VALE OF GLAMORGAN

REPLACEMENT LOCAL DEVELOPMENT PLAN 2021-2036

LOCAL HOUSING MARKET ASSESSMENT 2023

May 2024

BACKGROUND PAPER BP10B

RLDP CDLN

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The Vale of Glamorgan

Local Housing Market Assessment 2023

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EXECUTIVE SUMMARY

This Local Housing Market Assessment (LHMA) uses Welsh Government guidance *Undertaking Local Housing Market Assessments, March 2022* and Version 3.2 of the new *Local Housing Market Assessment Tool* to evaluate the housing need across the Vale of Glamorgan for the period 2023-2038.

This LHMA assesses the housing market in the Vale of Glamorgan (VoG), considering all geographical areas, at ward level and/or by major settlements. A range of information sources are used to feed into the assessment, including household projections, homelessness data, house prices, rental prices, household incomes, the Homes4U social housing register, Aspire2Own low-cost home ownership database, social housing stock turnover and projected housing supply data.

In assessing the housing market, the LHMA calculates the net need for affordable housing, including social rented housing and intermediate rented housing over the coming 15 years, in 5 year periods. Intermediate Housing includes low cost home ownership and intermediate rent, although the latter has proved unviable in the Vale of Glamorgan in the past.

The headline annual need for affordable housing, based on the principal projections in the tool, in the Vale of Glamorgan from 2023 to 2028 is: **1075 units per annum,** comprising:

- 687 units of social rented accommodation
- 388 units of intermediate rented housing and low-cost home ownership

This LHMA provides the latest evidence on affordable housing need, identifying a net annual need for 1,075 affordable units per annum in the Vale of Glamorgan during the next five-years and a further 154 units per annum over the following 10 years. If considered over a 15 year period, there is a need for 461 affordable units per annum (6918 in total), comprising 306 social rented units and 156 units of intermediate housing. The greatest need is for one- and two-bedroom properties, across all areas of the Vale of Glamorgan, although in some areas the LHMA identifies a requirement for 3 and 4 bedroom properties.

The new methodology categorises the need by the first 5 years, and subsequent 10 years, as well as providing a figure for need over the 15 year projection period, whereas the previous model assumed all the need would be met in 5 years. If we consider total need in the new model, there is a need for 6,918 new affordable homes using principal projections compared to 6,025 (1,205 x 5) in 2021, shows need is higher than in the most recent LHMA, 2021.

In addition, whilst it is necessary to provide a net affordable housing figure across all property types, affordable tenures and areas, this figure is highly misleading as it distorts differences in submarket areas, tenures and property types required. In particular, the need for social rented accommodation is masked by accommodation which is either considered to be surplus or has a relatively high turnover rate, due to the nature of the LHMA calculation. Consequently, even if the headline gross social housing need of 1075 was delivered every year in the Vale of Glamorgan, this would by no means meet the actual need present in many of the housing market areas. Hence, more consideration should be given to the specific need identified by property type and size within each housing market area as summarised within the assessment.

The LHMA informs the Local Development Plan (LDP) and provides evidence for the need for affordable housing in the Vale of Glamorgan. Operationally, it also provides a tool to negotiate affordable housing provision on planning applications, allocate Social Housing Grant (SHG) and inform strategic housing priorities at the local level.

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1. INTRODUCTION

1.1 National Policy Background

Section 8 of the Housing Act 1985 (as amended) places a statutory duty on local authorities to periodically assess the level of housing need in their area. It is vital that authorities have a comprehensive understanding of their local housing market(s) and provide a robust evidence base for effective strategic housing and planning services. Production of an LHMA falls under this duty, building upon the requirement to review housing needs through a more holistic review of the whole housing market. Welsh Government expect local authorities to rewrite LHMAs every five years and refresh that LHMA once during that five-year period (between years two and three) under section 87 of the Local Government Act 2003 (as substituted by the Deregulation Act 2015

The importance of LHMAs was underlined in the 2019 Independent Review of Affordable Housing Supply, which concluded “the basis of good housing policy and decisions regarding affordable housing supply stems from the best possible data on housing need and demand”. The Review placed significant emphasis on understanding exactly how many homes are needed, in which geographical areas and in what tenures. A robust LHMA is the key means of identifying this evidence at the local level.

Planning Policy Wales highlights that LHMAs are to “form a fundamental part of the evidence base for development plans”, that should be considered holistically with a range of other evidence “in order to identify an appropriate strategy for the delivery of housing in the plan area” (WG, 2023, para. 4.2.6). The importance of understanding need for different types of affordable housing in relation to supply is also highlighted, with the LHMA being deemed critical to inform the appropriate mix of dwellings for new developments and “to support policies and decisions on planning applications” (WG, 2023, para. 4.2.7)

In addition, local authorities must carry out a homelessness review and develop a homelessness strategy every four years under sections 50, 51 and 52 of the Housing (Wales) Act 2014. The LHMA plays a fundamental role in informing this strategy which must include a review of the resources available to the local authority and other bodies associated with supporting people who are or may become homeless.

1.1.1 Homelessness legislation and guidance

An overview of Welsh Government changes to homelessness legislation and guidance is included in this LHMA refresh due to its significance. The Covid 19 pandemic prompted a big change to how local authorities process homelessness applications, and authorities across Wales are still working through the consequences. From March 2020 the Welsh Government ordered authorities to suspend Priority Need and Intentionality tests to homeless applications and instilled

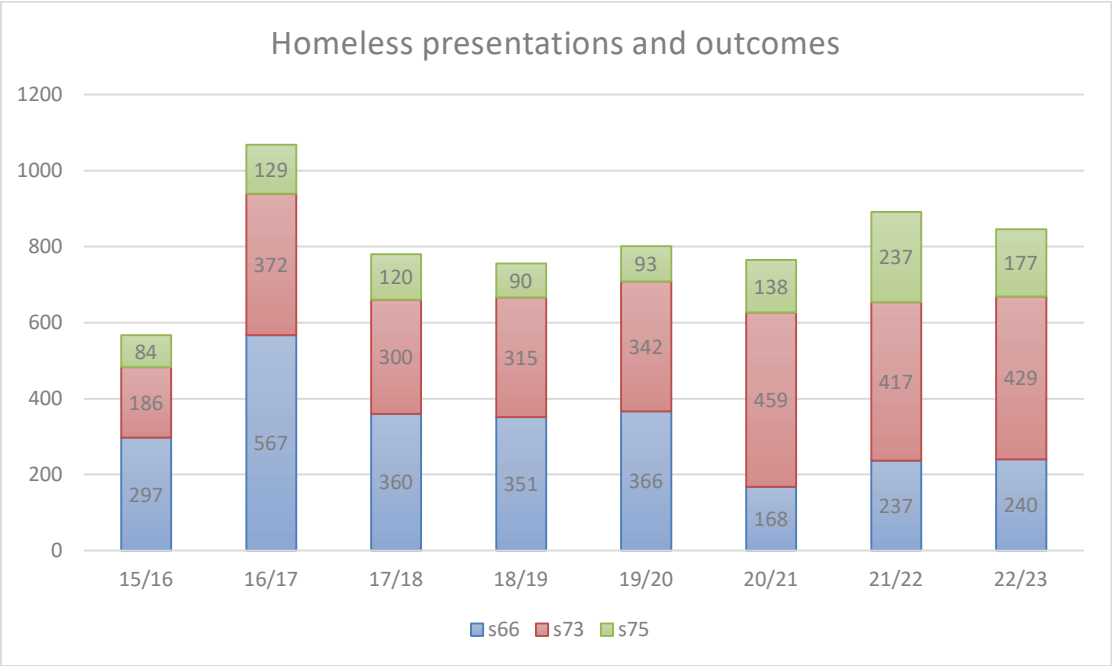
Public Health Measures under 'No-One Left Out'. This meant that authorities had a duty to accommodate anyone at risk of homelessness.

