.3%).
- Lack of awareness of travel packs and bus/cycle vouchers was significant. 69.5% of households reported that they did not receive a travel pack despite the fact that 80% of households should have done so. Of those that recalled receiving the travel pack, 59.7% reported using the pack and 47.7% reported using the bus vouchers.
- Only 12 households had a child who changed schools as a result of the move however 14% of households had pre-school age children who may attend nearby schools in the coming years.
- 55% of households reported that someone had changed surgery as a result of the move with the highest percentage (71%) being at the Stover Court development which is adjacent to a new surgery facility.
- In offering general comments the primary complaint was with parking on the development with almost 30% of households specifically complaining. Road width was also mentioned by almost 20% of households and this was generally in the context of difficulty/danger of using roads when cars were parked on street.
- In general, the demographic findings of the survey are consistent with those reported by sales offices and those used in recent housing market assessments.

1 THE 2015 SATISFACTION SURVEY

CONTEXT

- 1.1 The Teignbridge District Council Council Plan sets out a number of objectives and monitoring targets related to wellbeing, prosperity and the environment. Among the monitoring targets related to the built environment is new residents' satisfaction with recent development in their area. In 2011 a survey of new residents established a baseline figure and a challenging target of 90% satisfaction was established.
- 1.2 Monitoring this target has been undertaken by an annual survey of residents on newly completed housing estates in order to monitor the percentage of residents of new housing developments who are satisfied with their development. As the council is now considering a new and revised Council Strategy and monitoring framework, the 2014/15 survey provided a good opportunity to undertake a more detailed satisfaction survey.
- 1.3 There are a limited number of standard surveys reported which related to satisfaction, demographics and site issues related to new home users. It is useful to be aware of a few examples of ongoing work.

TEIGNBRIDGE SURVEY METHODOLOGY

- 1.4 The Teignbridge 2014/15 survey form was agreed by council planning officers from the development management service, planning policy and delivery monitoring teams working with the Council's community engagement officers. A long list of issues of interest were identified (about 30 questions). These were then prioritised in order to achieve a survey which could be easily answered in around ten minutes and would fit on to a single A4 sheet at an accessible font size. The survey form is provided in Appendix A to this report.
- 1.5 The survey was reviewed by the Council's Customer Reading Panel to ensure it would be readily understood. A number of door-step interviews were also carried out to confirm the understanding and relevance of the survey.
- 1.6 The question on overall satisfaction was retained using identical wording to previous years to ensure compatibility with the ongoing monitoring programme.

The Sites

- 1.7 The survey identified those new major development sites (or significant phases) which had been completed in the previous year and had not been previously surveyed. Developments included in this survey included some where residents may have been living in their new home for up to 2 years, but the majority had been completed in the previous 12 months and residents will have recently moved in. From the residents' comments received it is clear that some residents are still in effect living on a building site as the final units are completed.

1.8 Seven major developments that reached full completion or were nearly complete in 2014/15 were surveyed. In addition to these large developments, surveys were sent to two smaller developments (a block of 12 flats in Chudleigh and the new travellers site at Haldon) however only three responses were received from these sites. These responses were considered in all aggregate analyses, however where analysis is presented by development only the large majors are reported. The following table provides summary details of the large sites surveyed and the response rate.

Development Name	Location	Builders	# units surveyed	Response rate
Cardew (Monterey Park)	Bovey Tracey	Taylor Wimpey	112	33.9%
Marine View	Teignmouth	Bovis	94	31.9%
Milbury	Exminster	Linden & Bloor Homes	218	22.5%
Mile End	Newton Abbot	Persimmon & Redrow	272	31.3%
Nickleby Place/Aspects	Dawlish	Bovis / Cavanna	122	30.3%
Ogwell Brook (II/III)	Newton Abbot (Ogwell)	Linden Homes	84	23.8%
Stover Court	Newton Abbot	McCarthy & Stone	47	51.1%

1.9 The survey was posted to each household along with a short introductory letter from the council, a printed survey and a postage paid return envelope. A postage paid postal card invitation to join the Council's "Talking Teignbridge" residents' panel was also included and a number of residents expressed an interest in participating.

1.10 In all 283 surveys were returned which represents a response rate of almost 30%. This is a considerable improvement on previous years (11% and 12% response rates). In effect a more detailed survey (2 sides of A4 rather than 2 questions) resulted in a higher level of engagement and response rate than a single question.

Year	Surveys sent	Response rate
2014-15	955 ¹	29.7%
2013-14	288	10.7%
2012-13	224	12.5%

¹ Net delivered surveys reflects the fact that whilst 1004 letters were sent some were returned as a result of incorrect plot numbering and where dwellings were not yet occupied.

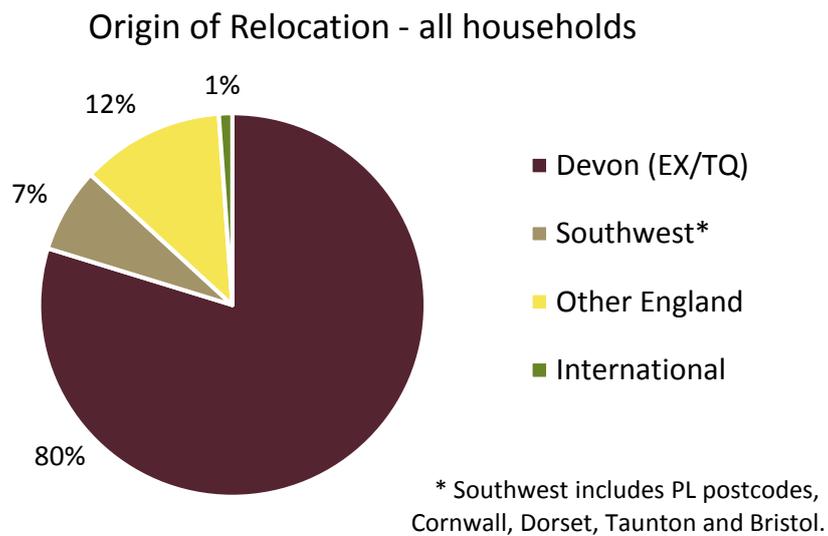
2 MIGRATION, TENURE & DEMOGRAPHICS

RELOCATION

2.1 A question was included in the survey in order to better understanding the dynamics of the local housing market for major new developments. This is important as context for plan making and housing, and is a query frequently raised in public consultation.

