

**A POST-OCCUPANCY EVALUATION OF THE HOPE CITY  
HOUSING COMPLEX OF THE GREATER MIDDELBURG  
HOUSING ASSOCIATION, MPUMALANGA**

**by**

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## **DECLARATION**

I the undersigned hereby declare that the work contained in this thesis is my own original work and has not previously in its entirety or in part been submitted at any university for a degree.

Signature:

Date:

## **ABSTRACT**

The Housing White Paper (Department of Housing, 1994:12) sets out the government's broad housing policy and the seven strategies undertaken in the implementation of the policy. One of the strategies is the mobilisation of housing credit through the establishment of the Social Housing Foundation (SHF). The SHF provides training, advice, and support to emerging and established social housing institutions. These housing institutions deliver high density subsidised rental or installment sale housing to the beneficiaries of the State housing subsidy scheme. The Greater Middelburg Housing Association (GMHA) is an example of such an institution.

Social housing in South Africa aims at addressing the broader quality of life of their residents, beyond the physical dwelling in which they reside. Furthermore, the aim is to build rental housing, which adheres to suitable quality standards, and is located close to economic opportunities and amenities (Crofton & Venter, 2000:7). To determine the satisfaction levels experienced by residents with regard to different aspects of their housing situation, a Post-Occupancy Evaluation survey can be used to determine whether the objectives of the social housing institution have been met by the housing provided.

The main objective of this research study was to determine the level of housing satisfaction experienced by residents of the Greater Middelburg Housing Association's Hope City Housing Complex. The secondary objectives of the study were derived from the main objective and were, firstly, to determine the residents' socio-demographic and socio-economic profiles, and secondly to determine the residents' satisfaction levels with regard to the housing unit, the housing complex and the management of the housing project. Thirdly the residents' overall satisfaction with their housing situation, were determined, and lastly recommendations were made for future developments and improvements of the Hope City Housing Complex. To achieve these objectives, a post-occupancy evaluation study was conducted among a randomly selected sample of 150 tenants residing in the complex.

Data were obtained through a structured questionnaire, which entailed dichotomous, multiple choice, scaled, matrix-type and open-ended questions. The scaled questions were answered on a four-point scale, where the tenants' opinions on certain aspects of the housing unit, complex and management, were rated. The questionnaire was administered during individual interviews of 40 minutes each, with the head or the spouse of the head of the selected households. A document-study of the GMHA was conducted to gain insight into the organisation's background, aims and goals.

The research results on the socio-demographic and socio-economic profile of the respondents indicated that the target market of the housing institution was mostly couples, between the ages of 21 and 40 years, who had dependants. The majority of the respondents indicated that they would prefer to own housing at this stage of their lives, but that they are satisfied with renting until they have the financial means to buy property. Most respondents had achieved grade 12 schooling and were formally employed, earning monthly household incomes between R2 000 and R3 500. Few respondents reported that they were saving regularly, and only a small number of tenants had been in arrears with their rental payment.

The results indicated that the respondents were satisfied with their overall housing situation, but had complaints about specific aspects of the housing unit, the complex and the management. Statistically a negative correlation was found between the satisfaction levels with the unit, complex and management indicators and overall housing satisfaction.

Concerning the unit, the respondents felt that the units, and especially the bedrooms, were too small. They felt that the complex did not provide facilities that are needed by the residents, such as play areas for children and a convenience store. Respondents were also dissatisfied with the way in which tenants, who have defaulted on their rental payments, were treated by management. Furthermore, respondents were dissatisfied with the relationship between the management of the housing complex and the residents. The main reason for their dissatisfaction was management's low response rate to maintenance complaints.

The GMHA should encourage the tenants to attend the Tenant Training Programmes run by the management. These programmes should outline the responsibilities of the management and the responsibilities of the residents with regard to the maintenance of the housing units. The GMHA should also look into providing the installment sale option as a tenure option to the residents, as this would enable those tenants, who would like to buy property, to do so.

## OPSOMMING

Die Behuising Witskrif (Department of Housing, 1994:12) stel die regering se breë behuisingsbeleid en die sewe strategieë wat onderneem is in die implementering van die beleid. Een van die strategieë is die mobilisering van behuisingkrediet, deur die totstandkoming van die *Social Housing Foundation* (SHF). Die SHF lewer opleiding, advies en ondersteuning aan nuwe en gevestigde sosiale behuisingsinstansies. Hierdie behuisingsinisiatiewe lewer hoëdigtheid gesubsideerde huur- of termyn-betalingbehuising aan die begunstigdes van die Staatsbehuisingssubsidieskema. Die *Greater Middelburg Housing Association* (GMHA) is 'n voorbeeld van so 'n instansie.

Sosiale behuising in Suid-Afrika het ten doel om die meer omvattende lewenskwaliteit van die inwoners, wyer as bloot die behuisingstruktuur wat bewoon word, aan te spreek. Verder is die doel om huur-behuisingstrukture te bou, wat voldoen aan bepaalde kwaliteitstandaarde en wat nie te ver van ekonomiese bedrywighele en geriewe geleë is nie (Crofton & Venter, 2000:7). Om die inwoners se vlakke van tevredenheid met verskillende aspekte van hul behuising te bepaal, kan 'n na-ingebruiknemingsevalueringopname gebruik word, om te bepaal of die doelstellings van die sosiale behuisingsinstansies bereik word, deur die behuising wat beskikbaar gestel word.

Die hoofdoelstelling van dié navorsingstudie was die bepaling van die verskillende vlakke van behuisingstevredenheid, soos dit ervaar word deur die inwoners wat in die *Greater Middelburg Housing Association* se *Hope City* behuisingskompleks woon. Die sekondêre doelstellings van die studie het voortgespruit uit die hoofdoelstelling en is eerstens die samestelling van die inwoners se sosio-demografiese en sosio-ekonomiese profiele, tweedens die bepaling van die inwoners se vlakke van behuisingstevredenheid ten opsigte van die behuisingseenhede, die behuisingskompleks en die bestuur van die behuisingsprojek. Derdens is die respondente se totale tevredenheid met hul behuisingsituasie bepaal, waarna aanbevelings vir verdere ontwikkelinge en verbeteringe aan die *Hope City* Behuisingskompleks gemaak word. Om

hierdie doelwitte te bereik, is 'n na-ingebruiknemingsevalueringstudie onderneem waaraan 'n ewekansige steekproef van 150 inwoners, wie woonagtig is in die kompleks, deelgeneem het.

Data is bekom deur gebruik te maak van 'n gestruktureerde vraelys wat digotome, multi-keuse, geskaleerde, matriks-tipe en oop vrae bevat het. Die geskaleerde vrae bestaan uit 'n vierpuntskaal, waarvolgens die inwoner se opinie oor sekere aspekte van die behuisingseenheid, die kompleks en die bestuur bepaal/gemeet is. Die vraelys is tydens individuele onderhoude, van 40 minute elk, met die hoof, of die eggenoot van die hoof van die geselekteerde huishoudings, voltooi. 'n Document analise van die besigheidsplan van die GMHA is onderneem om insig te verkry in die organisasie se agtergrond, mikpunte en doelstellings.

Die navorsingsresultate met betrekking tot die sosio-demografiese en sosio-ekonomiese profiel van die respondente, het aangedui dat die teikenmark van die GMHA hoofsaaklik pare in die ouderdomsgroep 21-40 jaar, wie afhanklikes het, is. Die meerderheid van die respondente het aangedui dat hulle op hierdie stadium van hul lewens verkies om 'n behuisingseenheid te besit, maar dat hulle tevrede is om te huur totdat hulle finansiële in staat is om 'n huis te koop. Meeste respondente het graad 12-skoolopleiding voltooi, en was werksaam in die formele sektor, met maandelikse inkomstes van tussen R2 000 en R3 500. Baie min van die respondente het aangedui dat hulle op gereelde basis spaar, en slegs enkele huurders was al agterstallig in die betaling van hul huurgeld.

Die resultate van die navorsing het aangedui dat die respondente tevrede was met hul behuisingssituasie in die algemeen, maar dat hulle klagtes gehad het oor spesifieke aspekte van die behuisingseenheid, die kompleks en die bestuur daarvan. Statisties is 'n negatiewe korrelasie gevind tussen die tevredenheidsvlakke met die eenheid-, kompleks- en bestuursindikatore en tevredenheid met die behuisingssituasie in die algemeen.

Wat die eenheid betref, het die respondente gevoel dat die eenhede, veral die slaapkamers, te klein was. Hulle het ook gevoel dat die kompleks nie voldoen aan die inwoners se behoefte aan fasiliteite soos speelareas vir die kinders en 'n geriefswinkel nie. Respondente was verder ontevrede met die manier waarop die bestuur van die kompleks mense, wie tydelik nie in staat

was om hul huurgelde te betaal nie, behandel. Die respondente het hulle ongelukkigheid met die verhouding tussen die inwoners en die bestuur geopper. Die hoofrede vir die ontevredenheid was die bestuur se traagheid om te reageer op die instandhoudingsklagtes van die inwoners.

Die GMHA moet die inwoners aanmoedig om die Inwoner Opleidingsprogramme, wat aangebied word deur die bestuur, by te woon. Die programme behoort die verantwoordelikhede van die inwoners en dié van die bestuur, met betrekking tot die instandhouding van die behuisingseenhede, te verduidelik. Die GMHA moet dit oorweeg om die termyn-verkoopsopsie aan inwoners beskikbaar te stel, aangesien dit die inwoners van *Hope City*, wie graag eiendom sou wou koop, in staat sou stel om dit te doen.



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## CHAPTER ONE: INTRODUCTORY PERSPECTIVES

Housing is one of the greatest challenges facing the South African Government today. The extent of the challenge is derived, not only from the enormous size of the housing backlog and the desperation and impatience of the homeless, but also from the type of housing end-products being provided through various housing subsidy programmes that the national government has to offer.

The White Paper on Housing (Department of Housing, 1994:21) has shown that government recognises the environment to be as important as the house itself in satisfying the needs and requirements of the occupants. Therefore, the National Housing Programme would have to provide subsidy housing that is adequate in meeting these occupant needs and requirements, for it to meet its objective for creating housing that is satisfactory and uplifting to the occupant's quality of life.

Acknowledgements, such as the one stated in the White Paper on Housing (Department of Housing, 1994:12) has led to one of the South African government's responses to the country's chronic housing shortage, namely the Institutional Subsidy Scheme. This subsidy is one of the six mechanisms that make up the National Housing Subsidy Scheme. The programme offers housing subsidies that enable housing institutions to offer affordable rental or instalment sale housing units to qualifying beneficiaries (National Housing Code 2000:UF39). The Social Housing Foundation (SHF) is a Section 21-company that was created by the National Housing Finance Corporation in 1997 to promote and assist in the development of social housing in South Africa, as well as to assist in the formation and mobilisation of independent social housing institutions throughout the country. One example of such a social housing institution is the Greater Middelburg Housing Association (GMHA) in the Mpumalanga Province.

Social Housing in South Africa is defined in terms of three essential components, namely the approach, the product, and the institution. In terms of the approach, social-housing aims at addressing the residents' broader needs and quality of life beyond the dwelling in which they reside. In terms of the product, it aims at providing rental housing, which is built to suitable quality standards, as well as being suitably located to provide access to social amenities and economic opportunities. Furthermore, social housing institutions must be structured in such a way as to demonstrate their long-term commitment to the provision of housing and quality of life solutions for

residents as well as the added benefit of regenerating the area where the housing stock is located (Crofton & Venter 2000:2).

The Greater Middelburg Housing Association (GMHA) was established in 2000. The association's first housing project, the Hope City Housing Complex, has been used as a benchmark for emerging social housing projects in the Middelburg Region. The establishment of the housing association has been motivated by the huge demand for housing in Middelburg, brought about by employers of the surrounding mining, manufacturing and various industrial sectors, who previously met the housing needs of their employees and now seem to have shifted their focus from housing to their core business. This has left a gap in the Middelburg housing market, as people living and working in the region need adequate housing.

The GMHA has identified a market in these communities, and aims to provide affordable social housing rental accommodation for these communities through the Hope City Housing Project. The GMHA's mission is to provide well-located and affordable accommodation of suitable standard to the residents of Greater Middelburg within the subsidised housing market through rental (GMHA Revised Business Plan, 2002:14). The Hope City Housing Project consists of 501 completed housing units of which 324 are occupied. Within the occupied number of units the GMHA has allocated 295 units to qualifying beneficiaries of the national housing subsidy, while the remaining 29 are unsubsidised housing units. The GMHA provides the unsubsidised units to supplement the operational rental revenues. Of the 501 housing units that the GMHA has to offer, 177 units are unoccupied. This is a cause of great concern for the GMHA management.

The GMHA plans on providing at least 2000 subsidized rental-housing units, as well as to offer a number of tenure options to residents over the next three to five years (GMHA Revised Business Plan, 2002:16). The fact that there are a number of unoccupied units in the Hope City complex might be an obstacle for the housing association. Therefore, it is highly imperative for the GMHA to initiate a tenant housing satisfaction study using a post-occupancy evaluation (POE) survey as a tool. POE is the process that attempts to establish whether the needs of the occupants are being met by the housing structure in which they reside. The POE-survey can be used to give an indication of the housing satisfaction of the occupants (Crofton & Venter 2000:2). Furthermore, it can be seen as essential as it is the only way in which housing in South Africa might be improved and adapted to meet the changing needs and lifestyles of the individuals involved in this sector (Van Wyk, 1996:2).

Furthermore, a majority of the objectives and guiding principles captured in the explanation of social housing in South Africa, can only be determined or confirmed by examining the social housing occupants' overall levels of housing satisfaction. The results of such a study should reflect the tenant's experience of the extent to which the housing adequately addresses or suit their housing needs, and further enable the GMHA management to learn from the oversights and mistakes in the complex in order to plan for future housing stock developments and the overall growth of the GMHA. Conducting POE studies, like in the case of Hope City complex, is always desirable, both because of the possibility of securing useful information about the residents socio-economic profiles, and their housing satisfaction levels concerning their current housing situation and most of all the POE process will lead to a housing community that is satisfied as their desire to be consulted about changes that effect their lives, is carried through.

### **1.1 PROBLEM STATEMENT**

In a research survey conducted by Tomlinson (1996:64) it was stated that people who had been granted a national housing subsidy were not satisfied with the cost of their housing, the quality of the house as well as the size of the house. It is therefore imperative for the GMHA-management to acknowledge that, if occupant's housing needs are not met by the housing units and the environment in which their homes exist, housing dissatisfaction might occur. A lack of information regarding the subsidy process, the design and the delivery of the housing product can also contribute to the dissatisfaction.

The above statement implies that there should be congruence between the user's needs, the physical design and the construction of the building in order to allow for optimal housing satisfaction. Therefore, a POE-survey should be used to determine whether the needs of the government housing subsidy recipients, residing in social housing accommodation such as the Hope City complex are being met by the housing provided (Crofton and Venter 2000:2). Studies such as this one are needed as Social Housing in South Africa is only seven years old, and residents in developments such as the Hope City complex have never before gone through a POE-study, as the previous (pre-1994) government focused on the provision of housing in large numbers, and neglected to focus on the socio-psychological housing issues. The GMHA has identified a need for a rental housing market amongst local employees who need housing that is affordable and located close to their places of work. The GMHA wanted to gain a deeper understanding of why the complex is not attracting more residents, considering the fact that a needs assessment survey was previously conducted in the region and its results showed a definite need for rental housing (GMHA Revised

Business Plan, 2002:24). It is through studies such as a POE-survey, that the GMHA-management will be able to detect the underlying reasons for the unoccupied housing units in the Hope City complex. A POE-survey could determine the occupants' housing satisfaction levels concerning the housing unit, complex and management as well as obtain each interviewed occupant's opinion regarding what the management can do to attract new tenants.

The research problem is therefore stated as follows: What are the housing satisfaction levels, concerning the housing units, complex and management, of tenants residing in the Greater Middelburg Housing Association's Hope City Complex?

## **1.2 OBJECTIVES OF THE RESEARCH**

The research problem was addressed through pursuing the following research objectives.

### **1.2.1 Main Objective**

To determine the level of housing satisfaction among the respondents residing in the Greater Middelburg Housing Association's Hope City Housing Complex.

### **1.2.2 Secondary Objectives**

The following secondary objectives were derived from the main objective of the research:

- To compile a socio-demographic and socio-economic profile of the respondents residing in the Hope City Housing Complex.
- To determine the housing satisfaction levels of the respondents with regard to the following:
  - The housing unit
  - The housing complex
  - The management of the Hope City Housing Complex
- To determine the respondents' overall level of satisfaction with their housing situation
- To make recommendations for future developments and improvements of the Hope City Housing Complex

## **1.3 RESEARCH VARIABLES**

### **1.3.1 Independent variables**

- The socio-economic profiles of the respondents including;
  - Age
  - Gender
  - Education
  - Income levels
  - Family life-cycle
- The Hope City housing complex.

### **1.3.2 Dependent variables**

The residents' housing satisfaction levels with regard to the housing unit, the housing complex and the management of the Hope City housing complex.

## **1.4 ASSUMPTION**

It was assumed that residents of the Hope City housing complex would be able to communicate their level of satisfaction concerning their housing unit, the complex and the management of the complex to an interviewer during a Post-Occupancy Evaluation study.

## **1.5 DEFINITIONS OF TERMS**

This section defines the most commonly used terms within the research.

### **1.5.1 The National Housing Subsidy Scheme**

Subsidy refers to financial assistance that a recipient is not expected to repay. The scheme provides a subsidy to households earning a maximum of R3 500 per month, so as to assist them in acquiring secure tenure, basic services and a top structure. A range of subsidy mechanisms are provided, namely the Individual Subsidy, the Project Linked Subsidy, the Consolidation subsidy, Institutional Subsidy, the Relocation Assistance Subsidy and the Rural Subsidy (National Housing Code, 2000:16UF).



### 1.5.2 Social Housing

Social Housing promotes improved quality of life and the integration of communities by providing affordable, subsidised housing of a high standard, with the added benefit of regenerating the area where the housing stock is located. The process is managed by viable, sustainable, independent institutions that encourage the participation of residents in managing their own communities. Social Housing is aimed at low-to-middle income families. It can comprise of several forms of tenure, excluding immediate individual ownership.

### 1.5.3 Housing Satisfaction

Housing Satisfaction can be described as a continuous subjective individual response to housing need gratification, which comes about because the consumer is constantly engaged in an evaluation process comparing his housing expectations, housing aspirations, and his previous home experiences to his present housing. It is possible that the consumer can be dissatisfied with specific features of the house and yet be generally satisfied with the whole. Aspirations are ideas that are often beyond immediate reach. The degree of satisfaction sensed is dependent on the consumer's evaluation of the degree of fulfilment of expectations and aspirations (Spreckelmeyer, 1998:423).

### 1.5.4 Post-Occupancy Evaluation (POE)

POE is the process of evaluating buildings in a systematic and rigorous manner after they have been built and occupied for some time (Preiser, Rabinowitz & White, 1988:29). The POE-process gauges the perceptions of housing satisfaction of residents as a means of determining the overall effectiveness of a housing product and process in addressing needs.

## 1.6 CONCEPTUAL FRAMEWORK

The conceptual framework as set out in Figure 1.1 was developed for this research. The main aim was to determine the housing satisfaction levels of the tenants residing in the Hope City housing complex. Housing satisfaction research, through the use of a post-occupancy evaluation survey aims at determining the following three issues: the tenants' socio-demographic status, socio-economic status and their level of satisfaction regarding the housing unit, complex and the management. The occupants' socio-demographic profile was compiled, and comprised of their gender, age, highest standard passed, marital status, disability status and family life-cycle stage. To determine their socio-economic profile, the occupants' employment status, gross monthly household income, the

household monthly expenditures, monthly savings as well as their rental arrears status had to be determined. From this data the researcher aimed to estimate the affordability levels of the respondents and their ability to afford to live in the units provided.

Lastly, the levels of satisfaction of the respondents regarding the housing unit, complex and the management were weighed. Concerning the housing unit aspects such as the floor level of the unit, size, quality, handling of noise from outside, temperature, kitchen areas and bedroom area were investigated. The housing complex looked at aspects such as the location of the housing complex, the quality of the building structure, the lighting in the complex, noise levels, security, safety, space for recreational activities and the access into the complex. Concerning the management of the housing complex aspects such as the treatment and availability of the management, the screening and allocation procedure, the reporting of complaints and the response of management with regards to the reported complaint were investigated.

Quality of life is defined as the level of satisfaction or confidence with one's circumstances, relationships and surroundings (McGregor & Goldsmith, 1998:2). The respondents' level of satisfaction with their overall housing situation could have an influence on their overall quality of life. Determining these satisfaction levels would provide an indication of how the management of the complex could improve the housing environment to attract other tenants to fill up the unoccupied units in the complex.

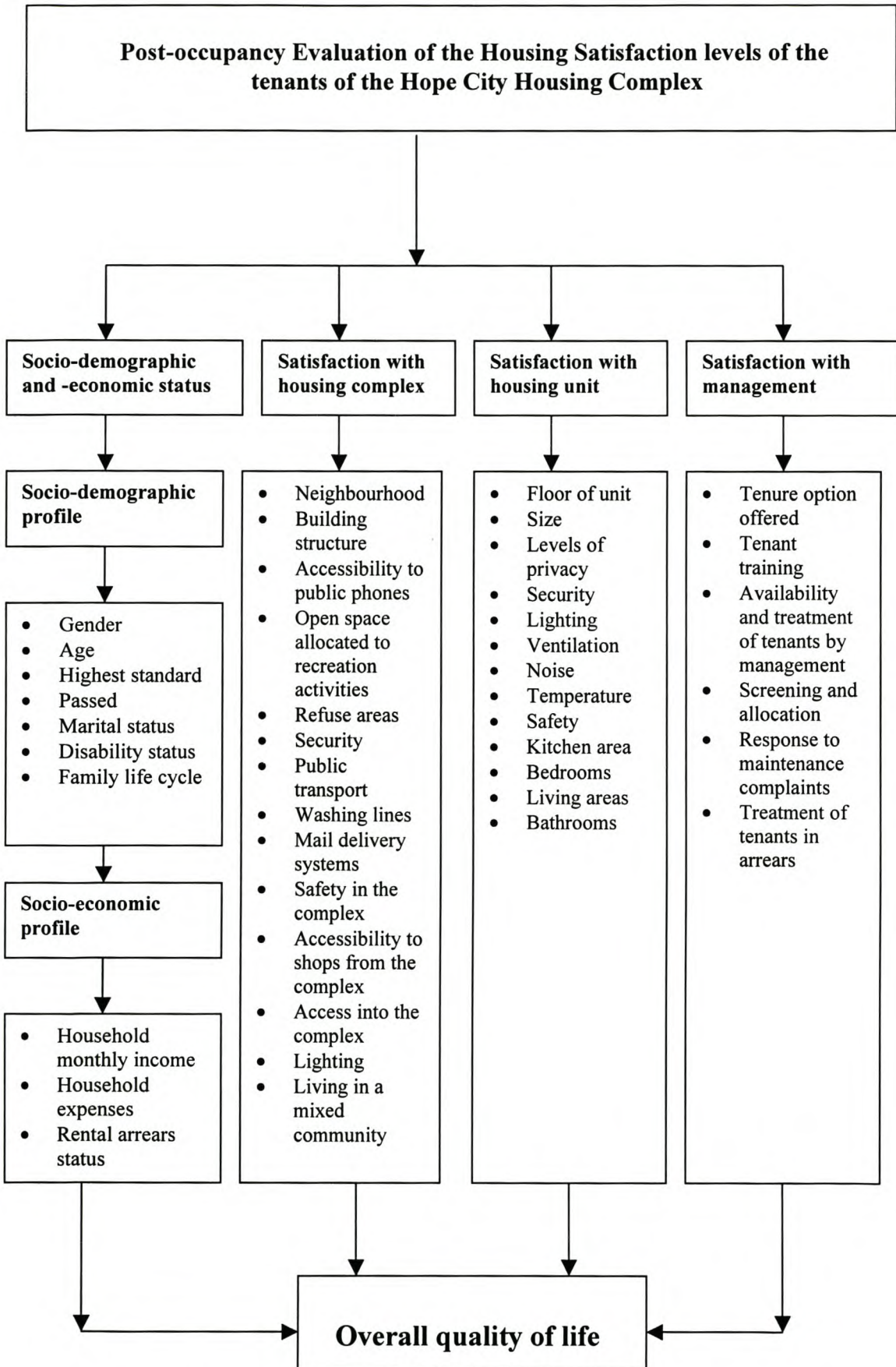


FIGURE 1.1: CONCEPTUAL FRAMEWORK OF THE RESEARCH STUDY

## 1.7 OUTLINE OF THE THESIS

**Chapter One** provides an introduction to the research. It includes the problem statement and objectives of the research. A description of the research variables and assumption are stated. The relevant terms, used in the thesis, are defined, and the conceptual framework presented.

**Chapter Two** includes the literature, relevant to the research that has been studied. This forms a theoretical basis for the study.

**Chapter Three** explains the research methodology used to obtain and analyse the data for this research. The research method, sampling, research techniques and procedure are discussed in detail in order to show their validity and reliability.

**Chapter Four** gives an overview of the Greater Middelburg Housing Association and background of the Hope City Housing Complex.

**Chapter Five** presents and discuss the survey results and findings of the research.

**Chapter Six** presents the conclusions of the study. It also provides recommendations to be implemented by the Greater Middelburg Housing Association.



## **CHAPTER 2: LITERATURE REVIEW**

### **2.1 INTRODUCTION**

According to Arkava and Lane (1983:25) the literature review enables the researcher to identify a relevant research topic. It also enables the researcher to develop a deeper understanding and insight into the complexities inherent to the identified research problem. It is important to equip the investigator with a complete and thorough justification of the subsequent steps, and provide an awareness of the importance of the undertaking. The aim of this chapter is to present an overview of relevant literature relating to the research. It also serves to define the key areas of focus and concepts used in the research and place it in context.

The literature review aims to address:

- The South African housing policy and social housing rental accommodation for the low-income earner through the existing South African National Housing Programme.
- The social aspects of housing
- A holistic approach to housing satisfaction.
- An overview of post-occupancy evaluation.

### **2.2 SOUTH AFRICAN HOUSING POLICY AND THE SEVEN HOUSING DELIVERY STRATEGIES**

The problems of the South African government, before 1994, have profoundly shaped the situation to which the present housing policy seeks to respond (Sandhu & Aldrich, 1998:210). However, the democratic South African government of 1994 has proceeded to emphasise that the aim of the initiated National Housing Programme is to be people-centered and development-orientated. Furthermore, it should be a development process, based on community needs and the fulfillment of human rights as a basic principle (Department of Housing, 1994:23). In order to meet the set goals of the housing programme the culture of bureaucratically imposed services will have to make way for consultation and community participation (Mokhobo, 1996:44). The quality of housing and its

environment are therefore important in providing satisfaction for individuals and their families. In this section, the extent of the housing problem in South Africa and the seven housing delivery strategies set by the government to meet the housing needs of low-income households across the country, will be discussed.

A central election promise had been “houses for all” and an early policy statement indicated its intention of delivering one million houses within five years (Department of Housing, 1994:21). In 1997, the National Housing Department estimated the number of families without adequate housing to be 2.2 million (National Housing Code, 2000:2UF). The government realised that the consequences of this backlog are the reasons for the overcrowding reflected in the increase of squatter settlements and land invasions in urban areas. The government identified housing development as one of their top priorities, because it is believed that developing adequate houses should lead to the up-liftment of the lives of the underprivileged. To facilitate the housing delivery process a new National Housing Programme, which was set out by the framework of the Housing White Paper, was established.

The government is an important and influential role-player in the field of housing, as it creates policies and laws within which the whole housing environment exists. The Housing White Paper (Department of Housing, 1994:22) stated that the goal of the government was to increase the total budget for housing to five percent and to increase housing delivery on a sustainable basis to a peak level of 350 000 units per annum. The National government assists provinces to develop the administrative capacity required for the effective exercise of their powers and performance of their duties in respect of housing development. It also supports and strengthens the capacity of municipalities to manage their own affairs, to exercise their powers and perform their duties in respect to housing development. The national government sets broad national housing delivery goals and support provincial and local government housing goals (Department of Housing, 1994:7).

The housing policy and strategy for South Africa has been set out in the White Paper on Housing. The housing vision and national goals as well as the overall approach taken to ensure the delivery of houses are given in this document. South Africa’s current housing challenge can only be met if government, the private sector and communities work together in pursuing these seven essential strategies. Each strategy is discussed in detail.

### 2.2.1 Stabilizing the housing environment

In order for the government to stabilise the housing environment, they had to start by creating stable and effective public environments. By ensuring that contracts are upheld and applied and that all parties understand and fulfil their roles and responsibilities, the risk of non-payment in the low income sector of the housing market could be lowered. Government endeavored to promote partnership and build trust within the housing sector, between beneficiaries and service providers as well as ensuring good quality housing. For government to create these elements of trust, five interventions were initiated to stabilise the housing environment, namely the Masakhane Campaign, the Mortgage Indemnity Fund, Servcon Housing Solutions, the National Home Builder's Registration Council and Thubelisha Homes. These five interventions sought to decrease the risk levels and to build trust within the housing industry and between beneficiaries and service providers (Karsen, 1999:3).

- The Masakhane Campaign tried to change public perceptions and attitudes regarding the rights and responsibilities of individuals, communities and local government. Individuals were thus encouraged to pay their rates, services and mortgage or rental payments as well as contribute towards their community and feel a sense of community pride (National Housing Code, 2000:9UF).
- The Mortgage Indemnity Fund encouraged private sector banks to resume lending into the affordable housing market, especially in neglected areas in the country.
- Servcon Housing Solutions assisted residents that are in arrears with their loans to find a way of continuing with their payments, in a way that is suitable to both the resident and the financial institution. This is done by three methods; the installment sale option, rescheduled payment and the right-sizing programme, where households are assisted in finding alternative affordable long-term accommodation (National Housing Code, 2000:12UF).
- Thubelisha Homes was established to provide housing stock for Servcon's rightsizing programme.
- The Home Builders Registration Council was established to ensure that consumers are protected against contractors and builders who might try to provide housing that is not of acceptable standards.

## 2.2.2 Mobilizing housing credit

Mobilising housing credit in South Africa is achieved by increasing the level of investment into the low-income housing sector and furthermore, by encouraging the lending of funds to the low-income sector by managing and cushioning commercial risk and sharing it between a range of players including the individual (National Housing Code, 2000:12UF). The White Paper (Department of Housing, 1994:29) states that credit is supplemented with saving, therefore it should enable the large section of the population who are in need of housing, and those who meet the criteria of the subsidy scheme to acquire access to formal starter housing under a range of tenure options. Individual savings for housing was seen by the Department of Housing (Department of Housing, 1995:10) as an important strategy towards mobilising housing resources, as the affordability constraints of the poor would affect the housing policy in two ways. Firstly, the government resources had to be focused on the poorest of the poor, it further required that the government pursue new ways of supporting the poor in order to maximise the benefits from the financial resources provided (Department of Housing, 1994:16).

The poor in South Africa have previously been limited to gaining housing finance from big financial institutions such as banks which left the majority of the population homeless or living in informal housing. Karsen (1994:4) went on to state that this was not due to the fact that the poor could not afford to borrow money, but because of other reasons such as red-lining, discrimination, poorly designed credit instruments and the lack of consumer success in saving.

Mechanisms for mobilising housing credit were introduced, to ensure that private sector institutions were introduced in the provision of low-income housing finance. The strategy to mobilise housing credit was spearheaded by the National Housing Finance Corporation (NHFC), the National Urban Reconstruction and Housing Agency (Nurcha) and the Social Housing Foundation (SHF).

### 2.2.2.1 National Housing Finance Corporation (NHFC)

The National Housing Finance Corporation (NHFC) is a public company that was set up in April 1996. It is owned by government and operates under specific exemptions from the Bank Act, [Act No. 94 of 1990]. The NHFC was launched by the government as an answer to the lack of available housing finance in the R15 000 to R50 000 price range. The NHFC's role is to increase the number and type of institutions that provide housing credit to low-income earners; both in urban and rural areas and to ensure that such organisations are sustainable in the long term. In addition to increase



the number of funds from the private sector and international donors to support its activities (National Housing Code, 2000:13UF).

Four housing programmes are currently available from the NHFC to provide security to pools of home loans from banks by issuing marketable securities. The first of the programmes is the Niche Market Lenders Program (NML), where the NHFC invests in micro-lenders such as housing institutions, non-bank lenders and small banks. The second and third options are the Housing Equity Fund (HEF) and the Rural Housing Loan Fund (RHIF), where the NHFC makes equity investments to help build the capacity of housing institutions and provide technical assistance that is to increase the capacity of intermediaries, in rural areas. The fourth programme is the Housing Institutions Development Fund (HIDF), which is targeted at housing institutions. It aims at assisting in the formation of housing institutions by providing start-up funding for the development phase, capacity building as well as institutional development.

The National Urban Reconstruction and Housing Agency (Nurcha) is the second method used by government to mobilise housing credit.

#### 2.2.2.2 The National Urban Reconstruction and Housing Agency (NURCHA)

The National Urban Reconstruction and Housing Agency (NURCHA) was established in 1995 to address the housing backlog and inequalities allowed by the previous government regime. The company promotes low-cost developments that focus on the needs of families earning up to R1 500 per month. NURCHA offers guarantees to encourage financial institutions to issue loans to housing contractors and developers. It also establishes ways of releasing credit for housing to people who do not meet the criteria of existing lending institutions. Lastly, NURCHA invests equity into joint ventures with the private sector to encourage the development of housing in the R20 000 to R60 000 range (Department of Housing, 1997b:8).

The Social Housing Foundation is one of governments systems of mobilising housing credit. The strategy is to stabilise the housing environment and increase the level of investment into the low-income housing sectors.

#### 2.2.2.3 The Social Housing Foundation (SHF)

South Africa inherited the concept of social housing from the Netherlands. This model of housing delivery was established in South Africa in 1997 and called the Social Housing Foundation. It is one of the government's initiatives and aims to deliver housing to the low-and moderate income

communities through alternative tenure options. The foundation was established by the NHFC as a Section 21 Company. The main objective is to promote, support and assist in the development of social housing in South Africa. Furthermore, the SHF has to assist in ensuring that the housing sector in South Africa provides housing for all sectors of the community.

The main function of the SHF is to assist in setting up other housing associations. The aim for the establishment of Social Housing Institutions (SHI's) is that, in time, these housing associations will become more professional and developed into social entrepreneurs. The institutions main responsibility is to accommodate households that are incapable of acquiring satisfactory housing on the free market. It is also evident that, because of their social responsibilities, the relationship between the housing association and their tenants is of prime importance (Social Housing Foundation, 2000:32). The association offers housing in the form of rental or rent-to-buy (installment sale). This is to introduce secure tenure and good quality housing at affordable rates for individuals earning between R1 500 to R3 500 per month.

Social housing as understood by the Social Housing Foundation is like a three-legged pot that can not stand without one of the three feet (Social Housing Foundation, 2000:26). The three "legs" are the approach, the product and the institution.

The approach includes the long-term commitment from both the social housing institution and the residents. The residents need to commit themselves to the terms and conditions in the lease, installment or use agreement, while the housing institution should commit to render the promised service as agreed and contracted. Meaningful stakeholders should participate in a way that will be supportive to the growth and sustainability of the social housing institution while upholding the principles of good governance, citizenship and democracy. Within social housing it is clear that individuals involved are to take responsibility for their contractual obligations. Social housing is a government initiative to house the urban poor, therefore individuals are not to profit. In stead all profit is to be invested back into the organisation for future growth and sustainability (Social Housing Foundation, 2000:26).

The product entails that social housing institutions exist because of the government subsidy that finances the projects. Therefore it is important that it focuses primarily on providing housing accommodation. Social housing offers the resident different tenure options and gives room to residents to be informed of the different tenure options. The social housing product offers the

resident affordable subsidized housing that is located in close proximity to amenities like shops, schools etc.

The social housing institution has to be registered as a legally constituted Section 21 Company and all of its profits should be invested into the institution for future developments. The institution should ensure that it is financially sustainable and that it has a marketing plan to attract residents who are able to meet their monthly rental or installment payments. The residents should be guaranteed legal right of stay, they should agree and sign the lease/use/installment sale agreement and the institution should meet its contractual obligations (Social Foundation, 2003:32). The standard lease agreements are drawn up for each tenant, to allow for eviction in case of a defined rental default. Strict criteria would have to be developed to provide clarity to the financial markets of the ability of the social housing associations to perform (Gauteng Department of Housing 2000:6).

The success of social housing is based on the premise that the housing products delivered under the strategy are of good quality and that the management of the housing stock is effective. The Social housing institutions provide installment sale and rental tenure options.

Table 2.1 indicates the different Provinces in which social housing institutions exist as well as the number of housing institutions set up in each Province from 1994 to November 2002.

**TABLE 2.1: NUMBER OF SOCIAL HOUSING INSTITUTIONS, PER PROVINCE**

Province	Number of Social Housing Institution's	
	2001	2002
Gauteng	16	30
Western Cape	7	8
Eastern Cape	7	8
KwaZulu- Natal	4	4
Northern Cape	0	1
Limpopo	0	1
Free State	1	2
Mpumalanga	3	4
North West	2	1
<b>Total</b>	<b>40</b>	<b>59</b>
Number of units (planned, completed or under construction)	24 917	30 332

(Social Housing Foundation Annual Report, 2002/2003:9)

- Rental housing in South Africa

In many parts of the world it has become clear, that the goal of universal home-ownership for the poor is not attainable. In South Africa, the rising costs of land and service provision, together with constraints on the availability of housing subsidies, have priced ownership out of reach for many of the poor (Watson & McCarthy, 1998:52).

Rental housing refers to a dwelling, which is leased through a lease agreement, which is concluded between a tenant and a landlord. The rental stock provided through the social housing follows the rules of the Rental Housing Act, Act 50 of 1999. The Rental Housing Act of 1999 states that the government has the responsibility to create mechanisms that will promote the provision of rental housing. To ensure that the rental housing market is functioning in the correct manner, rental housing tribunals create conflict resolution structures for the rental housing sector and lay down facilitation methods for creating healthy relationships between the tenant and the landlord as stated in the Government Gazette regarding the Rental Housing Act, Number 50 of 1999 (Rental Housing Act, Number 50 of 1999:6).

The contractual lease agreement between the tenant and the landlord needs to be written out on paper. The landlord should allow time for the tenant to inspect the housing unit after immediate occupancy. The Rental Act of 1999 seeks to stimulate the rental sector in a number of ways. Firstly, the landlord, may not discriminate against tenants based on their gender, marital status, race, pregnancy or sexual orientation, or on any other grounds except affordability of the unit offered for rental. Secondly, the landlord only has the right to inspect the property after notifying the tenant. The tenant therefore, has the right to privacy during the rental period and has the right not to have his/her home searched or possessions seized. Thirdly, the landlord must receive the property rental amount on the date of agreement as stated in the contractual lease. In a case where the lease contract is breached, the landlord has the right to recover the outstanding amount after obtaining a ruling from the Tribunal or an order of a court of law. Lastly, if the tenant's household causes any damage to the property the landlord has the right to be compensated so as to repair the damages (Rental Housing Act, Number 50 of 1999:6).