There are 5 key duties under the Housing (Wales) Act.

1. The duty to assess (section 62)
2. The help to prevent duty (section 66)
3. The help to secure accommodation duty (section 68)
4. The interim accommodation duty (section 73)
5. Final duty (section 75)

Due to the social and economic impact, the pandemic period understandably triggered a reverse in the previous downward trend in homelessness applications. The implication of Public Health measures coupled with a rise in homeless applications resulted in a sharp increase in households the Council had a duty to accommodate under Section 73 of the Housing (Wales) Act 2014, as in figure 1 below.

Figure 1: Homelessness presentations and outcomes 2015 – 2023



There has not been a significant rise in the number of homeless applications in the last two years, however, the nature of the duties owed has changed in these years, with more households reaching Section 73 and requiring the provision of temporary accommodation rather than only assistance to help secure accommodation. This was due to the temporary suspension of the priority need assessment because of Covid. The number of single people owed a duty under Section 75 has increased in the last two years as a result, significantly so in 2021/22. This has led to an increase in the use of temporary accommodation.

As Public Health measures were relaxed and slowly reversed during the 2022-2023 financial year, the Welsh Government published an addendum to the Housing (Wales) Act 2014 which added an 11th category to Priority Need of Rough Sleeping. The addendum, which came into force in October 2022, now means that anyone who presents as homeless who has no other accommodation options must be treated as at risk of rough sleeping and therefore in Priority Need, thus giving the local authority the duty to accommodate.

The Vale continues to apply Priority Need and Intentionality tests to all homeless applications but given the recent changes, it seems unlikely that presentations and those statutorily entitled to accommodation, will reduce significantly or go back to pre-pandemic levels.

In October 2023 the Expert Review Panel on Ending Homelessness published its recommendations for legislation reform in the White Paper on ending homelessness in Wales. These recommendations are under consultation until January 2024. It is anticipated that any housing legislation reform will be adopted by the end of the current Senedd term.

Of the more significant recommendations is the proposal to remove the tests of Priority Need and Intentionality which will have a direct impact on future homelessness figures and the Vale's statutory duties.

1.1.2 Rapid Rehousing

Welsh Government's vision is for homelessness to be 'rare, brief and unrepeated'. Local Authorities are seeking to achieve this by adopting a Rapid Rehousing approach to homelessness, focusing on the prevention of homelessness. Where prevention is not possible appropriate, stable housing and support should be provided through a range of models, thereby reducing the dependency on emergency housing.

Over the next five years Welsh Government expect to see removal of prolonged and potentially damaging spells in temporary accommodation and the development of a systematic and strategic process that links housing development, support and supply to housing need.

The Council's Rapid Rehousing Transition Plan (RRTP) identifies priority areas to prevent homelessness at the earliest opportunity, to minimise any time households may have to spend in temporary accommodation and to provide the right level of support at the right time to sustain future tenancies:

Aims

- Increase supply of settled accommodation to homeless people.
- Removal of barriers to settled accommodation faced by homeless people.

- Reduction in the need for temporary accommodation over the medium to longer term
- Deliver packages of tailored assistance and support to individual needs, including those excluded from other forms of accommodation.

1.1.3 Planning Policy Wales

Planning Policy Wales (Edition 12) indicates that the latest LHMA will form a fundamental part of the evidence base for development plans. These assessments allow authorities to develop a detailed understanding of the nature and level of market and affordable housing demand and need in their communities.

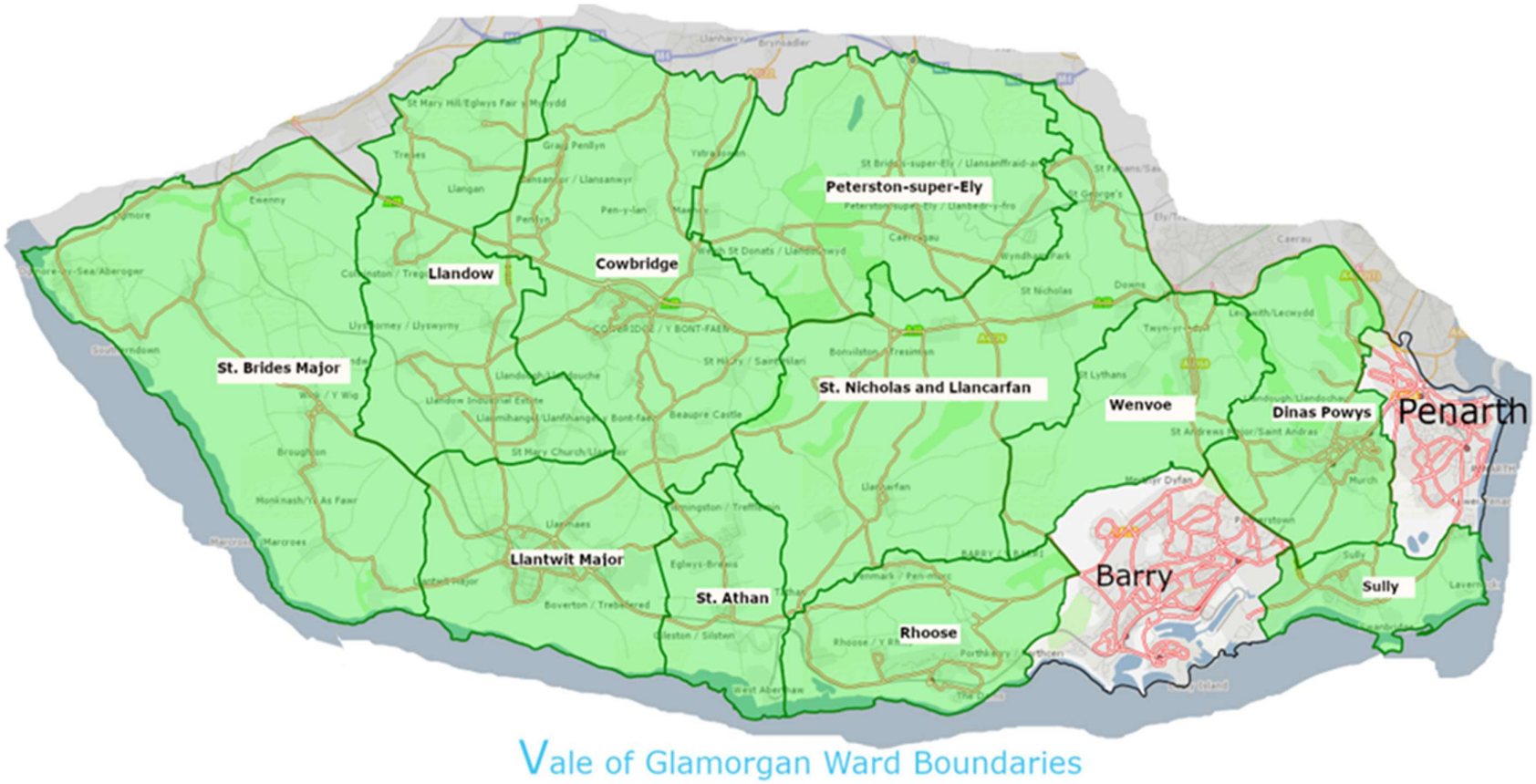
1.1.4 Future Wales: The National Plan 2040

Policy 7 of Future Wales on Delivery Affordable Homes states the planning authorities should develop strong evidence based policies to deliver affordable housing. These should be based on local assessments.