Q1. Please tell us your:	
Present post code	Previous post code

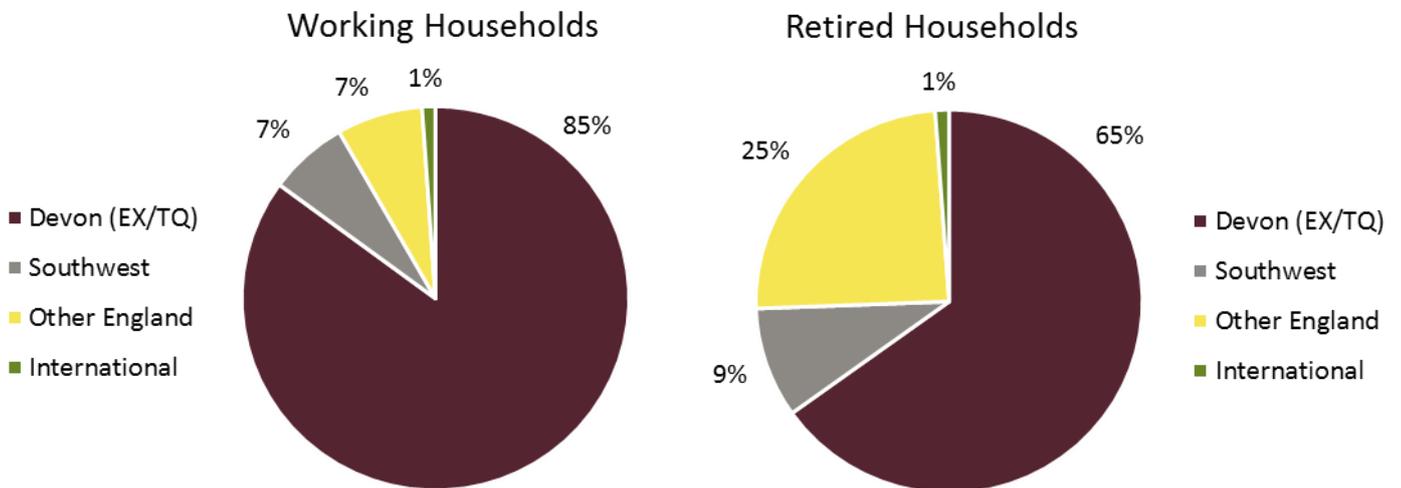
2.2 80% of residents responding moved from EX and TQ postcodes. The majority of the origins for Other England were from the South East and London, and there were 3 households relocating from outside England. This corresponds to reports from the development sales offices where it is reported that in general a large majority of the enquiries come from residents already in the South Devon area.



2.3 This corresponds well with migration data from the ONS. No data is available for numbers of population moving within the district (either through simple relocation or formation of new households) and housing market research indicates the majority of household moves are internal (within the district). The ONS 2013 annual migration data for Teignbridge identifies the top origins for incoming residents as Torbay, Exeter, South Hams and East Devon. These same councils also represent the highest areas for out-migration from the district.

2.4 Relocation information was also analysed by development. There was a measurable relationship between origin postcode and new development in that most relocations were close to home. For example Milbury farm (Exminster, EX post code) had 78% of residents move in from EX post codes whereas Mile End (Newton Abbot, TQ post code) had 75% of residents move in from TQ post codes. Interestingly, the Dawlish developments were more evenly split between EX and TQ postcodes, reflecting the location being between Exeter and Teignmouth/Newton Abbot.

2.5 There was a noticeable difference between the relocation origins for retired households and other households with 8% of households with working residents coming from outside the Southwest compared with 26% of retired households.. Consequently the Stover Court development (McCarthy and Stone) had a higher percentage of residents moving from outside South Devon.



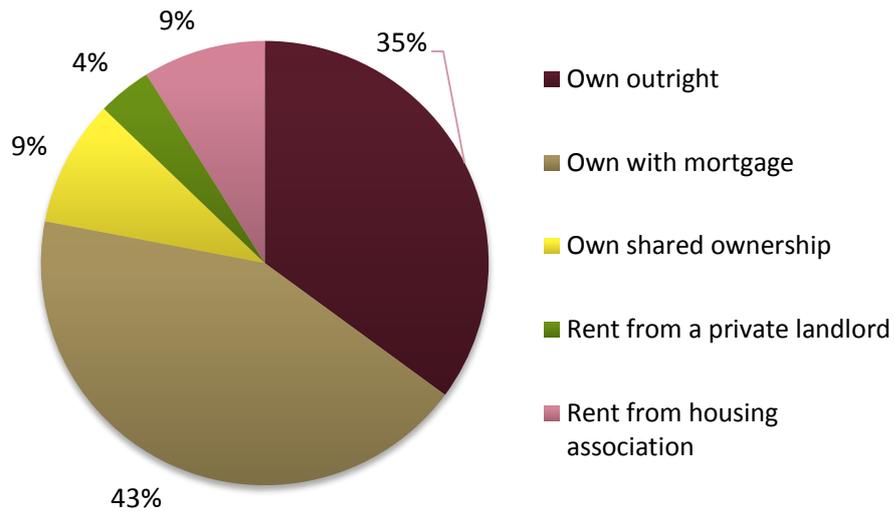
TENURE

Q2. Do you own or rent your home? Please tick the most relevant box.