There has been much debate around the issue of rental housing in developing countries, like South Africa, due to the large numbers of people who are currently being housed in such a manner. The demand for housing is higher than the supply, but the rental of public housing was not successful under the apartheid government of South Africa. The occupants generally felt that the public

housing rentals were kept low, because of government's apartheid strategy and as a result of tenants' resistance at the increase in rental fees. Another reason for the poor performance of formal rental accommodation has been that rent recovery and eviction have generally been difficult, and tenants have been able to put strong political pressure on government to keep rents low. Lastly, as the gap between public rentals and market rentals in private stock increased, an inevitable process of subletting set in, as original tenants capitalised on their hold of cheap accommodation (Watson & McCarthy, 1998:52-53).

The results of a research study done in 1995 by Mazur and Qangule, in Cape Town, indicated that 49% of the respondents stated that they would prefer rental to home-ownership. Survey results such as these indicate that the household rental sector is playing a vital role in terms of accommodating categories of people who are frequently marginalised by the formal processes of land and housing delivery. Watson & McCarthy, (1998:49) stated that there is interest in rental housing on the part of researchers and national policy maker, to a point where bodies such as the United Nations have explicitly called for recognition of the important role of rental in housing strategies.

Watson and McCarthy (1998:50) argued that the current form of the housing policy, which focuses primarily on home-ownership, is not meeting the demands, or the pockets of many of the urban poor. The national housing policy needs to consider removing the bias in housing subsidy systems towards home-ownership, by providing rental allowances to those who do not wish to own their homes. The one potential difficulty to this strategy would be that subsidising tenants could drive up accommodation costs, unless the supply of rental space is highly flexible such as in the social housing form of housing.

- Social housing tenant training and resident participation in management

Education is defined as the knowledge or skills acquired before entering a position or situation. Training on the other hand is defined as the dissemination of knowledge or skills that occurs from time-to-time to enhance or accompany acquired knowledge and skills (Van Wyk, 1996:2). The Social Housing Foundation urges the housing institutions that they support to initiate tenant training before households occupy the housing units. The purpose of the training is to share with residents the context within which social housing institutions are established and the roles and responsibilities of the parties concerned (Social Housing Foundation, 2003:3). The aim of social housing institutions is also to include residents in the governance and management of their housing, which should result in the enhancement of their housing experience (Gauteng Department of Housing,

2000:7). Furthermore, tenants are to be encouraged to elect a residents' committee, which is to represent the voice of the residents of the particular housing project, act as a middle-man between the residents and the management of the project, and to resolve disputes among fellow residents.

In practice however formal resident involvement in social housing institutions in South Africa has not been successful. In a few cases residents have been given places on the Board of housing institutions, but their involvement has only been marginal. In the ICHUT Survey residents' involvement has been found to be greater in tenant-based organizations (Gauteng Department of Housing, 2000:15). On tenant based management initiatives, lessons for success of social rental housing have been learnt, the most important being that tenant education is critical, clear conflict resolution procedures should be in place, and a strong leadership should be present. Residents need an appropriate housing product that they can afford and proper implementation of default policies and procedures are required.

### 2.2.3. Providing subsidy assistance

This strategy focuses on providing subsidy assistance to disadvantaged households who are unable to independently satisfy their housing needs. Government acknowledges that it can not provide housing for all underprivileged citizens, but through this strategy it will be able to assist as many people as possible. The funding provided is not sufficient to provide a complete housing unit, and additional funding from other resources, such as individual savings or labour and the private sector, is needed. This strategy is made up of three programs (the Housing Subsidy Scheme, the Discount Benefit Scheme and the Public Sector Hostels Redevelopment Programme) that together make up the National Housing Programme. This particular research will however only look into the Housing Subsidy Scheme.

#### 2.2.3.1 The Housing Subsidy Scheme

The National Government has established and supported the implementation of the Housing Subsidy Scheme of 1994 in order to assist households that are unable to satisfy their housing needs independently (National Housing Code, 2000: 15UF). The Housing Subsidy Schemes are meant to be flexible in order to accommodate a wide range of tenure and delivery options that will enable a flexible application of subsidies at the delivery level in order to obtain maximum gearing with private investment, savings and acceptable equity (Department of Housing, 1994:31).

The subsidy scheme provides a subsidy to households earning less than R 3 500 per month so as to assist them to acquire secure tenure, basic services and a top structure. A range of subsidy mechanism are provided namely, the Individual Subsidy, the Project Linked Subsidy, the Consolidation Subsidy, Institutional Subsidy, the Relocation Assistance Subsidy and the Rural Subsidy (National Housing Code, 2000:36UF).

The Housing Subsidy is available in all the different provinces in South Africa. The scheme grants housing subsidies to those beneficiaries who have not previously received government assistance in order to enable them to acquire an initial home or a serviced site. Subsidies are paid from the National Housing Fund through the provincial structures to enable a qualifying beneficiary to acquire residential property with secure tenure. It also provides for the health and safety requirement of potable water, adequate sanitary facilities, waste disposal and domestic electricity supply (National Housing Code, 2000:36UF). The subsidy can be utilised for a newly constructed single housing unit, a unit in a newly constructed multiple unit complex including flats, a unit in a reconditioned or refurbished building and on existing housing of any type (National Housing Code, 2000:37UF)

Households in different income categories are eligible for subsidy benefits. The subsidy amount varies depending on the subsidy mechanism implemented (National Housing Code, 2000:37UF). General rules of the Housing Subsidy Scheme apply to all of the subsidy mechanisms and address eligibility criteria, the value of the subsidy and how the subsidy may be used. A person only qualifies for a housing subsidy if they fulfil the following eligibility criteria (National Housing Code: 2000: 37UF):

- He or she is married or cohabits with any other person, or is single and has proven financial dependants.
- He or she is lawfully resident in South Africa.
- He or she is legally competent to contract: he or she is over 21 years of age, if not married.
- The gross monthly household income of his or her household does not exceed R3 500 per month.
- The beneficiary or spouse has not received a subsidy from the Government to buy a house previously.
- He or she is first time property owner.

Table 2.2 indicates the value of the subsidy as effective since 1 April 2003. It also indicates the contribution that should be made by beneficiaries.

**TABLE 2.2: HOUSING SUBSIDY INCOME CATEGORIES**

<b>TYPE OF SUBSIDY</b>	<b>INCOME CATEGORY</b>	<b>SUBSIDY AMOUNT</b>	<b>CONTRIBUTION</b>
Project linked and Individual subsidy. For qualifying beneficiaries: (Excluding indigent groups)	R0 to R1 500	R23 100	R2 479
	R1 501 to R2 500	R14 200	R2 479 + shortfall
	R2 501 to R3 500	R7 800	R2 479 + shortfall
Indigent: Aged, disabled and health stricken	R0 to R800	R25 580	None
Institutional subsidy	R0 to R3 500	R23 100	Indirect – Institution must add capital
Consolidation subsidy	R0 to R1 500	R12 521	R2 479
Consolidation subsidy for indigent groups	R0 to R800	R15 000	None
Rural subsidies and People's Housing Process	R0 to R1 500	R23 100	None
	R1 501 to R2 500	R14 200	Shortfall
	R2 501 to R3 500	R7 800	Shortfall

([www.housing.gov.za](http://www.housing.gov.za))

To compensate for abnormal development costs arising from location, geographical or topographical combinations the subsidy amount can be increased by an amount not exceeding 15%. An increase on the stated amount can be awarded to a household where a member of that household is disabled. The Provincial Housing Development Board decides on whether an increase is to be allocated (National Housing Code, 2000:37UF). In order for citizens to be awarded the project linked, individual and consolidation subsidy they are expected to put forward savings of R2 479.

As stated above there are a range of subsidy mechanisms. For the purpose of this research only the Institutional Subsidy will be explained as it is the subsidy mechanism that Social Housing Institutions are operating under.

### 2.2.3.2 Institutional subsidies

Housing institutions are granted institutional subsidies to develop their approved projects. The institution develops housing stock that is affordable and either rent or sell these units through installment payments to the qualifying beneficiaries of the subsidy scheme. The housing institution has to be established as a non-profit legal entity with marginal profit, as the government's idea is for



these units to be sold at cost price. Furthermore the institutions will have to decide on the kind of housing project that they want to undertake. The housing project can be either the upgrading of existing housing stock or the development of new stock (National Housing Code, 2000:39UF).

On an approved project, the institution is entitled to receive R23 100 for each residential property occupied by a qualifying beneficiary. The application for the subsidy is to be submitted to the Provincial Housing Development Board and payment to the institution will be made in the form of progress payments pending on the agreement between the Provincial Housing Development Board and the institution.

### 2.2.3.3 Conclusions regarding the Housing subsidy programme

In as much as the new South African government has implemented these subsidy programmes, there are concerns that the current South African housing policy will entrench and reinforce, rather than reduce the existing inequalities that were created by the legacy of apartheid (Lalloo, 1999:35). The first concern is the set criteria that a person needs to meet in order to qualify for a housing subsidy. Secondly, the problems encountered by housing subsidy programmes in terms of land acquisition that has resulted in affordable housing being located at the urban periphery distant from major infrastructure, transport and employment (Datta & Jones, 2001:336). This may lead potential subsidy beneficiaries, who are currently residing in informal settlements, to prefer to stay in the settlement rather than in the provided subsidised housing, due to the location of the housing unit (Jenkins, 1999:438). Thirdly, the fact that the housing policy introduced by the 1994-government, does not seem to have altered the spatial and racial divisions placed by the previous apartheid government.

Therefore, the question on whether the South African economy will continue to provide jobs and household earnings at a level necessary to provide for the upgrading or completion of a house as well as to continue with paying monthly housing rental or installments, remains (Sandhu & Aldrich, 1998:210). Fourthly, the award of a subsidy to a qualifying beneficiary does not necessarily mean that the person will move into the house. This is due to the bureaucratic red tape reigning as well as the lack of resources in government. Furthermore, Crankshaw and Parnell (1996:231) indicated that the housing programme merely supports the delivery of shelter, and instead of transforming the apartheid patterns of settlement, the policy literally casts them in stone.

Policy makers were alerted by housing subsidy analysts that there is a possibility that the subsidy programmes developed have not been designed with sufficient sensitivity to household needs, and are not as socially progressive in practice as they might appear on paper. Furthermore these subsidy programmes may lead some households into new forms of poverty (Datta & Jones, 2001:334). It was recommended that housing finance be improved gradually, in ways that support urban livelihoods and asset formation rather than increase vulnerability through debt, which in turn builds social capital rather than individualism and mistrust (Datta & Jones, 2001:334).

#### 2.2.4 Supporting the people's housing process

Another housing delivery strategy is the people's housing process which motivates and facilitates those households who want to build their own homes. The strategy assists households to access housing subsidies and provide technical, financial, logistical and administrative support. The strategy comprises of three arrangements, namely the support organisation, funding and the people's housing partnership trust.

Support organisations are legal entities formed by individuals or communities to facilitate in the acquisition of land on the basis of secure tenure, and to provide technical, financial, and administrative support to housing subsidy beneficiaries regarding the building of their homes.

The support organisations operate from a Housing Support Center. Housing Support Centers could be located in either an existing or new facility, and should be centrally located so that they are accessible to all members of the community involved in the People's Housing Process project (National Housing Code, 2000:17UF).

The funding component of the strategy is to support the people's housing process and it involves both the housing subsidy as well as facilitation and establishment funding for the preparation and establishment of housing support functions.

The People's Housing Partnerships Trust implements the government's national capacitation programme in support of the People's Housing Process.

#### 2.2.5 Rationalising institutional capacity

The first strategy that the government implement is the rationalization of institutional capacity this was done with a sustainable institutional framework, which redefined the roles and functions of all

three spheres of government and removed all racially based housing legislation (Department of Housing, 1997a:6). Government attempts at creating transparent, effective housing funding processes. There is one national housing fund that presently operates under the South African Housing Fund and each province is required to establish a Provincial Housing Development Fund (National Housing Code, 2000:19UF). Government has realised that in order to rationalise institutional capacity, resources and capacity building at different levels of government has to take place. The Minister of Housing and province delegates meet often to discuss and regulate the implementation of the current housing policy and strategy. The lower level of government meetings provide administrative support to the national level of housing governance, to share experiences and discuss issues that are of mutual concern (Department of Housing, 1996:40). The housing institutions that have been established to support the housing policy and strategy are to build capacity in order to succeed in the delivery of adequate housing (Karsen, 1999:6).

#### 2.2.6 Facilitating speedy release and servicing of land

The speedy release and servicing of land was to be achieved through the principles of the Development Facilitation Act, of 1997. The Act deals with facilitating the speedy undertaking of land-and development projects, with special interest in the delivery of serviced land for low-income housing (National Housing Code, 2000:30UF).

The main elements concerning housing as set out in the Act are that it provides a set of nationally enforceable principles in terms of land development. The Act states that each municipality should develop Land Development Objectives (LDO's), and that development Tribunals be established and should be made up of experts, officials and stakeholders. The lower levels of government should acknowledge that the Development and Planning Commission will be responsible for reviewing all provincial planning related to the South African legislation (National Housing Code, 2000:21UF).

#### 2.2.7 Co-ordination of government investment in development

As required by the White Paper (Department of Housing, 1994:33) the last of the strategies is the co-ordination of government investment in housing development. The aim of the strategy is to increase government's role in investing into low-cost housing through education and planning. The Housing Act, No 107 of 1997 was approved in parliament to facilitate a sustainable housing development process in which national, provincial and local governments, as well as the business sector, citizens and permanent residents all work together to access adequate housing (Department

of Housing, 1997a:6). A number of programmes were implemented such as the Special Presidential Projects on Urban Renewal, the National Presidential Job Summit Project on Housing, the Consolidated Municipal Infrastructure Programme and the Local Economic Development and Partnerships project solely for the delivery and building of institutions. Karsen, (1999:6) states that functional disparities and co-ordination inefficiencies, which are not conducive to an effective housing development process, still require further attention.

It is understood that for the strategy to succeed, all key housing development role players will have to be trained, educated and informed, because if they know their roles and responsibilities there will be no waste of valuable resources and time. The seven key strategies further aim to impact on the poverty problem in South Africa by initiating and maintaining sustainable socio-economic development (Department of Housing, 1996:26). Housing and development is closely linked, and through addressing the housing problem, sustainable socio-economic development can be initiated and maintained (Department of Housing, 1994:26).

Government needs to practice the preamble to the Housing White Paper of 1994 where it is made clear that “The time for policy debate is now past – the time for delivery has arrived” (Department of Housing, 1994:4). While ensuring that housing is delivered, the government has a responsibility to ensure that; there is equal access to housing; there is equality and fairness; equal access to credit in order to include disadvantaged households, that there is consumer protection and priority to housing people with special needs, for example people living with HIV/AIDS; and to reduce the level of housing poverty (Social Housing Foundation, 2003:13). The Housing Act, Act No 107 of 1997 refers to a number of general principles to be observed when providing housing for the nation.

#### 2.2.8 The South African Housing Act, 1997 (Act No. 107 of 1997)

The foundational principles of the National Housing Policy are imbedded in the South African Constitution’s Bill of Human Rights and the Housing Act of 1997. The Bill of Human Rights: Section 26, stipulates that all South Africans have the right to have ‘access to adequate housing’. It is the government’s duty to take reasonable legislative and other measures, within its available resources, to achieve the realisation of this right on a progressive basis. Adequate housing is measured in terms of certain key factors including legal security of tenure, the availability of services, material, facilities and infrastructure, affordability, accessibility and location. The Act specifies that the right to adequate housing cannot be achieved immediately, but must be achieved over time (Department of Housing, 1997a:2).

The Housing Act, Number 107 of 1997, refers to a number of general principles to be observed when providing housing for the nation. It argues that national, provincial and local spheres of government should give priority to the needs of the poor as well as consult meaningfully with individuals and communities who are affected by housing developments. The government is to further ensure that housing development provides as wide a choice of housing and tenure options as is reasonably possible, as well as become economically, socially and financially affordable and sustainable, administer in a transparent, accountable and equitable manner and uphold the practices of good governance. The Act continues to encourage and support individuals and communities, as well as co-operatives, institutions and other bodies that are community based, in their efforts to fulfil their own housing needs by assisting them in accessing land, services and technical assistance in a way that leads to the transfer of skills and empowerment of the community (Department of Housing, 1997a:6).

For the government to create housing that is sustainable, the investment from the state, the private sector and individuals should be increased. The government should also establish an institution, technical and logistical housing support mechanism to enable communities to improve their housing circumstances continuously (Department of Housing, 1994:21).

### **2.3 SOCIAL ASPECTS OF HOUSING**

In discussing social aspects of housing, the interaction between society and housing is of the utmost importance. Researchers and writers interested in society and housing have compiled work that studied or defined different terms that effect or are related to the satisfaction of housing occupants. The most commonly studied terms are; housing norms, preferences, satisfactions, needs, wants and acceptability (Morris & Winter, 1978:31, Bell *et al*, 1996:417, Shlay, 1998:482 & Purcell, 1998:374).). Satisfaction with housing and its environment is one of the main aspects that affect the quality of life of the residents. The South African government emphasises that the National Housing Programme should be people-centered and development-orientated. It should be based on community needs and the fulfillment of human rights as a basic principle (Department of Housing, 1994:23). This is an indication that the government is initiating and working on housing programmes that aim to satisfy people's needs as well as the development of the physical environments that will improve the quality of life for all South Africans.

### 2.3.1 Understanding housing

The White Paper (Department of Housing, 1994:21) defines housing as a “variety of process through which habitable, stable and sustainable public and private residential environments are created for viable household and communities”. The study of housing is complex, and it involves all disciplines from Home Economics, Consumer Science, Law, Sociology, Geography, Urban and Regional Planning, Public Management and Politics. These disciplines interpret housing in ways that are in accordance with their particular discipline. The common concern regarding housing within the different disciplines is the financial aspects, the building aspects and the social aspects of housing (Tremblay & Lindamood, 1990:1). The concern of home economics and consumer science has always been the individual and family well-being, including the effects of the environment on the family and the effect of the family on society (White, 1986:188).

As an instrument of political stability and economic prosperity, housing represents the largest financial investment most households will make during their lifetime. In the social sciences, housing is conceptualised as both a noun and a verb. The interpretation of housing as a noun refers to it as a product. It provides physical shelter and a symbolic meaning for those people who are occupants and those who are non-occupants of that particular house (Tremblay & Lindamood, 1990:1). This is because a house is more than a material object or structure that provides shelter, it is a cultural and social unit of space created to support a way of life (Rapoport, 1998:104). Housing units, complexes and subdivisions are unique products that combine to create neighborhoods and communities. Housing is seen as a verb because it is a process, that goes through stages beginning with land development and ending with consumers renting or purchasing the home, which must be serviced and maintained. People who plan, develop, finance, construct, sell, manage, improve, rehabilitate and regulate this product and its use, provide housing services. The process involves the individual and the collective provision and maintenance of housing stock by households and private or public sector participants. The process includes preparation, production, distribution and service (White, 1986:189).

It can therefore be understood that housing does not only supply shelter and protection, but provides the setting for many of the basic biological and social processes necessary to sustain life. The family status is symbolised by the house, to both the household and the wider community. Therefore, the residents’ main objective of obtaining a house, lays in the will to turn the structure of “bricks-and-cement’ into a home. A home is a place where accumulated life experiences are created resulting in an emotional attachment to the house. It is imperative for communities to be enabled to

partake in the realisation of their own housing needs, the transfer of skills, economic empowerment and independence from government financial assistance (Department of Housing, 1994:23). It is understandable why housing is so important to all households, and perhaps more important to the poor than the non-poor.

International governments aim at increasing economic prosperity of their countries by boosting employment and attaining population-related objectives through housing. The pre-1994 South African government used housing as an instrument in the implementation of apartheid. The democratic South African government of 1994 worked on the premise that housing is a process that represents more than the delivery of houses (Department of Housing, 1994:20), but the foundation for continuous improvement of public and private environments within which stable and productive communities can grow and prosper (Department of Housing, 1994:24; Department of Housing, 1997b:4). The post-apartheid government stated that the process of developing low-cost housing should include the improvement of physical well-being, the development of community capacity, the expansion of options for local economic development and the establishment or strengthening of local institutions in order for these developments to remain sustainable (National Housing Code, 2000:26). In the approach adopted to build houses in a community, the emphasis should be on developing the skills of the people in the community, and create employment opportunities while supplying in a basic need for shelter. The capacity of the community should be organised by sustainable intervention (Huchzermeyer, 2001:318).

### 2.3.2 Housing needs

Housing needs derive from cultural standards against which actual housing conditions are judged (Morris & Winter, 1978:31). According to Lewis (1994:10), Maslow's theory shows that life involves five basic human needs. Firstly, the physical needs then the psychological needs which make up the remaining four levels of the pyramid. The psychological needs are the need for security, the need for love and acceptance, the need for self-esteem and lastly the need for self-actualisation.

Housing is an important tool in meeting these five basic human needs. As part of the total environment, housing entails the fulfillment of both physical and psychological needs. It fulfils primarily the need for shelter and protection from the weather and the outside world, which is the most basic need and is essential for survival (Lindamood & Hanna, 1979:3; Lewis, 1994:10).

The housing physical structure of the house is essential to protect one from physical danger from outside elements, while the home protects one from visual intrusion. This creates a sense of security and privacy to the person. The windows provide some flexibility between total seclusion from exposure of the outer world (Nissen, Faulkner & Faulker, 1994:145; Lewis, 1994:10). Furthermore, windows influence the emotional and psychological well-being of people (Leather, Pyrgas, Beale & Lawrence, 1998:754; Heerwagen, 1990:631), as the amount of light entering a room through the window can have a direct effect on work attitudes, behavioural intentions as well as on the well-being of the worker. Housing provides feelings of being loved and accepted through being cared for by ones family (Lewis, 1994:13). Furthermore, according to Bell, Greene, Fischer & Baum, (1996:448), housing enhances social life and bonding of the family by offering a location for the major activities of daily living. George & Bearon (1980:76), refer to self-esteem as an individual's overall general sense of self-worth. Housing provides satisfaction that helps to reinforce self-esteem by gaining approval and respect of others as well as the enjoyment provided by the appropriate housing (Lewis, 1994:13). Self-actualisation is concerned with the achievement of one's full potential. The environment, in which the person resides, tends to have influence on the person's potential to development (Lewis, 1994:13). Therefore, congruence or fit between the user's needs and building is an important factor to provide satisfaction of housing (Bell *et al*, 1996:417).

### 2.3.3 Housing norms

Housing needs are one with cultural norms for housing (Morris & Winter, 1978:30-31) as families judge their own housing and that of others using certain culturally derived criteria known as norms. A family, whose housing does not meet the norms, experiences one or more deficits. The character of the dwelling and the neighbourhood play a role in determining the responses of others to a family. These responses in turn influence the family's response to itself (Gutman, 1970:124-125). This is due to the fact that others responses to a family, whose residence is an elegant mansion or a suburban dwelling, are very different from responses to a family whose home is an apartment in a decaying state, or located in a housing project (Morris & Winter, 1978:5).

Housing norms prescribe what type of housing structures, tenure, space, quality, expenditure and neighbourhood are appropriate for different ages and compositions of families. Housing norms are also influenced by cultural differences. Preference of the style of housing is influenced by experience of different cultures and geographic location (Purcell, 1998:374). The South African National Housing Code of 2000 specifies under "Choice", that individuals should have the right to choose freely in terms of satisfying their own housing needs. The National Housing Policy should



therefore provide a variety of housing and tenure options for people to choose from in order to improve their quality of life.

#### 2.3.4 Quality of life and housing

Researchers studying the “quality of life” have found that it has a great influence on a person’s overall feeling of well-being. It has been suggested that the built environment has an impact on the individual both directly and indirectly through its effect on social, cultural and psychological environments.

Campbell, Coverse & Rodgers, (1976:219) stated that satisfaction with overall quality of life was analysed as the dependent variable. It is dependent on the subjective responses to the domains such as neighbourhood, location of residence, type of structure and level of education. The overall satisfaction was perceived to be dependent on an individual’s attitude on some or all of these domains. Life satisfaction was essentially considered to be the cognitive assessment of one’s progress towards desired goals (Campbell *et al*, 1976:219). If the desired, or normative, state has been achieved for several of the domains under investigation, one would assume the result would be satisfaction with life in general.

McGregor & Goldsmith (1998:2) defined quality of life as the level of satisfaction or confidence with one’s conditions, relationships and surroundings. Although McCall in Butler (1983:41) stated that there is a distinction between happiness and quality of life, it seems likely that it should be closely related. Hence, in housing satisfaction research residents are asked to indicate the levels of satisfaction with particular domains of their lives. Butler (1983:41) refers to Andrews that stated that overall life satisfaction depends on an individual’s subjective evaluation of specific life domains, furthermore, housing is considered an important aspect in a person’s overall evaluation of his life. After the person investigates these life domains according to his set of values and expectations, an integration process takes place resulting in a subjective response to the specific domains.

As urban areas continue to grow throughout the world, it is likely that the quality of cities, their suburbs, and the quality of ambient environment will become even more important in defining quality of life. It is important to document quality of life in world cities by measuring the environment objectively and as it is experienced by the residents. (Marans, 2002:10). Satisfaction with housing and its environment is one of the main aspects of the quality of life of housing

occupants. Therefore, to uplift the quality of life experienced by both individuals and families through their housing, improvements should be made to the housing and the environment in which the house is situated. The South African government has realised that the housing shortage is creating social and political environments that are frustrating, insecure and un conducive for quality living. Therefore, the creation of the National Housing Programme and Subsidy Scheme, which aim to improve the lives of the underprivileged by facilitating the housing development process, was established (Department of Housing, 1994:10).

## **2.4 HOUSING SATISFACTION**

Housing satisfaction can be defined as the degree of satisfaction of a person with a specific house within their chosen residential, physical and social environments, as well as with specific housing attributes. Satisfaction with housing environments continues to be an area of interest for researchers in Housing, Sociology, Urban Planning and Consumer Economics. In both the public and private sectors, there is pressure to allocate scarce resources in a way that maximises individual and family well-being. Therefore, identifying the determinants of housing and neighbourhood satisfaction is necessary for a more accurate assessment of the housing demand. This is an issue that government housing programmes should take into account, especially in their aim to improve the supply of housing as well as improve the quality of life of the residents (Cook, 1990:71). Residential satisfaction and quality of housing are therefore two mutually related concepts in housing evaluation studies (Atlas & Özsoy, 1998:316).

Housing satisfaction is related to aspects such as the quality, quantity, ownership and structure of the house (Morris & Winter, 1978:154). Further factors such as the size of the house, the number of rooms, floor plan, facilities, site location, quality of the neighbourhood and tenure will also influence the housing satisfaction of a resident. Housing satisfaction closely relates to safety aspects and the general welfare of the resident in the building.

Atlas and Özsoy, (1998:315) referred to Francescato, Weideman & Anderson who stated that satisfaction is a function of different categories of variables: the objective characteristics of the residents, objective characteristics of the housing environments, and the occupants' perception and beliefs about the aspects of their housing environment, which are the physical environment, the housing management and the other residents. It should however, be recognized that the levels of satisfaction differ from individual to individual as one person's satisfaction level might be achieved

by the accomplishment of very few goals, while another person will have higher expectations and goals to reach before satisfaction is achieved. Regardless of the criteria that different occupants set for their level of satisfaction, each person is equally satisfied if they have achieved their personal goals. This is because not all residents of the same area have the same housing needs, as the neighbourhood and their dwellings can have different influences.

Galster & Hesser, (1981:735) stated that previous research on housing and neighbourhood satisfaction suggests that characteristics of the neighbourhood and dwelling and the socio-economic characteristics of the respondent's, influence the overall degree of residential satisfaction. This makes housing satisfaction an important indicator of quality of life and therefore can not be ignored. The aim of residential satisfaction assessments over time has been primarily to provide information that can be used to improve the residential conditions of those people who can not make preferences, requirements and expectations known through the market mechanism, that are at least in theory available to the most affluent population.

According to Bell *et al*, (1996:451) and Van Wyk (1990:37), housing should fulfil physical, psychological and social needs. Housing must also be functional in terms of user behaviour and satisfaction (Nissen *et al*, (1994:144). This means that a living space should contribute positively to the comfort and efficiency with which activities take place.

Empirical studies in residential satisfaction can be divided into two distinct approaches. On the one hand there are those studies in which residential satisfaction is considered as a criterion of residential quality (Galster & Hesser, 1981:735-758; Stokols, 1987:41-70). The objective of studies such as these is to establish which factors determine the degree to which the occupant is satisfied with the residential environment. Other studies (Newman & Duncan, 1979:154-166; Speare, 1974:173-178) consider residential satisfaction not as a criterion, but as a predictor of behaviour.

Different characteristics of the environment and the occupants are some of the issues that the Marans and Specklemeyer model (Altas & Özsoy, 1998:316) recognises. The physical environment indicates that objective attributes of a particular environment have an influence upon a person's satisfaction through the person's perception and assessments of those environmental attributes. The model states that satisfaction, the perception and assessments of the objective environmental attributes influence a person's behaviour, and the objective attributes of the environment itself. The South African government's housing policy of 1994, attempts on gaining a deeper insight of the

occupants' perception and beliefs about the different aspects of their housing environments. Aspects such as the management, the housing unit and relations with other residents are issues that effect the overall satisfaction of the occupants. The government through its through its Social Housing strategy of rental housing provision attempts at achieving residential satisfaction by including the residents in the governance and management of the housing products (National Housing Code, 2000:14UF).

There is no doubt that people from different economic classes, ethnic groups and age groups exhibit different housing behaviour and differently achieved housing conditions. This is due to the different housing norms that are influenced by cultural differences, for example the preference of housing styles is influenced by experiences of different cultures and geographic locations (Purcell, 1998:374). It has resulted in the differences in current housing conditions or housing related behaviour (Morris & Winter, 1978:140). Researchers, who are interested in examining potential links between satisfaction and behavior, propose that improvements in satisfactory environments should result in changes in occupants' satisfaction and in the social behaviour of occupants (Liu, 1999:512). Ajzen and Fishbein's (1980:19) "Theory of Reasoned Action" state that satisfaction is to be seen as an attitude towards a target, that is, towards a specific physical, social and organisational environment. Viewing satisfaction in this perspective allows a clarification of the link between satisfaction and behaviour. Within this optic, they developed a comprehensive model of the environment-satisfaction-behaviour relationship. The comprehensive model shows how satisfaction changes from a criterion to an external variable when viewed as an aspect of behavior.

When a person reaches a high level of satisfaction a state of equilibrium exists, characterised by a fit between consumer needs and his/her home. This is called behaviour-environment congruence.

Housing satisfaction is perceived when a consumer judges his purchase of a house by three criteria:

- Satisfactory features that the consumer expects to find in the new home at the price he is willing to pay.
- The presence of, at least, some features of the consumers ideal home, or the realisation of part of his housing aspirations
- The housing improvement gained by the presence of the new home (Brink and Johnston, 1979:340).

The higher the price of the home the greater the likelihood that a large proportion of the housing features expected could be achieved by the consumer (Brink & Johnston 1979:340). Therefore, some relationship is expected between price and housing satisfaction.

Housing satisfaction is produced by the removal of deficits rather than by their absence, so that when a deficit is removed the residents' level of satisfaction rises (Morris & Winter 1978:6). Furthermore, when housing conditions fail to provide a satisfactory environment and thus produce dissatisfaction, it leads to a lowered perceived quality of life (Van Wyk, 1989:19). This is a result of a person experiencing dissatisfaction with a particular life domain, because of lack of accomplishment of a particular goal in that domain. The reduced level of satisfaction results in residential stress, which is caused by housing that deviates from cultural, family or community norms. When the level of stress exceeds the limits the family is willing to tolerate, the propensity to engage in housing adjustment behaviour develops (Morris & Winter 1978:6).

The following aspects regarding housing satisfaction will be discussed, satisfaction with quality and design, satisfaction with affordability aspects of housing, satisfaction with the different types of tenure and structural type, satisfaction with the amount of space available in a house, satisfaction regarding the neighbourhood and the location of the house, and the security of the house.

#### 2.4.1 Satisfaction with the design and construction of housing

Mass housing is usually designed for the standard average user. Neither the difference of the characteristics of different occupants, nor the changing needs of residents are considered in the design (Altas & Özsoy, 1997:315). While previously efforts in housing provision in South Africa was directed towards meeting the quantitative shortage of dwellings, qualitative aspects of housing have become increasingly more important in recent years. Housing consumers are becoming more conscious of quality issues in housing environments (Özsoy, Atlas & Gökmen, 1996:16). In most governmental housing developments neither the differences of characteristics of different occupants, nor the changing needs of residents are considered in design. The quality norms have three dimensions and refer to structure quality, service quality and maintenance. According to Morris & Winter (1978:131) the measurement of housing quality requires knowledge of the objective attributes that contribute to the measure of housing quality through the subjective reactions of families. Van Wyk (1990:40) found that satisfaction with structure differed according to the stage of the family life-cycle and cultural differences. Young couples prefer a duplex structure, as opposed to couples with children who prefer single standing housing units.

Housing quality assumes that a family allocates its money for housing in a rational way, and in line with their perception of their housing needs. Housing directly affects the maximum satisfaction levels of occupants, because it is closely linked with their income. Yust, Hadjiyanni & Poncel, (1997:72), found income to be an important factor in improving the quality of housing. Considering that housing satisfaction is related to aspects such as the quality, quantity, ownership and structure of housing (Morris & Winter, 1978:154), this implies that the quality (material used to build the house and the area in which the house is situated) of the house should be in accordance to the resident's expectations and at the cost that he/she is willing to pay. The house should have the desired shape and form as well as the number of rooms that suites the resident.

Housing construction should not only concern durability and safety, but also aesthetics, comfort and efficiency of the people living and working within the product of the construction (Bell *et al*, 1996:417). Housing design, on the other hand, needs to consider and fulfil in three basic functions, namely commodity, firmness and delight (Bell *et al*, 1996:417). Liu (1999:512) refers to Markus who suggested that, in the field of design, any activity or object is considered to function as part of a system and consequently, interdependencies of systems and the dynamism of the environment must be emphasised. Descriptions of static entities (e.g. assessment of building performance) are of value only if they are considered as part of some other processes (e.g. the constant maintenance of balance between the occupants and environment).

Satisfaction with the housing structure is achieved when the structure fits the user's needs by providing an integration of all physical, functional, aesthetic, psychological and social factors. The housing structure should therefore fulfil the basic functions for the occupants, such as effectiveness, beauty and psychological or social comfort. The different aspects of design such as the foundation, roof of the house, windows, doors, aesthetic quality, water and sanitation, interior space and the quality of the construction are discussed below.

- Water and sanitation quality of construction

Water and sanitation systems should be planned and built before the house structure is constructed. Two systems are needed, namely the water supply and the waste systems. The piping of water supply systems is constructed in the floor, walls or ceiling of the house. There needs to be water pipes for hot and cold water to the taps of the dwelling. The cold water which is provided from the main line pipes is to be used for household purposes (Lawrence, 1994:34). For waste, different pipes are installed that will lead the waste away from the house to avoid toxic odors around the

house. These waste disposal pipes are larger than the supply pipes, and rely on gravity, rather than pressure, to remove the waste (Lewis, 1994:149).

- Foundation

The foundation is the substructure of the house, as it lies below the ground level. The foundation should be able to support itself as well as the weight of the house. The foundation is laid differently depending on the type of house that is to be built as well as the material used to build the house (Reader's Digest, 1982:22). Lewis (1994:136) states that the quality of the foundation is important to obtain a good house structure, because a house built without a supportive foundation will settle unevenly, causing cracks in the walls.

- Exterior and interior walls

The walls of a house are to provide the occupant with privacy and protection from outside elements. The walls support the roof, therefore they should provide structural strength. Walls also contribute towards the beauty of the product (Logan, Stepat-Devan, Kness & Szekely, 1980:315; Nissen *et al*, 1994:439). This is because the materials used can be an important interior element when left exposed (Pile, 1995:222). The wall finish is important to obtain acoustic, light and an esthetic quality. The walls need to be firm and supportive to the doors and windows. The walls also affect the light in design as lighter walls make a room look larger when darker walls make it look smaller. The external and internal colour of the walls could play a major role in the saving of energy for lighting and heat. The exterior colour of a building has an effect on the thermal performance of the walls, the darker coloured paint or brick buildings will absorb more energy from the sun than lighter colours. This means that in the winter months the darker exterior will require less indoor heating (Mathews & van Wyk, 1996:118)

- Roof

The materials used for the roof provides the colour and texture that make the exterior of the home more attractive. The roof should provide protection from outside elements such as rain and hail because if the roof leaks the structure of the house and its contents can be damaged (Lewis, 1994:140). The roof should thus be durable and have a long wear and tear period.

- Windows

Windows are more than a matter of simple preference; they influence the emotional and psychological well being of persons (Leather *et al*, 1998:754; Heerwagen, 1990:631). The main functions of windows are for ventilation, letting in of natural light and visual communication. There are three types of windows: sliding windows, swinging windows and fixed windows. The type of window depends on the exterior style of the house, building codes and personal preference. Rather than a strict reliance on only one type of window, a combination of operable and fixed windows as well as various types of glass help to provide the best solution for climate control in the home from both a aesthetic and environmental point of view (Shin, 2000:42). The location and size of windows influence the thermal and aesthetic quality, the view, privacy and security. Windows should be built into the house to optimise all their functions, including air protection and better insulation. Therefore, careful consideration of all factors in advance of construction is needed to solve as many problems as possible that may arise during the building phase (Nissen *et al*, 1994:501).

- Doors

Doors provide a barrier against sound, extreme temperatures and light. They function as traffic paths, privacy, protection, safety and ventilation. Doors are classified by their method of operation, of hinges and the direction of swing. For controlling traffic, doors control travel through the room in varying degrees depending on their location, design and material. To achieve the required amount of privacy, the door could be placed in a specific area of the housing structure. For occupants to gain quick ventilation, they can open the doors (Shin, 2000:42).

- Aesthetic quality

A sense of beauty differs according to time and culture, with purpose and context. Aesthetic appearance can be defined in terms of beauty. Housing is often used to show beauty by creating structures that are of quality, personalised and comfortable to the user. To optimise, the aesthetic quality of a house, it is necessary to combine functional and technical aspects (Pile, 1995:34).

Therefore, there should be congruence or a fit between the user's needs and the physical design and construction of a building in order to allow for optimal housing satisfaction. It is important to note that satisfaction with housing quality is highly dependent on the proportion of expenditure of a family's income (Morris & Winter, 1978:132).



#### 2.4.2 Satisfaction with the affordability aspects of housing

Housing expenditure concerns the question of how much income a family should spend on housing, including taxes, utility costs, interest, rent or mortgage. When a family's income increases, housing expenditures usually increase. Income enters as a facilitator or a constraint on the achievement of a number of housing norms such as tenure, space, and structural norms. Income may have a direct effect on housing satisfaction because of its relationship to quality norms and quality defects (Morris & Winter, 1978:159). Society depends largely on the private market forces of supply and demand, as well as on prices to distribute housing. Thus, families with less money available for housing have a more difficult time finding a suitable dwelling as there may be no standard housing in the private market at the price they can afford to pay (Morris & Winter, 1978:130).

The family income is a predictor of the amount spent on housing by a household. The changes in income and family size are both powerful determinants of the change in housing expenditure and in real housing consumption (Morris & Winter, 1978:109). Low wages means that families have to allocate higher proportions of their income on food, leaving little for shelter. Furthermore, when a market lacks a sufficient supply of affordable housing, lower-income families are often forced to limit expenditures for food, medical care, and other necessities in order to pay rent (Freeman, 2002:710). Therefore, the lack of affordable housing within a community can contribute to family's residential instability, as families are forced to move frequently, and tend to find alternative shelter, live with other families in overcrowded conditions, or experience periods of homelessness (Anderson, St Charles, Fullilove, Scrimshaw, Fielding, Normand & the task force on community preventive services, 2003:47).