1.2 Previous Local Housing Market Assessments

The Local Housing Market Assessment (LHMA) 2021 provided an up-to-date picture of the housing market information in the Vale of Glamorgan, this has now been reviewed to give an updated view as of 2023. The methodology for the LHMA is discussed in the next section, but it should be noted that a LHMA does not provide a definitive target figure for affordable housing. The assessment should be considered an art and not a science, as the data is only correct at the time the calculation is conducted and should only be used as a periodic review of the housing market. The need for affordable housing is presented across the housing market areas as shown in figure 2 following:

Figure 2: Map of the Vale of Glamorgan



1.3 Assessment and Methodology

The updated LHMA 2023, in common with previous LHMAs, assesses the housing market in the Vale of Glamorgan, considering all geographical areas, at housing market area (HMA) or ward level, an overview of population statistics, and a quantitative assessment of housing need.

LHMAs must be rewritten every five years and refreshed once during that five-year period (between years two and three). The Vale of Glamorgan Council last undertook a review of the LHMA in 2021, therefore a refresh was required again in 2023.

Welsh Government produced new guidance (Undertaking Local Housing Market Assessments: Guidance) in 2022 and a LHMA tool. This refresh has been undertaken using the new methodology and Version 3.2 of the tool, therefore caution should be used when comparing the results with previous versions. The report largely follows previous LHMAs, together with the LHMA refresh template produced by WG, however, additional points have been included where it is considered relevant.

The new methodology categorises the need by the first 5 years, and subsequent 10 years, as well as providing a figure for need over the 15 year and then 15 years projection period.

Historically, only households in need of social rented accommodation were in housing need. However, the on-going economic climate, with increasing cost of living and housing costs putting pressure on household incomes, has resulted in many households being unable to afford their housing and living costs, leading to households being squeezed out of the home ownership and private rented sectors and being left in need of alternative forms of affordable housing. These alternative forms of affordable accommodation include properties available for intermediate rent and low-cost home ownership.

For the purposes of the LHMA, affordable housing is defined as: ‘housing provided to those whose needs are not being met by the market’ and should: -

- Meet the needs of eligible households, including availability at a low enough cost for them to afford, determined regarding local incomes and local house prices.
- Include provision for the home to remain affordable for future eligible households (affordable in perpetuity), or if a home ceases to be affordable or stair-casing to full ownership takes place, any subsidy should generally be recycled to provide replacement affordable housing.
- Include social rented housing, intermediate rented housing and low-cost home ownership opportunities.

Social rented housing is that provided by local authorities and registered social landlords (RSLs). Intermediate housing is that where prices or rents are above those of social rent but below market housing prices or rents. Affordable housing differs to market housing, which is classed as private housing for sale or rent, where the price is set in the open market and their occupation is not subject to control by the Local Planning Authority.

In assessing the housing market, the LHMA specifically estimates the need for affordable housing, including social rented housing and intermediate housing products, over the coming years.

In common with the previous LHMA, this update considers housing data and need across the housing market areas (HMAs) in the Vale of Glamorgan; outside of Barry and Penarth and Llandough, these areas are coterminous with the ward boundaries. Since the last LHMA the wards in the Vale of Glamorgan have undergone some changes, with a new ward of St Nicholas and Llancarfan being added as of May 2022. Primarily, Barry and Penarth/Llandough combined are considered standalone areas which are made up of eight and five separate wards respectively as in figure 3.
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Figure 3: Market Areas by Ward

LHMA Housing Market Areas		
Barry	Llantwit Major	St Athan
Cowbridge	Penarth and Llandough	St Brides Major
Dinas Powys	Peterston-Super-Ely	St Nicholas & Llancarfan
Llandow	Rhoose	Sully
	Wenvoe	

1.4 Additional housing need estimates

The LHMA estimates the additional housing need likely to be required by the Vale of Glamorgan split by housing market areas and tenures. The previous LHMA rewrite was prepared in 2021, utilising section 87 of the Local Government Act 2003, local authorities are expected to rewrite their LHMAs every five years and refresh that LHMA once during that five year period. This 2023 LHMA is a refresh and the table in figure 4 below provides current estimate of the current overall additional housing need by HMA and tenure as of June 2023.

Figure 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA.

	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	**Social rent**	**Intermediate rent and LCHO**	**Affordable Housing (c) = (a) + (b)**	**Social rent**	**Intermediate rent and LCHO**	**Affordable Housing (c) = (a) + (b)**
Barry	145	65	210	2,176	979	3,154
Penarth/Llandough	48	26	74	718	392	1,110
Cowbridge	7	8	15	107	123	230
Dinas Powys	23	12	35	342	178	519
Llandow	2	1	3	34	16	50
Llantwit Major	31	14	45	466	209	675
Peterston Super Ely	5	1	6	81	13	94
Rhoose	12	6	19	184	95	279
St Athan	5	3	9	76	52	128
St Brides Major	6	2	8	92	32	124
St Nicholas & Llancarfan	4	1	5	62	15	77
Sully	6	10	16	92	144	237
Wenvoe	10	6	16	154	87	242
Additional housing need estimates by tenure	**306**	**156**	**461**	**4,584**	**2,334**	**6,918**

1.5 Latest additional housing need estimates

The LHMA Tool allows users to run need scenarios based on the latest WG Principal Household Projections (currently 2018-based), together with the published higher and lower variants of these projection. It also allows users to run a need estimate informed by projections used to inform LDPs.