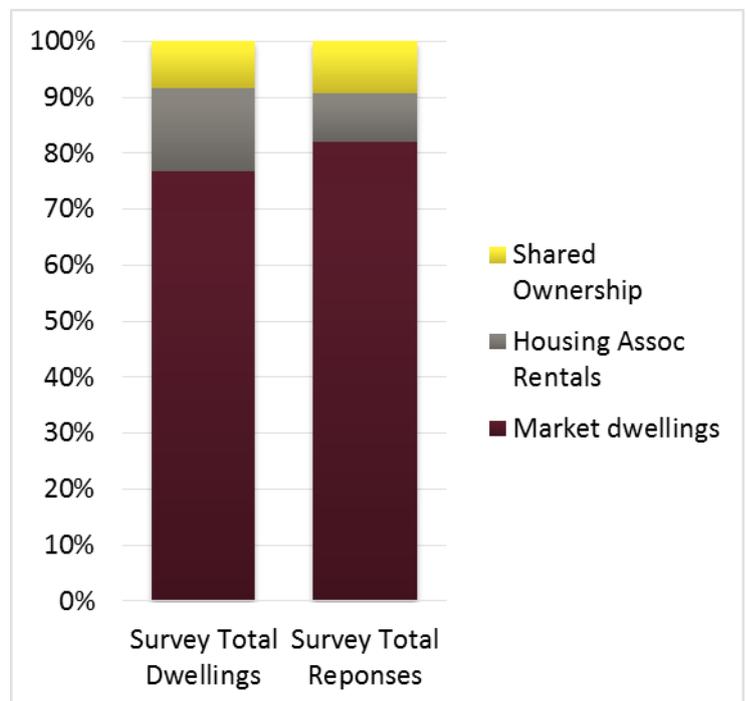
<input type="checkbox"/> Own outright	<input type="checkbox"/> Rent from private landlord
<input type="checkbox"/> Own with mortgage	<input type="checkbox"/> Rent from housing association
<input type="checkbox"/> Own shared ownership	

2.6 The majority of responses were from owner occupiers with 78% of households owning outright or with a mortgage.

Teignbridge 2015 Development Satisfaction Survey

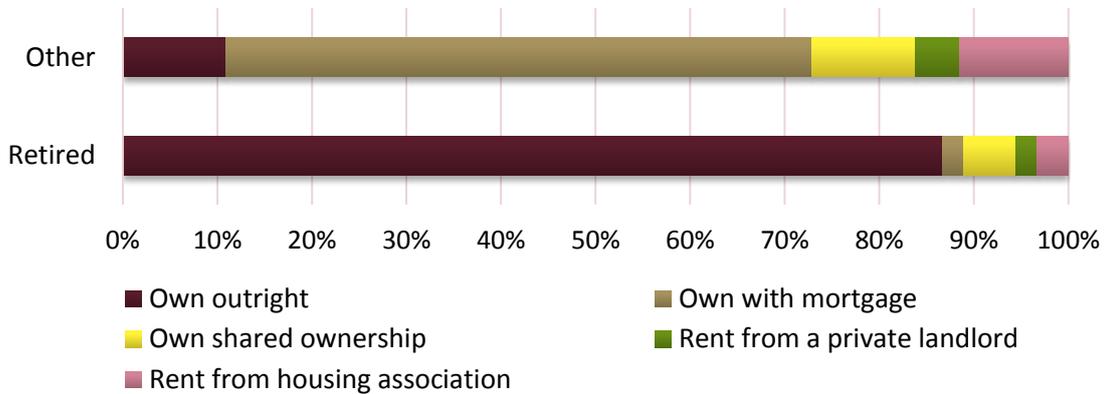


2.7 25% of households *receiving* the survey were identified as affordable housing yet over 80% of responses were from open market households. This may indicate a small under-sampling among housing association rented households, however the Teignbridge Housing service is undertaking a separate survey later this year for new residents of affordable housing which will provide additional information for this tenure.



2.8 In analysing the results by development the tenure split is generally consistent with the averages. The key differences being the MacCarthy and Stone development at Stover Court where 96% of homes were owned outright and the Milbury Farm development at Exminster where only 14% of homes were owned outright. This reflects the age profile of the developments with the Stover Court development being for the over 55s – where almost all households were retired residents only and Milbury Farm where only 16% of households responding had retired residents.

2.9 In the survey results the tenure split for households reporting retired residents versus working households is expected but striking as shown in the following chart.

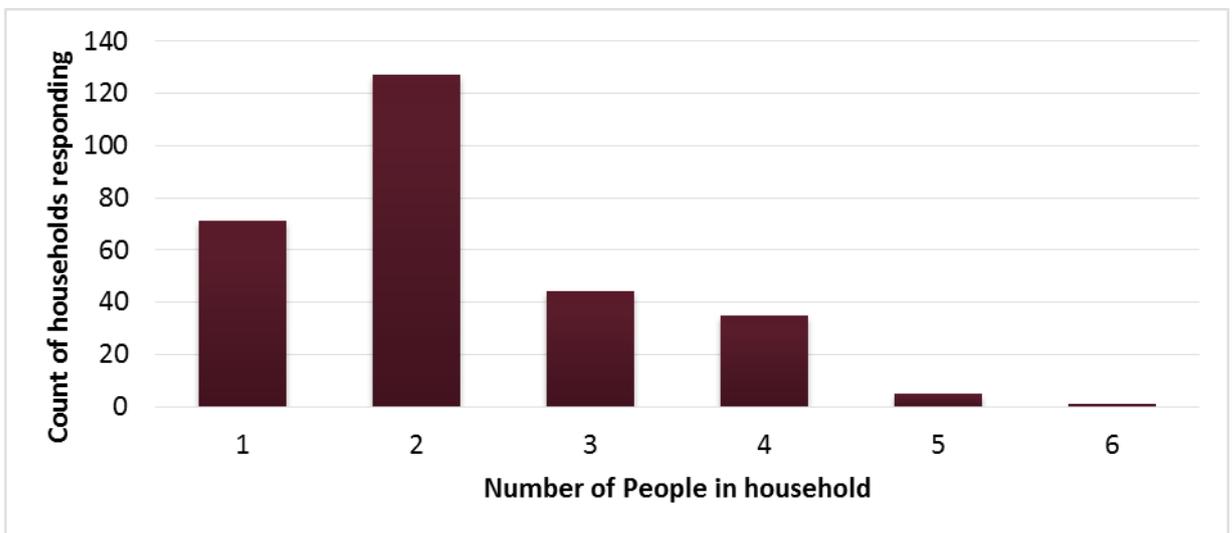


DEMOGRAPHICS

Q3. How many people are in your household? Enter a number in each relevant box.