The appropriate amount to spend on housing is related to income and so this amount varies among subgroups of the population (Morris & Winter, 1978:136). The individual or household obtains as much housing as resources will afford (Morris & Winter, 1978:7). Therefore, the price people are willing to pay for a particular type of dwelling unit is a reflection of how highly they value the combination of attributes they perceive in that type of dwelling (Morris & Winter, 1978:134). Expenditure norms expect families to obtain housing quality that is in accordance with their social status. Thus, the difference in quality is in accordance to a family's social class. The SA Housing Code of 2000 attempts to address the issue of housing affordability and quality, by stating that housing must be built to an acceptable quality and at a price that households can afford. This relates not only to the start-up cost of the house but also to the long-term maintenance cost and the payment for the rates and services. The national housing policy should be based on the nations

economy and on what the people in need of adequate housing can afford, otherwise the policy is not going to produce housing to supply in the demand (National Housing Code, 2000:14UF).

There is a global trend for government subsidized low-income housing to be located on the outskirts or “scattered-sites” of major cities, forgetting that the location of the housing units has a major influence on a family’s affordability status (Johnson & Hurter, 1998:258). The social, political, and economic forces have historically concentrated large numbers of lower-income African Americans in the center of cities, and continued racial discrimination in housing markets prevent their movement out of these areas (Anderson *et al*, 2003:47). The reverse can be said about South Africa as a large numbers of non-White South Africans were previously located in urban peripheries far from amenities and jobs (Lalloo, 1999:41).

The South African government housing policy, needs to address the inadequate supply of affordable housing for low-income families and the increasing spatial segregation of some households by income, race, ethnicity, or social class into unsafe neighbourhoods (Anderson *et al*, 2003:47). However, the pre-1994 government system of providing low-cost housing has not changed considerably with the post-apartheid government of 1994, as the subsidised housing projects are still located in stands far from access to large cities where employment and commodities are. The location of developing subsidy housing in South Africa is seen as unreasonable, to a point that occupants of the subsidised housing units have gained a tendency of moving out of the formal housing units provided to the informal settlement they had previously resided in (Huchzermeyer, 2001:318). Studies such as that by Wilson (in Johnson & Hurter, 1998:258) emphasise, that, to ensure the survival of low-income families, housing projects need to be located near employment opportunities, this is to ensure that families gain monthly incomes to enable them to pay for their housing and services as well as to decrease the high transport costs which encourage household poverty (Briley, 1999:6).

The South African government claims that one of their four housing programmes is that of “integrating the cities” with the aim of negating “apartheid-induced segregation, fragmentation and inequality” (Department of Housing, 1997b). The Social Housing Foundation is one of the strategies under these programs. It is seen as a method of delivering well-located housing by the government, it does this by developing high density units in previously White areas, with occupants of different races, as well as regenerating existing housing stock in inner city centers such as Johannesburg.

#### 2.4.3 Satisfaction with the different types of tenure and structural types

Tenure has also been found to relate to housing satisfaction, as people who own houses indicate higher levels of housing satisfaction than do persons who are renting (Campbell *et al*, 1976: 219). Morris & Winter (1978:157) found renters to be consistently more dissatisfied than owners on all the aspects of their housing. The difference between owners and renters was mainly due to the lack of ownership rather than to specific differences in the dwellings themselves (Morris & Winter 1978:107). Though, saying that those who buy are more satisfied than those renting is not totally true, as different people have different reasons for their choice of tenure and not forgetting that the structural type of the housing unit does in most cases influence the tenure option. This is because, most high density structures like flats, offer the rental tenure option while single standing units are for sale. The choice of structural type is influenced by the stage of the family lifecycle as well as the family's lifestyle. Satisfaction with regard to structure differs according to the family's life cycle and cultural differences (Vosloo, 1990:40). A young couple might prefer to live in a high rise building, while a middle aged couple might prefer to live in a single standing dwelling.

According to Morris & Winter (1978:109), home ownership and structure type are influenced by economic factors, demographic factors, changing norms and political factors. Over decades home ownership costs and structure type changed in terms of rapid urbanisation, increasing population, economic conditions and government involvement. In most communities, owning or affording to rent adequate housing can be seen as an achievement, and most people get to buy larger homes at a later age. The house does become a way of showing that one has reached a certain economic point in ones life. This is presented when one can afford to live and maintain a house. One does gain respect from his/her peers, family and community for this achievement.

For a long time the single-family dwelling has been the predominant form of housing. Urban policy shows that the low income earners that are said to be following a one way process from renting/sharing to owning with the latter seen as the "normal" goal of households (Datta & Jones, 2001:337). At the same time, research shows that the urban poor too, expect 'today's tenants to be tomorrow's owners', believing rental to be a temporary housing solution and exhibiting an almost universal desire for ownership (Datta & Jones, 2001:338). This representation fails to note that the attractions of ownership are to some extent constructed by the government support through subsidies on services and building materials, the right to buy policies and pronouncements that ownership is a sound investment (Datta & Jones, 2001:338). Property empowers and generally helps to give form to variations in the status and allegiance of citizenship. Rights in property are

necessary to sustain the basic needs of life and also affect the social and economic standing of citizenship (Macpherson, 1978:12).

From studying the South African housing policy, it is evident, that the provision of housing units through home-ownership for the urban poor is not attainable. This is due to the rising costs of land and service provision, together with constraints on the availability of housing subsidies, that ownership has been priced out of the reach of many of the poor (Watson & McCarthy, 1998:52). Therefore, the idea of introducing high density housing through the rental tenure option would be ideal. This is because ownership is also not the desired form of tenure for all, at least in the short term. Previous research on women-headed households, for example, showed that some women heads prefer to rent in central city apartments, which may offer greater physical security, a wider range of support networks and community acceptance of single mothers (Datta & Jones, 2001:338). Furthermore, for some households the only possibility of finding accommodation is renting since their income is too low to afford a house.

The suggestion that 'today's tenants are tomorrows owners' is based upon an assumption that the conditions that have produced access to ownership for large numbers of households in the past, will remain unchanged. Yet, research in many countries illustrate that the constraint element of housing (especially land and building materials) have been subject to price increases above income (Datta & Jones, 2001:338). The encouragement of home ownership in the USA was due to income tax laws which were more favourable to home owners than to renters because of two provisions: The tax benefits provided an amount to both a reduction in the price of housing for the owner and favoured treatment for the family who has chosen to invest their money in the dwelling they occupy rather than in other assets (Morris and Winter, 1978:107). Home ownership also renders social status and emotional security to the individual and the family. In the end, the homeowner's financial position is likely to be better than the renter's because of the tax advantage (Morris & Winter, 1978:110).

The introduction and support of rental accommodation by the South African housing policy may relieve some of the pressure on segments of the housing lands markets, as well as mitigate against the worst aspects of overcrowding (Datta & Jones, 2001:338). Rental assistance programmes encourage families to move to neighbourhoods of greater prosperity. This might disrupt the social ties and supports in the old neighbourhood, resulting in its increased social deterioration (Anderson *et al*, 2003:47). The South African housing policy strategy of Social Housing offers two types of tenure options. Firstly, the rental option, where the tenant leases a unit and pays a monthly rental

charge. Secondly, is the Installment sale option, where the person occupying the unit has a “use right” until such time that he/she has finished paying for the house. The purchase period is agreed upon at entry, between the Social Housing Institution and the person.

#### 2.4.4 Satisfaction with the amount of available space in housing

Space norms prescribe the amount of space a family should have, and the amount of space depends on the family size and composition. Space in a dwelling may be specified by individual rooms, the number of rooms or bedrooms or other specific rooms (Morris & Winter, 1978:87). According to Miron (1998:542) the size of the dwelling is measured by the amount of private, indoor space that is accessible to household members. The satisfaction with the size of the housing unit can be used to measure a family’s quality of life.

One measure of space is the number of rooms in the housing unit. A room is defined as a livable, interior space separated from other rooms by walls. The second measure of space is the number of bedrooms in the unit, a bedroom is defined as any room that is used for sleeping, even if it is also used for other purposes. The third measure of dwelling size is the number of bathrooms. A housing unit is considered to have a complete bathroom if it has a room with a flush toilet, bathtub or shower, a sink and hot and cold water. The fourth, measurement is the floor area. The floor area is measured by square footage for single, detached dwellings and mobile homes (Miron, 1998:542). Lindamood and Hanna (1979:83) emphasised that the types of space available is more important than the amount of space. Shoul (1993:56) found that the design of space according to the individual’s life-style could give more satisfaction to the user than more space.

Morris and Winter (1978:66) refer to Rossi who stated that family housing needs are determined by its composition, and a family would relocate to a house that met the demands of the family size. Rossi’s view of family composition and residential mobility can be seen as an explanation for family housing behaviour. This means that the number of bedrooms should be enough for all family members to retain a sense of privacy and room to personify their environments. In addition, the other areas of the house should provide enough space for all members of the household in order to avoid household crowding.

Crowding is a person’s psychological experience in relation to the amount of space available. The following are taken into consideration: age, sex and family role of each person in the household (Morris and Winter 1978:87). Density is a physical concept devoid of direct psychological meaning and reflecting a number of people per unit space (Lepore, 1998:100). Density is typically measured

by calculating a ratio of the number of people to a given amount of space. Household density can be assessed in several ways. The most common measure is the ratio of persons per room in a household, making it that the more people there are per available space in a house, the greater the density. According to Lepore (1998:100) there are three levels of density;

- density as a number of people per room
- density as number of rooms per apartment
- density as number of apartments per building

Rapid rates of urban population growth in developing countries are placing great strain on the housing stock provided by governments. To effectively address the effect of crowding on the individual, his needs, rather than the economic conditions of the community, should be considered (Lepore, 1998:100). Crowding is regarded to be a serious problem in certain communities of South Africa, especially the Coloured and Black communities as revealed in the SA Census, 2001. Lepore (1998:100) stated that households with greater than 1.0 person per room are considered to be overly populated. According to the South African Census 2001, there are 1 973 262 households that live in a one roomed dwelling and 1 770 935 that reside in a two roomed house (SA Census, 2001:69). This illustrates the extent of serious household crowding in South Africa.

Housing shortage which forces low income groups to lodge with others are the main reasons contributing to the crowding problem in South Africa, thus increasing household density and crowding. The second reason for household crowding was the apartheid socio-political restrictions of black confinement to so-called “locations”. These “locations” are also referred to as “townships” and normally comprised attached or semi-detached single family houses, built row upon row, along mass production lines (Laloo, 1999:42).

#### 2.4.5 Satisfaction regarding the neighbourhood and location of housing

According to Lewis (1994:62), each site, as the piece of land on which the dwelling is built, has its own characteristics with a specific size, shape, contour and soil type. It will determine the particular view, the amount of sunlight and the amount of protection from wind. Wilson & Baldassare (1996:39) found that by reducing the social stresses of having too many unwanted interactions with neighbours the satisfaction obtained by means of privacy could provide more positive relationships within the neighbourhood. Therefore, housing satisfaction can be achieved when the relevant physical, psychological and social factors are optimised within the housing unit and complex.

Quality of place or geographic setting (city, neighbourhood or dwelling) is a subjective phenomenon, and each person occupying that setting may differ in his/her views about it. The neighbourhood qualities are associated with the person's socio-economic status and health (Anderson *et al*, 2003:50). A person's perception of the neighbourhood is influenced by their experiences, which represent a set of standards against which current judgements are made. These standards or references include other settings experienced by the occupant, and settings to which the occupant aspires (Marans, 2002:2). Location of housing is taken as the identification of the geographical areas in which families may search for market-rate housing (Johnson & Hurter, 1998:260). The location and nature of the area in which the house stands are two of the factors that influence a person's housing choice. Location can be understood as both the site and the physical environment. Location as site refers to the relation of the housing unit to the occupant's work, shopping areas, schools, recreational areas and the location of the homes of their friends and family. Stewart and Peck (1985:371) found that housing satisfaction is significantly related to neighbourhood satisfaction because the location as a physical environment includes the individual aspects of the environment (like density, light, air and the condition of the dwellings surrounding the particular housing unit) and the quality of community facilities, services and utilities such as fire and police protection, garbage collection, water and sewage. Cassidy (1997:193) and Bell *et al*, (1996:398) state that the physical design of a neighbourhood influences social interaction, and hence the amount and quality of social support.

#### 2.4.6 Satisfaction regarding the security of housing

Lewis (1994:10) refers to Maslow's theory that security is one of the basic human needs. Housing provides security through protection from physical danger and other external elements. Adequate privacy also has a direct bearing on the feeling of security that provides psychological well being to the occupants (Duvall-Early & Benedict, 1992:678). Therefore, the layout of the rooms and the amount of privacy affect attitudes and mental health (Nissen *et al*, 1994:145; Lewis, 1994:10). Thurber and Malinowski (1999:487) discovered that an environment influences children's attitudes. Such influences may cause negative emotions that can result in compensatory behavioural withdrawals, therefore housing should accordingly provide safety and satisfaction that helps to reinforce self-esteem by gaining approval and the respect of others as well as the enjoyment provided by appropriate housing (Lewis, 1994:13). Tenant-based rental assistance programmes in the United States are required to improve household safety, based on sufficient evidence of reductions in exposure to crimes against persons and property and decreases in neighbourhood

social disorder (Anderson *et al*, 2003:51). Carvalho, George & Anthony, (1997:758) found that neighbourhood is an important factor to provide a feeling of safety to the occupants.

Watson & McCarthy (1998:54) refer to a study by Mazur and Qangule that recorded that, in rented accommodation most women state that they could call on the landlord or other tenants for assistance, and there were usually people around with whom child-care responsibilities could be shared. For the aged security was also an important consideration, because of the knowledge that there were people who could be called on to help in times of sickness (Watson & McCarthy, 1998:54). These are some of the reasons why the establishment of high density living, as provided by the Social Housing institutions in South Africa is seen as a positive development in housing provision.

## **2.5 POST-OCCUPANCY EVALUATION (POE)**

POE is an evaluation tool that is people-centered and that approaches a project evaluation in a holistic and integrated way and is thereby able to yield comprehensive guidelines that can be used when planning and initiating low-cost housing projects (Sommer, 1983:80). POE has been developed to address the problem of acquiring feedback from the occupants, who are using the facilities provided by their housing, and are arguably in the best position to provide information for a future design database (Liu, 1999:511). Therefore, with the housing delivery programmes that the National Government has implemented since the 1994 elections, it is imperative that a time for reflection and review be set aside. The post-occupancy evaluation process is a valuable tool which could be used for reflection on housing products. This is because it will provide a people-centered approach of assessing past mistakes and lessons as well as determining a way of overcoming them in future (Crofton & Venter, 1999:1). Furthermore, the POE is an information gathering process, and this information is now being used to make cost effective decisions about profit, productivity, efficiency and image (Moreno, 1989:120).

The POE process gauges the perceptions of housing satisfaction of residents as a means of determining the overall effectiveness of a housing product and process in addressing housing needs. It attempts to establish whether the needs of the occupants are being met by the physical structure (Mc Andrew, 1993:24). Post-occupancy evaluations are being conducted through very specific methods of gathering and analysing data, which is used as a needs analysis indicating not only what people already have, but also exploring what people still want/ or desire to change (Sommer,



1983:80). Ewang (1998:165) states "evaluation should be periodically undertaken during a project's life, regardless of the project status. As such, it can be a crucial component of a holistic approach to successful management" of housing projects. The timing for POE research in South Africa is currently ideal, as the housing sector is undergoing a review and reflection process.

### 2.5.1 Post-occupancy evaluation in South Africa

The use of POE seems to be highly insignificant in South Africa. The results of POE surveys should enable the housing providers to return to a site to fix any housing problems that may have come up. The literature consists mainly of foreign authors and very few SA authors. "SA at its present stage in the rapidly changing socio-political framework cannot afford to embark upon projects which are likely to be considered unsuccessful in the short to medium term" (Luyckx, 1994:5). Therefore an urgent need exists for researchers to identify how projects can be designed to not only be economically successful but also to be more meaningful to the local residents.

In SA very little evaluation of completed housing structures takes place. Housing providers have adopted the philosophy of not "looking back" on completed structures (Luyckx, 1994:6). Considering that the focal point of the new government's programmes is to provide housing products that are people-centered, it would be beneficial to analyse low-cost housing projects in order to determine if this aim is achieved through the current housing programmes. POE is especially effective when dealing with repetitive type buildings. Therefore, as social housing institutions in South Africa are in the business of providing cluster and high rise buildings, they need to implement POE surveys.

### 2.5.2 The use of post-occupancy evaluation surveys

According to Zimring, Wineman & Carpman (1988:278), the uses of a POE survey are:

- Fitting out and fine tuning: Aspects of the physical setting, for example unbalanced heating or ventilation, might be evident from an inspection of a building shortly after occupancy. Potential management problems, such as ineffective communication, might be addressed at this stage.
- Planning programming and design: Other than the basic concern with providing information or input on a specific project, the POE can also provide input on criteria for the effective use of space, design requirements and standards, accessibility and durability of equipment.

- Concept generation: The identification of key concepts and recommendations on issues that need to be addressed in future projects, can be obtained from the POE.
- Codes, standards and guidelines: The setting of government standards and guidelines pertaining to various industries, can be obtained from the POE. Old codes, standards and guidelines can thus be updated.
- Basic environment-behaviour information: The POE's are used to answer important questions on the role of personal control in the workplace, and on the concerns of occupants of low-cost housing.
- Feedback mechanism: Through routine evaluations feedback is gained on existing problems in building structure and performance. This creates insight on adaptations that need to be made in the next generation of repetitive type building.

#### 2.5.2.1 Benefits of conducting a POE

The benefits resulting from the implementation and recommendations of a POE survey could yield short-term, medium term and long term benefits Barrett (1998:100) identifies the following benefits:

The short-term benefits:

- Identification of and solutions to problems in facilities.
- Proactive facility management responsive to building user values.
- Understanding the performance implications of changes dictated by budget cuts.
- Improved attitude of building occupants through active involvement in the evaluation process.

Medium-term benefits:

- Built-in capacity for facility adaptation to organisational change and growth over time, including recycling of facilities into new uses.
- Accountability for building performance by design professionals and owners.

Long-term benefits:

- Long-term improvements in building performance.
- Improvement of design data bases, standards, criteria.
- Improved measurement of building performance through quantification.

The results of conducting a POE survey in social housing institutions should firstly be to the advantage of the tenants and also to the organisation.

For the occupants of the housing products, POE surveys will help to make environments more appropriate, obstacle-free, enjoyable, safe and responsive to their needs (Preiser, Rabinowitz & White, 1988:29). Furthermore, the POE should identify whether the design is suitable for the lifestyles of the occupants within the low-cost housing sector (Crofton & Venter, 1999:7). Van Wyk (1996:2) stated that POE of housing projects can be seen as essential, as it is the only way in which housing in South Africa may be continually improved and adapted to meet the changing needs and lifestyles of individuals and families.

For the housing provider, POE surveys could be seen as a quality control process, using the occupants of the housing as the evaluators. POE contributes to the improvement of building performances through the improvement of design databases, standards, criteria and guidelines (Preiser *et al*, 1988:5). Furthermore, POE findings could serve to motivate or justify the claims being made about the benefits of living in social housing projects (Crofton & Venter, 2000:8).

### 2.5.3 Post-occupancy evaluation process

There are three phases in conducting a POE survey, the first is the indicative level where quick walks through the structure, and group meetings with the end-user are conducted and inspection of both the negative and positive aspects of the structure are discussed. The second phase is the investigative level where interviews are conducted, survey questionnaires are completed by end-users, photographic and video recordings are made, and physical measurements are taken of the structure. The third phase is the diagnostic level focused and longitudinal evaluations, which take months or years to research (Preiser *et al*, 1988: 20).

As a process POE is usually conducted a couple of months after occupation of a building, this is to allow the users time to familiarise themselves with the environment, in which they work or live (Luyckx, 1994:9). POE's are diverse and rather than being tightly controlled studies with agreed-upon methods and common conceptual approaches, they are a loose network of efforts united by a common concern, which is, evaluating design environments for human users (Zimring & Wener, 1985:662). Social science consultants, designers, tenants, academics and others, may conduct POE surveys.

POE surveys of buildings, their services and occupants have broadened-out from single issues such as energy or occupant health into wider aspects of performance. A typical survey today might cover energy and technical performance, efficiency of space utilisation, occupant comfort, satisfaction and productivity, management, and perhaps environmental impact and cost-in-use (Bardass & Leaman 1997:149). The housing product should fulfil the basic functions, such as effectiveness, beauty and psychological or social comfort to the occupants (Shin, 200:51). The social housing sector should take the initiative of ensuring that a process of ongoing learning is encouraged, in an attempt to ensure that the product provided is suited to the needs of the tenants. This can be established by promoting POE studies in the social housing sector (Crofton & Venter, 2000:8).

## **2.6 SUMMARY**

In this chapter an overview of the relevant literature, pertaining to the research study, was given. In the next chapter the research methodology will be explained, as it was used to obtain the data for this study. The research method, sampling and research techniques and procedures will be explained.

## CHAPTER THREE: RESEARCH METHODOLOGY

The aim of this chapter is to discuss the research approach and methodology adopted for the post-occupancy evaluation of the Hope City housing complex. This will be done to highlight the reliability and validity of the data collection methods used as well as the reliability and validity of the data collected during the research.

The research was exploratory and descriptive in nature, yielding qualitative and quantitative data. The sub-sections to follow will present and discuss the research procedures taken during the research.

### 3.1. RESEARCH METHOD

Qualitative and quantitative research methods were used to allow for greater validity and reliability. The following research methods were used in the research:

- Documentary study
- A formal survey
- Observation (photo documentation)

A documentary study of the Greater Middelburg Housing Association's Hope City Housing Complex was conducted in order to look at previous surveys conducted by the GMHA on the Hope City Housing Complex. This information was summarised and used to compliment the data obtained during the formal survey.

The descriptive survey method (Leedy, 1993:185) was used to obtain the data for the formal survey using a structured questionnaire. The research used the questionnaire to determine the housing satisfaction levels of the tenants.

An observation component was added to the research design as certain details in the unit and the complex could only be documented visually. For example: photographs of cracking in the unit walls and pipe systems.

### **3.2. SAMPLING**

The GMHA's Hope City housing complex consists of 501 housing units, of which 324 are occupied. The units vary from two bedrooms, two bedrooms with loft apartments to three-bedroom stand-alone houses. The complex also has a commercial section consisting of a Laundromat. The residential units are divided up into 22 blocks with different names.

For the formal survey a sample of 150 units from the universum (324 housing units) was drawn for the following reasons:

- The research would be more manageable, contributing to the overall quality of the data.
- Time and cost constraints.
- Follow-up procedures are possible, again improving the quality of the data and the validity and reliability.

A sampling process, based on probability statistic was used to draw the best possible representative sample of the study population. The sampling proportional to size procedure using the Micro-soft Excel programme was used to draw an initial sample of 170 units from the universum. The extra 20 units were drawn for replacements in case the tenants of some units in the 150 required for the research, were not available to participate in the survey. The sample procedure made sure that the sample was a fair representation of each block in the complex in proportion to the size of the block.

The drawn sample could not be strictly adhered to as some of the selected sample were tenants that either worked or were not at home during the hours in which the survey was conducted. After consultation with the statistician it was decided that the fieldworkers should interview the tenants that were available from 10:30am to 8:30pm and gain at least 5 interviews from each block in order to have a fair representation of each block. This method was permissible as the sample size of 150 from a universum of 324 is high (46.3%).

### **3.3. RESEARCH TECHNIQUE**

In this section, the development and testing of the questionnaire and interview guide, the selection of fieldworkers and respondents will be presented.

### 3.3.1 Questionnaire design

A structured questionnaire was used during the study (see *Addendum A*). According to De Vaus (1990:80), the structured questionnaire is a highly structured data technique whereby each respondent is asked the same set of questions. The questionnaire entailed dichotomous, multiple choice, scaled, matrix-type, open-ended and follow-up questions. The questions were asked and respondent answered while the fieldworker filled in the answers. The fieldworker were instructed not to lead the respondents, but to accept the response provided and cross out the answer that best matches the given response. The scaled questions consist of a four-point scale where the tenant's feelings about certain aspects of the unit, complex and management were to be rated.

The questionnaire consisted of three sections. Section A collected the data for use in determining the respondents' socio-demographics profiles. Section B determined the respondents' socio-economic profile. Section C was aimed at determining the respondents' levels of satisfaction regarding the housing unit, complex and management of the Hope City complex. The content of the structured questionnaire is discussed briefly.

#### Section A: Respondents' socio-demographic profile

Section A consisted of Questions 1 to 19, and investigated the following:

- Respondents' race
- Age of respondents and all household members
- Gender of the respondents and of all household members
- Highest standard passed by respondents and all household members
- Disability status of respondents and all household members
- Floor level of the unit
- Type of unit
- Marital status of the respondents
- Mode of transport used by the household
- Respondents' previous type of housing
- Respondents' reasons for moving from previous housing
- Respondents' preferred tenure option at this stage of their lives
- Place where the respondents found out about the Hope City Housing Complex

- Respondents' view on how the complex can be marketed by the GMHA management in order to attract more tenants
- Respondents' reasons for living in the Hope City complex
- Respondents' intended length of stay in the complex and the reasons for the planned stay
- Respondents' reasons for the choice of the specific housing unit
- Whether the housing unit suits the respondents' current lifestyles

These questions were both closed-ended and open-ended, the fieldworkers were required to mark the appropriate response for the closed-ended questions and to write out the answer for the open-ended questions. According to Bailey (1987:118) closed-ended questions measure variables that are ordinal (e.g. educational levels) and nominal (e.g. gender, unit floor level) as well as questions measured by intervals that have been collapsed into relatively few ordinal categories. He went on to state that open-ended questions are used for complex questions that can not be answered in a few simple categories but require more detail and discussion.

#### Section B: Respondents' socio-economic status

Section B consisted of Questions 20 to 29, and investigated the following:

- Respondents' employment status
- Nature of respondents' employment
- Respondents' area of work
- Respondents' monthly household income
- Respondents' preferred rental payment
- Respondents' arrears status
- Respondents' preferred rental payment option
- Respondents' monthly household expenditure
- Respondents' monthly savings
- 

#### Section C: Respondents' housing satisfaction

Section C consisted of Questions 30 to 48. Questions measured the respondents' levels of satisfaction regarding the housing unit, complex and management indicators on a four point Likert-type scale. Ghosh (1985:145) states that the Likert scale supplies a more precise and defined response towards an issue. It is also more informative and reliable because of several levels of agreement and disagreement. In the case of this research study the scale read as follows: 1=



completely dissatisfied, 2= dissatisfied, 3= satisfied, 4= completely satisfied. The intention was to gauge the level of satisfaction of the respondents. The respondents were further asked to give a reason for their level of satisfaction with regard to the different unit, complex and management indicators.

A four-point scale was selected to keep the ratings as simple as possible for the respondents. The advantage with this choice of method is that the fieldworkers were able to write down the responses of the tenant.

To categories the responses to the open-ended questions in the questionnaire the responses were captured in a data base and frequency tables were generated. The prevailing response categories were identified and the responses were re-coded according to these categories.

### 3.3.2 Selection and training of fieldworkers

The researcher recruited and trained three fieldworkers who had previous experience of survey research interviewing. The fieldworkers attended a one-day training session, conducted by the researcher on how to handle the questionnaire and conduct the interviews (how to ask the questions and probe responses from the respondent). A fieldworker training manual drawn up by the researcher was handed out to the fieldworkers. (See *Addendum B*). The following aspects were covered and clarified in the training manual:

- Purpose of the research
- Brief background on housing and social housing
- Approaching and engaging respondents
- Indicating responses on the questionnaires
- Asking of the questions
- How to use the disposable cameras to capture the observation data
- Ethics in social research
- Ending of the interview
- Specific aspects relevant to GMHA situation and environment
- Tips on dealing with difficult respondents
- Questions and concerns of fieldworkers

The researcher acted as the fourth fieldworker. In this way there was support for the fieldworkers during the 14 days of data collection. The researcher also monitored and checked the completion of the questionnaires by the fieldworkers in order to ensure that quality data was obtained, and to resolve any problems that arose during the interviews.

### 3.3.3 Selection of respondents

The fieldworkers were instructed that, on arrival to a unit, the respondent should meet the following criteria in order to continue with the interview:

- Available and willing to participate in the research
- Head or spouse of the head of the household
- Has occupied unit for more than a month

## 3.4 RESEARCH PROCEDURE

The research had three components: an initial document study of the GMHA's Hope City housing complex, a pilot research phase and the main study phase.

### 3.4.1 Documentary study of the GMHA

The researcher took a walk through the Hope City complex, and had a meeting with the GMHA-management in order to familiarize herself with the daily running of the complex and the problems management was facing with regard to the complex. Furthermore, the researcher studied the GMHA's Business Plan and company structure to determine the company's goals, objectives and future plans concerning the Hope City complex. The business plan was summarized to enhance the empirical data and gain a deeper understanding of the GMHA.

### 3.4.2 Pilot study

The questionnaire was scrutinised by the research supervisor and discussions and suggestions relating to the technical aspects of the questionnaire were obtained. Attention was paid to the wording, structure and flow of the questionnaire. The reader-friendliness of the questionnaire and the instruction sheet, for use by the fieldworkers was carefully considered. The questionnaire was formally tested by interviewing 30 tenants of the Cape Town Community Housing Company housing project (Philippi Stockroad). The reason for this pilot study was to help the researcher to address any problems in the questionnaire, or to allow the opportunity to restructure those questions

that respondents seemed reluctant to respond to. The time needed to complete the questionnaire was also determined.

### 3.4.3 The main study

The main study was conducted from 25 August to 5 September 2003 (12 days). Interviews were conducted from 10:30am to 8:30pm, allowing for a maximum of 40 minutes per questionnaire interview for each fieldworker. Each morning a briefing session of 30 minutes was held with the fieldworkers to discuss any issues and questions arising during the interview process as well as to clarify logistical aspects relating to the research. This served as a quality control measure and ensured that the fieldworkers completed the questionnaire correctly. Four neighboring blocks were covered each day, in an attempt to concentrate the fieldworkers in an area where they could be controlled and monitored.

The GMHA management was notified of the dates of the survey interviews and they informed the tenants prior to the set date. Hardly any problems arose during the data collection period, as tenants were keen to be interviewed.

In spite of strict control measures during the research, some bias might have occurred. The leading of respondents by fieldworkers and bias responses due to the interpretation of answers by fieldworkers were managed through the daily and individual debriefing sessions with the fieldworkers. This was done throughout the duration of the data collection process. Some of the respondents might have experienced respondent fatigue, due to the length of the questionnaire and the time of day when the interview took place.

## **3.5. DATA ANALYSIS METHODS**

The raw data from the research questionnaires was captured in Microsoft Excel Workbook (2000), where it was verified and corrected. The researcher, with the help of the Center for Statistical Consultation at the University of Stellenbosch, conducted statistical calculations to determine the respondents' levels of satisfaction regarding the unit, complex and management of the Hope City complex. Cross-tabulations, to determine measures of influence among the different variables, were also calculated. The results are presented and discussed as frequency tables and percentages in Chapter 5. Observation data, which were in the form of photographs, were grouped and classified. The selected photography is incorporated in the discussion of the qualitative data, to illustrate various maintenance issues that the respondents had reported.

As stated in paragraph 3.3.1, a four point Likert-type scale was used to determine the respondents' levels of satisfaction. Satisfaction levels with regard to the unit, complex and management indicators were determined, as well as overall satisfaction with the unit, complex and overall housing environment. Respondents were also requested to provide a reason for their stated level of satisfaction with regard to the unit, complex and management indicators. The mean of the respondents' satisfaction with different indicators, e.g. unit, complex and management were computed. Raw data in the data set were coded and then grouped into broad categories. Frequencies were tabulated and relative frequencies were presented as percentages.

For this research, the Chi-squared test was mainly used to compare two categorical variables. The observed frequency was computed ( $O_{ij}$ ) in every cell ( $ij$ ), (the numbers in the  $i^{\text{th}}$  row and the  $j^{\text{th}}$  column).

The expected frequencies in each cell were computed ( $i, j$ ) e.g.  $E_{ij}$ . Then the Pearson chi-square

statistic was computed as: 
$$U = \sum_{i=1}^r \sum_{j=1}^s \frac{(O_{ij} - E_{ij})^2}{E_{ij}}$$

and was compared to the 95<sup>th</sup> percentile of the Chi-square distribution with  $(r-1) \times (s-1)$  degrees of freedom, where  $r$  = the number of rows in the table and  $s$  = the number of columns in the table. The  $p$ -value of the observed statistic  $U$  is then computed. If  $p < 0.05$  there is a significant difference among the row variables with respect to the variables/ or measurements in the columns.

As an example some of the cross-tabulations will be reported as follows: Pearson's chi-square statistic's value  $U = 21.0208$ , the degrees of freedom is 9 and the  $p$ -value is  $p = 0.0125$ . This is significant. Probabilities less than 0.05 and 0.01, were seen as significant and highly significant respectively.

Where needed for ranked data the Spearman rank correlation co-efficient was calculated. This correlation co-efficient was used when skewed distributions were encountered.

Raw data in the data set was coded and then grouped into broad categories. Frequencies were tabulated and relative frequencies are presented as percentages.

### **3.6 SUMMARY**

This chapter focused on the empirical method used to determine the housing satisfaction levels of the occupants of the Hope City housing complex. The following chapter is a documentary study and provides background to the Greater Middelburg Housing Association.

## **CHAPTER FOUR: OVERVIEW AND SUMMARY OF THE GREATER MIDDELBURG HOUSING ASSOCIATION REVISED BUSINESS PLAN AND BACKGROUND TO THE HOPE CITY HOUSING COMPLEX**

This section was compiled from documentation obtained from the Greater Middelburg Housing Association management and the company business plan compiled in August 2002 (GMHA Revised Business Plan, 2002).

### **4.1 INTRODUCTION**

The establishment of this housing association was motivated by the huge housing demand in the Middelburg area, as most of the housing needs were previously provided for by employers in the mining, manufacturing and other industrial sectors in the Middelburg area. The major employers of the mining, manufacturing and industrial sectors have shifted their focus to their core business, leaving people working and living in Middelburg neglected. The Greater Middelburg Housing Association has begun exploiting this challenge through its Hope City Project (GMHA Revised Business Plan, 2002:7).

A market research project on social housing in the Greater Middelburg area was conducted by Wits University in October 1999. The study showed that there is a high demand for rental housing stock, particularly by the transient population sector. The location where the Hope City project is situated was seen as well-located land, close to major economic and employment opportunities, and the structure of the project as an ideal opportunity for exploring high density residential accommodation to compliment and support the 5 000 to 10 000 houses (GMHA Revised Business Plan, 2002:25). This research gave the “go ahead” sign to the GMHA aim of developing rental and installment sale housing units in the area.

### **4.2 THE NATURE AND FUNCTIONS OF THE GMHA**

The Greater Middelburg Housing Association (Pty) LTD (GMHA) was registered as a private company with limited liability in terms of the Companies Act in January 2000 (Registration number 2000/002337/08) (GMHA Revised Business Plan, 2002:Annexure A). The Greater Middelburg City Council is the sole shareholder of the company. The primary purpose of establishing the GMHA

was to procure and rent or sell affordable, well-located houses to families in the subsidised housing market in Middelburg, while relieving the employers in the surrounding mining and manufacturing companies of the burden of providing housing to their employees.

The Hope City Project received funding through institutional subsidies of R7.2 million and a loan of R35.2 million from the National Housing Finance Corporation (NHFC) (GMHA Revised Business Plan, 2002:8).

#### 4.2.1 Mission and objectives of the Greater Middelburg Housing Association

Creating a housing organisation such as the GMHA includes a number of issues that have to be tackled, the main issue being the ability to create marketing strategies that will be effective enough to keep all housing units in the complex occupied, and to get to this level the organisation requires a clear and defined focus and direction to guide its actions.

The mission of the GMHA is stated as follows: “To provide well-located and affordable accommodation of a suitable standard to residents of Greater Middelburg within the subsidised housing market, through rental and rent to buy options in partnership with key stakeholders (GMHA Revised Business Plan, 2002:14).

The strategic goals of the GMHA are (GMHA Revised Business Plan, 2002:16):

- To provide at least 2000 subsidised housing units for rental within the Greater Middelburg Inner City over a three to five year period.
- To offer a range of tenure options to beneficiaries over time, including rental and rental with the option to purchase.
- To avail affordable accommodation to households earning between R1 500 to R3 500 per month, for residents preferably employed within the Greater Middelburg Municipality area and to meet the criteria set for government subsidy.
- To combine subsidised residential units with limited market related units in order to improve the financial viability and amenity of the housing provided.

- To secure the financial viability and sustainability of the institution beyond the initial five years of operation, by ensuring break-even of expenditure and income at least from the third year of operation.

The establishment of the GMHA was, and still is guided by the following principles (GMHA Revised Business Plan, 2002:15):

- **Sustainability:** The institution strives to become sustainable and financially self-sufficient with respect to its management and technical capacity requirements. The association will always be managed with sustainability as its long-term goal.
- **Affordability:** GMHA will insure that the housing stock provided is affordable to the target market of those in need within the inner city of Middelburg.
- **Integrity:** The affairs of GMHA will be run with integrity as a principle.
- **Independence:** Whilst the business of the association will be directed by its founders, at all times the independence of the Board of Management to guide the business of the GMHA will be maintained, free from political or other interference.
- **Realistic Targets:** The GMHA will set realistic growth targets in order to ensure it continues towards its stated goals, while at the same time not compromising its financial or operational sustainability.

#### **4.3. CURRENT STATUS OF THE GMHA**

The Greater Middelburg Housing Association exists in the same economic, social and political climate as any other business in South Africa. Over and above its mission, the Association finds itself rebuilding communities and interacting within a new environment that is constantly changing. An example is the rate at which the epidemic of HIV/AIDS is growing that calls for action from Social Housing Associations in the country at large.



The ability of GMHA to meet its financial and other obligations constantly remain crucial in order to meet its accounting principle. Thus, its current status is characterised by external factors of socio-economic and political nature, while the internal status is composed by financial and capacity requirements in order to achieve the anticipated growth over the coming years (GMHA Revised Business Plan, 2002:8).

#### 4.3.1 External Challenges (GMHA Revised Business Plan, 2002:10).

- Unemployment: South African economy is characterised by a high rate of unemployment and Middelburg is no exception to this situation. The GMHA as an economic entity is faced with a challenge of contributing to the employment rate within its trade jurisdiction. It must be therefore borne in mind that sustainability of the association contributes indirectly to the employment rate in the Mpumalanga Province.
- Political and marketing drive: Since delivery of the Hope City project, the GMHA has realised a need to embark on a political and marketing awareness campaign relating to social housing in the province. Comprehensive marketing strategies will be an urgent challenge to the association, once all units in Hope City have been fully occupied. The association will need to build internal marketing capacity to curb the vacancy rate in existing and future units.
- Competition and municipality owned stock: Middelburg currently has only one social housing institution. The emergence of other institutions is less probable at this stage, but could be a challenge that must not be underestimated. This might result in competition over available pieces of land for developments and municipality owned stock.
- Top-up funding and interest rates hike: The projects funding the GMHA are composed of institutional subsidies and loans from the NHFC. These loans are offered at market rates and have proven to be fluctuating repeatedly. GMHA has managed this challenge by introducing a moratorium period in loan agreement with capital portion repayable after five years. The loan repayments need to be managed carefully given the companies gearing situation, which reflect more liabilities to assets. Fixed interest rates could help provided the market rate does not fall below the contract rate.
- New project development: In a Value Management Workshop, the GMHA identified several options that could be used during the construction of new projects. The most favourable is to appoint a project manager who manages the construction process for a period of time. This

approach eliminates the role of the traditional developer but also avoids the risk associated with in-house construction department. The appointment project manager reports directly to the GMHA. The challenge of competency on the part of the professional team however remains.