Based on the 2018 based principal household projections in the Welsh Government assessment tool, the four tables below, Figures 5 and 6 cover the first five years of the LHMA and Figures 7 and 8 the remaining ten years, it is assumed that the current need will be met over the first five years:

Figure 5: LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

HMA	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	Social rent	Intermediate rent	LCHO	Affordable Housing
Barry	239	73	17	16	344	23	135	502
Penarth/Llandough	56	35	15	5	112	9	54	175
Cowbridge	10	3	-	-	13	2	19	35
Dinas Powys	30	11	8	2	51	3	27	81
Llandow	2	2	-	0	4	1	2	7
Llantwit Major	38	23	-	2	64	0	40	105
Peterston Super Ely	4	5	1	1	11	0	2	13
Rhoose	20	6	3	1	30	2	14	46
St Athan	10	-	-	1	11	1	6	19
St Brides Major	6	2	-	1	9	1	3	13
St Nicholas & Llancarfan	3	0	-	0	3	1	-	4
Sully	10	-	-	0	10	2	24	36
Wenvoe	10	9	3	2	23	1	14	39
Additional housing need estimates by tenure	**439**	**170**	**47**	**32**	**687**	**47**	**341**	**1,075**

Figure 6: LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

HMA	Social rent	Intermediate Housing	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
Barry	733	160	893	40	59	99	992
Penarth/Llandough	207	68	275	18	34	52	328
Cowbridge	56	33	90	3	11	14	104
Dinas Powys	73	32	105	5	8	13	118
Llandow	6	2	8	1	2	2	11
Llantwit Major	79	42	121	8	9	17	138
Peterston Super Ely	12	3	16	0	1	1	17
Rhoose	46	17	63	5	10	15	79
St Athan	34	9	44	4	5	9	52
St Brides Major	17	6	22	2	4	6	28
St Nicholas & Llancarfan	7	2	9	0	2	2	11
Sully	27	30	57	3	7	10	67
Wenvoe	32	16	48	1	2	3	51
Additional housing need estimates by tenure	**1,329**	**421**	**1,750**	**91**	**154**	**245**	**1,995**

Figure 7: LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period.

HMA	Social rent	Intermediate Housing	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
Barry	45	19	64	40	59	99	164
Penarth/Llandough	16	8	23	18	34	52	76
Cowbridge	4	2	6	3	11	14	20
Dinas Powys	9	3	11	5	8	13	24
Llandow	1	0	2	1	2	2	4
Llantwit Major	15	1	15	8	9	17	32
Peterston Super Ely	3	0	3	0	1	1	4
Rhoose	3	2	5	5	10	15	20
St Athan	2	1	3	4	5	9	12
St Brides Major	5	1	6	2	4	6	12
St Nicholas & Llancarfan	5	1	6	0	2	2	8
Sully	4	1	6	3	7	10	16
Wenvoe	4	1	5	1	2	3	8
Additional housing need estimates by tenure	**115**	**39**	**154**	**91**	**154**	**245**	**399**

Figure 8: LHMA Report Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA.

HMA	Social rent	Intermediate Housing	Affordable Housing	Social rent	Intermediate Housing	Affordable Housing
Barry	145	65	210	2,176	979	3,154
Penarth/Llandough	48	26	74	718	392	1,110
Cowbridge	7	8	15	107	123	230
Dinas Powys	23	12	35	342	178	519
Llandow	2	1	3	34	16	50
Llantwit Major	31	14	45	466	209	675
Peterston Super Ely	5	1	6	81	13	94
Rhoose	12	6	19	184	95	279
St Athan	5	3	9	76	52	128
St Brides Major	6	2	8	92	32	124
St Nicholas & Llancarfan	4	1	5	62	15	77
Sully	6	10	16	92	144	237
Wenvoe	10	6	16	154	87	242
Additional housing need estimates by tenure	**306**	**156**	**461**	**4,584**	**2,334**	**6,918**

1.6 Housing Market and Socio-economic and Demographic Trends

In mid-2022, the population of the Vale of Glamorgan was estimated to be 133,492. Between mid-2021 and mid-2022, the total population of the Vale of Glamorgan is estimated to have grown by 0.75%, which is 1,001 people. Between mid-2011 and mid-2022, the total population of the Vale of Glamorgan is estimated to have grown by 5.4%, 6,813 people. This growth was made-up of substantial positive net internal migration of 10,447 people. Negative net international migration of -361 people and natural change of -38. Between mid-2011 and mid-2022, it is estimated that the population aged 0-15 grew by 4%, 1,058 people; the population aged 16-64 reduced by -0.9%, -751 people; and the population; and the population aged 65 and over grew by 22%, 6,506 people. See Figure 9 following:

Figure 9 – Population Data from ONS

Summary components of change, Vale of Glamorgan

	mid-2011	mid-2012	mid-2013	mid-2014	mid-2015	mid-2016	mid-2017	mid-2018	mid-2019	mid-2020	mid-2021	mid-2022	Net
Population	126,679	126,703	126,458	126,714	126,261	127,082	128,377	129,165	129,802	131,224	132,491	133,492	
Births		1,431	1,336	1,304	1,321	1,307	1,391	1,315	1,246	1,225	1,206	1,231	14,313
Deaths		1,150	1,265	1,202	1,318	1,293	1,276	1,366	1,283	1,441	1,407	1,350	14,351
Natural Change		281	71	102	3	14	115	-51	-37	-216	-201	-119	-38
Internal In		5,486	5,715	5,877	5,752	6,449	6,005	6,177	6,002	6,175	7,024	5,874	66,536
Internal Out		5,267	5,516	5,365	5,752	5,285	4,505	4,889	4,867	4,207	5,199	5,237	56,089
Internal Net		219	199	512	0	1,164	1,500	1,288	1,135	1,968	1,825	637	10,447
International In		279	255	283	292	334	347	304	288	257	228	844	3,711
International Out		357	362	341	358	372	399	415	445	392	335	296	4,072
International Net		-78	-107	-58	-66	-38	-52	-111	-157	-135	-107	548	-361
Special		-34	-56	14	-41	39	43	-35	-19	33	-2	-65	-123
Unattributable		-364	-352	-314	-349	-358	-311	-303	-285	-228	-248	0	-3,112
Other		0	0	0	0	0	0	0	0	0	0	0	0
													6,813

Note: Incorporates rebased mid-year estimates published November 2023.

Note: Unattributable change has been rounded by single year of age and sex before aggregation

House Price Affordability data (residence based) for 2023 shows that a substantial gap remains between house price affordability in the Vale of Glamorgan when compared to the Welsh average. The house price to residence based earnings ratio measures the expected amount a full-time employee will have to spend to buy a home. In 2023, the house price to residence based earnings ratio, in the Vale was 8.33, 2.34 higher than the Welsh average of 5.99. This reflects the widening of median house price paid in September 2023 in the Vale of Glamorgan of £284,000 and Wales of £196,500. Across the Vale of Glamorgan there is significant variation in the median house price paid by Middle Super Output Area (MSOA), with the highest median house price paid in the Cowbridge MSOA at £529,995 in September 2023.

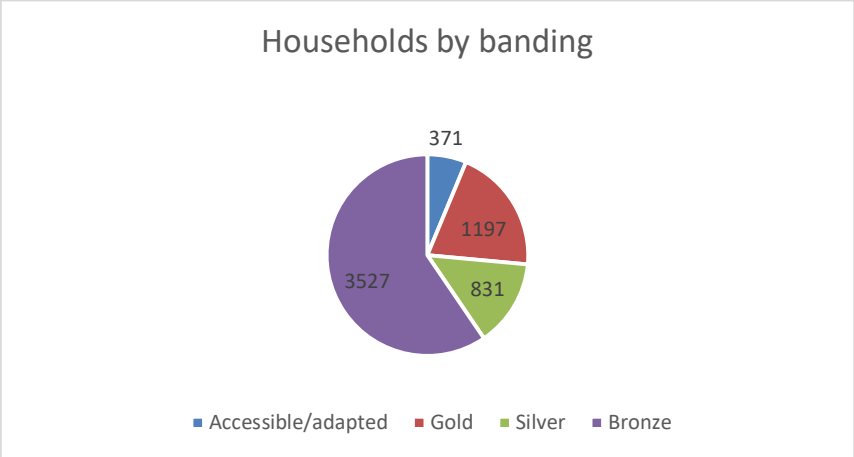
Newly published data from the ONS on private rental prices by Local Authority estimates the average price of private rent in the Vale of Glamorgan in February 2024 to be £844 a month. It is estimated that this price has increased by 9.7% in the last year, up from £770 in February 2023. The median indicative Local Housing Allowance (LHA) for all properties for 2024/25 in the Vale of Glamorgan are £160.06 a week, equating to a monthly payment of £640 a month.