<input type="checkbox"/> Under school age	<input type="checkbox"/> A home maker /child carer	<input type="checkbox"/> Work
<input type="checkbox"/> Go to primary school	<input type="checkbox"/> Go to secondary school	
<input type="checkbox"/> Go to college or university	<input type="checkbox"/> Unemployed	
<input type="checkbox"/> Retired	<input type="checkbox"/> Limiting long term illness	

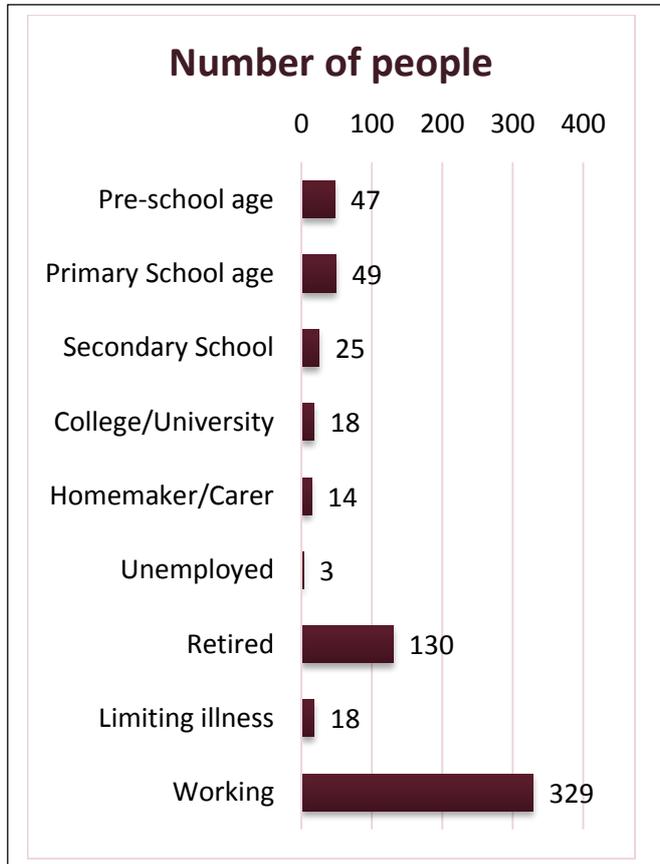
2.10 A total of 633 people were identified in the 283 returned surveys which is an average of 2.24 people per household. Retired households had an average of 1.46 people per household. Forty five percent of households were 2 person households with 25% reporting as single person households. Milbury Farm, Mile End and Ogwell Brook had the lowest single person households (average of 14%) and the Dawlish, Teignmouth and Bovey Tracey developments had an average of 30% single person households. The Stover Court development was more than two thirds single person households.



2.11 The majority of households (68%) had one or more working residents. 72 households (25.5%) had children present. 89 households (31%) had one or more retired residents.

2.12 There were 36 households with primary school children (12.7% of households) with 49 children in total. There were 16 households (5.6% of households) with secondary school children and a total of 25 children. See Section 5 for more detail on schools children in relation to schools planning.

2.13 In analysing the data we have reviewed data where children were shown to be present and where retired households were indicated as these provide insight into differing housing market needs and satisfaction.



3 SATISFACTION ANALYSIS

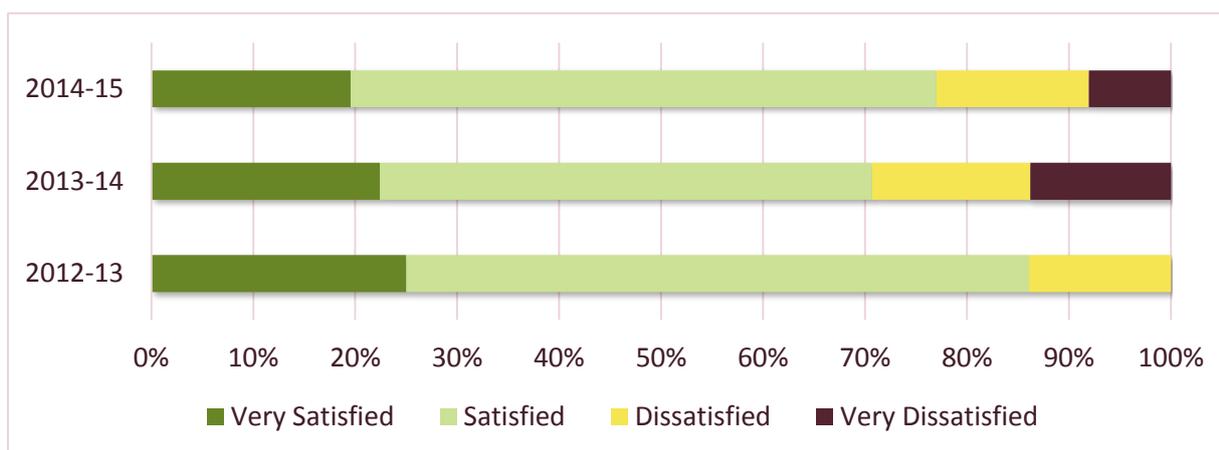
3.1 There were two sections of the survey asking about satisfaction with the development. The first question, Q7 Overall Satisfaction, uses the same wording as the previous monitoring surveys. The second satisfaction question, Q8 Topical Satisfaction asked residents to provide their level of satisfaction on 13 specific details as shown below. A “neither or n/a” option was introduced in the detailed question so the overall satisfaction level is not directly comparable to the satisfaction levels with the specific details.