#### 4.3.2 Internal Challenges (GMHA Revised Business Plan, 2002:12).

- Comprehensive property management system: GMHA faces a challenge of managing rental defaults efficiently. An effective software system has been procured to provide adequate information for management purposes. However, a huge challenge still exists for management to be constantly proactive to curb rental defaults. This can be achieved through frequent arrears review and employing the right personnel to enforce rental payments.
- Marketing strategy: The association will have to create a marketing strategy for its products. Upon full occupancy of the Hope City project, vacating tenants will have to be replaced quicker to avoid loss of revenue.
- Development cost and risk: Due to the up-front funding in the appointment of respective professional the feasibility study of new projects coupled with market research poses a big challenge to the GMHA. The association needs to build up critical mass stock but this must be substantiated by careful scientific evidence that prove viability and actual demand for the product. Peripheral equipment such as playgrounds for children is a necessity to complement the core social housing product. Due to its financial status, GMHA has no funding capacity for this exercise.
- Other tenure options: GMHA is providing social housing core products based on rental only. However, cognisance has been given to the fact that other tenure options such as instalment sale will be necessary in future to supplement cash in-flows. Thus, staff training needs to be planned to ensure competency of the association in handling various tenure options.
- Board development: A competently run institution needs good governance. This can only be achieved through continuous training, development, and skills within the board of directors. The directors are facing a challenge of offering full commitment to the affairs of the association. Compensating directors remains a challenge to the GMHA.
- Staff development: Staff must be developed to ensure competency in the handling of their duties. Training and development linked to career path and personal growth must be

developed for each staff member. This will minimise the staff turnover rate. However, funding of this process is a challenge to the association due to the lack of resources.

- **Affordability:** GMHA realises the sensitivity to rental pricing in the social housing market. Therefore, careful management of critical mass stock accumulation is the cornerstone of the operations approach.
- **Comprehensive policies and procedures:** Certain internal policies and procedures have been put in place and are implemented thus far. However, certain areas of the operation require a more specialised approach in designing the related policies and procedures.
- **Municipality co-operation agreement:** Whilst acknowledging the support offered by the Middelburg Municipality, GMHA seeks to reach economic independence, viability and sustainability in the near future. This will be indicated by the achievement of a break-even point at least three years from the year 2000. This places a fair amount of pressure to build capacity in all their functional areas.

#### **4.4 CURRENT GOVERNANCE STRUCTURE OF THE GMHA**

The GMHA has an organisational and management structure in which the following are the essential stakeholders:

The Middelburg Municipality, Middelburg Chamber of Business, Mpumalanga Housing Finance Corporation, Mpumalanga Provincial Government, surrounding communities as potential beneficiaries and the National Housing Finance Corporation. The Social Housing Foundation has and will continue to play a prominent role in stabilising and capacitating GMHA as a social housing association (GMHA Revised Business Plan, 2002:20).

**Figure 4.1 shows the stakeholders of the GMHA.**

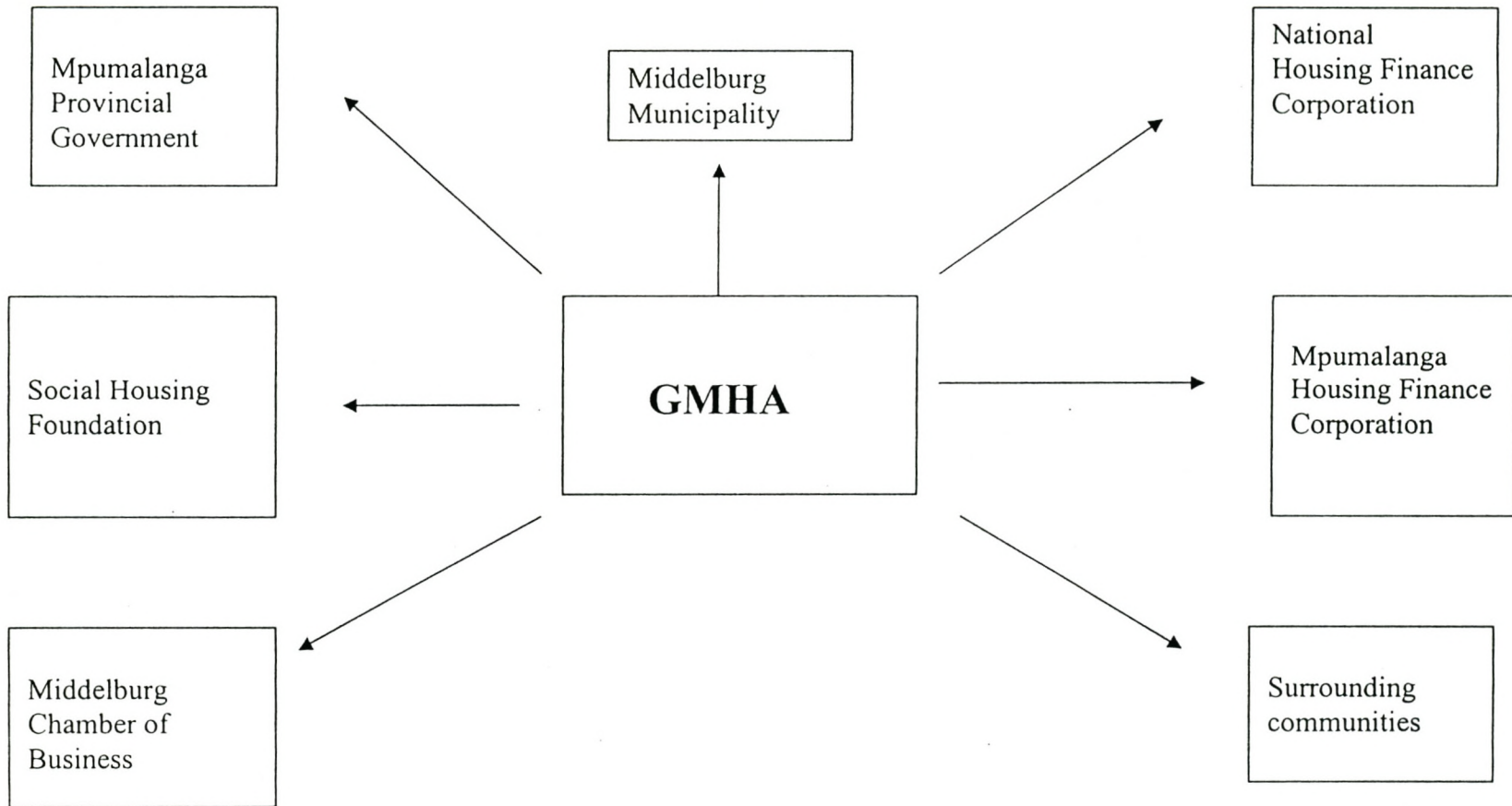


FIGURE 4.1: STAKEHOLDERS OF THE GMHA

#### 4.4.1 Board and management structure

The GMHA has a board of directors that are responsible for the management of the company. The management decisions are unilaterally approved and resolved by the board. The board delegates sufficient powers and authority to Executive Management, mainly the Chief Executive Officer, to co-ordinate and decides on operational matters.

The GMHA board of directors consists of nine members of which six are drawn from a range of constituencies and the additional three are from the Middelburg Municipality as councilors with diverse profiles and experiences. This composition is to contribute to the long-term viability and success of the GMHA (GMHA Revised Business Plan, 2002:19).

The effectiveness and efficiency of the board is promoted by means of sub-committees. Currently, there are four sub-committees: Finance Committee; Technical Committee; Legal Committee and Marketing Committee.

The management structure is composed of the:

- Board of Directors
- Chief Executive Officer (CEO)
- Tenants Liaison Manager
- Property Manager
- Accountant
- Housing supervisors
- Caretaker
- Assistant accountant
- Debt Collector
- General Workers

**Figure 4.2 shows the board and management structure of the GMHA.**

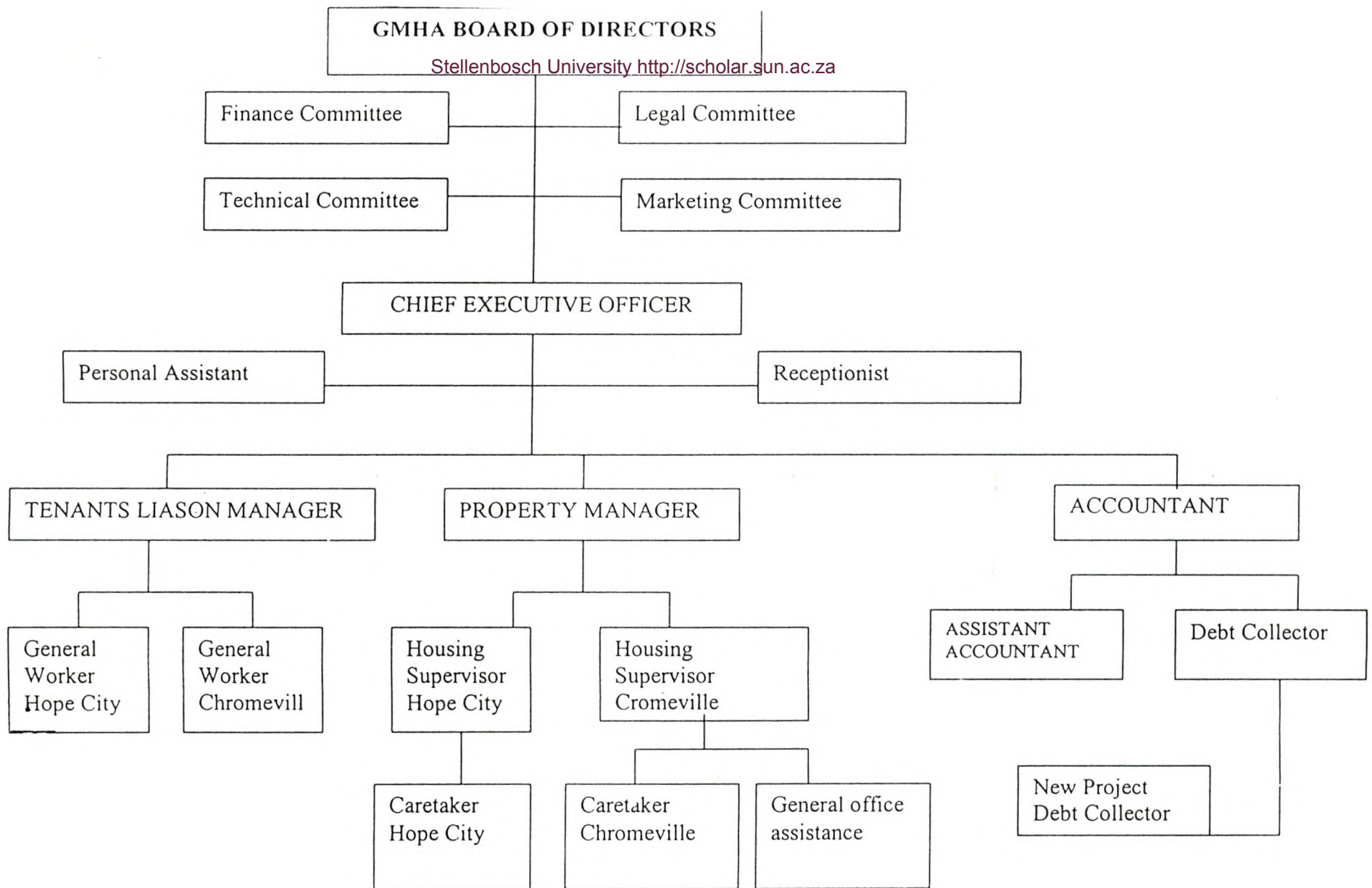


FIGURE 4.2: BOARD AND MANAGEMENT STRUCTURE OF THE GMHA

#### 4.4.2 Relationship with tenants

The GMHA sees itself as an association for tenants and not of tenants. Tenant relationships will be pursued and promoted through the following:

- Each project will have a tenant committee developed at the initiative of tenants. The Hope City tenant committee meets with the management on a regular basis.
- Hope City has offices in the Middelburg city center making it accessible for tenants to liaise with the employees of the organisation.
- Formal complaints, repairs and maintenance procedures have been outlined in the maintenance policy.
- The management of the GMHA regularly communicates with the tenants through written materials (news letters)
- One-on-one verbal communication is also undertaken with occupants in arrears.

### 4.5 THE HOPE CITY HOUSING COMPLEX

The Hope City housing complex is the first project to be undertaken by the GMHA. It consists of 501 residential units and one operating commercial unit. The project was completed in 2000 (GMHA Revised Business Plan, 2002:6). This project fulfilled in government's housing development requirement and principles of promoting densification, mixed land use, integration of the cities and viable public transportation. The development of the project was done parallel to the establishment of the GMHA.

#### 4.5.1 Site location and description of the housing units

The Hope City project is situated along Fontein and Verdoorn Streets, in Middelburg. The complex is situated on the boundaries of Middelburg suburbs, which is far from a number of amenities. The two entrances to the complex are on Fontein Street (*Addendum B*). The complex is secured with a fence all around the premises and guarded entrances. The entrances lead to a parking area, from where the housing units can be reached on foot.

**TABLE 4.1 COMBINATION OF HOUSING UNITS IN THE PROJECT**

<b>TYPE OF HOUSING UNIT</b>	<b>Size M2</b>	<b>Quantity</b>	<b>Rental p.m.</b>	<b>Unit cost</b>
<b>2 bed subsidised</b>	44	375	R1 100	R84 700
<b>2 bed non-subsidised</b>	44	42	R1 375	R84 700
<b>2 bed + loft subsidised</b>	55	74	R1 125	R93 000
<b>2 bed + loft non-subsidised</b>	55	3	R1 625	R93 000
<b>3 bed subsidised</b>	52	1	R1 125	R91 700
<b>3 bed non-subsidised</b>	52	6	R1 625	R91 700
		<b>501</b>		

The rentals for the housing product in the Hope City project were structured to be fair in comparison to the market place while still transferring the full benefit of the institutional subsidy to the occupants of the unit (GMHA Revised Business Plan, 2002:33). Covered in the rental were the costs of providing the housing stock and all additional functions required to ensuring the success of the GMHA. The rental charges therefore include portions for:

- The amount of the capital placed for the development of the unit
- Payment of interest of finances
- Management and general overhead costs
- Repairs and maintenance costs
- Rates, taxes and levies
- Defaults and vacancy provisions
- The development of a reserve for the association, and
- The generation of a reasonable surplus in the long term for future projects of the association

#### 4.5.2 Needs or demand assessment for the complex

Although the University of Witwatersrand conducted a market survey in October 1999, and the recommendations of the survey might seem outdated the GMHA management indicated that the findings were still legitimate and valid and thus, the new developments were still based on this research (GMHA Revised Business Plan, 2002:24). However, it is evident that new research needs to be undertaken to reaffirm some of the pointers indicated in the original research.



The research revealed that there is a high demand for rental stock, particularly by the transient population sector. The level of affordability in terms of rental payments was found strong since most of residential properties in the inner city were on operational lease basis. Four areas around the Central Business Area of Middelburg were investigated, to gain insight into the communities that should be targeted as future tenants.

**TABLE 4.2 AREAS WHERE MARKET SURVEY WAS CONDUCTED**

<b>Mhluzi</b>	<b>Bloekomsig &amp; Mineralia</b>	<b>Nasaret</b>	<b>Eastdenes</b>
Dominated by residents of the previously disadvantaged community in terms of housing provision	Low levels of demand for social housing since most residents were not falling within the target market at the time of the research.	This is predominantly a “Coloured” area and still resembles high levels of poverty and social deprivation although at better level compared to Mhluzi. Demand for Social housing is strong as there is a need for social upgrading.	These residents fell out of the target market for social housing since most had already gained ownership of their houses
Affordability tests revealed possibilities of weaker rental payment, because positive proof of employment would be a pre-requisite for occupation of the unit.	Should they be targeted, these residents would not have an affordability problem as opposed to social integration.	Affordability is definitely in question but credit control is a solution.	The income levels were also above the subsidy bracket.

(GMHA Revised Business Plan, 2002:25)

#### 4.5.3 Target market definition

The target market for the Hope City project was defined in terms of the government subsidy criteria, and specific criteria set by the GMHA.

Prospective tenants have to meet the following criteria:

- Be South African citizens
- Be older than 21 years
- Have a family income of between R1500 and R3500 per month
- The breadwinner has to be permanently employed
- Priority is given to people working in and around the Middelburg Area

Many of the people from the current target market for the project were residing in Nasaret, Mineralia, and other surrounding residential areas.

#### 4.5.4 Affordability profile of prospective tenants

In order to determine the affordability profile for the Hope City complex, it was assumed that families in the income categories of R1 500 to R3 500 could contribute 25% or 33% of their income to rental payments. This is similar to the formulas used by the banks to calculate the affordability of monthly bond payments.

The GMHA divided their units into unsubsidised and subsidised, the GMHA provides the unsubsidised units due to supplementing the operational rental revenues. The GMHA provides 90% of its rental accommodation to beneficiaries within the subsidy bracket as defined by the National Department of Housing and only 10% of its stock is allocated to the non-subsidised market (GMHA Revised Business Plan, 2002:6). See Table 4.1 for the number of subsidised and non-subsidised units in the Hope City complex.

#### 4.5.5 Tenure options

Prior to the study conducted by Wits University the tenure preferences of the GMHA's target market were not clear. The GMHA has focused on rental stock thus far and capacity still needs to be established before diversifying into other tenure options (GMHA Revised Business Plan, 2002:25). The problem with this option though is that there is an initial penalty in terms of the inability to claim back output VAT on the difference between the product price and the subsidy amount, this option offers additional benefits.

Tenants will however be offered first option to purchase the stock, if the association should decide to dispose of the stock. It is, however, envisaged that the stock will be kept and rented for a significant period of time, in order to ensure long-term benefits to occupants and to develop reserves to utilise for future projects.

#### 4.5.6 Marketing of the project

The marketing campaigns have been targeting communities/individuals that qualify for the government's housing subsidy and comply to the institutional guidelines. The Provincial government of Mpumalanga fully supports the social housing delivery method. GMHA states that their tenant's occupancy in the Hope City complex revealed that occupation is taken mostly by the white population sector as opposed to other racial groups (GMHA Revised Business Plan, 2002:26). The cause might be in the marketing approach but the association plans to embark into a new

market research to ascertain all factors needed before new projects are constructed. General advertising in the city's local newspaper was carried out.

#### 4.5.7 Tenant selection, screening and training

GMHA was primarily responsible for finding tenants to occupy the units. Apart from the criteria included in the definition of the target market for the project, prospective tenants further had to:

- Undergo an assessment of eligibility to receive the benefits of an institutional subsidy
- Undergo a thorough credit-worthiness and affordability analysis
- Undergo an assessment of employment status and ability to secure payroll deductions for rental and service payments
- Demonstrate the ability to pay the deposit equal to 1,5 month rental
- Contractually agree to all the rules and regulations of the housing association
- Demonstrate the ability to pay the first month's rental up-front

The potential tenant has to complete a registration form in which they answer all the questions pertaining the mentioned criteria. Once the credit-worthiness, affordability, employment status and subsidy application of potential occupants are approved and the deposits fully paid, the developer then selects and allocates units to the tenants on the first come, first served basis.

The tenants in the Hope City complex are then taken for a walk in the complex and shown the unoccupied units, of which they are expected to choose the unit that they would wish to occupy. The GMHA has discovered that tenants prefer the three bedroom single standing units. This has led to a waiting list of both potential tenants and present tenants wanting to move to different units in the complex.

The GMHA expect each tenant to attend the tenant-training programme before signing the standard lease agreement. The GMHA has had to hold a number of tenant training sessions for those tenants who have not attended the training. There is no indication from the documentation of the GMHA, stating whether the lease agreement was explained in detail to the prospective tenants before signing and occupying the unit (GMHA Revised Business Plan, 2002:26).

#### 4.5.8 Financing the complex

The Hope City project was primarily financed by the institutional subsidy together with project funding from the Housing Institutions Development Fund,

Sources of finance for the Hope City Complex

- NHFC Structured loan
- Department of Housing & Land Administration (Institutional subsidy)
- Middelburg Town Council (Land & Funding)
- MHF Co (Needs Assessment & Registration)
- SHF (Training & Grants)

#### 4.5.9 Risk assessment and management

The main risks in the rental housing sector are defaults from tenants and vacancy risk. The GMHA has identified eight essential areas of risk facing the association.

##### 4.5.9.1 External risk assessment and management

- Unemployment

The GMHA believes in empowering individuals and communities residing in and around their housing development projects, by creating sustainable employment opportunities (GMHA Revised Business Plan, 2002:26). So for example the services and skills of residents from Hope City complex might be used in future building projects in the vicinity of the complex, e.g. the shopping complex that is to be built.

- Political and Marketing Drive

The Mpumalanga Provincial Government is in full support of the social housing delivery method that is currently being implemented by the Greater Middelburg Housing Association. To support the endeavour they have allocated sufficient institutional subsidies to the local municipality (GMHA Revised Business Plan, 2002:26).

At present there seems to be a predominance of white residents residing in the Hope City complex. This might be, because of the marketing strategy employed up to date, but plans are in progress to

create a new, more race representative marketing plan, that would encompass all factors needed before new projects are constructed.

- Competition and Municipality owned stock

At present the GMHA do not foresee the threat of competition both from social housing institutions and municipality owned stock (GMHA Revised Business Plan, 2002:27). This is because their projects are suitably located, and because the GMHA is in the process of converting previously owned municipal housing stock (Chromeville) into social housing.

- Top-up funding and interest rates hikes

The Social Housing Foundation has realised that top-up funding is needed to counteract the negative gearing relationship in the balance sheet. The GMHA is applying for European Union Grants in order to increase its capacity through equity, to achieve a break-even point (GMHA Revised Business Plan, 2002:27).

- Corruption associated with government sector

To ensure that corruption is curbed internally and externally, the GMHA has strengthened its tenant selection and screening procedures. Debt collectors will be appointed to make sure that rental is collected from tenants. The effect of late and overdue rental payments will be minimized.

#### 4.5.9.2 Internal risk assessment and management

- Comprehensive Property Management Systems

By using the Nicor Property Management Software loss of office data in cases of theft, burglary, power failure etc. is limited. Staff needs to be trained to optimally enjoy the benefits of the system (GMHA Revised Business Plan, 2002:28).

- Development costs and risks

Not only do the Association need to build up mass housing stock, they also have to ensure that the marketing research prove viability and actual demand for the product. It is envisaged that a project manager will be employed to manage construction processes. This will eliminate the role of the traditional developer and avoids the risk associated with an in-house construction department (GMHA Revised Business Plan, 2002:28).

- Human resource development

Need assessment will be done for both staff and board development. Essential areas for staff development will include property management, financial management, and caretaker's course, housing supervisor's course. The Board will be trained on good management (GMHA Revised Business Plan, 2002:29).

#### **4.6. SUMMARY**

This chapter provided background on the Greater Middelburg Housing Association, and studied the organisation's aim, objectives, stakeholders, the management, and the risks that the organisation has to face. In Chapter Five the survey research results will be presented and discussed.

## CHAPTER FIVE: PRESENTATION AND DISCUSSION OF THE SURVEY RESULTS

This chapter will present and discuss the data obtained from the heads or the spouses of the heads of the households in the Hope City Complex, from here on called the “respondents”. The results will be presented in the order of the objectives of the research and in accordance to the questionnaire. Firstly, the socio-demographic profile of the respondents, secondly the respondents’ socio-economic status and thirdly the respondents’ degree of satisfaction with the housing unit, complex and management of the Hope City complex will be presented and discussed. The results are presented as frequency tables (with percentages), cross tabulations and graphs.

### 5.1. SAMPLE REALISATION

Tables 5.1 and 5.2 present the number of respondents per block in the Hope City Complex, as well as the number of respondents per type of unit in the complex. These two tables illustrate the representation of the sample drawn for the survey.

**TABLE 5.1: RESPONSES PER BLOCK IN THE COMPLEX**

BLOCKS	NUMBER OF UNITS CHOSEN FOR SAMPLE
ACACIA	9
BLUE GUM	9
CYCAD	6
DELAGOA	6
ELM	5
FERN	5
GARDENIA	5
HEATHER	9
ILEX	5
ILLALA PALM	6
JUNIPERUS	9
KAREE	5
LIVINGSTONIA	8
MANGOLIA	9
NERLUM	8
ORCHARD	5
PERTUNIA	5
QUEENSLACE	9
RANUNCULUS	5
SUNFLOWER	9
TULIP	5
URANIUS	8
<b>TOTAL</b>	<b>150 (46.3%)</b>

At the time that the research was conducted, 324 units were occupied. A randomly selected sample of 150 units were selected from the total number of units occupied (324). Data on the number of occupied units in each block was requested from the GMHA, but could not be provided.

Table 5.2 indicates the type of unit occupied by the residents selected for the sample.

**TABLE 5.2: RESPONSES PER TYPE OF UNIT IN THE COMPLEX**

TYPE OF UNIT	NUMBER OF UNITS OCCUPIED	NUMBER OF RESIDENTS INTERVIEWED	%
2-BED UNIT	237	101	42.6%
2-BED + LOFT UNIT	78	44	56.4%
3-BED UNIT	9	5	55.6%
<b>TOTAL</b>	<b>324</b>	<b>150</b>	<b>46.3%</b>

The two bedroom and loft units (56.4%) as well as the three bedroom units (55.6%) are well represented, as the number of respondents are from more than 50% of the total units occupied. The two bedroom units were represented by respondents occupying 42.6% of the total units. The researcher was satisfied that this is a good representation.

## 5.2 SOCIO-DEMOGRAPHIC PROFILE OF THE RESPONDENTS

This section will provide background information for the following sections and meet the first research objective of compiling a socio-demographic profile of the interviewed tenants residing in the Hope City complex. This profile could be used to redefine the present target market and to inform the GMHA management of the type of housing products they should aim to provide in future projects.

The research was restricted to interviewing the heads or spouses of the heads of the household, depending on their availability and willingness to co-operate.

The race and gender representation of the respondents is tabulated in Table 5.3.

**TABLE 5.3: GENDER AND RACE OF THE RESPONDENTS (N=150)**

RACE	GENDER		n (%)
	Female	Male	
BLACK	28 (18.7%)	27 (18.1%)	55 (36.7%)
COLOURED	6 (4%)	2 (1.3%)	8 (5.3%)
INDIAN	-	1 (0.7%)	1 (0.7%)
WHITE	37 (24.7%)	49 (32.7%)	86 (57.3%)
<b>TOTAL</b>	<b>71 (47.3%)</b>	<b>79 (52.7%)</b>	<b>150 (100%)</b>



It is clear from Table 5.3 that the Hope City complex is integrated in terms of the race of the respondents residing in the complex. The majority of the respondents were white (57.3%), while 36.7% were black. The GMHA have plans in progress to create a new, more race representative marketing plan that would encompass all factors needed before new projects are constructed (GMHA Revised Business Plan, 2002:26). The table also indicates that there was an even representation of male and female respondents in the survey.

Respondents were asked to indicate their marital status, which was cross-tabulated with the gender of the respondents in table 5.4.

**TABLE 5.4: MARITAL STATUS AND GENDER OF THE RESPONDENTS (N=150)**

MARITAL STATUS	GENDER OF RESPONDENTS		n (%)
	Female	Male	
MARRIED	31 (20.7%)	52 (34.7%)	83 (55.3%)
LIVING TOGETHER	11 (7.3%)	14 (9.3%)	25 (16.7%)
SINGLE/NEVER MARRIED	11 (7.3%)	12 (8%)	23 (15.3%)
DIVORCED	12 (8%)	1 (0.7%)	13 (8.7%)
WIDOWED	6 (4%)	-	6 (4%)
<b>TOTAL</b>	<b>71 (47.3%)</b>	<b>79 (52.7%)</b>	<b>150 (100%)</b>

Table 5.4 shows that 55.3% of the respondents were married, 16.7% were couples living together and 15.3% were single. Very few of the respondents in the complex were divorced or widowed.

Table 5.5 indicates the gender and age of the heads of the households.

**TABLE 5.5: GENDER AND AGE OF THE HEADS OF THE HOUSEHOLDS (N=150)**

AGE	GENDER OF HEADS OF HOUSEHOLDS		n (%)
	Female	Male	
21-30	14 (9.3%)	45 (30%)	59 (39.3%)
31-40	19 (12.7%)	37 (24.7%)	56 (37.3%)
41-50	7 (4.7%)	13 (8.7%)	20 (13.3%)
51-60	1 (0.7%)	9 (6%)	10 (6.7%)
61-above	4 (2.7%)	1 (0.7%)	5 (3.3%)
<b>Total</b>	<b>45 (30%)</b>	<b>105 (70%)</b>	<b>150 (%)</b>

Table 5.5 shows that, of the 150 respondents interviewed, 105 housing units (70%) have males as the heads, and 30% have females as the heads of the households. It is evident that 54.7% of the male heads are between the ages of 21 and 40 years, while 22% of the heads of this age category are female. The majority of the heads of households (76.6%) are 40 years or younger.

Table 5.6 shows the marital status of the respondents in Hope City per age category.

**TABLE 5.6: MARITAL STATUS AND AGE OF THE RESPONDENTS (N=150)**

AGE CATEGORY	MARITAL STATUS					N (%)
	Married	Living together	Single/never married	Divorced	Widowed	
21-30	28 (18.7%)	13 (8.7%)	15 (10%)	1 (0.7%)	1 (0.7%)	58 (38.7%)
31-40	36 (24%)	8 (5.3%)	7 (4.7%)	6 (4%)	1 (0.7%)	58(38.7%)
41-50	12 (8%)	2 (1.3%)	-	5(3.3%)	1 (0.7%)	20 (13.3%)
51-60	6 (4%0	2 (1.3%)	1 (0.7%)	-	-	9 (6%)
61-above	1 (0.7%)	-	-	1 (0.7%)	3 (2%0	5(3.3%)
<b>Total</b>	<b>83</b> <b>(55.3%)</b>	<b>25</b> <b>(16.7%)</b>	<b>23</b> <b>(15.3%)</b>	<b>13</b> <b>(8.7%)</b>	<b>6</b> <b>(4%)</b>	<b>150</b> <b>(100%)</b>

Table 5.6 shows that 55.3% of respondents were married and that the majority falls in the 21 to 30 and 31 to 40 years age categories. The couples living together and the single persons will most likely either proceed to the married couple or parent stage of the family life cycle within the next few years. This will potentially have implications for the affordability status of the tenant as well as on the type of housing unit they are currently occupying, as they might need more space. From the figures in the table it is also clear that only 9.3% of the respondents are 51 years or older while 90.7% are 50 years or younger. The residents in Hope City can therefore be seen as predominantly young and in the economically active population group.

In a housing satisfaction survey conducted in a social housing complex in Germiston (Pharoe Park Complex) it was found that the majority (80%) of the tenants were in the age category 20 to 39. There is therefore a close similarity between the tenant ages in the Hope City and Pharoe Park housing complexes (Crofton & Venter, 2000:45).

Table 5.7 shows the gender and age of the children who were part of the 150 households included in the survey.

**TABLE 5.7: GENDER AND AGE OF THE CHILDREN**

AGE	GENDER OF CHILDREN		n (%)
	Female	Male	
1 MONTH TO 5 YEARS	19	47	66 (39.1%)
6 TO 12 YEARS	27	27	54 (32%)
13 TO 18 YEARS	18	19	37 (21.9%)
19 AND ABOVE	8	4	12 (7.1%)
<b>TOTAL</b>	<b>72 (42.6%)</b>	<b>97 (57.4%)</b>	<b>169 (100%)</b>

The majority of the children (71%) were younger than 12 years, while 21.9% of the children were teenagers and 7.1% were over the age of 18. From this data it is clear that the majority of the children accommodated in the complex are young, and the Hope City complex should therefore cater for the needs of young children.

It was imperative to determine the respondents' stage of the family life cycle because satisfaction with housing is influenced by the stage of the family life-cycle (Van Wyk, 1990:40). Table 5.8 shows a breakdown of the marital status of the respondents in terms of the typical stages in the family life cycle.

**TABLE 5.8: MARITAL STATUS AND STAGE IN THE FAMILY LIFE CYCLE (N=150)**

FAMILY LIFE CYCLE	MARITAL STATUS					n (%)
	Married	Living Together	Single/Never married	Divorced	Widowed	
Living alone	-	-	15 (10%)	3 (2%)	2 (1.3%)	20 (13.3%)
Couple + no children	14 (9.3%)	10 (6.7%)	-	-	-	25 (16.7%)
Parent(s) + young children (1 mnth-12 yrs)	53 (35.3%)	12 (8%)	7 (4.7%)	3 (2%)	1 (0.7%)	76 (50.7%)
Parent(s) + teenaged children (13-18 yrs)	10 (6.7%)	2 (1.3%)	-	6 (4%)	2 (1.3%)	20 (13.3%)
Parent(s) + children (older than 18 yrs)	3 (2%)	-	-	1 (0.7%)	1 (0.7%)	5 (3.3%)
Ageing couple	3 (2%)	-	1 (0.7%)	-	-	4 (2.7%)
<b>Total</b>	<b>83 (55.3%)</b>	<b>25 (16.7%)</b>	<b>23 (15.3%)</b>	<b>13 (8.7%)</b>	<b>6 (4%)</b>	<b>150 (100%)</b>

The majority of the respondents (64%) are parents with either younger or teenaged children. There are single or never married respondents who have children (4.7%). It is a relatively small

percentage, but as the complex units become occupied and more families move into Hope City, management might need to introduce childcare facilities for when the parents are at work. There are however some respondents who are at the aging stage of their lifecycle (2.7%) residing in the complex. This means that the complex does cater for the needs in the different stages of life.

Respondents were asked to indicate the number of people staying in their unit. In Table 5.9 the cross-tabulated number of people and the type of unit that they are occupying are given.

**TABLE 5.9: TYPE OF UNIT AND THE NUMBER OF OCCUPANTS (N=150)**

NUMBER. OF PEOPLE IN THE UNIT	TYPE OF UNIT OCCUPIED			Total
	2-bed	2-bed +loft	3-bed	
1	9	2	-	11 (2.4%)
2	28	7	2	74 (15.8%)
3	29	12	1	126 (26.9%)
4	27	17	2	184 (39.4%)
5	7	5	-	60 (12.8%)
6	1	1	-	12 (2.6%)
<b>Total</b>	<b>101</b>	<b>44</b>	<b>5</b>	<b>467 (100%)</b>

The total number of inhabitants in the 150 units surveyed was 467. From table 5.9 it appears that there is no overcrowding in the units. Half (125) of the units have two to four inhabitants. The Hope City management could keep an eye on the two bedroom units, as there are some units sheltering five to six people. This could in future lead to overcrowding in the units.

One of the objectives of the Hope City complex was to provide affordable accommodation to residents who are preferably employed in the Middleburg area. It was necessary to gain insight into where the current tenants were coming from, in order for the GMHA to gain an understanding of where to focus their marketing programmes.

**TABLE 5.10: PREVIOUS AREAS OF RESIDENCE (N=150)**

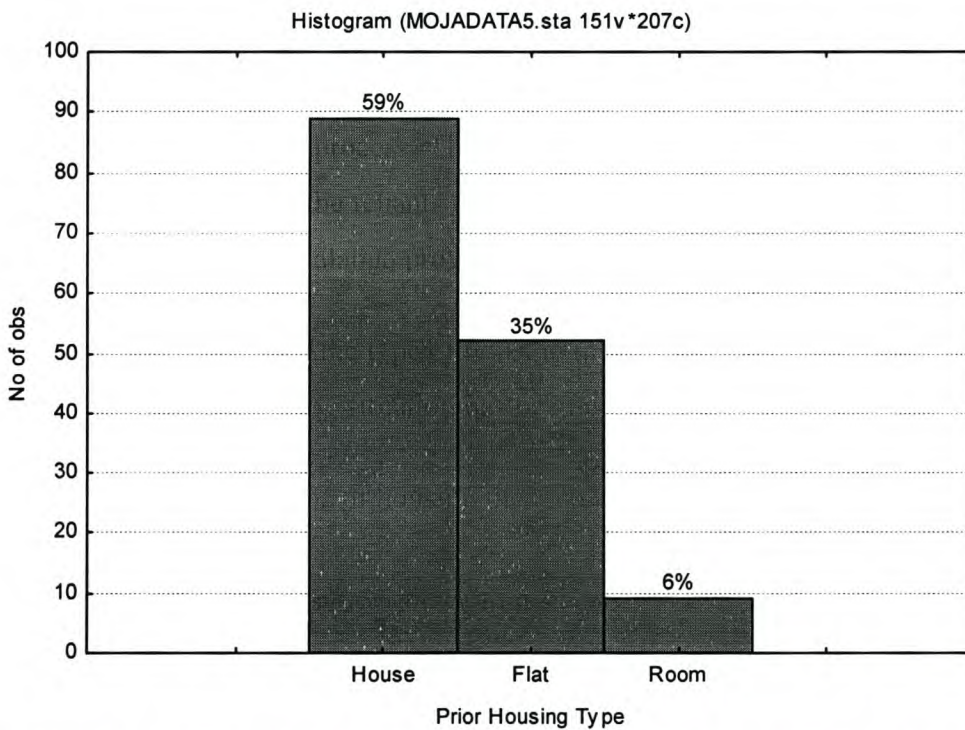
TOWNS	NUMBER OF RESPONDENTS
MIDDLEBURG	77 (51.3%)
WITBANK	16 (10.7%)
PRETORIA	10 (6.7%)
JOHANNESBURG	9 (6%)
OTHER	18 (12%)
<b>TOTAL</b>	<b>150 (100%)</b>

Table 5.10 indicates that 51.3% of the respondents stayed in the Middleburg area before moving to the Hope City complex. This is an indication that there is a demand for the type of rental housing

offered by the GMHA. There are residents from the neighbouring towns such as Witbank (10.7%) and other towns in different provinces, such as Ermelo, Rustenburg, Cape Town, Durban and Portgietersrus. It would be interesting to determine how these respondents managed to get through the provincial screening process. The GMHA advertising strategies focus on the Middleburg area, as this is where most of the tenants come from. The GMHA could conduct marketing campaigns in other towns in the Mpumalanga province for secondary marketing of future housing projects.

It was important to know the type of housing the respondent used to stay in before coming to Hope City, to see if their housing situation has been improved by their current housing.

Figure 5.1 reflects the type of housing the respondents previously occupied.



**FIGURE 5.1: TYPE OF HOUSING OCCUPIED BY RESPONDENTS BEFORE MOVING TO HOPE CITY**

Figure 5.1 indicates that 59.3% of the respondents residing in the Hope City complex previously stayed in formal housing, 34.7% in flats while 6% stayed in a room in someone else’s backyard. It is almost certain that all these respondents were previously renting their housing and will therefore have certain perceptions and experiences relating to rental housing. These experiences should be shared during the respondents training so that comparisons can be drawn between the GMHA type of rental housing and other forms of rental. Bad habits and practices of the respondents from their previous housing will also emerge which can then be clarified during the tenant training.

It is evident that the Hope City complex is not effectively addressing the informal housing problem in Middleburg, yet it is providing some opportunities for residents from this area. The Hope City complex however, is significantly addressing the rental housing need in the area.

The reasons why the respondents had moved from their previous housing could be used by the GMHA to market their housing products. This information is given in Table 5.11.