1.7 Specific Housing Needs Requirements

1.7.1 Accessible & Adapted Housing Provision

Fure xx below shows that as in 2021, 371 (6%) of applicants have an Accessible Homes banding; this banding is for households where a member is disabled, has mobility issues or a chronic illness and may need a property which is accessible or adapted to meet their needs. This includes a small number of people with a very high priority as they are awaiting release from hospital to a suitable home. This percentage has not changed despite 252 applicants in this category having been housed over the past two years, which points to an increase in the number of people needing this type of accommodation.

Figure 10: **Household by Banding on Homes4U**



Most of the purpose built adapted accommodation continues to be built by social landlords and not by market developers. This is due to the space requirements needed for these properties and the relatively high cost of developing such accommodation.

Securing new accessible and adapted social rented accommodation is usually through the development of suitably adapted ground floor accommodation. In addition, on affordable housing developments led by social landlords, efforts are made to include a minimum of two accessible homes to meet the needs of larger households and households with higher needs.

1.7.2 Multi-generational and/or larger families requiring larger properties.

Although most homes needed are smaller, there is still a need for larger family homes as in Figure 5 above which shows 32 people per year for the first 5 years of the LHMA waiting for properties larger than 4 bedroom.

1.7.3 Non-permanent housing

The need for temporary accommodation (TA) has increased dramatically over the time since homelessness legislation was changed during Covid 19. Currently the Vale of Glamorgan has 242 households in TA, this is a combination of purpose built hostel type and properties leased from the private rented sector for this purpose. The 242 households are made up mostly of singles/couple, 192, and the remaining 50 being families. Additional TA is constantly being identified as there is no let-up in the people presenting as homeless. The Vale of Glamorgan is placing on average 5 singes/couple or families into TA and families are waiting up to 3 months for permanent accommodation with this time stretching to 2 years for some singles/couples.

1.7.4 Housing, care and support needs

Housing related support seeks to enable vulnerable people to maintain and increase their independence and capacity to remain in their own home and is about individualised care targeted at improving the life of that person whilst developing essential personal, social and financial skills for keeping the home they are in using a range of housing related support services.

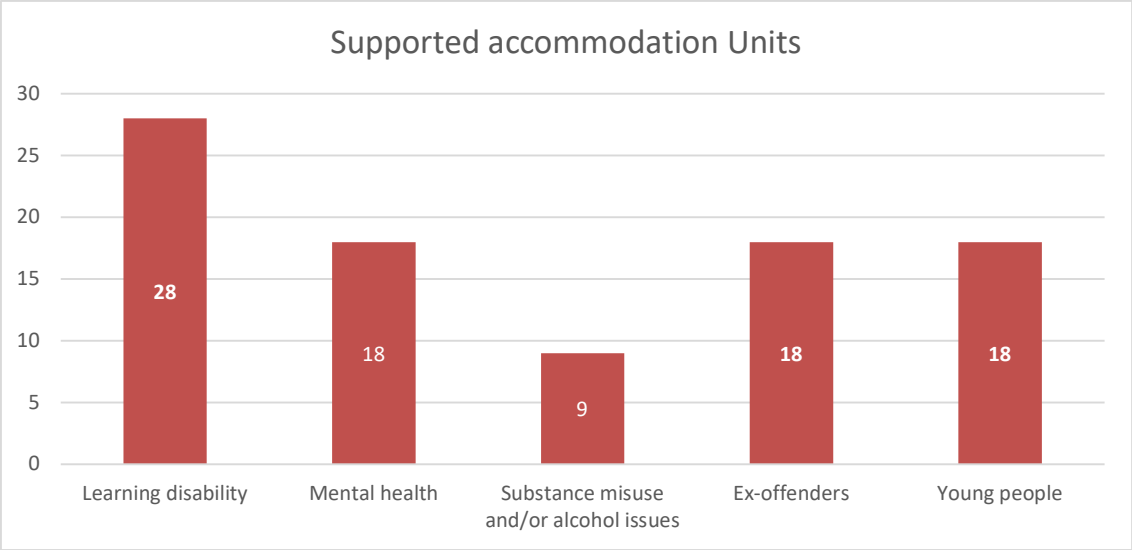
The demand for supported housing continues to grow and with it the need for specialised accommodation such as:

- Supported accommodation for people with Learning Difficulties and/or Developmental Disorders.

- Additional temporary supported accommodation for people with generic needs.
- Additional Supported Lodgings Placements.
- Specialist supported accommodation provision for people with substance misuses issues where support is available out of hours.
- Additional capacity for refuge provision.

The need for supported accommodation is growing, there are currently 26 people on the waiting list for support with a further 78 who are waiting for supported accommodation.

Figure 11: Supported Accommodation Units



The Vale of Glamorgan has 91 people currently living in supported accommodation as above in figure 11, with enquiries for the service per annum reaching 3,342.

As people live longer the need for additional care and support increases as a result of more people experiencing difficulties with day-to-day activities. This impacts the type of care and support needed to support this cohort, and naturally impacts on the type of accommodation required. It is therefore important that the needs of this age range are considered in more detail.

There is also a significant need for older person's accommodation, most of which is for one-bedroom properties. Accommodation for older people has changed over recent years and traditional types of accommodation such as bedsits are now unpopular. The Older Persons Accommodation Strategy for the Vale of Glamorgan shows the demand for different types of housing and how this will change over the coming fifteen years as in Figures 12 and 13 below.

Figure 12: Total estimated net need: Older people's housing: retirement housing (for social rent and for sale) (units)

Locality	Current Provision (units)	By 2027	By 2032	By 2037
Central Vale	297	70	148	216
Eastern Vale	445	50	104	153
Western Vale	87	53	109	159
TOTAL	829	173	361	528

Figure 13: Total estimate net need: Housing with care: extra care housing (for social rent and for sale) (units)

Locality	Current Provision (units)	By 2027	By 2032	By 2037
Central Vale	42	1	53	107
Eastern Vale	0	39	86	135
Western Vale	0	41	88	140
TOTAL	42	81	227	382

In summary this suggests that there is estimated net need for:

- Retirement housing (for social rent and for sale): c.175 units by 2027, increasing to c.530 units by 2037.
- Housing with care (extra care housing for social rent and for sale): c.80 units by 2027, increasing to c.380 units by 2037.

The Homes4U waiting list evidenced 943 people only interested in sheltered housing properties.