OVERALL SATISFACTION

Q7. Please tell us how satisfied you are with recent development in your area?

Very satisfied
 Satisfied
 Dissatisfied
 Very dissatisfied

3.2 75.5% of respondents reported being Satisfied or Very Satisfied with recent development in the area. This is lower than the annual target (90%) but is an improvement over the 2014 survey in terms of overall satisfactions and in the reduction of the percentage of respondents who were “very dissatisfied.”



TOPICAL SATISFACTION

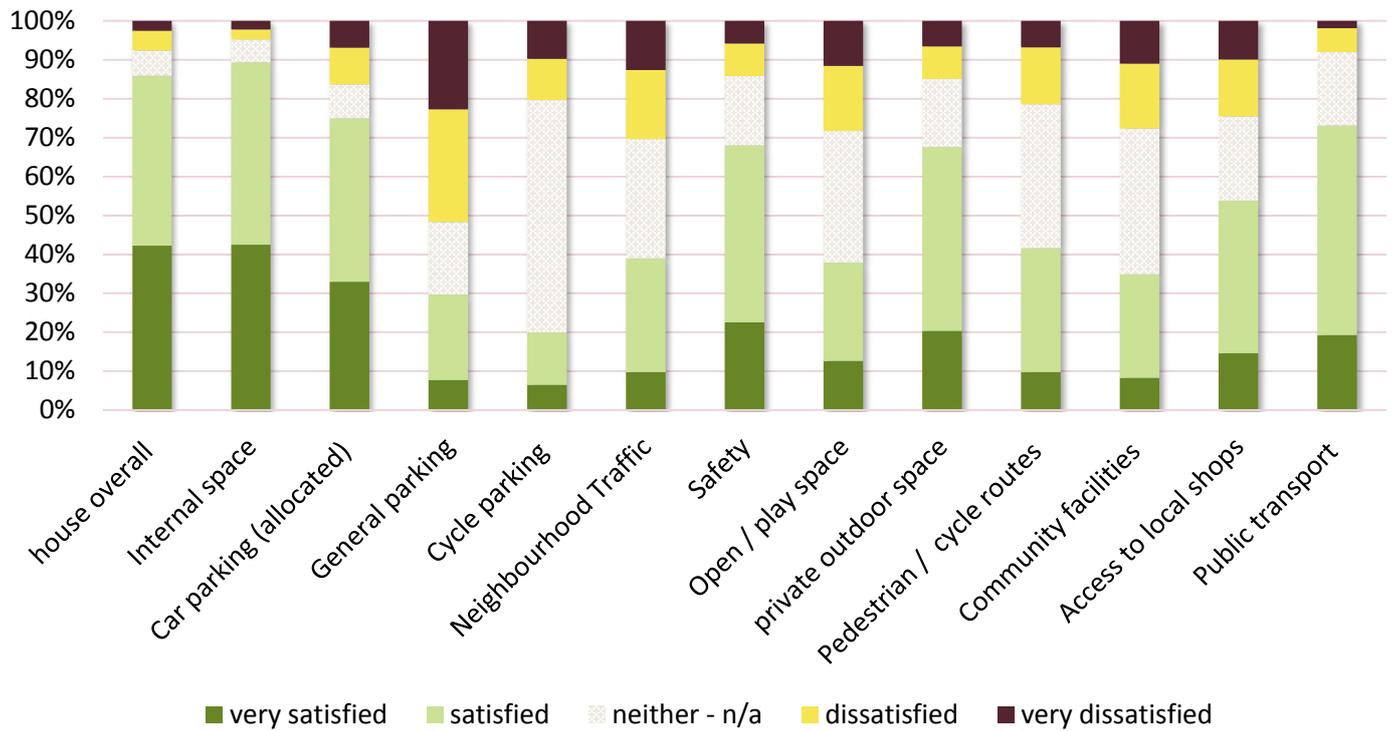
Q8. How satisfied are you with the following?

• Your house overall	• Internal space	• Car parking (allocated)
• General parking		• Cycle parking
• Traffic around the neighbourhood		• Safety of the neighbourhood
• Open space and play facilities		• Community facilities
• Garden and private outdoor space		• Pedestrian and cycle routes
• Access to local shops		• Access to public transport

Very Satisfied
 Satisfied
 Neither or n/a
 Dissatisfied
 Very Dissatisfied

3.3 Of the 13 topics queried the majority of responses were Satisfied or Very Satisfied. There were very high levels of satisfaction with the dwelling unit, internal space, and

allocated car parking. The greatest dissatisfaction was with general parking and the lowest level of satisfaction was with Cycle Parking².



3.4 The highest levels of satisfaction were in relation to the resident’s home including the home overall and internal space (87% and 90% satisfied or very satisfied) and private garden and allocated parking.

3.5 General parking was the area with least satisfaction and highest dissatisfaction with over 51.2% of households being dissatisfied or very dissatisfied. Lack of parking was the most frequently raised issue in the general comments as well, and this is consistent with previous surveys in which inadequate parking provision has been the biggest complaint/comment.

3.6 Access to public transport showed high levels of satisfaction and it is worth noting that all of the developments surveyed were in areas already served by regular bus service and contributions had been made to improve or extend existing bus routes.

3.7 Issues which resulted in high levels of dissatisfaction included open space and play facilities, community facilities and access to local shops. In the case of play facilities some developments have only recently reached trigger points for completing playgrounds agreed through planning and it should be assumed satisfaction will improve once these are in place. None of the developments have been accompanied by new on-site community facilities or neighbourhood shops.