**TABLE 5.11: REASONS FOR MOVING FROM PREVIOUS HOUSING (N=150)**

REASON FOR MOVING	PREVIOUS TYPE OF HOUSING			n (%)
	Formal house	Flat	Room in backyard	
BETTER HOUSING	43 (28.7%)	34 (22.7%)	5 (3.3%)	82 (54.7%)
CLOSE TO FAMILY	6 (4%)	-	-	6 (4%)
CLOSE TO WORK	37 (24.7%)	15 (10%)	4 (2.7%)	56 (37.3%)
OTHER	3 (2%)	3 (2%)	-	6 (4%)
<b>TOTAL</b>	<b>89 (59.3%)</b>	<b>52 (34.7%)</b>	<b>9 (6%)</b>	<b>150 (100%)</b>

Table 5.11 shows that the majority of respondents' main reason for moving from their previous type of housing into the Hope City complex was that they wanted better housing (54.7%). Furthermore, it is interesting to note that a large number (43) of the respondents who previously lived in a formal house are the ones who moved to the Hope City complex for better housing. It is interesting to note that the majority of the respondents (89) previously lived in a formal house. It can be assumed that they rented these formal houses.

The respondents' planned length of stay and the motivation for the planned length of stay in the Hope City complex, was determined through the survey. These results are provided in Table 5.12.

**TABLE 5.12: INTENDED LENGTH OF STAY AND REASONS FOR THIS (N=150)**

REASON FOR STAY	Temporary (less than 1 yr)	Medium term (longer than 1-3 yrs)	Long term (longer than 3 yrs)	n (%)
Renting is more affordable than buying property	5 (3.3%)	7 (4.7%)	19 (12.7%)	31 (20.7%)
The complex is well maintained and well-located, quiet and secure	9 (6%)	5 (3.3%)	20 (13.3%)	34 (22.7%)
Until I can afford to buy property as renting is not an investment	32 (21.3%)	25 (16.7%)	17 (11.3%)	74 (49.3%)
Management needs to improve in dealing with tenants	1 (0.7%)	4 (2.7%)	4 (2.7%)	9 (6%)
No response	-	2 (1.3%)	-	2 (1.3%)
<b>Total</b>	<b>47 (31.3%)</b>	<b>43 (28.7%)</b>	<b>60 (40%)</b>	<b>150 (100%)</b>

The largest percentage of the respondents stated that they are planning on staying in the Hope City complex for longer than three years (40%) while 31.3% stated that they are planning on staying less than a year. It is interesting to see that in all three categories of planned length of stay, respondents seem to be planning their lengths of stay around future plans of purchasing a house outside the Hope City complex, as they stated that they feel that renting was not an investment (49.3%). It is however evident that the respondents have the need to own a property, this is an issue the GMHA needs to address by introducing the instalment sale tenure option to their tenants.

The results indicate that the GMHA could expect that at least 40% respondents would stay in the Hope City complex for a period longer than three years. The success or sustainability of the GMHA lies in the fact that tenants will be renting housing units from the organisation for an extended period of time, thereby securing an income for the organisation and allowing the organisation to grow and develop more housing stock in the area. Given that the Hope City complex is a pilot project of the GMHA, it is interesting to note the respondents' planned length of stay and the motivation for the planned length of stay in the complex. The planned length of stay however, is not guaranteed for the organisation, as factors such as death in the family or loss of income could not be projected. Yet, the general trend among the respondents could be useful to the organisation.

Datta and Jones (2001:337) state that most urban policies of developing countries indicate that low income earners follow a one way process from renting/sharing to owning, with the latter seen as the "normal" goal of households. It is therefore not surprising that the respondents stated that they will stay in the complex until they can afford to buy their own property, as they feel that renting is not an investment. Furthermore, home ownership also renders social status and emotional security to the individual and the family (Morris & Winter, 1978:110).

Table 5.13 indicates how respondents found out about the Hope City housing complex and what motivated them to stay in the complex.

**TABLE 5.13: HOW RESPONDENTS FOUND OUT ABOUT THE HOPE CITY COMPLEX AND WHAT MOTIVATED THEM TO STAY IN THE COMPLEX (N=150)**

MOTIVATION TO STAY	WHERE RESPONDENT FOUND OUT ABOUT HOPE CITY					n (%)
	Developer	Municipality	Employer	Media	Friends & family	
Location of Complex	3 (2%)	4 (2.7%)	-	2 (1.3%)	10 (6.7%)	19 (12.7%)
Rent to buy option	-	1 (0.7%)	-	1 (0.7%)	6 (4%)	8 (5.3%)
Cost of the unit Is affordable	13 (8.7%)	7 (4.7%)	6 (4%)	18 (12%)	53 (35.3%)	97 (64.7%)
Quality of the units	-	1 (0.7%)	1 (0.7%)	1 (0.7%)	2 (1.3%)	5 (3.3%)
Recommended by family & friends	-	1 (0.7%)	4 (2.7%)	-	-	5 (3.3%)
Security	1 (0.7%)	-	1 (0.7%)	4 (2.7%)	2 (1.3%)	8 (5.3%)
Allocated by council	-	1 (0.7%)	-	-	-	1 (0.7%)
Other	1 (0.7%)	1 (0.7%)	-	1 (0.7%)	4 (2.7%)	7 (4.7%)
<b>Total</b>	<b>18 (12%)</b>	<b>16 (10.7%)</b>	<b>12 (8%)</b>	<b>27 (18%)</b>	<b>77 (51.3%)</b>	<b>150 (100 %)</b>

The motivation for the respondents to come to the Hope City complex was determined to provide some insight into what the respondents were initially expecting from their housing. The efficiency of the marketing process was also examined, to determine the most effective way to market future housing projects by the GMHA.

Table 5.13 shows that 51.3% of the respondents found out about the Hope City complex from friends and family. Therefore, the word-of-mouth marketing method appears to be the most efficient form of marketing. However, 18% of the respondents were informed through the media, *inter alia* newspapers. Marketing through the employer and the developer does not seem to have much success. The current method of advertising in the local newspaper, as stated in the GMHA business plan, is proving not to be effective (GMHA Revised Business Plan, 2002:24).

Table 5.13 indicates that there was one predominate reason that motivated respondents to want to live in the Hope City complex. This reason being the monthly rental charge of the housing unit (64.7%). Some respondents (5.3%) stated that they were motivated by the rent-to-buy option that the GMHA management is planning to introduce at a later stage.



Respondents were asked how they think the Hope City complex can be marketed more effectively to attract other tenants. Table 5.14 indicates the responses to this question.

**TABLE 5.14: MARKETING SUGGESTIONS FOR HOPE CITY TO ATTRACT OTHER TENANTS (N=150)**

METHODS OF ATTRACTING TENANTS	n (%)
Advertisement in the local newspaper and pamphlets	84 (56%)
Word of mouth	18 (12%)
Lower the monthly rental costs of the units	14 (9.3%)
Make the complex more attractive	4 (2.7%)
Improve management skills and attitude	17 (11.3%)
No response	13 (8.7%)
<b>TOTAL</b>	<b>150 (100%)</b>

Table 5.14 shows that respondents feel the best way of marketing the Hope City complex to be through newspapers and pamphlet advertisements (56%). Word-of-mouth does not seem to be a popular advertising medium as stated in Table 5.14. This is surprising as the majority of respondents were attracted to the complex through word-of-mouth, but did not recommend it as a way of marketing the complex. This might be that the GMHA did not advertise well enough for respondents to know that such adverts appeared in the newspapers.

### 5.3 SOCIO-ECONOMIC PROFILE OF THE RESPONDENTS

This section attempted to meet the objective of compiling a socio-economic profile of the interviewed tenants residing in the Hope City complex. This section could be used to gain insight into the respondents' income and expenditure levels.

Table 5.15 provides information on the employment status and the level of schooling of the respondents.

**TABLE 5.15: EMPLOYMENT STATUS AND LEVELS OF SCHOOLING (N=150)**

LEVEL OF SCHOOLING	EMPLOYMENT STATUS		n (%)
	Unemployed	Employed	
GRADE 0- GRADE 7	1 (0.7%)	2 (2%)	3 (2%)
GRADE 8- 11	12 (8%)	31 (20.7%)	43 (28.7%)
GRADE 12	5 (3.3%)	46 (30.7%)	51 (34%)
CERTIFICATE	-	16 (10.7%)	16 (10.7%)
DIPLOMA	2 (1.3%)	26 (17.3%)	28 (18.7%)
DEGREE	-	4 (2.7%)	4 (2.7%)
NO RESPONSE	1 (0.7%)	4 (2.7%)	5 (3.3%)
<b>TOTAL</b>	<b>21 (14%)</b>	<b>129 (86%)</b>	<b>150 (100%)</b>

It is positive to note that 86% of the respondents are employed and that 66% of the respondents have either matriculated or achieved post matric qualifications. Only 2% of the respondents have schooling between Grade 0 and Grade 7. This means the illiteracy levels are low among the respondents, and that the GMHA could prepare training manuals where information is given and written responses asked from the participants in the Tenant Training Programmes. The respondents who were employed were asked the nature of their employment. This data is tabulated in Table 5.16.

**TABLE 5.16: RESPONDENTS' STATUS AND NATURE OF EMPLOYMENT (N=150)**

NATURE OF EMPLOYMENT	EMPLOYMENT STATUS		n (%)
	Unemployed	Employed	
FORMALLY EMPLOYED	-	107 (71.3%)	107 (71.3%)
PART TIME EMPLOYMENT	-	11 (7.3%)	11 (7.3%)
SELF EMPLOYMENT	-	11 (7.3%)	11 (7.3%)
NOT EMPLOYED	21 (14%)	-	21 (14%)
<b>TOTAL</b>	<b>21 (14%)</b>	<b>129 (86%)</b>	<b>150 (100%)</b>

Table 5.16 shows that 71.3% of the respondents are formally employed and therefore have reasonably secure monthly incomes. The remainder of the respondents that are employed are either self employed or employed on a part time basis. The respondents that are employed full time have jobs that varied from teachers, boilermakers, mechanics, sales representatives and management in different companies.

The employed respondents were asked in which regional areas their places of employment were located. The areas are represented in Table 5.17.

**TABLE 5.17: AREA OF EMPLOYMENT (N=129)**

AREA OF EMPLOYMENT	N (%)
MIDDELBURG	123 (95.3%)
OTHER AREAS	6 (4.7 %)
<b>TOTAL</b>	<b>129 (100%)</b>

Table 5.17 shows that 95.3% of the 129 employed respondents worked in the Middleburg area, while the other 4.7% worked in the surrounding towns. One of GMHA's objectives is to house people living and working in the Middleburg area. Table 5.17 makes it evident that the GMHA's screening process is refined to ensure that the tenants are working in Middleburg. Table 5.10

indicates that about 48.7% of the Hope City tenants lived in other areas outside Middleburg before moving to the Hope City complex. GMHA also seem to be attracting tenants who are not from Middleburg but who have come to the area to work (37.3%) (see Table 5.11).

Respondents were asked to indicate their monthly household income, which was compared to the type of unit the respondents were occupying (Table 5.18).

**TABLE 5.18: HOUSEHOLD INCOME AND THE TYPE OF UNIT OCCUPIED (N=150)**

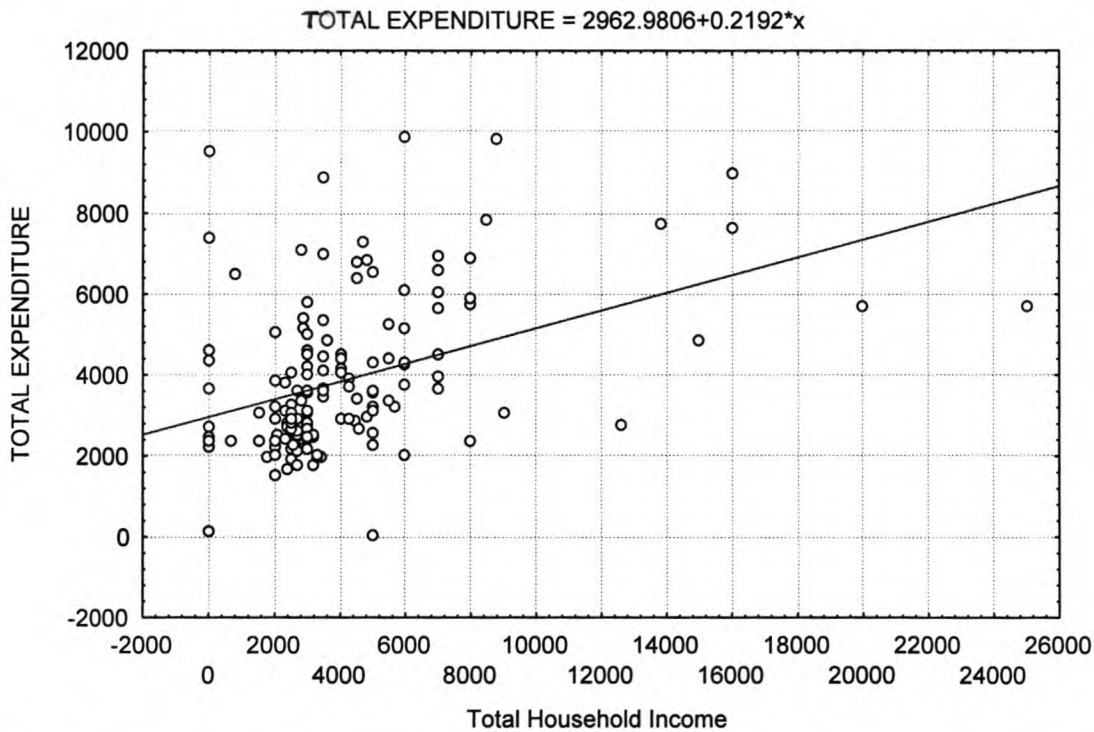
HOUSEHOLD INCOME	TYPE OF UNIT OCCUPIED			n (%)
	2-Bed	2-Bed +loft	3-Bed	
R 500-R1 000	2 (1.3%)	-	-	2 (1.3%)
R1 001-R2 000	9 (6%)	3 (2%)	1 (0.7%)	13 (8.7%)
R2 001-R2 500	17 (11.3%)	7 (4.7%)	-	24 (16%)
R2 501-R3 000	19 (12.7%)	12 (8%)	2 (1.3%)	33 (22%)
R3 001-R3 500	15 (10%)	5 (3.3%)	-	20 (13.3%)
R3 501-R4 000	4 (2.7%)	4 (2.7%)	-	8 (5.3%)
R4 001-more	28 (18.7%)	9 (6%)	1 (0.7%)	38 (25.3%)
NO RESPONSE	7 (4.7%)	4 (2.7%)	1 (0.7%)	12 (8%)
<b>TOTAL</b>	<b>101 (67.3%)</b>	<b>44 (29.3%)</b>	<b>5 (3.3%)</b>	<b>150 (100%)</b>

The 1.3% of the households with an income of R500 to R1 000, as well as those with an income of R1 001 - R2 000 (8.7%) could be considered a default risk, unless their household incomes are being supplemented by other sources not declared in the research. According to the household income as indicated in Table 5.18, it appears that 60% of the respondents in the complex have monthly household incomes ranging from R1 500 to R3 500, which means that these are the respondents that should be beneficiaries of the government housing subsidy offered through the GMHA.

The GMHA has previously stated that they have allocated 90% of the Hope City housing stock to beneficiaries within the subsidy bracket as defined by the National Department of Housing. The remaining 10% is allocated to the non-subsidised market in order to supplement operational rental revenues (GMHA Business Plan, 2001:6). There were 30.7% of the 150 respondents earning above the R3500 government criteria for housing subsidies, and therefore do not qualify for the housing subsidy. The GMHA should therefore be careful that they do not end up with the majority of the tenants earning more than the subsidy limit. This will defeat the purpose of the Hope City complex.

The majority of the households residing in the two bedroom units have an income between R2 001 and R3 500. The two bedrooms and loft units also tend to be occupied by households earning R2001 to R3 500. For these units the GMHA charge a monthly rental of R1 100 to R1 375, this can be covered by the respondents though it leaves them with little for other expenses. Respondents from different income categories occupy the three bedroom units.

Figure 5.2 indicates the respondents' household income and their monthly expenditure. Regression statistics were used to determine the significant difference between the two variants. (For further explanation of the method, see paragraph 3.5 in Chapter 3).



Total Household income: Total household expenditure:  $r^2=1692$ ;  $r=0.4113$ ;  $p=0.0000002$

**FIGURE 5.2: RESPONDENTS' HOUSEHOLD INCOME AND TOTAL MONTHLY EXPENSES**

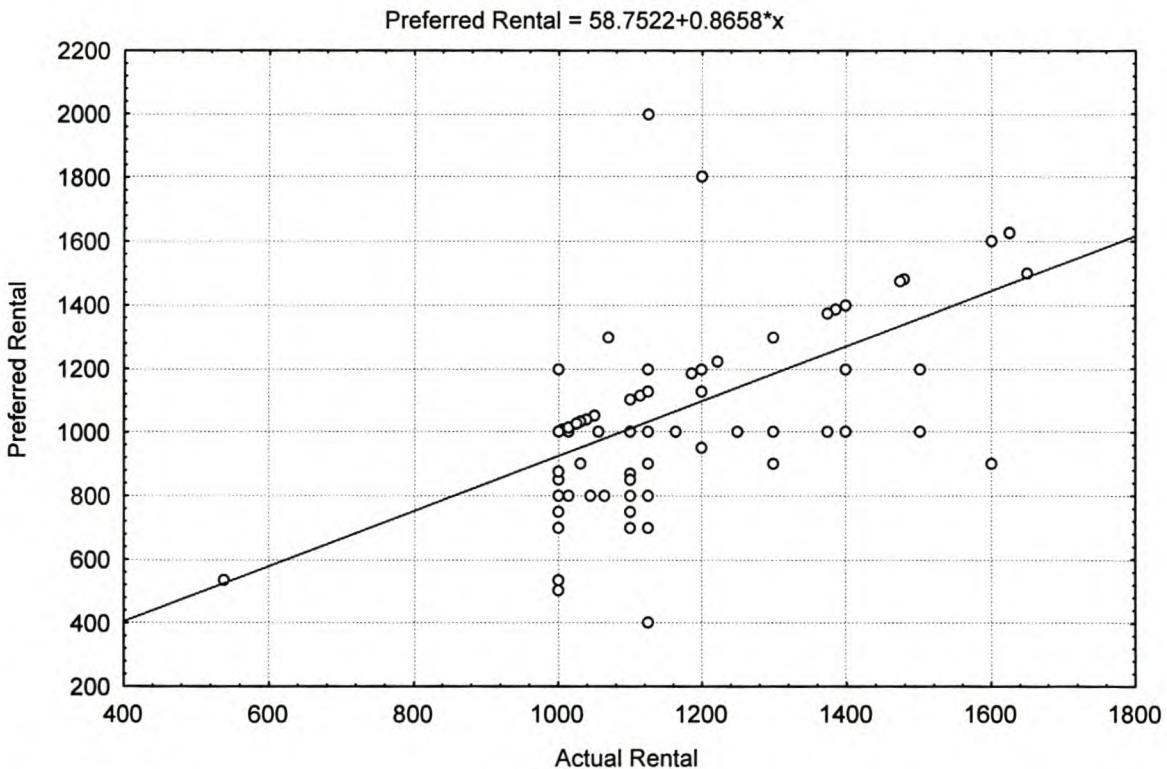
The regression line of Total household expenditure versus Total household income values was fitted by using the least squares method. The fitted regression line is: Total expenditure = 2962.9806 + Total household income x (0.21912) which explains 16.92% of the variation observed in the total household expenditure. The correlation coefficient observed is  $r = 0.4113$  which is significantly different from 0 with the p-value of  $p=0.0000002 (<0.05)$ .

There is a clustering of respondents' household income in the range of R2 000 to R6 000, and they also seem to be spending mostly between R2 000 and R6 000. There were however, respondents who claimed to have household incomes that were below R2 000 but who had a total household

expenditure of R9 000, while those with higher household incomes of up to R26 000 seem to be spending less than those with lower household incomes.

Housing subsidy analysts have alerted policy makers that there is a possibility that the subsidy programmes developed have not been designed with sufficient sensitivity to household financial needs, and are not as socially progressive in practice as they might appear on paper. Furthermore these subsidy programmes may lead some households into new forms of poverty (Datta & Jones, 2001:334) as households spend more on transport to get to amenities and household goods. Therefore the GMHA should be aware of the respondents spending more than their household income, as they might fall in arrears with their monthly rental charges. The GMHA’s tenant-training programme included a section where tenants were taught how to budget for their monthly expenditures, as well as how to save money at the end of each month, therefore to avoid cases of default more attention should be given to this part of the programme.

Figure 5.3 indicates the respondent’s monthly rental charge and the rental charge that the respondent would prefer to pay for the unit they reside in, the regression statistic was used to determine the significant difference between the two variants.



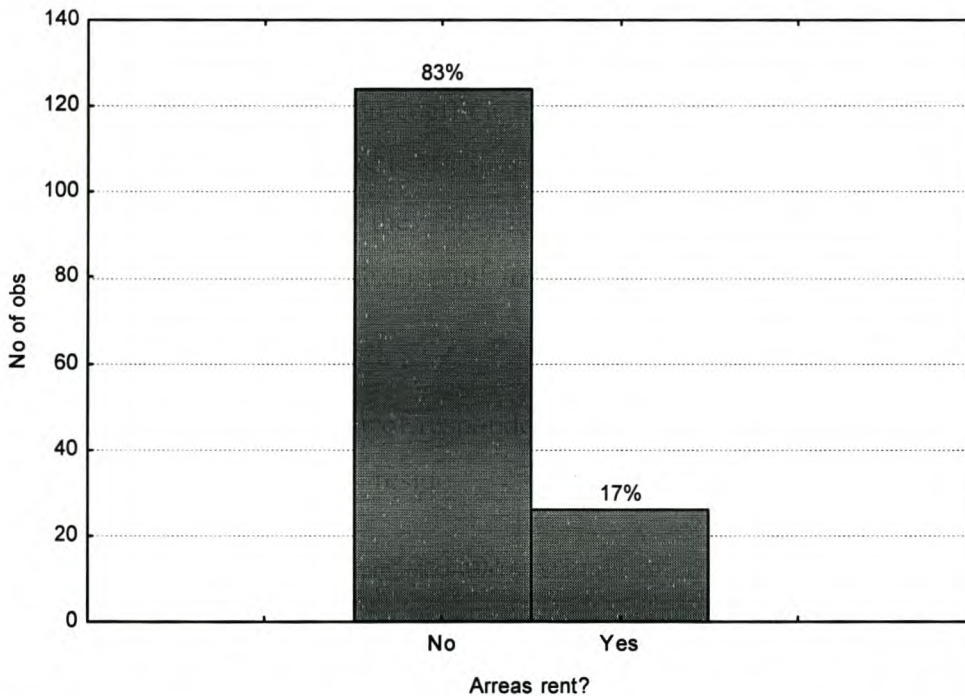
Preferred rental: Actual rental:  $r^2 = 0.3846$ ;  $r = 0.6202$ ;  $p = 0.0000$

**FIGURE 5.3: ACTUAL RENTAL CHARGES AND THE RENTALS RESPONDENTS STATE THEY CAN AFFORD FOR THE UNITS**

The regression line of Actual rental versus Preferred rental values were fitted by using the least squares method. The fitted regression line is: Preferred rental  $58.7522 + \text{Actual rental} \times (0.8658)$  which explains 38.46% of the variation observed in the preferred rental. The correlation coefficient observed is  $r = 0.6202$  which is significantly different from 0 with the p-value reading as  $p=0.0000$  ( $<0.05$ ).

Since the observed regression is below the  $Y = X$  line (where  $Y = \text{Preferred rental}$  and  $X = \text{Actual rental}$ ), it indicates that respondents prefer to pay less than what they are actually paying. This is also clear since the regression coefficient  $b= 0.8658$  is less than 1. There are respondents that are paying less than R1 000, this is because they are the tenants placed in the Hope City complex as transitional housing before they are moved to GMHA's Cromeville housing complex in the Middleburg area (the complex is still in the development stages) where rental charges are to be lower.

Figure 5.4 shows the number of respondents that have been in areas with their monthly rental and the type of unit in which they reside



**FIGURE 5.4: RESPONDENTS WHO HAVE BEEN IN ARREARS WITH THEIR RENTAL**

The figure indicates that there were 83% of the respondents who stated that they had never been in arrears with their rentals, and only 17% had been in arrears. The respondents who had been in arrears with their rent were asked how management supported or helped them, the respondents gave two different reactions some indicated that management would lock them out of their units in their

absence, while others stated that management was supportive by giving them more time to come up with the rental amounts, as well as allowing them to pay the rental arrears in installments.

The respondents' arrears status was compared to the types of units they were residing in (Table 5.19).

**TABLE 5.19: RESPONDENTS IN ARREARS WITH RENTAL PAYMENTS IN THE DIFFERENT TYPES OF UNITS (N= 150)**

TYPE OF UNIT	RESPONDENTS IN ARREARS		n (%)
	Had been in arrears	Had never been in arrears	
2-BEDROOM	10 (6.7%)	34 (22.7%)	44 (29.3%)
2-BEDROOM AND LOFT	16 (10.7)	85 (56.7%)	101 (67.3%)
3-BEDROOM	-	5 (3.3%)	5 (3.3%)
<b>TOTAL</b>	<b>26 (17.3%)</b>	<b>124 (82.7%)</b>	<b>150 (100%)</b>

Table 5.19 shows that the two bedroom and loft units had the highest number of respondents that had been in arrears. The GMHA at this stage is still able to manage the number of rental defaults. The lock out system for non-payers acts as a huge threat to the tenants and seems to limit the number of rental defaults. Due to the 177 unoccupied units in the complex, it will become increasingly difficult for the GMHA to stay financially viable if rental defaults should increase.

The GMHA should include the aspect of family size, age, employment and composition in the screening process and highlight the impact that the rental charges will have on the tenant's household income. This should also be part of the tenant-training programme.

Respondents were asked whether they saved any money at the end of each month. Those that indicated that they do save were asked to state the amount they save each month as tabulated in Table 5.20.

**TABLE 5.20: AMOUNT SAVED BY THOSE RESPONDENTS WHO DO SO (N= 150)**

AMOUNT SAVED PER MONTH	STATUS OF SAVINGS		n (%)
	Save	Do not save	
R50 - R200	28 (18.7%)	-	28 (18.7%)
R 201- R 500	17 (11.3%)	-	17 (11.3%)
R 501- R1 000	4 (2.7%)	-	4 (2.7%)
R1 001 +	3 (2%)	-	3 (2%)
NO RESPONSE	1 (0.7%)	-	1 (0.7%)
<b>TOTAL</b>	<b>53 (35.3%)</b>	<b>97 (64.7%)</b>	<b>150 (100%)</b>

Table 5.20 indicates that 35.3% of the respondents do save at the end of each month. Of the respondents, who save, 18.7% save between R50 and R200. This might seem low but in comparison to their household incomes and their monthly expenditures, it is a fair amount to save.

The GMHA should, through its tenant training programme, encourage tenants to save, as they might need the funds for emergencies, and it could prevent them from defaulting on their rent.

Respondents were asked to indicate their preferred rental payment options (Table 5.21).

**TABLE 5.21: PREFERRED RENTAL PAYMENT OPTION (N=150)**

<b>PREFERRED RENTAL PAYMENT OPTION</b>	<b>n (%)</b>
BANK DEPOSIT	35 (23.3%)
DEBIT ORDER	14 (9.3%)
CASH AT THE GMHA OFFICE	92 (61.3%)
PAYROLL DEDUCTION	6 (4%)
NO RESPONSE	3 (2%)
<b>TOTAL</b>	<b>150 (100%)</b>

The tenants of the Hope City complex are given a number of monthly rental payment options. Table 5.21 shows that the majority of the respondents (61.3%) prefer the cash payment option at the GMHA management office.

The bank deposit was the second most preferred option. This system would be the best for the GMHA as the monthly rental payments would go directly into the GMHA's banking account. The current popular system of cash payment is not a wise option for the GMHA as they have been handling big amounts of cash at the end of each month.

The GMHA should consider encouraging the tenants to pay their rent via debit order. Only 9.3% of the respondents had preferred this payment option. Payment by debit order would ensure that rentals are paid directly into the bank account of the GMHA. This option will be to the advantage of the GMHA as with plans of developing more housing stock, it might be difficult to monitor the large number of cash rental payments.

#### **5.4 RESPONDENTS' HOUSING SATISFACTION**

The housing satisfactions of the respondents were determined by examining a variety of satisfaction indicators relating to the housing unit that the respondents were renting, the housing complex, and



the management of the complex by the GMHA. Satisfaction was indicated on a scale where a rating of one indicated that the respondent was completely dissatisfied, two indicated dissatisfied, three indicated satisfied and four indicated completely satisfied. Furthermore the respondents were also asked to motivate their levels of satisfaction. Where relevant these motivations are quoted in the text.

To calculate the mean of the respondents' satisfaction with different indicators, 150 response values were computed as scale ratings of 1 to 4. The added averages were divided by 150 to get the mean ratings. This calculation was conducted for the unit, the complex and the management indicators.

To highlight the discussion on the satisfaction with different aspects of the housing unit and complex, please refer to photographs in *Addendum D*.

#### 5.4.1 Satisfaction with the unit

The respondents' satisfaction with the housing unit was assessed based on their experiences of the size, privacy, security, lighting, ventilation, noise, temperature and safety of the housing unit. Their satisfaction levels with the different rooms of the unit and with the housing unit as a whole were also assessed.

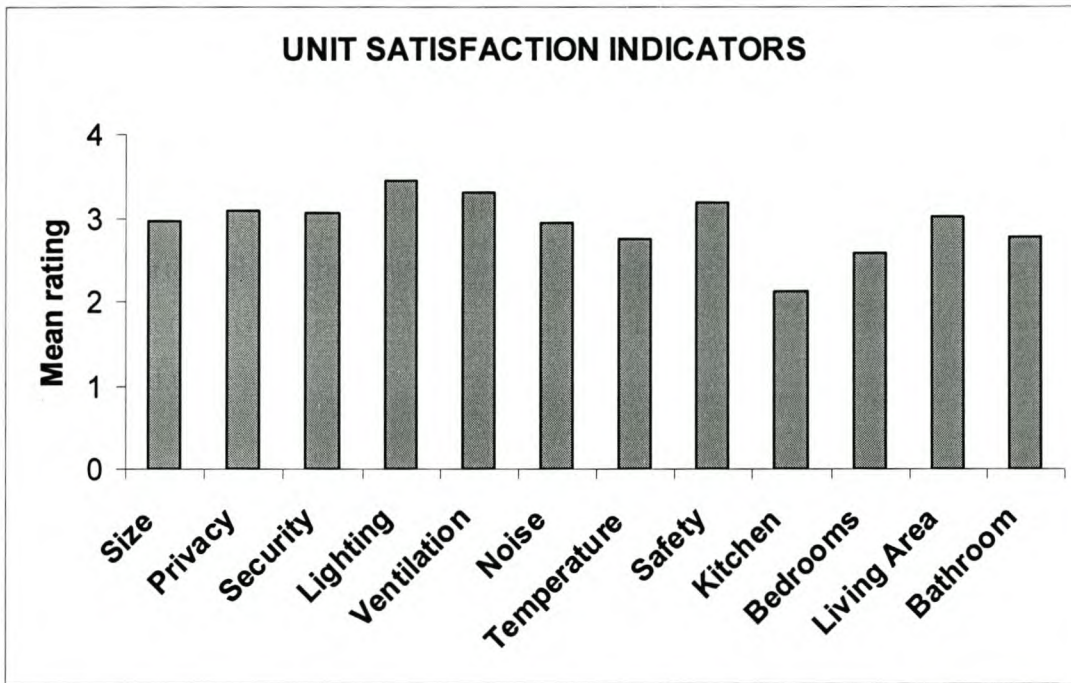
Table 5.22 indicates the respondents' mean satisfaction ratings concerning the housing unit indicators.

**TABLE 5.22: MEAN SATISFACTION RATINGS WITH THE UNIT INDICATORS**

UNIT SATISFACTION INDICATORS	MEAN
SIZE OF UNIT	2.95
PRIVACY	3.08
SECURITY	3.07
LIGHTING	3.45
VENTILATION	3.29
NOISE	2.94
TEMPERATURE	2.74
SAFETY	3.18
KITCHEN	2.12
BEDROOMS	2.59
LIVING AREA	3.02
BATHROOM	2.78

Table 5.22 and Figure 5.5 indicate that the respondents' highest satisfaction levels were with the amount of artificial and natural lighting (3.45) in the units. The light switches were placed within reach and there was sufficient artificial lighting. The sunlight coming in during the summer season was also said to be good.

These mean satisfaction ratings are also visually presented in Figure 5.5.



**FIGURE 5.5 MEAN SATISFACTION LEVELS WITH THE UNIT INDICATORS**

The mean ratings indicated in Figure 5.5 represent the following:

- 1 = Completely dissatisfied
- 2 = Dissatisfied
- 3 = Satisfied
- 4 = Completely satisfied

Respondents were satisfied with the ventilation in the unit (3.29), they stated that there is enough fresh air when one opens doors and windows. There are air sufficient air vents in the units for good ventilation. Though some respondents in the units with a loft complained that there was not enough fresh air coming into the lofts as the windows were too small.

*“In the evenings we can smell our neighbours food, and it takes long for the smell to leave our flat.”*

The respondents appeared to be satisfied with the safety of the units, the mean satisfaction rating being 3.18. The respondents were also satisfied with the security in the units (3.07). Yet, they would like to see the units provided with burglarproofing and security doors.

Residents' sense of security could be viewed as having a major influence on their level of satisfaction with their home. Table 5.23 indicates the respondents' level of satisfaction with the security that the units offer.

**TABLE 5.23: LEVEL OF SATISFACTION WITH SECURITY IN THE DIFFERENT TYPES OF UNITS (N=150)**

UNIT SECURITY	TYPE OF UNIT			n (%)
	2-bed	2-bed + loft	3-bed	
COMPLETELY DISSATISFIED	13 (8.7%)	1 (0.7%)	-	14 (9.3%)
DISSATISFIED	20 (13.3%)	6 (4%)	-	26 (17.3%)
SATISFIED	35 (23.3%)	10 (6.7%)	1 (0.7%)	46 (30.7%)
COMPLETELY SATISFIED	33 (22%)	27 (18%)	4 (2.7%)	64 (42.7%)
<b>TOTAL</b>	<b>101 (67.3%)</b>	<b>44 (29.3%)</b>	<b>5 (3.3%)</b>	<b>150 (100%)</b>

Table 5.23 shows that most of the respondents (73.4%) were either satisfied or completely satisfied with the security provided by the units. Of the 101 respondents residing in the two bedroom units, 67.3% are either completely satisfied or satisfied with the security, while the remaining 32.7%, are either completely dissatisfied or dissatisfied. There are 44 respondents residing in the two bedrooms and loft units and 84.1% of them are either completely satisfied or satisfied, while 15.9% are either completely dissatisfied or dissatisfied. Therefore, it seems that the respondents feel that the two bedrooms with loft provide more security, this could be because most of these units are on the first floor of the complex blocks. Residents in high-rise buildings tend to gain the impression that the higher their unit, the safer it is.

Statistically there was a significant difference in the satisfaction levels of respondents living in different unit types regarding the security that the units provide. (Pearson's chi-square  $U= 14.9559$ , degrees of freedom 6,  $p=0.020609$ ). The respondents in the two bedroom with loft units were significantly more satisfied with the security that the units provided.

*“The area in which the complex is situated is safe, therefore we don't really feel unsafe in the units but for more safety it would be nice to have burglar bars on our windows and doors”*

The noise level (2.94) from adjoining units appeared to bother the respondents. Comments were made by the respondents of hearing neighbours' arguments and activities through the walls, which was disturbing. Yet, this is part of high-density living. It is however, interesting to note that tenants were satisfied with the privacy (3.08) they had in the units. The GMHA should consider more soundproofing between the individual units in the complex.

***“The units are not sound proof enough as we can hear the people upstairs moving their furniture at night, and closing their doors”***

Other respondents who were satisfied with the way in which the unit handles noise stated that

***“The children playing outside can be heard from inside the unit but is not such a disturbance”***  
and ***“The neighbours are not in our business, so we are OK”***.

Regarding the living area in the units, a mean satisfaction rating of 3.02 was recorded. The respondents felt that the area was big enough and that their couches and television stands fitted well into the space provided by the living area.

***“Our wall unit and the couches fit in well, and there is space for us to walk in the living area”***

Respondents tended to experience low satisfaction levels (2.12) with the kitchen area of the unit. When this issue was probed, it appeared that the respondents felt that the design of the kitchen area was not satisfactory and there were not enough storage space and workspace in the kitchen.

The bedrooms were seen to be too small (2.59), because after the furniture had been placed in the unit, very little space remained. There are no clothing cupboards in the second bedroom. This means that tenants have to buy their own wardrobes, which takes up a lot of space.

***“The addition of a wardrobe in the second bedroom would be nice”***

The respondents were also dissatisfied with the temperature in the unit (2.74). They felt that some units were cold during the winter seasons. Although the respondents were satisfied with the amount of light inside the unit (3.45) some stated that their units were cold during the winter seasons as they do not gain enough sunlight. The GMHA should remind the designers of the units, that the units need to be designed in a way that heat can be retained from the sun. This would assist tenants in saving on heating costs.

***“These units are way too cold in the winter, and in the summer the lofts get too hot”***

The bathroom area (2.78) was also rated as dissatisfactory by the respondents. They felt that the space available in the bathroom was too small and that the fittings were of poor quality, hence they were always breaking or the baths cracking. Furthermore, respondents felt that the location of the bathrooms was too close to the main door. The GMHA needs to realize that housing must be functional in terms of user behaviour and satisfaction (Nissen *et al*, (1994:144). This means that a living space should contribute positively to the comfort and efficiency within which activities take place because when housing conditions fail to provide a satisfactory environment and thus produce dissatisfaction, it leads to a lowered perceived quality of life (Van Wyk, 1989:19). Therefore these bathroom spaces should, during the design phases be planned in such a way that they provide optimum functionality to the occupants.

Picture 5.1 shows cracks that have occurred in the bath. (See *Addendum D*)

***“The bathroom is too close to the front door entrance”***

Respondents’ mean satisfaction rating with the size of the unit was 2.95, which is close to the positive satisfaction level of 3. The respondents that were satisfied with the size of the unit stated that they felt that the unit did cater for their current family needs, as the units were big enough for all family members. Those that were dissatisfied stated that their belongings did not fit in well and there was not enough room for the family members. It is difficult for the GMHA to plan on developing larger units, as the larger the unit the more costly the development of the unit becomes. Furthermore, developing such units may lead to higher rental charges for tenants.

***“The unit is big enough for my family”***

To address the need for space, recreational or entertaining space and even allocated garden space should be considered for the use of the respondents. The GMHA will have to consider the needs of families with children, as this appears to form a large part of the target market of the organisation. This should be considered during the design phase of future projects.

Table 5.24 examines the number of respondents who have family members who are disabled and the floor level that these respondents are staying on.