1.7.5 Locational needs for people with physical or cultural needs

The 2021 Census shows that most people in the Vale of Glamorgan, 94.6%, identified as being from a White background; this compares to 96.4% in 2011. 92% of people identified as being from a White: English, Welsh, Scottish, Northern Irish or British background; this compares to 94.45% in 2011.

In 2021, 2.3% of Vale of Glamorgan residents identified their ethnic group.

within the "Mixed or Multiple ethnic groups" category, up from 1.3% in 2011. This 0.9 percentage-point change was the largest increase among high-level ethnic groups in the Vale of Glamorgan. 2.1% of people in the Vale of Glamorgan identified their ethnic group within the "Asian, Asian British or Asian Welsh" category; this compares to 1.6% in 2011 and 0.5% of Vale of Glamorgan residents identified their ethnic group within the 'Black, Black Welsh, Black British, Caribbean of African' category.

An analysis of the waiting list shows 93% of the applicants who answered the question have identified as White, with 2% as Mixed Race, 1% Asian and 1% Black, the remainder have not suppled an answer.

The Vale of Glamorgan has been supporting displaced families to resettle in the Vale since 2016. There are currently 30 families from Syria and Afghanistan living in privately rented accommodation that are being supported whilst on various resettlement schemes. Support is in place for the length of the resettlement scheme which lasts for between 3 and 5 years depending on the scheme they arrived under. The aim of the support is to help the families integrate into their new community and learn to live independently in the Vale of Glamorgan

2 ANALYSIS OF CHANGE

This LHMA has been prepared using version 3.2 of the LHMA tool issued by Welsh Government, along with training materials and guidance: *Undertaking Local Housing Market Assessments (LHMAs), March 2022*. The LHMA and updated guidance has been developed to ensure that local authorities adopt a consistent approach to developing their LHMAs.

The methodology for calculating the net shortfall of affordable housing is relatively complex and involves collating and analysing several sources of data and applying various assumptions to the LHMA Tool. The sources of data and assumptions are outlined in this section.

2.1 Data Inputs and key assumptions

A range of data sets have been used to prepare this LHMA. The primary sources of data are:

- Vale of Glamorgan Homes4U and Aspire2Own registers
- Hometrack - property valuation and housing market data
- Office for National Statistics
- Land Registry Data
- CACI Paycheck - gross household income estimates
- Nomis – official Census and labour market statistics provided by the ONS.

Below, Figure 14 shows how the data fed into the tool is used to determine the need. The backlog of need is taken from waiting list data and from homelessness cases (existing falling into need) and together with newly arising need (from the WG household projections) is netted off against the re lets and new build (committed supply).

Figure 14: Summary of headline need over the first 5 years of the LHMA, as per Welsh Government Tool 2023

	Social Rent	Intermediate Housing	Total
Newly Arising Need	115	39	154
Backlog	1214	382	1596
Sub Total	**1329**	**421**	**1750**
Supply	642	33	675
Net Annual Need	**687**	**388**	**1075**

2.1.1 Newly arising need

The Local Housing Market Assessment Guidance 2022 states that the LHMA Tool will be pre-populated with the latest Welsh Government household projections, including principal and higher and lower variant options. The variants allow for different assumptions in the migration, fertility and mortality rates. Practitioners are required to run scenarios based on the principal and two variants to better understand how a change to the selected household projections impacts the additional housing need estimates. The outputs from these scenarios are the baseline scenarios that are required to be included in the LHMA Report.

Practitioners can also provide their own household projections to understand how a particular housing strategy may influence the additional housing need estimates. Where possible and appropriate as determined by the local authority, it is recommended that the projections utilised within LHMAs and Development Plans are consistent, although this will depend on publication timescales.

The Council has commenced preparation of a Replacement Local Development Plan (RLDP) for the period 2021-2036. The Preferred Strategy for the RLDP was published for consultation in December 2023 and include a preferred growth scenario based on the dwelling led scenario equating to 526 dwellings per annum, reflecting the average delivery over a 10-year period to 2021. Whilst the RLDP covers the period to 2036, the projections have been extended to reflect the longer time period of the LHMA. The household projections by household type generated from this RLDP scenario have been included within the LHMA tool as a 'user projection.'

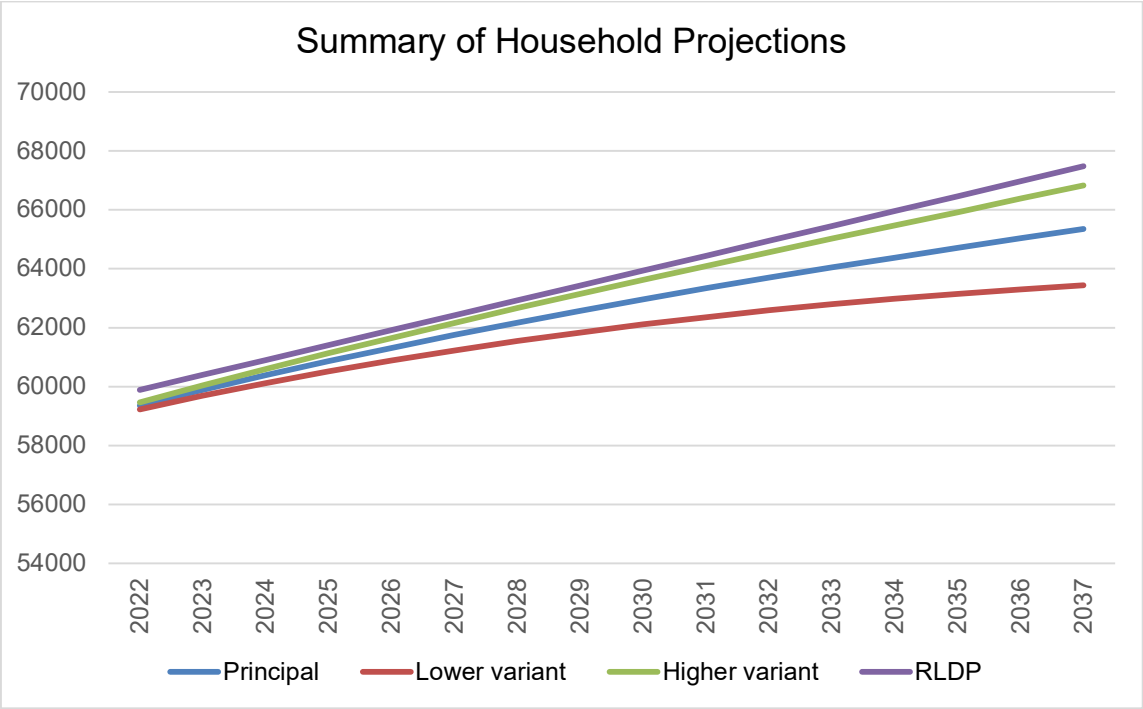
The WG 2018 household projections are being used to inform the headline projection from the LHMA. These projections, which are the latest published by WG, estimate that the number of households in the Vale of Glamorgan will increase from 59885 in 2023 to 65,346 by 2037 as in Figure 15 below.

Figure 15: Welsh Government 2018 Household Projection Figures

	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037
2018	59358	59885	60383	60863	61316	61750	62176	62575	62962	63335	63700	64051	64380	64706	65030	65346

These projection figures, together with the higher and lower variants and the RLDP projection are shown in Figure 16.