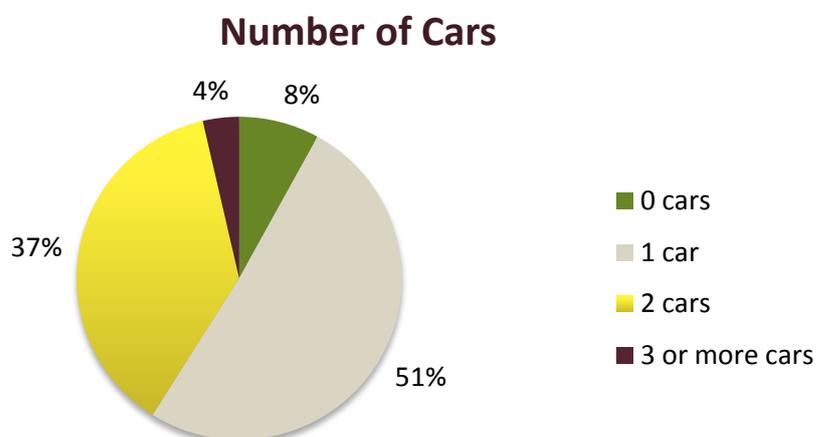
² It is not possible to determine if the issues are related to cycle parking/storage for the dwelling unit or for the development as a whole.

4 TRANSPORT

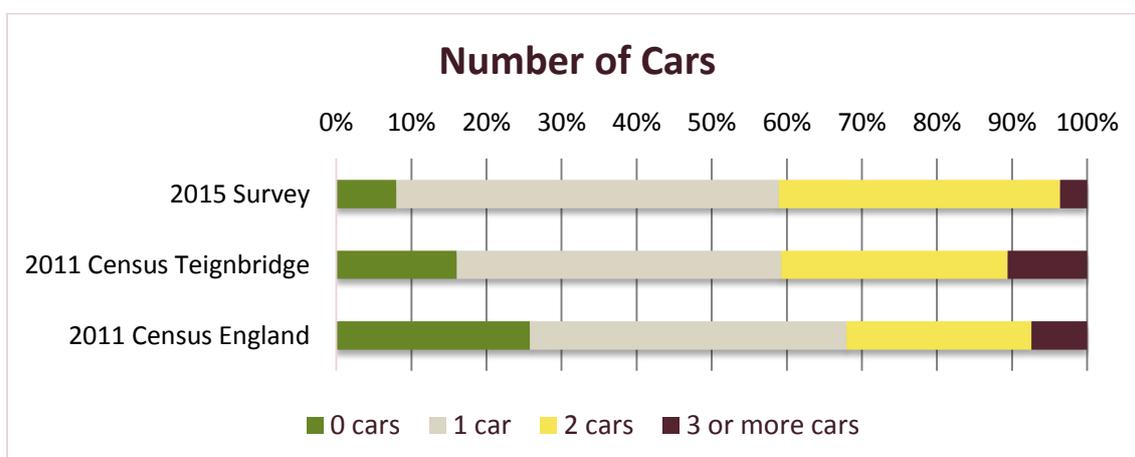
- 4.1 The survey included a number of questions about cars and travel behaviour. A key objective of supporting sustainable development is to guide development to areas where services and transport hubs can be accessed via active or public transport as well as minimising driving distances where required.
- 4.2 The survey included specific questions on cars and commuting. In support of these objectives developers as part of their travel plans generally are required to submit travel information and often vouchers to encourage uptake of buses and cycling.

CAR OWNERSHIP

Q5. How many cars are there in your household?



- 4.3 251 households (89%) responded to this question and of those responding 91% of households had a car. There were a total of 343 cars represented in the responses or an average of 1.36 cars per household. The chart below compares the survey results with those of the district as a whole.



- 4.4 Interestingly the number of cars in a household had no clear effect on satisfaction levels with parking or overall satisfaction.

COMMUTING

Q4. Please tell us the location(s) of your workplace(s) / schools(s) and briefly the mix of modes of transport you use to get there, e.g. train, bus, walk, cycle, etc. for each person in your household.

- 4.5 202 households provided information about their commute. Only 6 people reported having someone working from home (3% of households). The following table provides a summary with the 2011 Census for comparison. It should be noted that the Census figure is based on working residents and the Survey is based on households where one or more commute-mode was reported. Many households featured mixed-mode with one worker travelling by car and another travelling by other mode (bus/cycle/walk).

Method of travel	Survey Responses (households)	ONS 2011 Census (by pop working age)
car	75.7%	66.3%
walk	22.3%	11.5%
bus	18.8%	3%
cycle	7.9%	1.7%
Work Mainly at/from Home	2.4%	8.3%

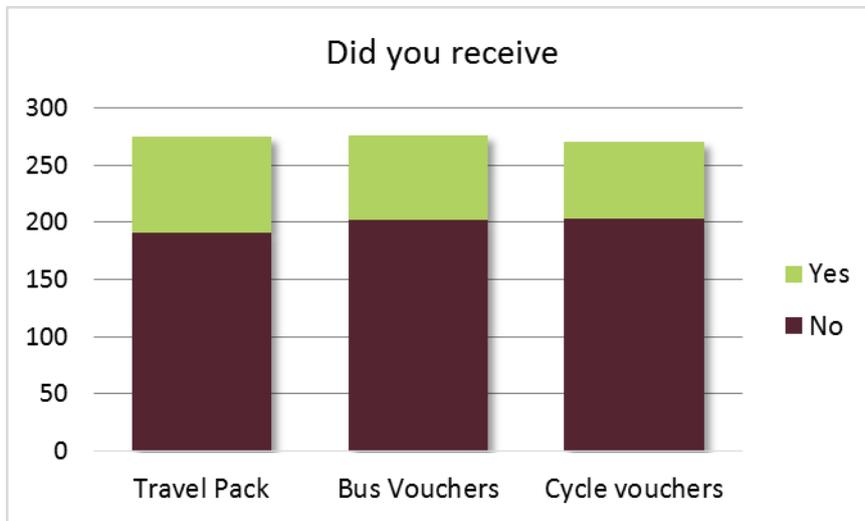
- 4.6 In reviewing the commute by development there is a noticeable trend for new residents to live closer to their place of work. The majority of the Milbury (Exminster) households worked in Exeter; residents of Cardew in Bovey Tracey has a more even split with workers in Exeter, Newton Abbot, and along the A38 corridor. 68% of responding households in Marine View (Teignmouth) worked in Teignmouth. The Newton Abbot developments at Mile End and Ogwell Brook had the largest number of people commuting to Newton Abbot.
- 4.7 Details of commuting information have been provided to Green Infrastructure and Transport officers for further analysis.