**TABLE 5.24: DISABLED FAMILY MEMBERS RESIDING ON DIFFERENT FLOOR LEVELS (N=150)**

FLOOR LEVEL	DISABLED FAMILY MEMBERS		n (%)
	Not disabled	Disabled	
GROUND FLOOR	73 (48.7%)	7 (4.7%)	80 (53.3%)
FIRST FLOOR	70 (46.7%)	-	70 (46.7%)
<b>TOTAL</b>	<b>143 (95.3%)</b>	<b>7 (4.7%)</b>	<b>150 (100%)</b>

Table 5.24 shows that 53.3% of the respondents reside on the ground floor, and that the households with disabled members (4.7%) all occupy units on the ground floor. The nature of the disabilities ranges from blindness to semi-paralysis. The GMHA seems to be sensitive to the needs of these respondents by allocating the ground floor units to them. The current designs of the units do, however, not cater for the disabled who are bound to a wheelchair. The GMHA should consider developing some units that cater for persons with special needs in one of their future housing projects. This aspect should also be included in the tenant screening process.

Respondents were asked whether they were able to choose the units that they are occupying. Twenty respondents indicated that they did not have a choice as management allocated the unit to them. Table 5.25 shows the reasons that motivated the respondents to choose a specific unit.

**TABLE 5.25: REASONS FOR CHOICE OF PARTICULAR UNIT (N=150)**

REASON FOR CHOICE OF UNIT	CHOICE OF UNIT		n (%)
	Had a choice	Had no choice	
Unit seemed quite, private and safe	23	-	23 (45.3%)
Liked the location of the unit	40	-	40 (26.7%)
The size of the unit seemed like it would suite our needs	15	-	15 (10%)
Liked the design of the unit	40	-	40 (26.7%)
The unit monthly rental seemed affordable	11	-	11 (7.3%)
I did not choose as management allocated this unit to me	-	20	20 (13.3%)
No response	-	-	1 (0.7%)
<b>TOTAL</b>	<b>129 (86%)</b>	<b>20 (13.3%)</b>	<b>150 (100%)</b>

Table 5.25 indicates that 86% of the respondents chose the units they are currently residing in, while 13.3% stated that they were allocated their housing units by the GMHA management. A majority of the respondents who had a choice of housing unit seem to have chosen their particular units because of the location (31%) and the design of the unit (31%).

The respondents were asked which tenure option they preferred at this stage in their lives as well as the reasons for their choice of tenure (Table 5.26).

**TABLE 5.26: PREFERRED TENURE OPTION AND THE REASONS THERE FOR (N=150)**

REASON FOR CHOICE OF TENURE	PREFERRED TENURE OPTION AT THIS STAGE OF LIFE		n (%)
	Ownership	Rental	
Cheaper to own a house, it is an investment	33 (22%)	3 (2%)	33 (22%)
Owning gives one a sense of pride	10 (6.7%)	-	10 (6.7%)
Owning is better as the property belongs to you	50 (33.3%)	3 (2%)	53 (35.3%)
Renting is more affordable	2 (1.3%)	44 (29.3%)	46 (30.7%)
Renting provides one with flexibility to move when one pleases	-	1 (0.7%)	1 (0.7%)
No response	2 (1.3%)	2 (1.3%)	4 (2.7%)
<b>TOTAL</b>	<b>97 (64.7%)</b>	<b>53 (35.3%)</b>	<b>150 (100%)</b>

Table 5.26 reveals that the majority (64.7%) of the respondents stated that they prefer to own a home rather than to rent (35.3%). Of the respondents that prefer to own, 50 felt that owning a home is better as one would have the freedom to do what one wants in and around the property. One could reason that the majority of the respondents might not be feeling a sense of belonging in the Hope City complex because of their desire to purchase a place of their own. The respondents are forced by their financial position to rent at this stage in their lives even though they prefer to own. Of the 53 respondents that prefer to rent 44 (83%) felt that renting is affordable.

Datta & Jones (2001:338) state that the attraction to home ownership is to some extent constructed by governments' support through housing subsidies as well as pronouncements that home ownership is a sound investment. Another reason could be that home ownership renders social status and emotional security to the individual and the family (Morris & Winter, 1978:110). Furthermore home ownership places the resident in a better financial position than that of the renter because housing can be used as collateral.

After determining the respondents' satisfaction levels with the different unit indicators, they were asked to rate their satisfaction with the housing unit as a whole. They were also asked to explain their answer. These results are provided in Table 5.27.

**TABLE 5.27: REASONS FOR OVERALL LEVELS OF SATISFACTION WITH THE UNITS (N=150)**

REASONS FOR SATISFACTION WITH THE UNITS	LEVEL OF OVERALL SATISFACTION WITH UNITS					n (%)
	Completely Dissatisfied	Dissatisfied	Satisfied	Completely Satisfied	No response	
The unit is big enough for the family and belongings	-	-	34 (22.7%)	19 (12.7%)	-	53 (35.3%)
The unit feels like home and meet the tenants' needs	-	-	40 (26.7%)	22 (14.7%)	-	62 (41.3%)
The monthly rental is affordable	-	-	5 (3.3%)	-	-	5 (3.3%)
The unit is too small for the family	-	6 (4%)	1 (0.7%)	-	-	7 (4.7%)
The unit could have been designed better	1 (0.7%)	12 (8%)	3 (2%)	-	-	16 (10.7%)
The monthly rental is expensive	2 (0.7%)	4 (2.7%)	-	-	-	6 (4%)
No response	-	-	-	-	1 (0.7%)	1 (0.7%)
<b>TOTAL</b>	<b>3 (2%)</b>	<b>22 (14.7%)</b>	<b>83 (55.3%)</b>	<b>41 (27.3%)</b>	<b>1 (0.7%)</b>	<b>150 (100%)</b>

Table 5.27 shows that the majority of the respondents were either completely satisfied or satisfied with their unit as a whole (82.7%). Respondents gave a number of reasons for their levels of satisfaction with the unit as a whole. Of the 124 respondents that were completely satisfied or satisfied, 42.7% (34+19) felt that the units were big enough for family members and accommodated their furniture and other belongings, while 50% (40+22) stated that the units felt like home and it met their needs. If space is well designed to accommodate individuals' life-styles and needs, the individual will feel more satisfied than if merely more space is provided (Shoul, 1993:56, Lindamood & Hanna, 1979:83).

For some respondents the units seem to be big enough for their belongings, thereby creating a sense of pride and a feeling of being at home in the unit. Though others felt that the units were too small and stated that they felt the bedrooms and kitchen areas were not meeting their needs. This is because their bedroom units could not fit into the bedrooms, and there were no wardrobes in the second bedroom. The kitchen was lacking cupboards as well as working space.

The GMHA should in their tenant-training try to provide tenants with tips on furnishing their units for optimum effectiveness. This would help the tenants with environmental settings and space saving in their homes.



Table 5.28 presents a cross-tabulation of the race of the respondents and their levels of satisfaction regarding the unit as a whole.

**TABLE 5.28: RACE AND OVERALL LEVEL OF SATISFACTION WITH THE UNIT (N=150)**

RACE	LEVELS OF SATISFACTION WITH THE UNIT					n (%)
	Completely dissatisfied	Dissatisfied	Satisfied	Completely satisfied	No response	
BLACK	1 (0.7%)	12 (8%)	29 (19.3%)	13 (8.7%)	-	55 (36.7%)
COLOURED	-	2 (1.3%)	4 (2.7%)	2 (1.3%)	-	8 (5.3%)
INDIAN	-	-	1 (0.7%)	-	-	1 (0.7%)
WHITE	2 (1.3%)	17 (11.3%)	40 (26.7%)	26 (17.3%)	1 (0.7%)	86 (57.3%)
<b>TOTAL</b>	<b>3 (2%)</b>	<b>31 (20.7%)</b>	<b>74 (49.3%)</b>	<b>41 (27.3%)</b>	<b>1 (0.7%)</b>	<b>150 (100%)</b>

The majority of respondents were completely satisfied or satisfied (76.7%) with their housing units as a whole. In order to determine whether there were any significant differences in the satisfaction levels of the respondents from different race groups, the Pearson chi-square analysis was done. No significant difference was found ( $U = 2.18600$ , degrees of freedom is 9,  $p = 0.988172$ ). Race was therefore not a determining factor concerning satisfaction levels with the housing units as a whole. Considering that satisfaction levels regarding the different unit indicators contribute to the overall satisfaction with the housing unit, the highest absolute correlation influence was determined using the Spearman correlation of  $r$ . Calculate  $H = r^2 (k-1)$ , reject the null-hypothesis of  $r$ -correlation. If  $H$  is greater than or equal to the appropriate critical value of Chi-square with 1 degree of freedom.

Table 5.29 indicates the correlations.

**TABLE 5.29: CORRELATION BETWEEN SATISFACTION WITH THE UNIT INDICATORS AND OVERALL SATISFACTION WITH THE UNIT**

UNIT INDICATOR	SPEARMAN RANK CORRELATIONS
SIZE	0.25 *
PRIVACY	0.26 *
SECURITY	0.14
VENTILATION	-0.04
LIGHTING	0.09
NOISE	0.13
SUMMER TEMPERATURE	0.28 *
WINTER TEMPERATURE	-0.21
SAFETY	0.25 *
KITCHEN	0.19 *
BEDROOMS	0.29 *
LIVING AREA	0.18 *
BATHROOM	0.08
<b>OVERALL UNIT</b>	<b>1.00</b>

\*= significance of 5% level

Table 5.29 shows that the bedrooms in the unit have the highest correlation with the respondents' levels of satisfaction regarding their housing unit as a whole. Therefore, should the respondents' satisfaction with the bedrooms increase the respondents level of satisfaction with the overall unit will increase. This is a clear indication to the GMHA that they need to correct the faults concerning the bedroom space in future housing projects.

From Figure 5.5 it appears that respondents are satisfied with the units that have been provided in the Hope City complex. More will have to be done by the GMHA however to attain the respondents complete satisfaction. In determining the respondents' satisfaction with their housing, it was also necessary to explore their experiences concerning high-density living. This will be discussed in the next section.

#### **5.4.2 Satisfaction with the complex**

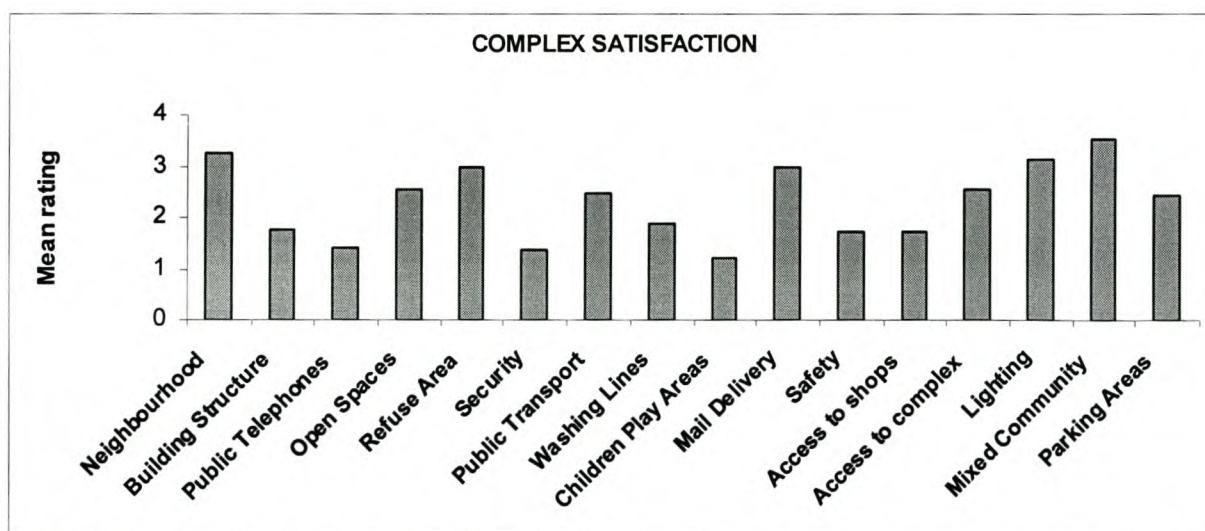
To determine the respondents' satisfaction with the complex, the respondents' experiences with regard to the following were measured; the neighbourhood in which the complex is located, the building structure that makes up the Hope City complex, the availability of public phones in the complex, the availability of open spaces for recreational activities in the complex, the management of the refuse area, the security in the complex, accessibility to public transport, the location of the washing lines, the mail delivery system in the complex, the safety in the complex, the accessibility to shops from the complex, the gate access into the complex, the street lighting, the parking areas, mixed community and the available play space for children.

Table 5.30 indicates the respondents' average satisfaction ratings concerning the housing complex indicators.

**TABLE 5.30: MEAN SATISFACTION RATINGS WITH THE COMPLEX INDICATORS**

COMPLEX INDICATOR	MEAN
NEIGHBOURHOOD	3.27
BUILDING STRUCTURE	1.76
PUBLIC TELEPHONES	1.40
OPEN SPACES	2.53
REFUSE AREAS	2.97
COMPLEX SECURITY	1.38
PUBLIC TRANSPORT	2.48
WASHING LINES	1.88
CHILDREN'S PLAY AREAS	1.23
MAIL DELIVERY	2.99
COMPLEX SAFETY	1.71
ACCESS TO SHOPS FROM COMPLEX	1.71
ACCESS INTO COMPLEX	2.55
LIGHTING	3.12
LIVING IN A MIXED COMMUNITY	3.54
PARKING AREAS	2.42

Table 5.30 shows the different mean satisfaction ratings with the complex indicators for the Hope City Complex. These numbered ratings indicate the average ratings in numeric order for Figure 5.6.



**FIGURE 5.6: MEAN SATISFACTION LEVELS WITH THE COMPLEX INDICATORS**

The mean ratings indicated in Figure 5.6 represent the following:

- 1 = Completely dissatisfied
- 2 = Dissatisfied
- 3 = Satisfied
- 4 = Completely satisfied

Figure 5.6 and Table 30 shows that the respondents were satisfied with living in a mixed community (3.54), and the location of the neighbourhood (3.27), lighting in the complex (3.12), they were almost satisfied with the mail delivery system the complex uses (2.99) and the condition of the refuse areas in the complex (2.97). Furthermore, respondents were dissatisfied with space available for children to play (1.23), security in the complex (1.38), the accessibility to public telephones (1.40), safety in the complex (1.71), the quality of the building structure (1.76), the accessibility to shops from the complex (1.71), the location of the washing lines (1.88), the accessibility to public transport from the complex (2.48) and the use of open spaces for recreational activities (2.53).

Respondents are highly satisfied with the fact that they are living in a mixed community (3.54). There is a sense of integration and tolerance in the complex with tenants getting along well.

***“It is a new South Africa, and here at Hope City we are a rainbow nation”***

The respondents reported that they were satisfied with the location (3.27) of the complex. The respondents said that they liked the neighbourhood, as it was quite and peaceful. Therefore, if they were provided with public transport, they would be even more satisfied with the location of the complex. Prior to conducting the survey one would have thought that the respondents would indicate a high dissatisfaction level in relation to the location of the Hope City housing complex because the complex is located on the periphery of the Middelburg suburbs, in an area which is in the process of development, making it fairly far from the city centre. Wilson in Johnson & Hurter (1998:258) emphasises that to ensure the survival of low-income families, housing projects need to be located near employment opportunities. This would ensure that families gain a monthly income to enable them to pay for their housing and services as well as to decrease the high transport costs which encourage household poverty (Briley, 1999:6).

***“The area is quite and far from the busy streets of town”***

Respondents were satisfied with the amount of street lighting (3.12) provided, there are enough lights and the complex is well lit at all times. This should be a factor that is beneficial to the security of the complex.

***“The streetlight are always switched on in the evening, making it safe for us to walk around at night”***

The mean calculation of the respondents' satisfaction with the mail delivery system in the complex is 2.99, which came very close to the positive satisfaction rating of 3. Therefore, it can be said that the respondents were almost satisfied with the mail delivery system. The current mail delivery system in place in the Hope City complex requires man power from management as all the mail for the complex is received at the office, and then has to be sorted and distributed by the staff, to the tenants' doors, this creates additional work for the managing staff.

***“Our letters and rental statements are always placed under our doors and they are safe as it is in the unit”***

Some of the respondents that were dissatisfied about the mail delivery system stated that

***“Everyone should have a postbox in the complex as we end up not getting the different shop pamphlets showing discounts and sales, as management does not deliver these pamphlets”***

The respondents were also not satisfied that the rental accounts are placed under the unit doors. They state that it can be lost or misplaced by the respondent when it is delivered in this manner. Should all the tenants get post box addresses, the GMHA would have to mail the monthly rental accounts to the tenants, which could add additional postage costs for the organisation. Yet, if post boxes were installed in the complex, the rental accounts could be delivered to the boxes, with no additional postage charges. The management could even consider pigeonhole type post boxes placed inside the management maintenance office, where tenants can come and collect their post.

Respondents were somewhat dissatisfied with the way the refuse areas are managed in the complex (2.97), but because the mean rating is close to the mean satisfaction rating of 3.00 this indicates that some respondents were satisfied with the refuse areas in the complex. Those respondents that were dissatisfied were concerned that the refuse areas were not kept locked at all times, making them easily accessible for children to play in. Another problem with the refuse areas was that it was placed too near to some of the units. This attracts flies and causes smells in the summer seasons, which could create a health risk to the residents and their children. Respondents also felt that black refuse bins must be provided for each block. Those that were satisfied stated that the refuse areas were well kept and the municipality collects the refuse on a weekly base.

Picture 5.2 shows the unhygienic state of the refuse areas, as it was at the time of the research. (See *Addendum D*).

***“Worsie (caretaker) always tells people to lock the gates after they have thrown their bags in there, sometimes he also comes and locks the gates”***

***“This rubbish dump is too close to my flat, and when it is summer I get a lot of flies and the smell is bad”.***

The maintenance management must on a regular basis check that the refuse areas are being kept clean. The tenant-training programme sessions should also cover the refuse removal system in the complex in more detail.

The entrances (2.55) into the complex was dissatisfactory to the respondents, as some stated that the two access gates into the complex are both situated in front of the complex, there should be two smaller pedestrian gates at the back of the complex which would make it easy for tenants to get to the neighbouring shops. Their other concern was that the two gates created traffic congestion during peak hours, as tenants leave for work and on their arrival.

Picture 5.3 shows one of the entrances into the complex. (See *Addendum D*).

***“The security guards are always playing with guns in front of our children, this is not safe”***

***“The caretaker has made us bring our ID pictures to him as he promised that we would get car stickers that show who stays in the complex, but we have not received the cards yet”***

The GMHA management could consider creating two pedestrian gates, but this would mean that more security personnel have to be employed which would imply added running costs. These gates will have to be monitored to limit crime in the complex. Identity discs should be placed on the tenants' cars for security purposes.

Lewis (1994:10) refers to Maslow's theory that safety and security is a basic human need and therefore it is imperative that housing meet these needs. It is of great concern that the respondents' level of satisfaction with regard to the complex security (1.38) and the safety (1.71) was extremely low as indicated in Figure 5.6. The respondents stated that they are dissatisfied with the security at the gate as they are not able to distinguish between tenants, visitors and trespassers in the complex as tenants or visitors are not required to sign in when entering the complex. They also mentioned that the guards do not walk through the complex to check for any irregularities around the complex.

The management of the complex has placed speed limit signs and speed-humps in the parking and driving areas to limit the speeding of cars that could be dangerous to children.

Picture 5.4 shows the speed limit signs and the speed humps in the parking and driving areas. (See *Addendum D.*)

***“The security guards don’t walk around the complex at night to check that everything is alright, they just sit at the gate”***

Table 5.31 presents a cross-tabulation of respondents’ levels of satisfaction with the complex security and the type of unit in which they reside.

**TABLE 5.31: LEVEL OF SATISFACTION WITH THE COMPLEX SECURITY IN DIFFERENT TYPES OF UNITS (N=150)**

COMPLEX SECURITY	TYPE OF UNIT			n (%)
	2-bed	2-bed + loft	3-bed	
COMPLETELY DISSATISFIED	61 (40.7%)	33 (22%)	5 (3.3%)	99 (66%)
DISSATISFIED	25 (16.7%)	5 (3.3%)	-	30 (20%)
SATISFIED	6 (4%)	1 (0.7%)	-	7 (4.7%)
COMPLETELY SATISFIED	3 (2%)	-	-	3 (2%)
NO RESPONSE	5 (3.3%)	6 (4%)	-	11 (7.3%)
<b>TOTAL</b>	<b>95 (63.3%)</b>	<b>39 (26%)</b>	<b>5 (3.3%)</b>	<b>150 (100%)</b>

Table 5.31 shows that 86% of the respondents are either completely dissatisfied or dissatisfied with the security in the complex (129). Of these 129 respondents, 66.7% are from the 2 bedroom units, 29.5% from the two-bedroom with loft units and 3.9% from the three bedroom units. The GMHA should pay urgent attention to tenants’ complaints regarding the security of the complex.

The mean satisfaction levels on the complex indicator regarding to the play areas for children was rated as having the lowest satisfaction level (1.23). As already explained most of the children (71%) were younger than 12 (Table 5.7) and most of the respondents were parent(s) with young children (51.7%) (Table 5.8). As the results of the research indicate that the GMHA seems to be attracting young families, the need for the creation of play areas and the supply of play area equipment, should be addressed urgently. At present most of the children in the complex are playing in the parking areas, which creates a safety hazard, and a major concern for the parents.

***“Children are always playing in the parking areas because they have no where else to play”***

***“Children are not safe they need parks in the complex for them to go and play”***

Open areas for recreational use (2.53), such as braai areas where tenants can socialise were not specifically provided for in the complex. This is dissatisfying to the respondents as they feel that these areas could be used for “get together” of the residents of Hope City, so that they can get to know each other better.

***“There is this red sand everywhere in the complex, grass should be planted so that we can have braais with all the other people in the complex”***

Respondents were asked whether they felt that the complex needed recreational facilities, and if yes, what types of recreational facilities or activities they would like to see in the complex. (Table 5.32).

**TABLE 5.32: NEED FOR RECREATIONAL FACILITIES AND THE TYPES OF FACILITIES RECOMMENDED (N=150)**

TYPE OF FACILITIES	NEED FOR FACILITIES			n (%)
	Need facilities	No need for facilities	No response	
CLINICS	13	-	-	13 (8.7%)
PLAYGROUNDS	61	-	-	61 (40.7%)
SHOPPING COMPLEX	15	-	-	15 (10%)
SWIMMING POOLS AND BRAAI AREAS	29	-	-	29 (19.3%)
COMMUNITY HALL	15	-	-	17 (11.3%)
CAR WASH	2	-	-	2 (1.3%)
NO NEED FOR FACILITIES	-	8 (5.3%)	-	8 (5.3%)
NO RESPONSE	5	-	2	14 (9.3%)
<b>TOTAL</b>	<b>140 (93.3%)</b>	<b>8 (5.3%)</b>	<b>2 (1.3%)</b>	<b>150 (100%)</b>

Table 5.32 shows that (93.3%) of the respondents feel that there is a need for recreational facilities in the complex. The dominating need is the need for children’s plays areas. The GMHA could consider providing socialising and play areas throughout the complex. There should be some braai areas and at least two play areas for the whole complex. Should facilities be provided the GMHA should ensure that during their tenant-training programme, tenants are reminded to take responsibility for their children and watch where they are playing in the complex in order to avoid accidents from happening. Furthermore, the GMHA should ensure that the recreational facilities are located and designed in a way that will prevent social stress occurring. Too many unwanted interactions with neighbours decreases ones level of privacy and could result in negative relationships arising within the neighbourhood (Wilson & Baldassare, 1996:39).



Picture 5.5 (See *Addendum D*) shows that the respondents are committed to use the open spaces to create gardens in order to beautify their housing environment as well as to personify their housing units from the outside. Some respondents stated that the lack of watering facilities outside the units made it difficult to maintain their gardens.

The respondents were dissatisfied with the quality of the complex building structure (1.76). They seem to feel that the quality and the workmanship was poor. When there are mine blasts in the neighbouring industries, the blocks tend to shake and this result in the walls cracking.

***“The workmanship looks like it was cheap and hurried as the pipes are always bursting and the walls cracking”***

The respondents also stated that they are dissatisfied with the access to public telephones within the complex (1.40). This is because there are only two telephones provided in the complex (see Picture 5.6 in *Addendum D*). The telephones are located near the maintenance office, which is too far a walk for most of the tenants in the complex. Respondents feel that more telephones are to be installed throughout the complex, preferably one for each block.

Respondents were mostly dissatisfied with the location of the washing lines (1.88) in the complex. The respondents stated that there were not enough washing lines in the complex for all the tenants to use. The washing lines are not specifically allocated to certain blocks in the complex, therefore tenants can use any of the lines in the complex. In Picture 5.7 the location of the washing lines in the complex can be seen (*Addendum D*).

***“We need a longer washing line, as there is no place to hang our linen”***

***“The washing lines are too close to the fence which is close to the street, and this attracts thieves that will steal our clothes”***

Given that many of the tenants in the complex were working during the day, it was difficult for them to watch their laundry while it was hanging on the washing lines. Washing was therefore left hanging for long periods and was prone to being stolen. Ideally, the respondents would like more washing lines in the complex and these should be within visible range of the respondents' units, so that they can “keep an eye” on the washing.

The complex has a laundromat where tenants can have their washing done at a set fee. This is to the advantage of the working tenants as they can drop off in the mornings and pick it up in the evening. The laundromat is open from 7am to 9pm on weekdays and 7am to 5pm on the weekends.

The accessibility of shops from the complex (1.71) and the accessibility of public transport from the complex (2.48) were also dissatisfying to the respondents. This is due to the fact that there are no shops within the complex and as a result those respondents that do not own cars have to walk far to the nearest shops. The fact that there is limited public transport from the complex makes the accessibility worse. Many of the complex tenants and their families have to walk to different locations and this is unsafe for children.

The respondents were asked what mode of transport they use. The responses are tabulated in Table 5.33.

**TABLE 5.33: HOUSEHOLDS' MOST FREQUENTLY USED MODE OF TRANSPORT TO DIFFERENT DESTINATIONS; (N=150)**

Destination	Bus	Own car	Taxi	Train	Walk	Lift club/Car pool
WORK	-	73	10	-	12	34
SCHOOL	2	13	14	-	32	30
SHOPS	-	88	7	-	35	7
SOCIAL EVENTS	1	86	11	-	15	15

Table 5.33 indicates that 73 of the respondents used their own cars to get to work, while 34 make use of a lift club or car pool. Most of the children in the complex walk to school, or make use of a lift club or car pool in order to get to school. Most of the respondents reported to use their own cars to attend social events.

*“There is no public transport we have to walk all the time, this is not safe for children and the old people living here”*

*“The management should create a bus system that will take people into town at least once a week, and people must pay for this”*

For those respondents that do not own cars, accessing amenities is a hassle as there is a serious lack of public transport in and around the Hope City complex.

The social housing products' goal is to offer the resident affordable subsidized housing that is located in close proximity to amenities like shops, schools etc (Social Housing Foundation, 2000:26). The Hope City housing complex is failing to meet these goals. It is therefore recommended that the GMHA consider operating a small convenience store in the complex where tenants can access basic commodities. Management should, however, control the shop as well as regulate what is being sold in the shop. This is to avoid the sale of alcohol and the creating of shebeens (pubs) in the complex. Public transport on the other hand can not be provided by the GMHA, but with the development of surrounding areas there might be an even higher demand for transport and taxis will start doing their rounds in the area.

***“The shops are too far especially if you don’t have a car, the management should have a tuck-shop in the complex so that we can buy bread and milk”***

Respondents were dissatisfied with the parking areas (2.42) in the complex. They felt that their cars were not safe as children played in the areas, and might do damage to the cars. They also state that maintenance management had promised to allocate bays to each unit, as the advantage in doing so would be to create rules for parking areas in the complex and would eliminate the problem of other tenants parking in a space that do not belong to them. Another major issue was that the car parks do not have shades, leaving the cars in the sun.

***“Our cars are always parked in the sun, there are no shaded cars parks in the complex”***

***“The parking area is too far from my unit”***

The management of Hope City will have to consider installing car shades and allocating the parking bays to different units. Possibly an extra levy for parking can be charged. In the allocation of parking bays, each unit should be given two parking bays to allow for visitors. The Hope City management should also set rules regarding broken down cars and tenants working on their cars in the parking areas, as this creates dirt and grease on the ground as well as danger for children in the complex. Pictures 5.8 and 5.9 show a broken-down car in the parking area, and give a general idea of what the parking areas look like. (See *Addendum D*).

Apart from expressing their satisfaction with the different complex indicators, the respondents were also asked to rate their satisfaction with the Hope City complex as a whole and provide reasons for their level of satisfaction. Table 5.34 provides this information.

**TABLE 5.34: RESPONDENTS' REASONS FOR OVERALL SATISFACTION WITH THE HOUSING COMPLEX (N=150)**

REASONS FOR LEVEL OF SATISFACTION	LEVEL OF SATISFACTION WITH COMPLEX					n (%)
	Completely Dissatisfied	Dissatisfied	Satisfied	Completely Satisfied	No response	
It is a home and it meets our needs	-	-	27 (18%)	4 (2.7%)	-	31 (20.7%)
It is a secure, comfortable, quiet and attractive complex	-	-	56 (37.3%)	10 (6.7%)	-	66 (44%)
Efficient and effective management	-	-	17 (11.3%)	6 (4%)	-	23 (15.3%)
Management is not efficient and effective, bad communicators	3 (2%)	18 (12%)	-	-	-	21 (14%)
Complex is poorly designed and far from amenities	1 (0.7%)	5 (3.3%)	-	-	-	6 (4%)
No response	-	-	-	-	3 (2%)	3 (2%)
<b>Total</b>	<b>4 (2.7%)</b>	<b>23 (15.3%)</b>	<b>100 (66.7%)</b>	<b>20 (13.3%)</b>	<b>3 (2%)</b>	<b>150 (100%)</b>

Table 5.34 indicates that the majority of the respondents (80%) are either satisfied or completely satisfied with the housing complex as a whole. The main reasons provided for these levels of satisfaction were that the complex is secure, comfortable, quite and attractive (55%) and that it feels like home and meets their needs (25.8%). The GMHA should pay attention to the effective and efficient management of the complex as 14% of the respondents mentioned negative aspects regarding the management.

It was investigated whether the preferred tenure plays a role in the level of satisfaction of the respondents. Table 5.35 indicates the respondents' preferred tenure option, and their levels of satisfaction regarding the housing complex as a whole.

**TABLE 5.35: RESPONDENTS PREFERRED TENURE OPTION AND THEIR LEVEL OF SATISFACTION REGARDING THE COMPLEX AS A WHOLE (N=150)**

PREFERRED TENURE OPTIONS	SATISFACTION LEVELS FOR COMPLEX AS A WHOLE				n (%)
	Completely dissatisfied	Dissatisfied	Satisfied	Completely satisfied	
Rent	2 (1.3%)	8 (5.3%)	36 (24%)	5 (3.3%)	51 (34%)
Own	1 (0.7%)	15 (10%)	64 (42.7%)	15 (10.7%)	95 (64%)
No response	-	-	-	-	4 (2.7%)
<b>Total</b>	<b>3 (2%)</b>	<b>23 (15.3%)</b>	<b>100 (66.7%)</b>	<b>20 (13.3%)</b>	<b>150 (100%)</b>

Table 5.35 shows that most of the respondents prefer to own (64%) at this stage in their lives, and that they are satisfied or completely satisfied with the complex as a whole. Of the 51 respondents that prefer to rent at this stage in their lives, 80.4% (41) are either satisfied or completely satisfied with the complex. Datta & Jones (2001:338) state that most of the urban poor expect 'today's tenants to be tomorrow's owners', and they further believe rental to be a temporary housing solution. This exhibits an almost universal desire for ownership.

No significant difference was found ( $U=1.39003$ , degrees of freedom being 3,  $p= 0.707873$ ) between the respondents' preferred tenure option and their level of satisfaction with the complex as a whole.

In general the respondents were satisfied with their living environment, but would appreciate it if certain aspects could change for the better. Recreational facilities or playing areas for children were seen as a priority. The GMHA should address the issues that cause dissatisfaction among tenants, in order to try creating a complex that best suits the needs of the occupants. Keeping in mind that the Hope City complex is a form of cluster living, the complex in which their housing units exist, can effect the tenants overall satisfaction with their housing environment.

A home is a place where accumulated life experiences are created resulting in an emotional attachment to the house (Department of Housing, 1994:23). Emotional attachment to housing is exhibited through expressed pride in housing. To gain an understanding of the respondents' sense of pride with regard to their units a question was posed on whether they were proud to be a resident in the Hope City complex. They were also requested to give a reason for their specific answer. These responses are presented in Table 5.36.

**TABLE 5.36: REASONS FOR PRIDE/ LACK OF PRIDE IN BEING RESIDENTS OF HOPE CITY (N=150)**

REASONS	SENSE OF PRIDE			n (%)
	Yes	No	No response	
Monthly rental is affordable	7 (4.7%)	-	1 (0.7%)	8 (5.3%)
The complex is secure, friendly, comfortable and it provides one with enough privacy	73 (48.7%)	3 (2%)	-	76 (50.7%)
The complex is a nice place to call home as it suits our housing needs	33 (22%)	1 (0.7%)	-	34 (22.7%)
Not proud as renting is a waste of money	-	7 (4.7%)	-	7 (4.7%)
Other reasons	1 (0.7%)	20 (13.3%)	-	21 (14%)
No response	-	-	4 (2.7%)	4 (2.7%)
<b>TOTAL</b>	<b>114 (76%)</b>	<b>31 (20.7%)</b>	<b>5 (3.3%)</b>	<b>150 (100%)</b>

Table 5.36 shows that 76% of the respondents are proud of living in the Hope City complex and their main reasons being that they feel that the complex is secure, comfortable, friendly and that it provides enough privacy for them. There were 33 respondents that stated that they were proud because the complex is a place to call home and that it suits their needs. Only 20.7% of the respondents state that they are not proud of staying in the complex. The “other” reasons (14%) provided by the respondents were that they felt that renting is a waste of money, that management treats tenants badly, and that the complex is perceived by non-residents as housing for the low income.

Tenants tend to recommend housing that they are proud of, and that is affordable to their peers. The respondents were asked whether they would recommend the Hope City Complex to their friends and family. The results are presented in Table 5.37.

**TABLE 5.37: SENSE OF PRIDE IN THE COMPLEX AND WILLINGNESS TO RECOMMEND IT TO FRIENDS (N= 150)**

SENSE OF PRIDE	RECOMMEND COMPLEX TO FRIENDS & RELATIVES			n (%)
	Yes	No	No response	
NO	13 (8.7%)	17 (11.3%)	1 (0.7%)	31 (20.7%)
YES	106 (73.3%)	8 (5.3%)	-	114 (76%)
NO RESPONSE	-	-	5 (3.3%)	5 (3.3%)
<b>TOTAL</b>	<b>119 (79.3%)</b>	<b>25 (16.7%)</b>	<b>6 (4%)</b>	<b>150 (100%)</b>

Table 5.37 shows that respondents were proud (76%) of being residents of the Hope City complex and that 79.3% were willing to recommend the complex to family and friends. This indicates that the respondents, in spite of their dissatisfaction with specific aspects of the complex, still believe

that these problems could be solved and therefore they would recommend the complex to family and friends.

Some respondents (31) were not proud to be residents of the complex, but would nevertheless recommend the complex to others. It could be that the complex is not meeting some of their needs, but they feel that someone else might be proud to be a resident there. It is recommended that the GMHA could encourage the tenants to promote the complex to their family and friends, especially when new housing projects are being considered.

Table 5.38 presents a cross-tabulation of the race of the respondents and their levels of satisfaction regarding the complex as a whole.

**TABLE 5.38: RACE OF RESPONDENTS AND LEVEL OF SATISFACTION REGARDING THE COMPLEX (N=150)**

RACE	SATISFACTION LEVELS FOR THE COMPLEX					n (%)
	Completely dissatisfied	Dissatisfied	Satisfied	Completely satisfied	No response	
BLACK	2 (1.3%)	9 (6%)	40 (26.7%)	3 (2%)	1 (0.7%)	55 (36.7%)
COLOURED	-	3 (2%)	4 (2.7%)	1 (0.7%)	-	8 (5.3%)
INDIAN	1 (0.7%)	-	-	-	-	1 (0.7%)
WHITE	2 (1.3%)	11 (7.3%)	56 (37.3%)	15 (10%)	2 (1.3%)	86 (57.3%)
<b>TOTAL</b>	<b>4 (2.7%)</b>	<b>23 (15.3%)</b>	<b>100 (67.3%)</b>	<b>20 (13.3%)</b>	<b>3 (2%)</b>	<b>150 (100%)</b>

In order to determine whether there was a significant difference between the levels of satisfaction of the different race groups with the complex, the Pearson chi-square statistical procedure was used. No significant difference was found ( $U = 7.23355$ , degree of freedom is 9,  $p=0.612818$ ). As stated before the majority of the respondents were satisfied (80%) with the housing complex as a whole. The Hope City complex is a multi-racial complex and the fact that there is no significant difference in the levels of satisfaction of the residents, indicates that the complex is truly integrated and is functioning well.

***“There should be tenants get together in order to know each other and create one big rainbow nation, a braai would be a good idea”***

Considering that satisfaction levels regarding the different complex indicators contribute to the overall satisfaction with the housing complex as a whole, the highest absolute correlation influence was determined using the Spearman significance correlation statistics, which reads as follows:

Calculate  $H = r^2 (k-1)$ , reject if  $H$  is greater than or equal to the appropriate critical value of Chi-square with 1 degree of freedom.

The results are presented in Table 5.39.

**TABLE 5.39: CORRELATION BETWEEN SATISFACTION WITH THE COMPLEX INDICATORS AND OVERALL SATISFACTION WITH THE COMPLEX**

COMPLEX INDICATORS	SPEARMAN RANK CORRELATIONS
LOCATION OF COMPLEX	-0.19 *
BUILDING STRUCTURE OF COMPLEX	0.10
ACCESSIBILITY TO PUBLIC PHONES IN THE COMPLEX	0.16 *
OPEN SPACES FOR RECREATIONAL PURPOSES IN THE COMPLEX	0.29 *
REFUSE AREAS MANAGEMENT IN THE COMPLEX	-0.01
SECURITY IN THE COMPLEX	0.08
ACCESSIBILITY TO PUBLIC TRANSPORT FROM THE COMPLEX	0.11
LOCATION OF WASHING LINES IN THE COMPLEX	0.23 *
MAIL DELIVERY SYSTEM IN THE COMPLEX	-0.10
SAFETY IN THE COMPLEX	0.04
ACCESSIBILITY TO SHOPS FROM THE COMPLEX	0.17 *
TENANT ACCESS INTO THE COMPLEX	0.24 *
STREET LIGHTING IN THE COMPLEX	0.03
LIVING IN A MIXED COMMUNITY	0.05
PARKING AREAS IN THE COMPLEX	0.19 *
AVAILABILITY OF PLAYING AREAS FOR CHILDREN	0.32 *
<b>OVERALL COMPLEX</b>	<b>1.00</b>

\* = significant at 5% level

Table 5.39 shows that the availability of play areas for children in the complex has the highest correlation with the respondents' level of satisfaction regarding the housing complex as a whole. Therefore, should the respondents' satisfaction with the children's play areas increase the respondents' level of satisfaction with the overall complex will increase.

This is a clear indication to the GMHA that they need to create playgrounds where children can play. The secondary influence is the space allocated to recreational activities (0.29) in the complex, this seems to be closely related to the need for children's play areas. The tenants' access (0.24) to the complex has the third highest correlation with the satisfaction levels with the complex. This as a whole needs to be addressed by implementing a sign-in document that all visitors must sign on entry into the complex. The tenants' cars should get a disc that will indicate that they are tenants.