Figure 16: Summary of Household Projections used in the tool.



The principal projection predicts there will be 5988 additional households by 2037 while the lower and higher variants predict this will be 4207 and 7372, respectively. The Preferred Growth Option in the RLDP is based on a dwelling led scenario reflecting 10 year average completions. This assumes a growth of 7,586 households, which equates to 7,890 dwellings when vacancy rates are applied.

Only a proportion of new households will require affordable housing as some will be able to meet their own housing needs via the open market. House price and household income data was applied to produce an estimation of the newly arising need by tenure, disaggregated to HMAs using the Census 2021 percentages.

The LHMA Tool shows the gross estimated annual additional housing need by HMA and tenure for the first five years of the LHMA as in figure 17 below.

Figure 17: Additional Housing Need by HMA and Tenure first five years

HMA	Social rent	Intermediate Housing	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
Barry	733	160	893	40	59	99	992
Penarth/Llandough	207	68	275	18	34	52	328
Cowbridge	56	33	90	3	11	14	104
Dinas Powys	73	32	105	5	8	13	118
Llandow	6	2	8	1	2	2	11
Llantwit Major	79	42	121	8	9	17	138
Peterston Super Ely	12	3	16	0	1	1	17
Rhoose	46	17	63	5	10	15	79
St Athan	34	9	44	4	5	9	52
St Brides Major	17	6	22	2	4	6	28
St Nicholas & Llancarfan	7	2	9	0	2	2	11
Sully	27	30	57	3	7	10	67
Wenvoe	32	16	48	1	2	3	51
Additional housing need estimates by tenure	**1,329**	**421**	**1,750**	**91**	**154**	**245**	**1,995**

The LHMA tool shows the additional newly arising need over the remaining 10 years of the LHMA as in figure 18 below.

Figure 18: Additional Housing Need by HMA and Tenure remaining 10 years.

HMA	Social rent	Intermediate Housing	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
Barry	45	19	64	40	59	99	164
Penarth/Llandough	16	8	23	18	34	52	76
Cowbridge	4	2	6	3	11	14	20
Dinas Powys	9	3	11	5	8	13	24
Llandow	1	0	2	1	2	2	4
Llantwit Major	15	1	15	8	9	17	32
Peterston Super Ely	3	0	3	0	1	1	4
Rhoose	3	2	5	5	10	15	20
St Athan	2	1	3	4	5	9	12
St Brides Major	5	1	6	2	4	6	12
St Nicholas & Llancarfan	5	1	6	0	2	2	8
Sully	4	1	6	3	7	10	16
Wenvoe	4	1	5	1	2	3	8
Additional housing need estimates by tenure	**115**	**39**	**154**	**91**	**154**	**245**	**399**

2.1.2 Existing affordable housing need

The backlog of need for affordable housing can be generically defined as, the current number of households who are in housing need and unable to meet their needs in the market. Traditionally these only included households waiting for social rented accommodation, captured by analysing the households registered with Home4U, the common housing register in the Vale of Glamorgan.

The Council also operates Aspire2Own, a register for those first-time buyers in a financially stable position, yet still unable to purchase a home outright without assistance. This source of data is used with Homes4U to assess the total backlog of affordable housing need in the Vale of Glamorgan.

It is recognised that every LHMA is based on a snapshot in time and thus it is inappropriate to directly compare different outputs, however it is useful to show the

previous LHMA output as below in Figure 19. Previous LHMAs have split Intermediate Housing between those considered able to afford to buy with those who could afford market rents only but who were not eligible for social rent. The data collection exercise in the 2021 LHMA was carried out immediately before the lists were reviewed, whilst the 2023 data was taken mid-year, hence the lower numbers.

Figure 19: Headline Need net of Supply.

Year	Social Rent	Intermediate Housing	Total
2021	915	290	1205
2023	687	388	1075

Before proceeding with the analysis, it is imperative to outline three caveats that are integral to understanding the social housing backlog. Firstly, to enable an analysis of Homes4U, a snapshot of households waiting on the Register was taken on 5th June 2023 (a total of 6071 households were registered at this time); disaggregated by the first-choice area and property size (number of bedrooms) selected by each applicant as seen in figure 20 below.

Figure 20: Existing Unmet Need by HMA and Tenure from waiting lists.

HMA	Social Rent	Intermediate	
Barry	3437	707	
Penarth/Llandough	956	304	
Cowbridge	262	158	
Dinas Powys	320	148	
Llandow	23	10	
Llantwit Major	323	206	
Peterston Super Ely	48	15	
Rhoose	216	77	
St Athan	161	40	
St Brides Major	59	23	
St Nicholas & Llancarfan	10	5	
Sully	114	142	
Wenvoe	142	73	
TOTAL	6071	1908	**7979**

Homes4U data also captured all those homeless households deemed to be in priority need and to whom the local authority has a statutory duty to assist, together with non-priority homelessness cases in housing need. The data is only correct on the day of the snapshot; there are new registrations every week and the number of households registered continues to increase until a re-registration process takes place. The backlog of social housing used in the LHMA is likely to be an underestimation as

people register daily so information on the need for social housing should always be supplemented by 'live' waiting list data. A point to note is the low need collected for the ward of St Nicholas & Llancarfan, this is due it being a new ward in May 2022, so historically people were not able to select this area.

Applicants are asked to choose their first choice area so may be less likely to express a preference in areas with low stock or turnover so it may not be a true reflection of people who would want to live in rural areas.

Secondly, although housing registers provide a good estimation of existing households in need, they can also include a proportion of households who are not in need. Prior to being accepted onto the register applications are assessed according to the Homes4U Policy Homes4U Allocations Policy (valeofglamorgan.gov.uk) and then banded according to their level of housing need. However, there are few restrictions in terms of income or affordability, as it is recognised that in the Vale of Glamorgan house prices and rental levels can differ significantly and so setting a maximum income level would exclude people in more expensive areas.

The LHMA assumes the existing unmet need will be met over the first five years of the LHMA, so the gross backlog of need is divided by five to give the annual need of 1596, as in figure 21 below.

Figure 21: Annual Backlog of Affordable Housing

Social Rent	Intermediate	TOTAL
1214	382	1596

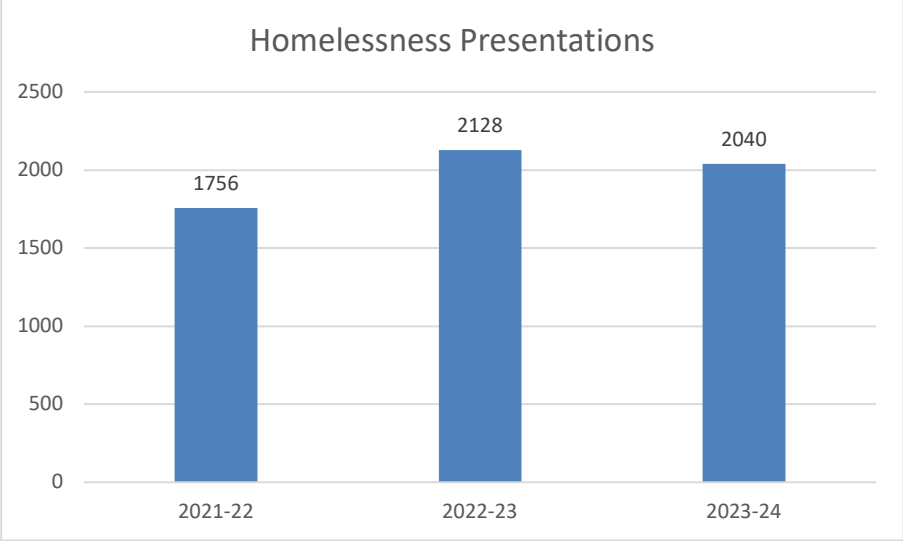
It is considered that the intermediate housing backlog may not be an accurate reflection of actual need. The limited stock and lack of turnover means that these properties are rarely available, due to a lack of availability people are less likely to register or be aware of these types of affordable housing.