TRAVEL PLANS

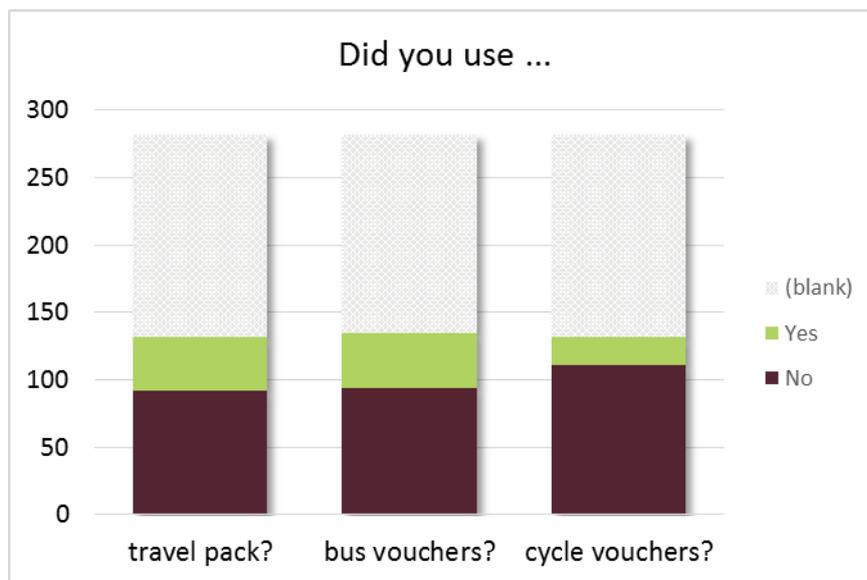
Q6. When you moved into your new home....					
	Did you receive....?		Have you used ...?		
a. A travel pack	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
b. Bus vouches	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
c. Cycle vouchers	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

4.8 Almost all households responded to this question (97%) with the majority saying they had not received a travel pack or vouchers

No travel pack received: 69.5%
No bus vouchers received: 73.2%
No cycle vouchers received: 75.2%



4.9 Of those households answering yes to the "did you use..." questions a quarter of households used the travel pack and bus vouchers.



	% of those who received a pack	% of total survey sample
used travel pack	59.7%	14.18%
used bus vouchers	47.7%	14.54%
used cycle vouchers	25.3%	7.45%

4.10 The highest percentage of residents indicating they had received a travel pack were in the Stover Court and Ogwell Brook developments.

Did you receive a travel pack?	No	Yes
Stover Court	56.5%	43.5%
Ogwell Brook	57.1%	42.9%
Mile End	67.1%	32.9%
Cardew	68.6%	31.4%
Milbury	75.5%	24.5%
Nickleby Aspects	74.3%	25.7%
Marine view	80.0%	20.0%

5 OTHER INFRASTRUCTURE

5.1 Two questions on community infrastructure were included in the survey in order to better understand the impact of new development on community services.

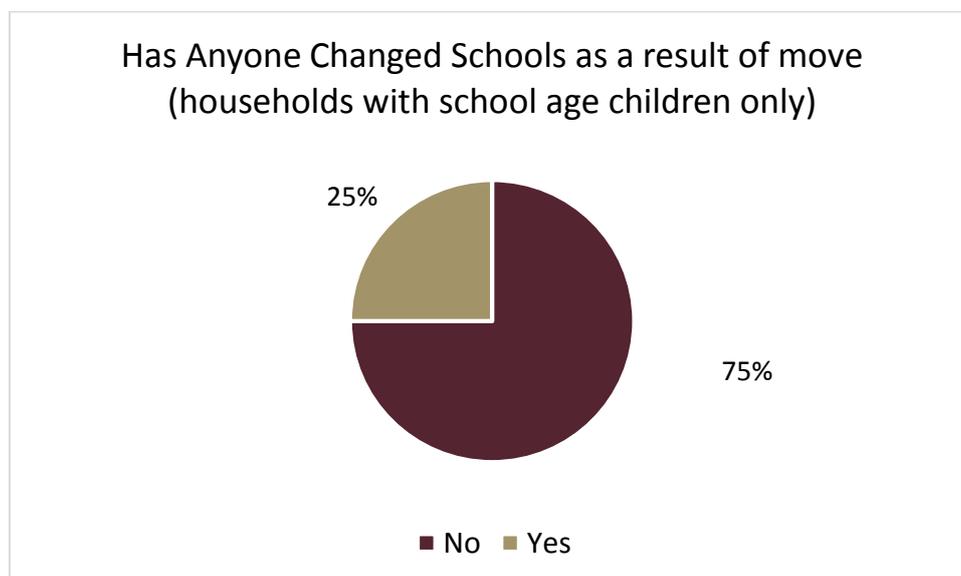
Q9. Has anyone in your household changed schools as a result of the move?
Q10. Has anyone in your household changed GP surgeries as a result of the move?

SCHOOLS

5.2 As noted in the demographic analysis, 25% of households had children present with more households having preschool or primary children than secondary school-age children. There was some difference in percentages within different developments with the Milbury development in Exminster having the highest percentage of households with children. (21 out of the 49 households responding).