### 5.4.3 Satisfaction with the management

The respondents' satisfaction with the management of the complex was assessed based on their experience of information received from the management, the allocation process, the screening process, the availability of management, treatment and relationship between the tenants and management, communication of management to the tenants, maintenance and filing of maintenance complaints and the treatment of tenants in arrears with their monthly rental payments.

Table 5.40 indicates the respondents' mean satisfaction ratings concerning the housing management indicators.

**TABLE 5.40: MEAN SATISFACTION RATINGS WITH THE MANAGEMENT INDICATORS**

MANAGEMENT INDICATORS	MEAN
TREATMENT	2.70
AVAILABILITY	2.78
RELATIONSHIP	2.81
SCREENING AND ALLOCATION	3.26
FILING A COMPLAINTS	2.83
MAINTENANCE AND COMPLAINTS	2.59
COMMUNICATION OF INFORMATION	3.01
RESIDENTS IN ARREARS	2.52

Table 5.40 shows the different mean satisfaction ratings with the complex indicators for the Hope City management. These numbered ratings indicate the average ratings in numeric order for Figure 5.7.



**FIGURE 5.7: MEAN SATISFACTION LEVELS WITH THE MANAGEMENT INDICATORS**

The GMHA has appointed a caretaker working and residing in the Hope City complex. Tenants are to report any maintenance problems to the caretaker who is to fix the problem. Figure 5.7 indicates the respondents' satisfaction levels with the GMHA management at the head office as well as the maintenance management (caretaker).

Table 5.40 and Figure 5.7 show that the respondents are satisfied with the way in which management conducts the screening and allocation of tenants to the complex (3.26) and communication of information to tenants (3.01). They are dissatisfied with the management's system of filing complaints (2.83), the relationship between management and tenants (2.81), management's availability (2.78), their treatment of tenants (2.70), their handling of maintenance complaints (2.59) and the way in which management handles residents in arrears (2.52).

Respondents stated that they are satisfied with the screening process (3.26) implemented by the GMHA, because all significant documents and records are handed over to GMHA management to conduct a background check on the tenant. The respondents felt that this was a worthwhile process as only trustworthy people get allocated units in the complex. They were also satisfied with the allocation of the units. Management takes the tenants on a walk about of the complex and shows them the empty units, allowing the tenants to make a choice of the unit they want to stay in.

*“The management asked for all my personal documents like my pay slip and ID, and the process was quick and I got to choose my unit in no time”*

Respondents were asked whether management keeps them informed about any plans concerning the housing complex. Those who responded positively were further asked to indicate the method which management uses to inform them.

**TABLE 5.41: METHODS OF COMMUNICATION WITH RESPONDENTS (N=150)**

METHODS OF INFORMATION	MANGEMENT INFORMS RESPONDENTS		n (%)
	Yes	No	
Newsletters	123 (82%)	-	123 (82%)
Tenants committee	1 (0.7%)	-	1 (0.7%)
No response	3 (2%)	23 (15.3%)	26 (17.3%)
<b>Total</b>	<b>127 (84.7%)</b>	<b>23 (15.3%)</b>	<b>150 (100%)</b>

Table 5.41 indicates that 84.7% of the respondents stated that management keeps them informed about any plans concerning the housing complex. These respondents stated that they were mainly informed through the distribution of newsletter (82%). However, 15.3% of the respondents

indicated that they were not being kept informed by management. The GMHA has placed a post-box on the premises and tenants are encouraged to place their written suggestions and complaints in it. Through this form of consultation and community participation, tenants are encouraged to communicate their problems and grievances to the management. In the long run this will assist in meeting the set goals of the National Housing Programme, by demolishing the culture of bureaucratically imposed services (Mokhobo, 1996:44).

Respondents were somewhat dissatisfied with the procedure they needed to follow to file a complaint (2.83) about any issue within the complex. They were also dissatisfied with the response to maintenance complaints (2.59).

*“The caretaker does not respond to our problems fast enough, we have to end up fixing the problem ourselves”*

Respondents were asked whether they had ever reported a complaint to management and if so, to state the nature of the complaint. The responses are recorded in Table 5.42.

**TABLE 5.42: NATURE OF RESPONDENTS' COMPLAINTS TO MANAGEMENT (N=150)**

NATURE OF COMPLAINT	REPORTING OF COMPLAINTS		n (%)
	Yes	No	
NO COMPLAINTS	-	61	61 (40.7)
LEAKING TAPS/PIPES, GEYSERS	29	-	29 (19.3%)
BROKEN WINDOWS AND HANDLES	8	-	8 (5.3%)
TOILET SEAT BROKEN	4	-	4 (2.7%)
CUPBOARDS BREAKING AND WALL CRACKING	7	-	7 (4.7%)
NOISY NEIGHBOURS	11	-	11 (7.3%)
LACK OF PARKING SHADES	7	-	7 (4.7%)
MAINTENANCE MANAGERS TREATMENT OF THE TENANTS	12	-	12 (8%)
POOR WORKMANSHIP OF DOOR FITTINGS	3	-	3 (2%)
PROBLEMS WITH THE LIGHTING AND PLUGS	6	-	6 (4%)
CEILING PROBLEMS	3	-	3 (2%)
NO RESPONSE	-	-	3 (2%)
<b>TOTAL</b>	<b>86 (57.3%)</b>	<b>61 (40.7%)</b>	<b>150 (100%)</b>

Table 5.42 shows that 57.3% of the respondents had previously filed complaints to the maintenance management while 40.7% had not filed a complaint. The main complaints filed were the leakage in

taps and pipes. Respondents stated that they were experiencing problems with the geysers breaking and leaking in the units. The leaking pipes outside were also of great concern to the respondents as it resulted in pools of accumulating water. Picture 5.10 shows the pools of accumulating water outside the unit. (see *Addendum D*)

The cracking of the walls and plaster might be from poor workmanship or poor quality material used during construction. In Picture 5.11 (see *Addendum D*) the cracked wall can be seen. Environmental conditions such as temperature changes and humidity, movement of the foundations, due to unstable ground, or vibrations from the neighbouring mining industries, as well as the design details not suited to the nature of the building material, could be the cause of the cracking. Professional building contractors will have to be brought in to investigate the cracking, as previously there was a building pillar that had shifted in one of the blocks, which resulted in tenants residing in that block being moved out of their units and allocated to other blocks.

Respondents who had previously filed complaints to management were asked to comment on the management's response to the complaints.

**TABLE 5.43: MANAGEMENT'S RESPONSE TO COMPLAINTS REPORTED**

MANAGEMENT'S RESPONSE TO COMPLAINTS	N (%)
NO RESPONSE	51 (59.3%)
ATTENDED TO ON TIME	35 (37.2%)
TOTAL	86 (100%)

Of the 86 respondents who had reported a complaint to the caretaker, 59.3% indicated that no response was received (59.3%). The respondents recommended that the caretaker should record the complaints on paper instead of just noting them verbally. The response time to maintenance complaints has been very long, although 35 respondents stated that their complaints were attended to in good time.

The GMHA should monitor the response times to complaints in order to ensure that complaints are addressed within at least five working days and that there is enough clarity among the respondents on which maintenance aspects are considered to be a tenant's responsibility, and which is management's responsibility. The current maintenance procedure does not appear to be working well and should be reconsidered by the GMHA. Ideally, information regarding the maintenance

procedure should be provided in the form of a booklet that tenants can refer to. The procedure the tenants need to follow to file a complaint can also be outlined in the booklet. During the tenant education sessions, specific or common maintenance aspects can be highlighted.

The customer service approach is lacking in the management, and tenants' complaints and concerns do not appear to be taken seriously by the management staff of the organisation. Respondents were dissatisfied with regards to the relationship between management and tenants (2.81). This was because they felt that the management does not treat them with respect. This is evident in the respondents' level of satisfaction with the way in which management treats tenants (2.70) and the availability of management during office hours (2.78). Respondents felt that the managing staffs of the GMHA were not always available to deal with their concerns and grievances, and that they did not consult tenants when making decisions that concern the complex.

***“Management in the complex and at the head office are never available for consultation with us, and they don't get back to you to find out what the problem is”***

***“Management does not have respect for us, they talk to us any way they feel like especially the care taker”***

Though some respondents stated that:

***“Management is excellent as they don't see you as a number but as a person”***

The GMHA assisted the tenants of Hope City to elect a Residents' Committee, which is to act as the middleman between the management and the tenants. The reason for the formation of such a committee was to bridge the gap between management and its tenants and moreover to build a respectful and understanding relationship.

Respondents were asked whether they were aware of this committee and the role they think it plays within the complex.

The results are presented in Table 5.44.

**TABLE 5.44: AWARENESS OF AND ROLES OF THE RESIDENTS COMMITTEE (N= 150)**

ROLE OF THE RESIDENTS' COMMITTEE	AWARE OF THE RESIDENTS' COMMITTEE?		n (%)
	Yes	No	
Not aware of an elected residents committee	-	45	45 (30%)
Communication to management	43	-	43 (28.7%)
Information from management	10	-	10 (6.7%)
Resolve disputes among residents	45	-	45 (30%)
Aware of committee but do not know their role in the complex	7	-	7 (4.7%)
<b>TOTAL</b>	<b>105 (70%)</b>	<b>45 (30%)</b>	<b>150 (100%)</b>

Table 5.44 shows that 70% of the respondents were aware that there is an elected committee in the complex that resolves disputes among tenants and communicates tenants' grievances to the management. The Table also shows that 30% of the respondents did not know of such a committee in the complex, and 4.7% knew that there was a committee but were not aware of the committee's role in the complex. The respondents did however state that they did not feel that the management reacts to the complaints posted via the tenant committee, and that the committee does not seem to have influence in the management of the complex.

*"I do know that there is a tenants committee but I did not vote for them, and they have not been helpful in protecting us from having our pets removed from the complex"*

The GMHA should use the tenant committee to communicate with the tenants more often, as it will be easier for tenants to be more open with the committee than with management. In addition, the access to the committee is easier than that of the managing staff as the committee members are Hope City tenants too. The use of the committee by management will also help to bridge the relationship gap that exists between the management and the tenants. The tenant-training programme should also clarify the use of the committee and explain the election process.

Sixty respondents stated that they were dissatisfied with the system that was implemented by the GMHA to deal with tenants in arrears (2.52). The GMHA gives the tenants seven days grace after the due date for monthly rental payments. Should the tenant not pay their rentals the maintenance manager is given the right to lock the tenant out of their unit until payment is received.

Staff appears to be unwilling to assist tenants with problems relating to late rental payments. The GMHA management implements a "lock out system" for tenants that do not pay their monthly rentals. Respondents are dissatisfied with the system, as they state that management should provide

time for tenants to come up with the rent. Respondents also felt that there is no distinction between tenants who appear to default due to administrative errors and genuine defaulters. A letter is sent to both, yet, no follow-up or visits to the tenants are undertaken to determine the cause of the default.

***“Tenants are not notified, the management just gets the units locked up without you knowing”***

***“The management only locks doors for those who don’t pay, it is fair as you are given enough time to pay”***

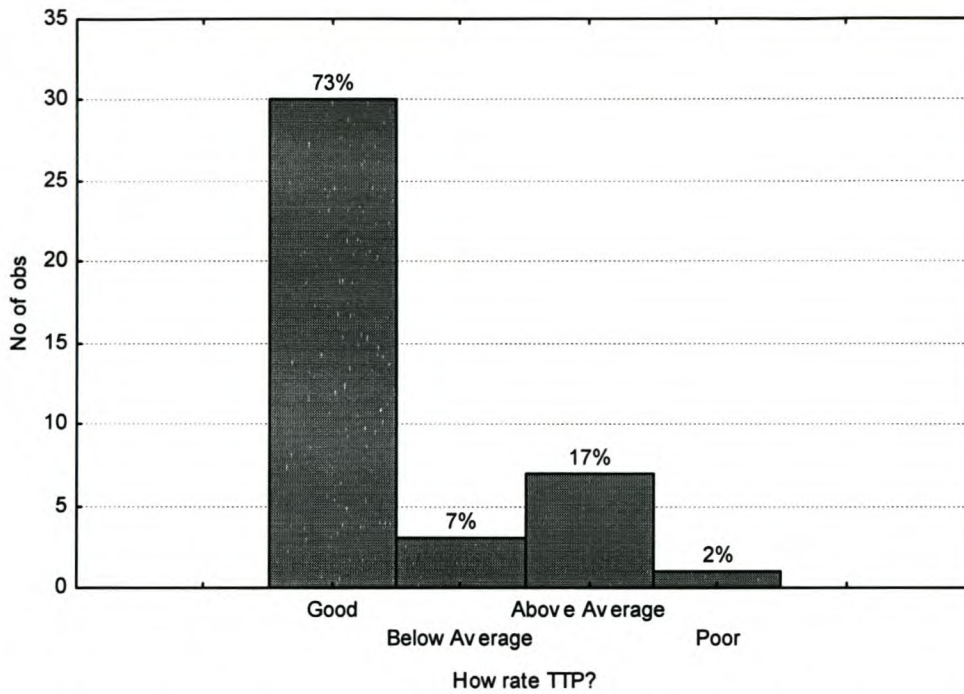
Figure 5.4 under the socio-economic section, indicated the percentage of respondents who had been in arrears with their monthly rental payments (17.3%). Respondents felt that the management does not treat these residents with respect and are not willing to understand the tenants’ financial situation at that time. Others even query whether the lockout system is at all legal.

The GMHA should include a section, in their tenant-training programme on procedures to be followed by tenants, should they be unable to pay their rent. It is the responsibility of tenants to inform management beforehand of their position. It is not only a management responsibility to follow up on tenants in arrears, they as tenants also have a responsibility.

#### **5.4.4 Satisfaction with the Tenant Training Programme**

Respondents were asked whether they or any of their household members had attended the Tenant Training Programme conducted by the GMHA. The responses indicated that only 42 (28%) households were represented at the tenant-training programme. This situation is not satisfactory and the GMHA should see to it that all households are represented at future tenant training programmes. There has been clear indication that for the success of social rental housing, tenant education is critical as it educates the tenants on conflict resolution procedures as well as the responsibilities of both the tenants and management (Gauteng Department of Housing, 2000:15).

Those respondents who indicated that their households were represented at the tenant-training programme were asked to rate the training programme. Figure 5.8 presents the results.



**FIGURE 5.8: TENANT TRAINING ATTENDENCE AND RESPONDENTS' RATING OF THE PROGRAMME**

Of the 42 households that attended the training programme 73% rated it as being informative. The low attendance was due to the fact that the programme was not compulsory. This is an issue that the GMHA need to look into. Tenants need to attend the programme before moving into the complex in order for information such as reporting a maintenance complaint can be addressed. This should help to increase the satisfaction levels of the tenants with regards to maintenance complaints. The programme should also outline the roles of the maintenance management and those of the tenant. By encouraging the tenants to attend these tenant training programmes, the aim of social housing institutions to include residents in the governance and management of their housing, which should result in the enhancement of their housing experience would be achieved (Gauteng Department of Housing, 2000:7).

Respondents were asked whether they thought it was necessary to attend the tenant-training programme. They were also asked to provide a reason for their answer. Table 5.45 shows the respondents responses to these questions.



**TABLE 5.45: THE NECESSITY AND REASONS FOR TENANTS TO ATTEND THE TENANT TRAINING PROGRAMME (N= 150)**

REASON FOR NECESSITY TO ATTEND	NECESSITY TO ATTEND?			n (%)
	Yes	No	No response	
Tenants will be taught their responsibilities, rights and understanding the lease agreement	83	-	-	83 (55.3%)
An opportunity for tenants to give their opinion of the complex	9	-	-	9 (6%)
Tenants feel that the training is a waste of their time	3	41	-	44 (29.3%)
Respondents have never heard about the training programme and don't know what it entails	3	8	-	10 (6.7%)
No response	-	-	3	3 (2%)
<b>TOTAL</b>	<b>98 (65.3%)</b>	<b>49 (32.7%)</b>	<b>3 (2%)</b>	<b>150 (100%)</b>

Table 5.45 shows that 65.3% of the respondents found it vital for tenants to attend the tenant training programme. Respondents stated that the training sessions taught tenants their responsibilities and rights, explained the lease agreement and informed them about the Hope City complex management.

Of the 49 respondents that felt that it was not necessary to attend the tenant training programme, 41 stated that the training was a waste of time. The GMHA should take note of this, as it could be an indication that their training programme needs to be improved. The GMHA needs to consult the tenants, then schedule the training sessions on days that suite the tenants as well as improve the awareness of the programme among the tenants.

***“Tenants should be given appropriate information regarding the lease agreement and the period of the lease”***

***“There should be a tenants list of what they should and should not do at the training, and management needs to ask the tenants for their suggestions on how to run a housing complex”***

***“The management should try to be time conscious, as the programme is too long. Have the training in two sessions and it should be worth our time”***

As Hope City is a multi-racial housing complex it was important to determine the opinions of the different race groups regarding the management of the complex. Table 5.46 presents a cross-

tabulation of the race of the respondents and their level of satisfaction regarding the management of Hope City.

**TABLE 5.46: RACE AND LEVEL OF SATISFACTION REGARDING MANAGEMENT (N=150)**

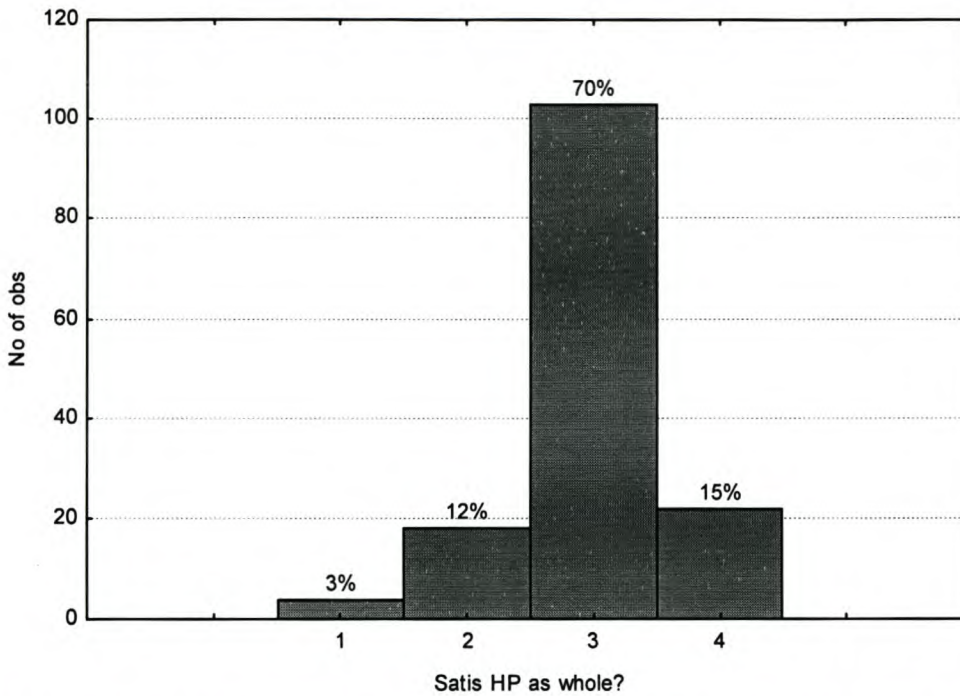
RACE	SATISFACTION LEVELS FOR THE MANAGEMENT					N (%)
	Completely dissatisfied	Dissatisfied	Satisfied	Completely satisfied	No response	
BLACK	3	10	24	13	5 (3.3%)	55 (36.7%)
COLOURED	-	4	1	1	2 (1.3%)	8 (5.3%)
INDIAN	1	-	-	-	-	1 (0.7%)
WHITE	18	12	31	18	7 (4.7%)	86 (57.3%)
<b>TOTAL</b>	<b>22 (14.7%)</b>	<b>26 (17.3%)</b>	<b>56 (37.3%)</b>	<b>32 (21.3%)</b>	<b>14 (9.3%)</b>	<b>150 (100%)</b>

The majority of the respondents were satisfied (58.7%) with the management of the complex while 32% were dissatisfied. Looking at the satisfaction levels of the different race groups, it is evident that 67.2% of the black respondents, compared to 57% of the white respondents, were either satisfied or completely satisfied.

In order to determine whether there was a significant difference between the levels of satisfaction of the different race groups with the management of the complex, the Pearson chi-square statistical procedure was used. There was a significant difference found ( $U= 21.0208$ , degrees of freedom being 9,  $p=0.012565$ ). The black respondents were significantly more satisfied than the white respondents. This could be due to the fact that the white respondents seemed to be more critical of their living situation than most of the black respondents.

#### **5.4.5 Overall housing satisfaction**

Respondents were asked to rate their level of satisfaction regarding their housing situation as a whole, the responses are presented in Figure 5.9. The reason for asking this question was to determine how the respondents felt about Hope City as a living environment. Previously respondents were asked to rate their unit, the complex, and the management separately. Here they were requested to judge it as a whole.



**FIGURE 5.9: RESPONDENTS' LEVEL OF SATISFACTION WITH THEIR OVERALL HOUSING SITUATION**

Figure 5.9 shows that 85% of the respondents were either satisfied or completely satisfied while 15% were dissatisfied with their overall housing situation. Some respondents mentioned that the reason they felt satisfied with their housing situation as a whole, was because the units provided were big enough and suited their current life styles, as most had small families. Furthermore, the respondents stated that the monthly rental charges were affordable as they do not earn high incomes, and considering the charges on units like these in other complexes in Middleburg, Hope City is the better option. They feel secure in the complex, the neighbours are friendly but allow each other personal space and privacy, and the design of the units and complex is attractive to the eye.

*“It is shelter for me and my family, it is also affordable I like it here”*

*“It is unhygienic, and it is not a pleasant environment as people are unfriendly and noisy”*

The 15% of the respondents, who were not satisfied with their housing situation as a whole, stated that the rent was too high and they would like to buy as they would be investing in property. Others went on to say that they felt uncomfortable as management is constantly telling tenants what to do, and they felt that others perceive the complex as a place for the poor.

Table 5.7 presents a cross-tabulation of the gender of the respondents and their levels of satisfaction with their housing as a whole.

**TABLE 5.47: GENDER AND SATISFACTION WITH OVERALL HOUSING SITUATION (N= 150)**

GENDER	SATISFACTION LEVELS OF HOUSING AS A WHOLE					n (%)
	Completely dissatisfied	Dissatisfied	Satisfied	Completely satisfied	No response	
FEMALE	2 (1.3%)	7 (4.7%)	48 (32%)	14 (9.3%)	-	71 (47.3%)
MALE	2 (1.3%)	11 (7.3%)	57 (38%)	8 (5.3%)	1 (0.7%)	79 (52.7%)
<b>TOTAL</b>	<b>4 (2.7%)</b>	<b>18 (12%)</b>	<b>105 (70%)</b>	<b>22 (14.7%)</b>	<b>1 (0.7%)</b>	<b>150 (100%)</b>

Table 5.47 indicates that of the 127 satisfied respondents 51.2% were male respondents and 48.8% were females. Of the 22 respondents that were dissatisfied, 13 were male while 9 were females. There is no significant difference in the satisfaction levels of males and females regarding their housing as a whole. ( $U=2.974387$ , degrees of freedom 4,  $p=0.81$ ).

As Hope City is a multi-racial housing complex it was important to determine the opinions of the different race groups regarding their satisfaction with the overall housing situation. Table 5.48 presents a cross-tabulation of the race of the respondents and their level of satisfaction regarding the overall housing situation.

**TABLE 5.48: RACE AND SATISFACTION WITH OVERALL HOUSING SITUATION (N=150)**

RACE	SATISFACTION LEVELS WITH OVERALL HOUSING SITUATION					n (%)
	Completely dissatisfied	Dissatisfied	Satisfied	Completely satisfied	No response	
BLACK	1 (0.7%)	7 (4.7%)	37	10 (6.7%)	-	55 (36.7%)
COLOURED	-	2 (1.3%)	4 (2.7%)	2 (1.3%)	-	8 (5.3%)
INDIAN	-	-	1 (0.7%)	-	-	1 (0.7%)
WHITE	3 (2%)	9 (6%)	44 (29.3%)	19 (12.7%)	1(0.7%)	86 (57.3%)
<b>TOTAL</b>	<b>4 (2.7%)</b>	<b>18 (12%)</b>	<b>105 (70%)</b>	<b>22 (14.7%)</b>	<b>1 (0.7%)</b>	<b>150 (100%)</b>

The majority of the respondents were either completely satisfied or satisfied with their housing situation as a whole (85%). In order to determine whether there was a significant difference amongst the different race groups' satisfaction levels with their housing situation as a whole the Pearson's chi-square statistical value was calculated.

No significant difference was found ( $U= 13.6239$ , degrees of freedom 9,  $p=0.75$ ). Race was therefore not a determining factor with regard to satisfaction levels with the housing situation as a whole.

Considering that satisfaction levels regarding the unit, complex and management of Hope City all contribute to residents' overall satisfaction levels with their housing situation, the question arose of which one of the unit, the complex or management had the highest correlation with the respondents overall satisfaction with their housing situation. Table 5.49 presents these results.

**TABLE 5.49: CORRELATION BETWEEN THE UNIT, COMPLEX AND MANAGEMENT SATISFACTION LEVELS AND OVERALL SATISFACTION WITH HOUSING SITUATION**

	MANAGEMENT	UNIT	COMPLEX	OVERALL HOUSING
MANAGEMENT	1.00	0.36	0.20	-0.16
UNIT	0.36	1.00	0.13	-0.23
COMPLEX	0.20	0.13	1.00	-0.10
OVERALL HOUSING	-0.16	-0.23	-0.10	1.00

The median of the responses with regard to the unit, complex and management satisfaction scores were computed. Then the Spearman correlations between these variants were determined. The unit had the highest absolute correlation of +0.23. The unit-, complex- and management satisfaction measures were compiled measurements (medians were calculated), while the question on overall housing satisfaction was a single question/measure. From the above analysis it seems that this single question/measure on overall housing satisfaction is negatively correlated with all the other satisfaction measures. If the overall housing satisfaction measure was also compiled from a number of different questions/measures, there would have been more congruence with the unit, complex and management satisfaction measures and a better criterion would have been established.

The respondents were dissatisfied with the size of the units, especially the bedrooms and kitchen area. The lack of storage space and the design of the kitchen added to the dissatisfaction. The lack of ventilation during summer temperatures was also cause for dissatisfaction. For some of the respondents the lack of privacy associated with high density living was uncomfortable.

## **5.5 SUMMARY**

In Chapter Five the survey results and findings were presented. The data obtained were presented with the aid of tables and figures. Photographs were used to further explain the observations and where applicable the residents' direct quotes with regard to their levels of satisfaction with the housing situation were given. In Chapter Six the conclusions of the research study will be presented, and the recommendations to be made to the Greater Middelburg Housing Association, outlined.

## CHAPTER SIX: CONCLUSIONS AND RECOMMENDATIONS

The aim of the research was to establish and determine the levels of housing satisfaction of the selected residents of the Hope City complex. This was achieved by setting research objectives, which were followed in the construction of the questionnaire, the analysis of the raw data and the discussion and results. This chapter presents the final conclusions and recommendations of the research study.

### 6.1 CONCLUSIONS

The conclusions are formulated in terms of the research objectives of the study.

#### 6.1.1 The respondents' socio-demographic and socio-economic profiles

Young families with dependants always seek housing that can best suit their current lifestyle, space needs and their financial status. Most high density structures like flats seem to be more attractive to young families because they offer the rental tenure option while most single standing units are for sale. This choice of structural type is further influenced by the stage of the family lifecycle as well as the family's lifestyle (Vosloo, 1990:40). Furthermore, the family income is a predictor of the amount spent on housing by a household (Morris & Winter, 1978:109) thus, households with less money available for housing, like young low-income families, have a more difficult time finding a suitable dwelling as there may be no homes for sale in the private market at the price they can afford to pay. Government is therefore left with the challenge of providing adequate and affordable housing with different tenure options for the low-income section of the population.

The majority of the respondents in this research study were working young couples (between 21 and 40 years of age) with children under the age of 12. The majority of the households had incomes of R2001 to R3 500 per month, and were planning to stay in the complex for longer than three years, this is until they can afford to purchase property. This could be due to the perception that purchasing a house is an indication to ones peers that one has reached a certain financial position in ones life (Morris & Winter, 1978:109). At the same time, research shows that the urban poor also expect 'today's tenants to be tomorrow's owners', believing rental to be a temporary housing solution and exhibiting an almost universal desire for ownership (Datta & Jones, 2001:338). The survey results indicated that the GMHA is attracting tenants that qualify for the National Housing Subsidy Scheme. Intense marketing initiatives will have to be conducted to attract more tenants to

the Hope City complex, especially those who meet the criteria of the National Housing Subsidy Scheme (GMHA Revised Business Plan, 2002:26).

### **6.1.2 Housing satisfaction**

The Hope City complex is a social housing project and therefore its main aim is to create high density subsidised housing that is managed by an independent housing institution like the GMHA. The institution's mission is to provide housing that is well located through affordable rental or instalment sale tenure options as well as to create sustainable, friendly living environments. Therefore, to determine the success of the GMHA in meeting its aim and objectives, the residents' level of satisfaction with the housing product had to be determined.

#### **6.1.2.1 Satisfaction with the housing unit**

With regard to the housing unit it can be concluded that the mean satisfaction ratings showed that the respondents were satisfied with the units provided. There were twelve unit indicators used to determine the respondents' levels of satisfaction with their units. For eight of the indicators the mean satisfaction ratings reported a satisfied score, while for the remaining four indicators the mean satisfaction rating reported a dissatisfied score. The respondents' dissatisfaction concerning the housing unit, were centered predominately around the issues of size. The mean satisfaction ratings determined in the study indicated that the respondents were dissatisfied with the size and design of the kitchen, bedrooms and the bathrooms. This is because they felt that there should be more cupboard space in each room, and that the kitchen should have been designed to be more functional. The way in which the unit reduces and handles the noise from outside was also dissatisfactory to the respondents, they stated that they hear their neighbours through the walls. The safety, security and the amount of privacy provided by the housing units were however perceived to be satisfactory. The respondents were also satisfied with the living area in the unit. The housing units are well suited for the beneficiaries of the state subsidised housing scheme. It can therefore be said that the GMHA has succeeded in providing housing units which suite its target market.

#### **6.1.2.2 Satisfaction with the housing complex**

A social housing complex that is considered to be successful is one that is of high construction standards, provides a safe and secure environment and that is in close proximity to social amenities, economic opportunities and social networks (Crofton & Venter 2000:2). In conclusion regarding the



housing complex it can be said that the mean satisfaction ratings with the indicators showed that the respondents were predominantly dissatisfied with the complex. There were sixteen indicators used by the research to investigate the satisfaction levels of the respondents concerning the complex. Of these sixteen indicators five showed a mean satisfaction rating reporting a satisfied score, while eleven showed that the respondents were either completely dissatisfied or dissatisfied with the housing complex. The respondents were most satisfied with the mixed community in which they reside. Furthermore they were satisfied with the location of the complex, the street lighting in the complex, and the system used for delivering mail in the complex.

The complex's lack of security, public transport, public telephones, long distance to shops, location of washing lines and parking areas in the complex caused dissatisfaction among the respondents. The lowest mean rating was recorded for children's play areas. This was highlighted in the respondents' dissatisfaction with the use of open spaces for recreational facilities and the location of washing lines and parking areas in the complex. The dissatisfaction with the children's play area is of great concern as it influences the respondents' overall housing satisfaction.

Considering that children are by far the greatest users of shared outdoor spaces in multifamily housing, there is a pressing need to create play areas that are in direct access to open spaces, that cater for easy supervision, that are safe, secure and comfortable, as well as big enough to avoid children's play to intrude on dwelling privacy (Marcus, Sarkissian, Wilson & Pergut, 1986:110). It can thus be said that the Hope City complex is not succeeding in providing a living environment that is safe, secure, close to amenities and that cater for the needs of children.

#### 6.1.2.3 Satisfaction with the housing management

The mean ratings for the management of the Hope City complex indicated that the respondents were satisfied with the management of the complex. There was however a significant difference in the satisfaction levels of different race groups with regard to the management. Black respondents were significantly more satisfied than white respondents. This could be due to the fact that the white respondents seemed to be more critical of management than most of the black respondents. In social housing an institution is established to manage the housing stock over the long term and is therefore committed to continuously address the housing related needs of the tenants residing in the housing units provided. The management of the Hope City complex is playing their role as management, though there are specific issues that they have to address in order to create an effective and efficient management team. These issues range from addressing the respondents' dissatisfaction with regard

to the interpersonal relationship between them and the management, the nature and approach of management staff to maintenance complaints and to the treatment of tenants in arrears. Although the managing staff is adhering to the essential aspects of social housing management, the customer relations will have to be improved to create a housing complex that is people-centered.

#### 6.1.2.4 Satisfaction with the overall housing situation

When comparing the mean satisfaction ratings of the unit, complex and the management indicators, it becomes evident that of the three the respondents were mostly satisfied with the housing unit. The respondents were mostly dissatisfied with the complex, while they were rather satisfied with the management.

The respondents stated that although the units were small, it provided them with enough living space, as they predominantly had small families. They felt that the complex provided them with affordable rental, but it did not have allocated space for children's play. Furthermore the open spaces could have been better utilised for recreational facilities. The lock out of tenants, who had fallen in arrears, was the major complaint with regard to management.

Independent of the above satisfaction measures, the majority of the respondents (85%) indicated that they were satisfied with their overall housing situation. There were no significant differences in the satisfaction levels of males and females, as well as different race groups, regarding their housing situation as a whole.

It can be concluded that the respondents appeared to be adapting well to the medium to high-density living provided by the Hope City housing complex. Furthermore, the GMHA has provided a social housing complex that in its totality brings a high standard of housing environment in the Middelburg area, but it still remains that certain aspects of the unit, the management and especially of the complex, will need to be addressed to create a social housing complex that uplifts the quality of life of its residents.

## 6.2. RECOMMENDATIONS

The following recommendations are made based on the main findings and conclusions of the research.

### **6.2.1 Stock acquisition and marketing of the Hope City Complex**

Marketing of the Hope City complex is presently done through the local newspaper, which is distributed on a daily bases. It was interesting to note that, although the majority (51.3%) of the respondents reported to have heard of the Hope City complex from family and friends and only 18% stated that they were informed by the media, 56% recommended that the main advertising vehicle to be used by the management should be the newspaper and pamphlets. Positive referrals by tenants who live in the complex had the most impact on the popularity of the complex as a whole. The GMHA should therefore strive to satisfy the needs of their present residents, so that this trend of positive referrals can continue. This, relatively inexpensive mode of marketing should be complimented by a series of innovative marketing initiatives, such as open days and showing of a specific unit to prospective tenants. Tenant participation in this marketing endeavor should ideally be sought and it is recommended that they should become involved through the Residents' Committee, and should be given the opportunity to invite people to the open days.

A home is a place where accumulated life experiences are created resulting in an emotional attachment to the house. It is imperative for communities to be enabled to partake in the realisation of their own housing needs (Department of Housing, 1994:23). Therefore by getting the tenants involved in making gardens around their units, a sense of pride in the unit and in the complex as a whole can be created.

Therefore the outside taps that have been shut down should be opened. At open days or other marketing events, the residents can provide refreshments to the visitors at a cost, and the money raised could be used to fund a specific project as decided on by the Residents' Committee, with the input of the residents.

The GMHA housing units are presently offered through the rental tenure option only. The organisation stated in their Business Plan that they would with time, start offering other tenure options such as the rent-to-buy (installment sale) option. The organisation should consider introducing the rent-to-buy option as it was established that the majority of the respondents would prefer to own a house. A more permanent resident base will be to the benefit of the GMHA as the mobility rate will be lower and the residents will look at Hope City as a permanent residential setting. The rent-to-buy option would be well suited to the affordability status of the tenants of Hope City, as the units would be subsidised and reasonable monthly installments would be payable.

In the introduction of such a tenure option in the Hope City complex, the GMHA should provide training to the residents, whereby the tenure option could effectively be explain to them.

### **6.2.2. Housing Satisfaction**

The majority of the respondents were satisfied with the unit but they were dissatisfied with the size of the kitchen and bedrooms. The GMHA should realise that it is imperative that housing space should be conducive to the present and changing needs of a family. The GMHA should look into the functional design of their units by increasing the storage space in the kitchen area through adding more shelves and also building in a wardrobe in the second bedroom of the units. It is also advised that a consumer scientist or interior designer be included as part of the Tenant Training Programme, where she/he can make recommendations on better utilisation and furnishing of the current kitchen, living room and bedroom areas in order to enhance family living. Tenants could also be asked to come up with creative ideas on the issue, keeping in mind that the ideas should be in an affordable price range.

The location of the complex seemed to be acceptable to most of the respondents. Access to amenities and transport are however critical considerations that would seriously affect the demand for the units. It is therefore recommended that a convenience store be opened in the complex. This facility can be run by one of the tenants or by the Management of the complex. Negotiations with the Municipality to allow for public transport routes near the Hope City housing complex, should be initiated.

It is highly imperative that children's play areas be developed by the GMHA, in order to cater for the needs of the young families with children residing in the complex. This could be done by including the tenants in the creation of a play area within the complex, by having the tenants build play equipment out of logs and metal that the GMHA management provides. The advantages of having the tenants involved will firstly, cut down on the cost of the labour towards the development, secondly create unity amongst the tenants, thirdly to increase their levels of pride with regard to the complex and lastly increase their overall levels of housing satisfaction.

### **6.2.3 Management, maintenance and repairs**

The Management of the Hope City complex needs to develop a more customer friendly system of dealing with the tenants. The management staff needs to be available at specific times of the day

and week, and these times should be communicated to all residents. The management staff should develop a helpful approach towards the tenants and be committed to treating them with the necessary respect. The reporting of maintenance complaints and the subsequent responses to these complaints should be carefully monitored by the GMHA. A maintenance complaints sheet needs to be developed, whereby tenants with complaints can fill out the sheet and hand it over to the caretaker, instead of verbally reporting their complaints, as is the current practice.

Management should educate tenants on the lease agreement, especially their responsibility to pay rent promptly on the dates prescribed. This should eliminate rental defaults by tenants and the unlawful system that the GMHA is currently practicing of locking out tenants that are in arrears with their rental payments.

The Hope City management should meet with the tenants on a regular basis. During these meetings, tenants must be given the opportunity to voice their grievances or express their gratitude. The Management should also use this opportunity to inform or educate the tenants on issues of importance to the running of the complex. The tenant committee should be given the opportunity to become a spokesperson for the tenants, and all tenants should be given the contact details of such committee members.

#### **6.2.4 Tenant information and training**

The GMHA needs to develop rules stating that each tenant needs to attend the tenant-training programme before occupying the housing unit. This might change the current low attendance of the programme by tenants, as some say that it is held on a Saturday and therefore a waste of their time. Furthermore, more details need to be provided regarding the rights and responsibilities of the tenants and the management, policies and procedures of the organisation, especially maintenance responsibilities, and tenants' management of their finances. A tenant handbook indicating the lease agreement and various issues relating to the complex, for example, location of refuse areas, understanding of the rental tenure option, noise levels allowed within the complex and names and contact numbers of the Tenant Committee, should be developed and handed to the tenants to keep in their units as reference. The training programme should not be a once off session, but rather an ongoing process. Furthermore, the GMHA should also conduct HIV/AIDS awareness programmes for their tenants. These awareness campaigns should be conducted as part of the Tenant Training Programme so that tenants can give their opinions on how this issue affects their housing environment.

### **6.3 RECOMMENDATIONS FOR FUTURE RESEARCH**

Future research should focus on developing a module to be used by Social Housing Institutions in training its managing staff, in order for them to acquire consumer relation skills to improve the interpersonal relationship between Management and the tenants. A method of evaluating the management after the training is also needed.