% with children		% of households	
		# children	
42.9%	Milbury	40	14.2%
27.8%	Cardew	36	12.8%
26.7%	Marine View	16	5.7%
26.2%	Mile End		
18.9%	Nickleby Aspects		
18.2%	Ogwell Brook		
n/a	Stover court		

5.3 As school capacity is frequently mentioned in consideration of planning applications the survey specifically asked if anyone had changed schools as a result of the move. Of the 48 households with school age children only 12 households reported children moving schools as a result of the move.

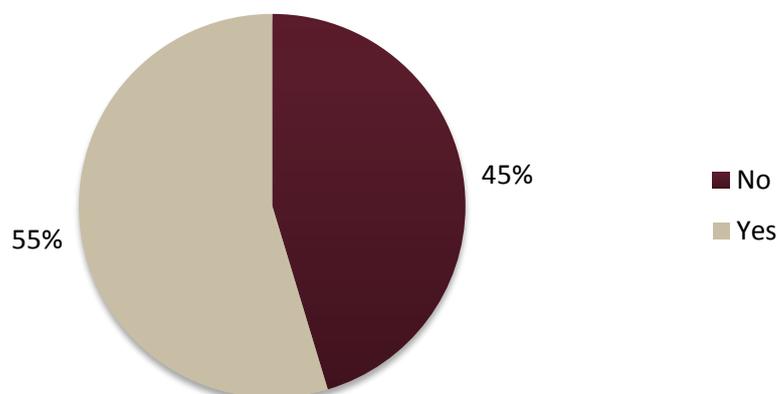


- 5.4 As noted previously most new residents originated from the same TQ or EX postcode in which their new development was located and where possible often parents may wish to maintain continuity in schools.
- 5.5 In forward planning for school places, Devon County Council have established that, on Average, each family dwelling (i.e. dwellings with 2 bedrooms or more) generates approximately 0.25 primary aged pupils (ages 5 to 11) and 0.15 secondary aged pupils (ages 12 to 16). These numbers are somewhat higher than was seen in the survey responses, however when the pre-school age children are taken into consideration, and on the assumption that more of these children will attend local schools in coming years, the numbers provide a reasonable rule of thumb.
- 5.6 It should be noted that elsewhere evidence has shown that when a new development is related to delivery of new school facilities, these facilities act as a sales 'attractor' for parents and results in a significant increase in the number of households with children.

GP SURGERY

- 5.7 158 households (55%) reported that someone in the house had changed surgery as a result of the move. The trend was the same for household types (eg with children or none, workers or retired). The one development showing a high percentage of people changing surgery (71%) was the Stover Court McCarthy & Stone development. This may be due to the new surgery being built next door to the development and the fact that a larger number of these (retired) households has relocated from outside their postcode area.

Has anyone changed GP as a result of the move?



6 GENERAL COMMENTS

- 6.1 In keeping with previous surveys the final query on the survey form was a free text box asking for any other comments.

Q11. Do you have any comments about the design and location of new houses, in general, or specifically yours? If commenting on properties other than your own please be specific about their location.

- 6.2 74% of respondents provided general comments, and the full text of the comments has been provided to officers for consideration. An anonymised list of comments for each specific development will be offered to the housebuilders in question for their consideration as well. The following table summarises the comments received.

# mentions	Issue
72	Parking
45	Road width/road safety
27	Overdevelopment
19	Visitor parking
17	Build quality
14	Broadband
13	Social comments
12	Services/shops
11	Dog / dog bin issues
10	Construction
10	Garage issue (too small for vehicles)
9	Bin storage
6	Noise
6	Lighting

- 6.3 As with the previous surveys, the biggest complaint made through general comments was the parking provision with 19 responses also specifically mentioning the lack of visitor parking spaces. Key issues which were raised are outlined in the table below. This was often mentioned in combination with road width or road safety issues but road width was specifically mentioned frequently.
- 6.4 There were 27 comments related to additional new development or density/overlooking issues. The majority of these comments came from the Stover Court and Mile End development. At Stover Court the issue was primarily that residents were unaware of the scale of the extra care facility being development. At Mile End many comments did not support additional development in the area and in several cases were unaware that there would be more development to the west of the Mile End development.
- 6.5 13 out of the 14 comments on broadband access/speed were from the Mile End development.

ANNEX: SURVEY FORM

Customer Satisfaction with New Housing Survey 2015

Ref XX

1. Please tell us your:

Present post code

Previous post code

2. Do you own or rent your home? Please tick the most relevant box.

- Own outright Rent from private landlord
 Own with mortgage Rent from housing association
 Own shared ownership

3. How many people are in your household? Enter a number in each relevant box.

- Under school age A home maker /child carer Work
 Go to primary school Go to secondary school
 Go to college or university Unemployed
 Retired Limiting long term illness

4. Please tell us the location(s) of your workplace(s) / schools(s) and briefly the mix of modes of transport you use to get there, e.g. train, bus, walk, cycle, etc. for each person in your household.

e.g. Newton Abbot or TQ12 XXX and I travel by bicycle and train to work

5. How many cars are there in your household?

6. When you moved into your new home....

	Did you receive....?		Have you used....?	
a. A travel pack	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. Bus vouchers	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
c. Cycle vouchers	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No

7. Please tell us how satisfied you are with recent development in your area?

- Very satisfied Satisfied Dissatisfied Very dissatisfied

Please turn over



8. How satisfied are you with the following?

	Very Satisfied	Satisfied	Neither satisfied or dissatisfied	Dissatisfied	Very dissatisfied
Your house overall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internal space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car parking (allocated)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cycle parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic around the neighbourhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety of the neighbourhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open space and play facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Garden and private outdoor space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pedestrian and cycle routes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to local shops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to public transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Has anyone in your household changed schools as a result of the move?

Yes No

10. Has anyone in your household changed GP surgeries as a result of the move?

Yes No

11. Do you have any comments about the design and location of new houses, in general, or specifically yours? If commenting on properties other than your own please be specific about their location.

If you have any further comments on any of the questions, please continue on a separate sheet, or e-mail us at consultation@teignbridge.gov.uk

Please return this form in the envelope provided. Thank you for your time.