The Hope City housing complex is new and certain aspect of the complex, like the landscaping, has not been done. Therefore it would be viable for the Hope City management to initiate a future POE study once the recommendations made above, have been implemented in order to determine whether the satisfaction levels of the residents have changed in any way.

The recommendations of the study by Rust, Moat, Kunene & Lotriet (2000) on South African Social Housing Institutions and HIV/AIDS should be implemented as soon as possible. This will enable the institutions to plan for future housing projects that will cater for the effected families' special needs. Research studies to determine tenants' views on the HIV/AIDS problem and how it should be handled by a housing institution, should also be conducted.

It is recommended that researchers who want to take on post-occupancy evaluation studies should be involved as fieldworkers in the actual surveys. Taking part in the actual data collection process greatly enhances the insight into the housing environment and creates an awareness of the situation at hand.

### **6.4 RESEARCH LIMITATIONS**

One of the limitations to the research study was that the perceptions of the residents of the Hope City housing complex, concerning the handling of tenants with HIV/AIDS, were not determined in the survey. The reasoning behind this was that it was a sensitive issue and should rather be avoided. However, this would have been an ideal opportunity to gain the respondents' views on how management should handle tenants suffering from AIDS.

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# **ADDENDUM A**

## **Questionnaire used for the research**



**A POST-OCCUPANCY EVALUATION  
SURVEY OF THE HOPE CITY  
HOUSING COMPLEX IN MIDDELBURG**

**QUESTIONNAIRE SEPTEMBER  
2003**

<b>Fieldworker name</b>	
<b>Date</b>	
<b>Block name</b>	
<b>Unit number</b>	
<b>Questionnaire number</b>	

*This paragraph should be read as an introduction by the fieldworker to the respondent at first contact.*

Hello my name is \_\_\_\_\_ and I am working for the University of Stellenbosch. We would like to find out about the situation in the Hope City Housing complex, specifically the tenants satisfaction with the housing.

We would like to interview the head or spouse of the head of the unit. Will you please answer the following questions to the best of your ability and as honestly as possible. All the information will remain confidential and anonymous. The information you provide will be used to advice and inform the Middelburg Housing Association management on the residents' current housing satisfaction.

The interview will last approximately 40 minutes.

## SECTION A: Respondents' Socio-demographic profile

*Question 1 and 2 are to be completed by the fieldworker on observation.*

**1) Gender of respondent?**

Male	1
Female	2

**2) Race of the respondent?**

Black	1
Coloured	2
Indian	3
White	4

**3) What floor is this unit on?**

Ground floor	1
First floor	2

**4) How many bedrooms does the unit have?**

2 bedrooms	1
2 bedrooms and a loft	2
3 bedroom	3

**5) How many people stay in this unit? \_\_\_\_\_**

**5.1) What is the gender of the people staying in this unit?**

**5.2) Of what age are they?**

**5.3) What are their highest standards passed/qualification?**

Family Composition	Gender		Age	Qualifications
	M	F		
Head of household	1	2		
Spouse of head of household	1	2		
First born child	1	2		
Second born child	1	2		
Third born child	1	2		
Fourth born child	1	2		
Fifth born child	1	2		
Other person: specify	1	2		
	1	2		
	1	2		

**6) Stage in family life cycle (OFFICE USE ONLY)**

Living alone	1
Couple without children	2
Parent (s) and younger children (1 month – 12 years)	3
Parent (s) and teenage children (13-18 years)	4
Parent (s) and older children (over 18 years old)	5
Ageing couple	6
Other	7

**7) Is anyone in the house disabled?**

YES	1
NO	2

**7.1 If YES, what is the nature of the disability?**

\_\_\_\_\_

**8) What is your marital status?**

Married	1
Living Together	2
Divorced	3
Single/Never married	4
Widowed	5

**9) What is the most frequently used mode of travelling by the household from home to the following?**

Destination	Bus	Own car	Taxi	Train	Walk	Lift club/ Car pool
Work						
School						
Shops						
Social events						

**10) Where did you live before coming to the Hope City housing complex?**

**10.1 Area:** \_\_\_\_\_ **10.2 Town:** \_\_\_\_\_

**11) What type of housing did you stay in before moving to the Hope City housing complex?**

House or brick structure on a separate stand or yard	1
Flat in block of flats	2
Room in backyard	3
Informal dwelling/shack	4
Other please specify	5

**12) Why did you move from your previous housing?**

Better housing	1
Close to friends	2
Close to work	3
Other, please specify	4

**13) Which tenure option would you prefer at this stage in your life?**

Owner	1
Rent	2

**13.1 Please provide a reason for your answer**

**14) Where did you find out about the Hope City housing complex?**

Developer of the units	1
Municipality of the area	2
My employer	3
The media	4
Through family and friends	5
Other means/ please specify	6

**15) How do you think that the Hope City housing complex can be marketed to attract other tenants?**

**16) Why are you living in this particular housing complex –Hope City?**

Location of the project	1
The rent-to-buy option	2
Cost of the unit is affordable	3
Quality of the units	4
Recommendation from family and friends	5
Security of the project	6
Allocation to this project by council	7
Other please specify:	8

**17) How long are you intending to live in this complex?**

Temporarily (less than one year)	1
Medium term (longer than one year to three years)	2
Long term (longer than three years)	3

**17.1 Please provide a reason for your answer**

---



---



---

**18) Did you choose the unit you are living in?**

YES	1
NO	2

**18.1 Please explain your answer**

---



---



---

**19) Does the unit that you are living in now adapt well to your lifestyle?**

YES	1
NO	2

**19.1 Please provide a reason for your answer**

---



---



---

## SECTION B: Respondents' Socio-economic profile

*Let fieldworker re-emphasise to the respondent that this information will be kept confidential*

20) Are you currently employed?

Yes	1
No	2

If your answer is YES, please complete the next question.

And if your answer is NO please move on to question 24.

21) What is nature of your employment?

Formally employed	1
Part time employment	2
Self employed	3

22) What kind of work are you doing?

<b>Job</b>	
------------	--

23) In which area are you working?

<b>Area</b>	
-------------	--

24) What is the income of each of the household members? (Refer to question 5 for household composition)

MEMBER OF FAMILY	WEEKLY	MONTHLY
• Head of household		
• Spouse of head of household		
•		
•		
•		
•		
•		

**25) Have you ever been in arrears with your rent?**

YES	1
NO	2

**25.1 If YES did management support or help you in any way?**

---

**26) How much rent can you afford to pay for the unit you are staying in?**

Two bedrooms	R
Two bedrooms and a loft	R
Three bedroom	R

**27) What is your preferred rental payment option?**

Bank deposit	1
Debit order	2
Cash Pay at the management offices	3
Payroll deduction	4
Easy pay	5
Other please specify:	6

**28) What is the household estimated monthly expenses on the following?**

EXPENSES	WEEKLY	MONTHLY
28.1 Rental		
28.2 Food		
28.3 Electricity		
28.4 Water		
28.5 Transportation		
28.6 Clothing		
28.7 Loans		
28.8 Hire purchase		
28.9 Furniture		
28.10 Gambling/Lotto tickets		
28.11 Telephone (house line)		
28.12 Cell phone		
28.13 Cash given to extended family		
28.14 Medical expenses		
28.15 Insurance		
28.16 Burial society		
28.17 Entertainment		

28.18 Schooling		
28.19 Other expenses please specify:		

29) Do you save at the end of each month?

YES	1
NO	2

29.1 If **YES**, how much? R \_\_\_\_\_

29.2 If **NO**, please explain \_\_\_\_\_

## SECTION C: Tenants' housing satisfaction

### ▪ SATISFACTION REGARDING THE UNIT

30) How satisfied are you with the following regarding your unit? (*Show card to respondent*)

- 1 = Completely dissatisfied
- 2 = Dissatisfied
- 3 = Satisfied
- 4 = Completely satisfied

<b>UNIT SATISFACTION</b>			
<b>CHARACTERISTICS OF THE UNIT</b>	<b>LEVEL</b>	<b>REASON FOR ANSWER</b>	<b>OFFICE USE ONLY</b>
30.1 How satisfied are you with the <b>size</b> of your unit?			
30.2 How satisfied are you with the level of <b>privacy</b> the unit offers?			
30.3 How satisfied are you with the <b>security</b> of the unit?			
30.4 How satisfied are you with the amount of <b>lighting</b> inside the unit?			
30.5 How satisfied are you with the <b>ventilation</b> of the unit?			
30.6 How satisfied are you with the way in which the unit handles <b>noise levels</b> from outside?			
30.7 How satisfied are you with the <b>temperature</b> of the unit in <b>winter</b> ?			



<b>30.8</b> How satisfied are you with the <b>temperature</b> of the unit in <b>summer</b> ?			
<b>30.9</b> How satisfied are you with the <b>safety</b> of the unit?			
<b>30.10</b> How satisfied are you with the <b>kitchen area</b> in your unit?			
<b>30.11</b> How satisfied are you with the <b>bedrooms</b> of your unit?			
<b>30.12</b> How satisfied are you with the positioning of the <b>bathroom</b> in the unit?			
<b>30.13</b> How satisfied are you with the <b>living area</b> in the unit?			

**31) Please indicate your level of satisfaction with your housing unit as a whole (*Show card to respondent*)**

1	Completely dissatisfied
2	Dissatisfied
3	Satisfied
4	Completely satisfied

**31.1 Please explain your answer.**

---



---

▪ **SATISFACTION REGARDING THE COMPLEX**

**32) How satisfied are you with the following regarding the complex? (*Show card to respondent*)**

- 1 = Completely dissatisfied**
- 2 = Dissatisfied**
- 3 = Satisfied**
- 4 = Completely satisfied**

<b>COMPLEX SATISFACTION</b>			
<b>CHARACTERISTICS OF THE UNIT</b>	<b>LEVEL</b>	<b>REASON FOR ANSWER</b>	<b>OFFICE USE ONLY</b>
<b>32.1</b> How satisfied are you with the <b>neighbourhood</b> in which the unit is located?			
<b>32.2</b> How satisfied are you with the quality of the <b>building structure</b> ?			

<b>32.3</b> How satisfied are you with accessibility to <b>public telephones</b> ?			
<b>32.4</b> How satisfied are you with the <b>open spaces</b> for recreational purposes?			
<b>32.5</b> How satisfied are you with the way in which the <b>refuse area</b> is being managed in the complex?			
<b>32.6</b> How satisfied with the <b>security</b> within the complex?			
<b>32.7</b> How satisfied are you with the accessibility to <b>public transport</b> ?			
<b>32.8</b> How satisfied are you with the location of the <b>washing lines</b> within the complex?			

**33) Do you think the complex needs more facilities and/or space for recreational activities to take place?**

YES	1
NO	2

**33.1 Please explain your answer**

---

**34) How satisfied are you with the following regarding the complex? (Show card to respondent)**

- 1 = Completely dissatisfied**
- 2 = Dissatisfied**
- 3 = Satisfied**
- 4 = Completely satisfied**

<b>COMPLEX SATISFACTION</b>			
<b>CHARACTERISTICS OF THE COMPLEX</b>	<b>LEVEL</b>	<b>REASON FOR ANSWER</b>	<b>OFFICE USE ONLY</b>
<b>34.1</b> How satisfied are you with the <b>mail-delivery</b> system within the complex?			
<b>34.2</b> How satisfied are you with the <b>safety</b> in the complex?			
<b>34.3</b> How satisfied are you with the <b>accessibility to shops</b> from the complex?			

34.4 How satisfied are you with the way in which tenants can <b>access</b> the complex?			
34.5 How satisfied are you with the <b>street lighting</b> in the complex?			
34.6 How satisfied are you with the fact that you are living in a <b>mixed community</b> ?			
34.7 How satisfied are you with the existing <b>parking areas</b> in the complex?			
34.8 How satisfied are you with the amount of space allocated to <b>children's play area</b> in the complex?			

35) How satisfied are you with the complex as a whole (*Show card*)

1	Completely dissatisfied
2	Dissatisfied
3	Satisfied
4	Completely satisfied

35.1 Please explain your answer.

---



---

▪ **SATISFACTION REGARDING THE MANAGEMENT**

36) Have you ever received a government housing subsidy?

YES	1
NO	2

36.1 Do you understand how the housing subsidy is applied in the Hope City complex?

YES	1
NO	2

If **NO**, please ask question **37**

36.2 If **YES**, please explain your answer

---

**37) Do you feel that GMHA management keeps you informed about any plans concerning the housing complex?**

YES	1
NO	2

**If NO, go to question 38**

**37.1 If YES, how are you being informed?**

Tenant committee	1
Newsletter	2
Visit from staff	3
Word-of-mouth	4
Other, please specify	5

**38) Are you aware that the complex has an elected residents committee?**

YES	1
NO	2

**If NO, go to question 39**

**38.1 If YES, what does this committee do? Please specify.**

Communication to management	1
Information from management	2
Disputes among residents	3
Other, please specify	4

**39) Do you think that the residents committee is useful to the tenants?**

YES	1
NO	2

**39.1 Please give a reason for your answer**

---

**40) Have you or any of your household members attended the Tenants Training Programme offered by management?**

YES	1
NO	2

If **NO**, go to question 41

**40.1 If YES, how would you rate this training programme? (Show card to respondent)**

POOR (1)	BELOW AVERAGE (2)	ABOVE AVERAGE (3)	GOOD (4)
----------	-------------------	-------------------	----------

**40.2 What do you think should be done to improve the training programmes?**

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**41) Do you think that it is necessary for tenants to attend this programme?**

Yes	1
No	2

**41.1 Please provide a reason for your answer.**

---



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▪ **SATISFACTION WITH MANAGEMENT**

**42) What is your level of satisfaction concerning the management of the Hope City complex?  
(Show card to respondent)**

- 1 = Completely dissatisfied**
- 2 = Dissatisfied**
- 3 = Satisfied**
- 4 = Completely satisfied**

<b>MANAGEMENT SATISFACTION</b>			
<b>QUESTIONS</b>	<b>LEVEL</b>	<b>REASON FOR ANSWER</b>	<b>OFFICE USE ONLY</b>
<b>42.1</b> How satisfied are you with the way in which the management <b>treats tenants</b> ?			
<b>42.2</b> How satisfied are you with the <b>availability</b> of the complex management during office hours?			
<b>42.3</b> How satisfied are you with the <b>relationship</b> between management and the tenants of Hope City?			

<b>42.4</b> How satisfied are with the <b>screening and allocation</b> procedures used by the Hope City management?			
<b>42.5</b> How satisfied are you with the procedure one needs to follow to <b>file a complaint</b> about any issue within the complex?			
<b>42.6</b> How satisfied are you with the response to <b>maintenance complaints</b> ?			
<b>42.7</b> How satisfied are you with <b>communication of information</b> to residents by management?			
<b>42.8</b> How satisfied are you with the way that <b>residents in arrears</b> are dealt with by management?			

**43) Have you ever reported a complaint to management?**

YES	1
NO	2

IF **NO**, go to question **44**

**43.1 IF YES, what was the complaint?**

---



---

**43.2 What was the response by management to the complaint?**

No response	1
Attended to on time	2
Other, please specify	3

**44) Would you recommend the Hope City housing complex to any of your friends or relatives?**

Yes	1
No	2

**44.1 Why?**

---



---

**45) How satisfied are you with your housing situation as a whole (*Show card*)**

1	Completely dissatisfied
2	Dissatisfied
3	Satisfied
4	Completely satisfied

**45.1 Please explain your answer.**

---

---

**46) Are you proud to be a resident in the Hope City complex?**

Yes	1
No	2

**46.1 Why?**

---

---

**47) What advice would you as a tenant like to give to the Hope City management?**

---

---

**48) I would like to document any problems within the units. Are there any problems within your unit that you would like to show me?**

Yes	1
No	2

**48.1 If YES, please state the type of problem you are facing?**

---

---

**Can I please take a picture of the problem?**

**THANK YOU FOR YOUR TIME!**

## **ADDENDUM B**

### **A map of the hope City Housing**

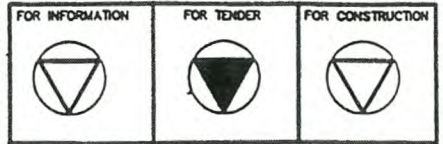


NOTE: THIS AREA IS STILL TO BE REVISED



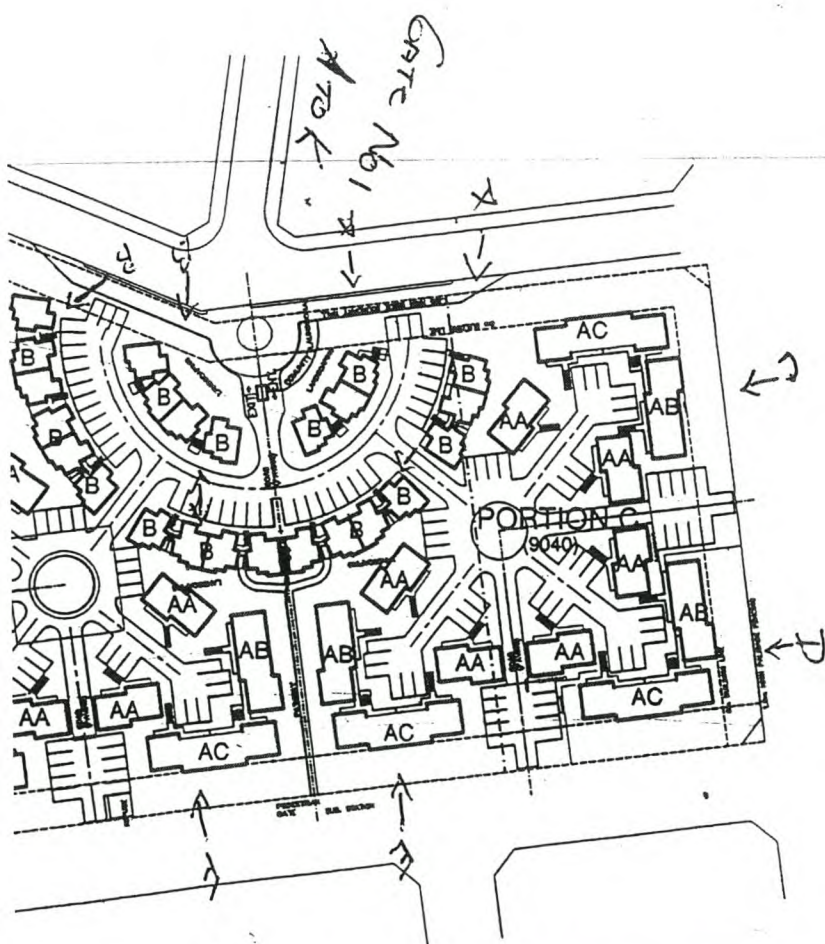
NOTE: FOR DETAILS OF STAIRS TO UNIT AA REFER TO DWG AA-01

B - 2H3  
 A - 2H3  
 B - 1H5



**FIRE PROTECTION NOTES**

- 1) SUPPLY 1 HOSE REEL FOR EVERY 4 AND 8 UNITS
- 2) FOR FIRE HYDRANTS REFER TO ENGINEER'S DRAWING
- 3) FIRE HOSE REEL CONNECTING TO MAIN FEED T-OFF MINIMUM 25mm CONNECTION
- 4) FLOW RATE TO COMPLY WITH SABS 0400 WHEL SECTION AND MAIN FEED TO BE 100mm
- 5) SUPPLY 1x4.5 DRY CHEMICAL POWDER FIRE EXTINGUISHER FOR EVERY 400m<sup>2</sup> TO BE PLACED IN FIRE HOSE REELS
- 6) SUPPLY DOUBLE BOOSTER CONNECTION ON MAIN WATER SUPPLY WITH PRESSURE GAUGE AND REFLEX VALVE SABS 0400 W/ 6.2 (4)
- 7) FIREWALLS BETWEEN UNITS TO REACH UNDERSIDE OF ROOF COVERING AND ROOF CONSTRUCTION NOT TO PENETRATE FIRE WALLS
- 8) ROOF VOIDS NOT TO EXCEED 300mm<sup>2</sup>



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**ASA ARCHITECTURAL DESIGNS**  
 RB House 141 Greenway rd. Greenside 2193  
 Tel: 486-4111 Fax: 486-4112 Email: asaarch@con.co.za

CLIENT  
 GREATER MIDDELBURG HOUSING ASSOCIATION

PROJECT  
 HOPE CITY  
 MIDDELBURG - MPUMALANGA

DESCRIPTION  
 UNIT KEY SITE PLAN

SCALE 1:750	DRAWN ML	DATE APR. 01
----------------	-------------	-----------------

PROJECT CODE GMHAHC	DRAWING CODE S 01	LAST REVISION 1
------------------------	----------------------	--------------------

REV NO.	DATE	COMMENTS
1	14.04.01	AA BLOCK, AB AND AC REVISIONS AS DISCUSSED

**ADDENDUM C**

**FIELDWORKER TRAINING MANUAL**

**FEILDWORKER TRAINING FOR A POE  
SURVEY IN THE GMHA' s HOPE CITY  
COMPLEX (MPUMALANGA)**

**SEPTEMBER 2003**

## **BACKGROUND OF THE HOPE CITY HOUSING COMPLEX**

The Greater Middelburg Housing Association (GMHA) is a legal entity incorporated in terms of the Section 21 of the Companies Act of 1973. The stakeholders of GNHA include among others, Middelburg Municipality, Middelburg Chamber of Business, Mpumalanga Housing Finance Corporation, and the Social Housing Foundation as well as the surrounding communities as potential beneficiaries. The establishment of the housing association has been motivated by the huge demand for housing in the Middelburg area, as most of the housing needs were previously provided for by employers in the mining, manufacturing and other industrial sectors in the area.

The mission of GMHA is to provide well-located and affordable accommodation of a suitable standard to residents of Greater Middelburg within the subsidized housing market, through rental and rent to buy option in partnership with key stakeholders. The GHMA will therefore operate as a social housing institution and a facilitator of housing opportunities in the long term.

The community of Hope City Housing Complex consists of 237 approved housing subsidy beneficiaries as well as 87 unsubsidised. The housing complex has 501 completed and handed over units, there are two bedroom, two bedrooms and loft and a three-bedroom unit.

The complex was one of Greater Middelburg Housing Association's housing projects through the National Housing Subsidy, to develop rental stock for people earning up to R3500.

**INSTRUCTIONS ON HOW TO HANDLE  
QUESTIONNAIRE**

• **INTRODUCTION ON ARRIVAL TO A HOUSING UNIT**

Hello my name is \_\_\_\_\_ and I am working for the University of Stellenbosch. We would like to find out about the situation at the Hope City complex, specifically the tenants satisfaction with their housing.

We would like to interview the head or the spouse of the head of the unit. Will you please answer the following questions to the best of your ability and as honestly as possible. All the information will remain confidential and anonymous. The information you provide will be used to advise and inform the Middelburg Housing Association management on the resident's current housing satisfaction. The interview will last approximately 40 minutes.

- **HOW TO ASK AND RECORD RESPONSES**

<p style="text-align: center;"><b>SECTION A: RESPONDENTS' SOCIO-DEMOGRAPHIC PROFILE</b></p>
-------------------------------------------------------------------------------------------------

This section comprises of questions that are to gain an insight into the backgrounds of the respondent.

You must not ask the respondent Question 1 to 3 , as you are to complete them by observation.

**Question 1:**

<p style="text-align: center;"><i>Gender of the respondent</i></p>
--------------------------------------------------------------------

The fieldworker will **NOT** ask this question, but will mark the appropriate answer once the respondent agrees to continue with the interview.

**Question 2:**

<p style="text-align: center;"><i>Race of the respondent</i></p>
------------------------------------------------------------------

The fieldworker will **NOT** ask this question, but will mark the appropriate answer once the respondent agrees to continue with the interview.

**Question 3:**

<p style="text-align: center;"><i>What floor is this unit on?</i></p>
-----------------------------------------------------------------------

The fieldworker will **NOT** ask this question, but will mark the appropriate answer once the respondent agrees to continue with the interview.

**Question 4:**

*How many bedrooms does this unit have?*

The fieldworker will ask this question. Then record the response in the appropriate box.

**Question 5:**

*How many people are staying in this unit?*

Fieldworker will ask how many people are staying in the unit. Then record the answer on the line provided.

**Question 5.1.**

*What gender is each of the members of the household?*

The fieldworker must ask the question then indicate the answer by crossing out the appropriate box using an "X".

**EXAMPLE:** If the head of the household is MALE you must cross out the 1 under GENDER.

Ask the gender of each member of the household. It must correspond with the answer provided for question 5.

**Question 5.2.**

*Of what age are the household members?*

The fieldworker is to ask the question then record ages for each person under the AGE block. **EXAMPLE:** Head of unit is 35 yrs old, under AGE record the 35.



**Question 5.3.**

*What is their highest standard passed/qualifications?*

The fieldworker is to ask the question then record, each household member highest standard passed under **HIGHEST STANDARD PASSED/QUALIFICATION** block.

**THE NUMBER OF PEOPLE YOU HAVE DETAILS FOR, SHOULD MATCH UP THE NUMBER YOU HAVE IN QUESTION 5.**

**Question 6.**

*Do not ask this question, it is for office use only*

**The researcher will complete this question after each interview questionnaire is completed.**

**Question 7.**

*Is anyone in the unit disabled?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 7.1.**

If the answer is **YES**, then the fieldworker must ask the respondent to explain the nature of the disability. Then fieldworker is to record the answer on the line provided.

**Question 8.**

*What is your marital status?*

The fieldworker is to ask the question, wait for the response, and then cross out the response on the appropriate box.

**Question 9.**

*What is the most frequently used mode of traveling by the household from home to the following?*

The fieldworker is to ask the question, wait for the response, and then cross out the response on the appropriate box. There should be an answer for each of the four **DESTINATIONS**.

**Question 10.**

*Where did you live before coming to the Hope City Housing complex?*

The fieldworker must ask the question, wait for the response then write out the response next to **10.1** for Area \_\_\_\_\_ and **10.2** for Town \_\_\_\_\_

**Question 11.**

*What type of housing did you stay in before moving to the Hope City complex?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box. If “other” please record the response.

**Question 12.**

*Why did you move from your previous housing?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 13.**

*Which tenure option do you prefer at this stage in your life?*

The fieldworker is to ask the question, wait for the response, and then cross out the response on the appropriate box.

**Question 13.1.**

Ask the respondent to provide a reason for their answer.

**Question 14.**

*Where did you find out about the Hope City housing complex?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box. If “other” please record the response.

**Question 15.**

*How do you think the Hope City housing complex can be marketed to attract other tenants?*

The fieldworker is to ask the question, wait for the response, then write out the response in full in the space provided.

**Question 16.**

*Why are you living in this particular housing complex?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box. If “other” please record the response.

**Question 17.**

*How long are you intending to live in this complex?*

The fieldworker is to ask the question, wait for the response, and then cross out the response on the appropriate box.

**Question 17.1.**

Ask the respondent to provide a reason for their answer.

**Question 18.**

*Did you choose the unit you are living in?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 18.1.**

Ask the respondent to explain their answer.

**Question 19.**

*Does the unit that you are living in now adapt well to your lifestyle (way of life)?*

The fieldworker is to ask the question, wait for the response, and then cross out the response on the appropriate box.

**Question 19.1.**

Ask the respondent to provide a reason for their answer.

## **SECTION B: RESPONDENTS SOCIO-ECONOMIC PROFILE**

This section attempts at gaining insight into the respondents affordability status, through determining their socio-economic profile.

### ▪ **Important message**

**The fieldworker must re-emphasize to the respondent that this information will be kept confidential.**

#### **Question 20.**

*Are you currently employed?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

If the answer is **YES**, ask question **21**.

If the answer is **NO**, ask question **24**

#### **Question 21.**

*What is the nature of your employment?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

#### **Question 22.**

*What kind of work are you doing?*

Fieldworker must ask question, wait for the response then the fieldworker must write out the answer in full in the space provided.

**Question 23.**

*In which area are you working?*

Fieldworker must ask question, wait for the response then the fieldworker must write out the answer in full in the space provided.

**Question 24.**

*What is the income of each of the household members?*

Fieldworker must ask the weekly or monthly income of each adult individual in the household.

- **IMPORTANT MESSAGE:**

**PLEASE REFER TO QUESTION 5, TO SEE THAT THE INCOME OF EACH ADULT IN THE HOUSE HAS BEEN RECORDED.**

**Question 25.**

*Have you ever been in arrears with your rent?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

If **YES**, ask question **25.1**.

If **NO**, ask question **26**.

**Question 25.1.**

*If YES, did management support or help you in any way?*

Fieldworker must ask question, wait for the response then the fieldworker must write out the answer in full in the space provided.

**Question 26.**

*How much rent can you afford to pay for the unit you are staying in?*

Fieldworker must ask the question, wait for the response then write down the answer in **Rands (Example: R300)**, next to the type of unit occupied by the respondent.

**Question 27.**

*What is your preferred rental payment option?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 28.**

*What is the household estimated monthly expenses on the following?*

The fieldworker must ask each expense item, wait for the response, then write out the estimated amount of each stated expenses under the blocks **WEEKLY OR MONTHLY** depending on how the respondent provides the information.

**Question 29.**

*Do you save money at the end of the month?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**If YES**, ask question **29.1**.

**If NO**, ask question **29.2**

**Question 29.1.**

*If YES, how much do you save?*

Fieldworker must ask the question, wait for the response then write down the answer in **Rands (Example: R100)**.

**Question 29.2.**

*If NO, please give a reason.*

Fieldworker must ask question, wait for the response then the fieldworker must write out the answer in full in the space provided.

**SECTION C: TENANTS' HOUSING SATISFACTION**

This section attempts at determining the respondents levels of satisfaction regarding the unit, complex and the management of the Hope City complex.

▪ **SATISFACTION REGARDING THE UNIT**

**Question 30.**

*How satisfied are you with the following regarding your unit?*

**30.1. – 30.13** Fieldworker must ask the question under **CHARACTERISTICS** (one at a time), then hand over the card with the levels of satisfaction to the respondent to indicate their level of satisfaction ranging from 1-completely dissatisfied to 4-completely satisfied, wait for the response then record on the questionnaire under **LEVEL** the appropriate number.

The fieldworker must then ask the respondent to motivate their answer in each case, wait for the response then write out in full under **REASON FOR ANSWER**.

**FIELDWORKER MUST NOT WRITE IN THE BLOCK LABELLED OFFICE USE ONLY.**



**Question 31.**

*Please indicate your level of satisfaction with your housing unit as a whole?*

Fieldworker must ask the question, show the respondent the card to choose their level of satisfaction. Then fieldworker must mark the appropriate block.

**Question 31.1.**

Ask the respondent to explain their previous answer.

▪ **SATISFACTION REGARDING THE COMPLEX**

**Question 32.**

*How satisfied are you with following regarding the complex?*

**32.1. – 32.8.** Fieldworker must ask the question under **CHARACTERISTICS** (one at a time), then hand over the card with the levels of satisfaction to the respondent to indicate their level of satisfaction ranging from 1-completely satisfied to 4-completely dissatisfied, wait for the response then record on the questionnaire under **LEVEL** the appropriate number.

The fieldworker must then ask the respondent to motivate their answer in each case, wait for the response, then write out in full under **REASON FOR ANSWER**

**FIELDWORKER MUST NOT WRITE IN THE BLOCK LABELLED OFFICE USE ONLY.**

**Question 33.**

*Do you think the complex needs more facilities and/or space for recreational activities to take place?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 33.1**

Ask respondent to explain their previous answer

**Question 34.**

*How satisfied are you with the following regarding the complex?*

**34.1. -34.8.** Fieldworker must ask the question under **CHARACTERISTICS** (one at a time), then hand over the card with the levels of satisfaction to the respondent to indicate their level of satisfaction ranging from 1-completely dissatisfied to 4-completely satisfied, wait for the response then record on the questionnaire under **LEVEL** the appropriate number.

The fieldworker must then ask the respondent to motivate their answer in each case, wait for the response then write out in full under **REASON FOR ANSWER**.

**FIELDWORKER MUST NOT WRITE IN THE BLOCK LABELLED OFFICE USE ONLY.**

**Question 35.**

*How satisfied are you with the complex as a whole?*

Fieldworker must ask the question, show the respondent the card to choose their level of satisfaction. Then the fieldworker must cross out the response in the appropriate block.

**Question 35.1.**

Ask the respondent to explain their previous answer.

▪ **SATISFACTION REGARDING THE MANAGEMENT**

**Question 36.**

*Have you ever received a government-housing subsidy?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 36.1.**

*Do you understand how the housing subsidy is applied in the Hope City complex?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

If **NO**, please ask question **37**

**Question 36.2**

If the answer is **YES**, the fieldworker must ask the respondent to explain their previous answer.

**Question 37.**

*Do you feel that GMHA management keeps you informed about any plans concerning  
the  
Housing complex?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

If **NO**, ask question **38**

If **YES**, ask question **37.1**

**Question 37.1.**

*If YES, how are you being informed?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box. If “other” please record the response.

**Question 38.**

*Are you aware that the complex has an elected residents committee?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

If response is YES, then ask question 38.1.

If NO, please ask question 39.

**Question 38.1.**

*If YES, what does the committee do? Please specify.*

Fieldworker must ask question, wait for the response and then cross out the response in the appropriate block. If “other” please record the response.

**Question 39.**

*Do you think that the residents committee is useful to the tenants?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 39.1.**

Ask the respondent to give a reason for their answer in question 39. Record the response.

**Question 40.**

***Have you or any of your household members attended the tenants training programme offered by management?***

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

If response is **NO**, please ask question **41**

If response is **YES**, please ask question **40.1**.

**Question 40.1.**

***If YES, how would you rate the training programme?***

Ask the question, show the respondent the card then record the answer by marking in the appropriate block.

**Question 40.2**

***What do you think should be done to improve the training programme?***

The fieldworker is to ask the question, wait for the response, then write out the response the space provided.

**Question 41.**

***Do you think that it is necessary for the tenants to attend this programme?***

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 41.1.**

Ask the respondent to provide a reason for their answer.

▪ **SATISFACTION WITH MANAGEMENT**

**Question 42.**

*What is your level of satisfaction regarding the management of the complex?*

**42.1. -42.8.** Fieldworker must ask the question under **CHARACTERISTICS** (one at a time), then hand over the card with the levels of satisfaction to the respondent to indicate their level of satisfaction ranging from 1-completely dissatisfied to 4-completely satisfied, wait for the response then record on the questionnaire under **LEVEL** the appropriate number.

The fieldworker must then ask the respondent to motivate their answer in each case, wait for the response then write out in full under **REASON FOR ANSWER**.

**FIELDWORKER MUST NOT WRITE IN THE BLOCK LABELLED OFFICE USE ONLY.**

**Question 43.**

*Have you ever reported a complaint to management?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

If **NO**, ask question **44**.

If **YES**, ask question **43.1**

**Question 43.1.**

*If **YES**, what was the complaint?*

The fieldworker is to ask the question, wait for the response, then write out the response in full in the space provided.

**Question 43.2.**

*What was the response by management to the complaint?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 44.**

*Would you recommend the Hope City housing complex to any of your friends or Relatives?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 44.1.**

Ask the respondent to explain their previous answer.

**Question 45.**

*Please indicate your level of satisfaction with your housing situation as a whole?*

Fieldworker must ask the question, show the respondent the card to choose their level of satisfaction. Then fieldworker must mark the appropriate block.

**Question 45.1.**

Ask the respondent to explain their previous answer. Record the response in full.

**Question 46.**

*Are you proud to be a resident in the Hope City complex?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

**Question 46.1.**

Ask the respondent to explain their previous answer. Record the response in full.

**Question 47.**

*What advice would you as a tenant like to give to the Hope City management?*

Fieldworker must ask question, wait for the response then the fieldworker must write out the answer in full in the space provided.

**Question 48.**

*Are there any problems within your unit that you would like to show me?*

The fieldworker is to ask the question, wait for the response, and then cross out the response in the appropriate box.

If YES, ask question **48.1.**

**Question 48.1.**

*If YES, please state the types of problems.*

Fieldworker must ask question, wait for the response then the fieldworker must write out the answer in full in the space provided.

**Fieldworker must ask permission to take pictures of the problems shown by the respondent, describe the photographs, and then write in the number of the photograph on the box provided**



## **ADDENDUM D**

### **Photographs of maintenance problems**



Picture 5.1 indicating cracking bath



Picture 5.2 indicating the refuse area in the complex



Picture 5.3 indicating the entrance and the security guards of the complex



Picture 5.4 indicating the speed limit signs and speed humps in the complex



Picture 5.5 indicating gardens that some tenants have started outside their units



Picture 5.6 indicating public telephones in the complex



Picture 5.7 indicating the washing lines in the complex



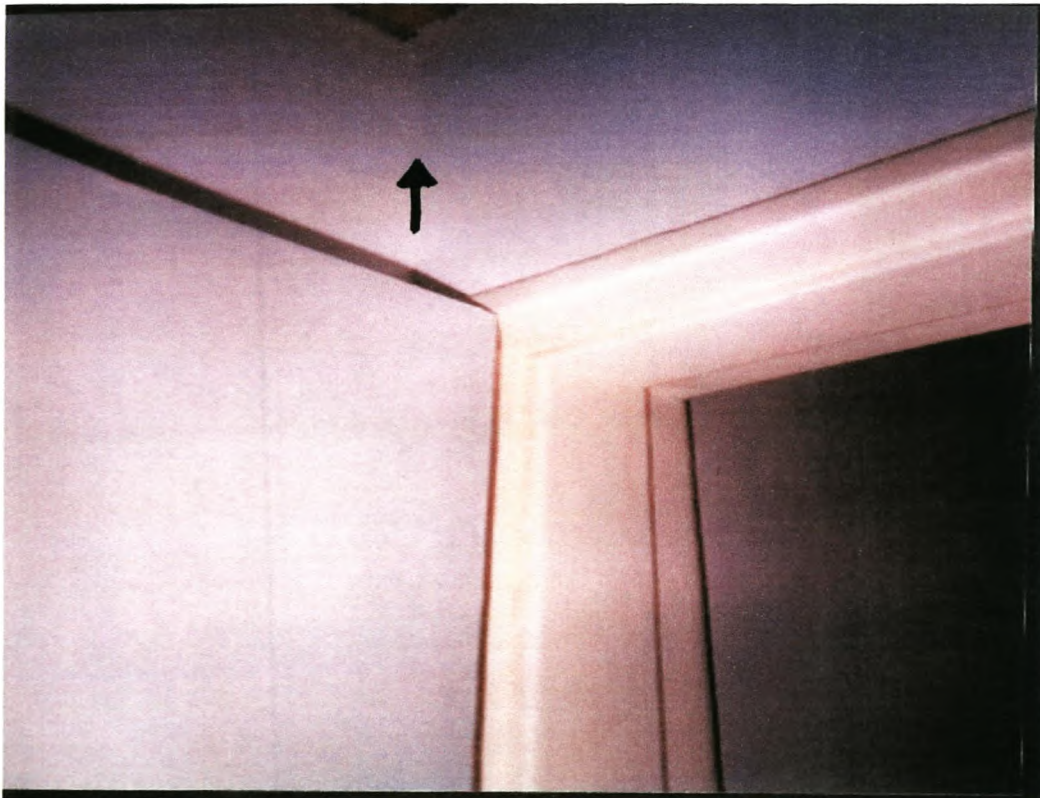
Picture 5.8 indicating the parking areas with a broken down car in the complex



Picture 5.9 indicating the parking areas in the complex



Picture 5.10 indicating the water leakage outside the unit



Picture 5.11 indicating the cracking on the wall of the unit