The LHMA also needs to consider existing households falling into need each year due to homelessness. The number of homeless presentations requiring temporary accommodation gives a reasonable indication of the number of households likely to fall into need. Data has been used from the last three years to give an annual average. Duplicate presentations were filtered out to prevent double counting then presentations were analysed by bedroom requirement and the census ward level proportions were applied to give an estimation of the need at ward level.

There were 5924 homelessness presentations between April 2020 and March 2023, as in figure 22 below. As it is assumed that the existing need will be met over the first five years of the LHMA period, this equates to an annual figure of 1975 households.

These households will be eligible for social rent housing, they were allocated to this tenure.

Figure 22: Homelessness Presentations



Mortgage and landlord possession claims leading to orders can also be used to estimate the number of households likely to fall into need.

Homeless Charity 'Crisis' reported on Thursday 9 February 2023:

"the Ministry of Justice has released the latest figures on mortgage and landlord possessions in England and Wales, for October - December 2022.

The new figures show that there were 5,409 landlord repossessions in this period, a 98% increase on the same quarter last year and a similar level to the previous quarter.

The statistics also show that there were:

- *20,460 landlord repossession claims, 42% more than at the same time last year, and a similar level to the previous quarter.*
- *733 mortgage repossessions, a 134% increase on the same time last year, and a similar level to the previous quarter*. "

Most of these households will have been included in the homelessness presentations, therefore these households have not been included in the existing need figures to prevent double counting.

Additionally, there are indications that the mortgage and landlord possession claims have increased for the first two quarters of 2023 compared with the same period in

the previous year, the current economic situation is likely to be a contributory factor, with higher interest rates, inflation and cost of living.

2.1.4 Committed supply and turnover of existing stock.

The anticipated quantity of affordable housing (social rent and intermediate housing) 'already planned to be built (and/or acquired) over the period of the Assessment' is an important consideration to offset gross housing need. This includes all additional affordable housing due to be delivered over the first five years of the LHMA period, this information was gathered from:

- RSL development programmes
- Social Housing Grant Programme
- Local Development Plan
- Planning permissions requiring affordable housing as part of a Section 106 agreement.

To reach a figure for the number of units of affordable housing expected to be delivered for social rent, the committed supply of social rented housing going forward has been added to the average re-lets to give the estimated number of affordable homes for rent that will be provided.

The last three years lettings data was analysed from the Common Housing Registers for all tenures of affordable housing divided by three and combined with the annual committed supply to give the number of homes likely to become available for letting over the next five years as in figure 23 below.

Figure 23: Existing stock and planned supply of affordable housing over the next 5 years.

	Social rent								Intermediate Housing	
	Committed Supply				Expected re-lets					
HMA	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	Committed Supply	Expected turnover
Barry	233	119	24	6	745	467	327	22	-	13
Penarth/Llandough	127	36	-	-	152	95	58	7	2	24
Cowbridge	76	48	32	11	32	15	8	3	57	2
Dinas Powys	-	-	-	-	47	47	13	2	-	8
Llandow	-	-	-	-	2	2	3	-	-	-
Llantwit Major	-	-	-	-	28	23	40	2	-	7
Peterston Super Ely	-	-	-	-	2	2	3	-	-	7
Rhoose	6	6	3	-	28	30	7	-	-	7
St Athan	28	53	41	4	13	25	13	-	-	7
St Brides Major	7	4	6	-	13	5	3	2	6	-
St Nicholas & Llancarfan	4	11	3	-	-	-	2	-	39	5
Sully	16	58	13	4	-	3	2	-	-	20
Wenvoe	12	11	5	-	7	8	-	-	-	-
LA Total	509	346	127	25	1,069	722	479	38	104	97

The number of homes expected to be delivered each year for the next five years by bedroom size and tenure can be seen in figure 24 below.

Figure 24: Existing stock and planned supply of affordable housing per annum over each of the next 5 years by bedroom size.

	Total Social - net housing stock and supply				Total Intermediate - net housing stock and Supply
HMA	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	
Barry	196	117	70	6	3
Penarth/Llandough	56	26	12	1	5
Cowbridge	22	13	8	3	12
Dinas Powys	9	9	3	0	2
Llandow	0	0	1	-	-
Llantwit Major	6	5	8	0	1
Peterston Super Ely	0	0	1	-	1
Rhoose	7	7	2	-	1
St Athan	8	16	11	1	1
St Brides Major	4	2	2	0	1
St Nicholas & Llancarfan	1	2	1	-	9
Sully	3	12	3	1	4
Wenvoe	4	4	1	-	-
LA Total	316	214	121	13	40

2.1.5 House price data

Land Registry house price data is built into the tool, covering the calendar year 2022-2023. The data below in figure 25 shows a wide variation in the median house prices across the Vale of Glamorgan's HMAs, ranging from £182,934 in the Barry area to £524,081 in the St Nicholas and Llancarfan area. The most expensive properties in the Vale of Glamorgan tend to be in more rural areas as these tend to be larger, detached properties which attract a premium. The Barry area has the lowest average house price as this is mainly made up of more urban areas.

Figure 25: Median House Prices across the Vale of Glamorgan

HMAs	Barry	Penarth/Llandough	Cowbridge	Dinas Powys	Llandow	Llantwit Major	Peterston Super Ely	Rhoose	St Athan	St Brides Major	St Nicholas & Llancarfan	Sully	Wenvoe
Median House Price	182,934	297,144	420,253	296,645	459,807	237,320	521,609	271,929	212,599	400,477	524,081	316,426	316,426

2.1.6 Household income data

The variance in household incomes across the Vale of Glamorgan is a consideration and the only source of information to provide estimates at sub ward level CACI (Paycheck) which profiles incomes for all households in the UK, based on government data sources together with income data for millions of UK households collected from lifestyle surveys and other sources. The data captures all sources of income coming into the residential address, which is important to ensure that the data isn't skewed by households working in the Vale of Glamorgan yet living outside of the local authority boundary.

The 2023 CACI Paycheck figures which show the mean household income band in the Vale of Glamorgan is £50,000 to £55,000, whereas the median is £40,000 to

£45,000. The former is 'susceptible to small numbers of very high earners', whereas the latter measures 'the amount earned by the typical individual within a domain' without being skewed by extremities. The median figure is thus a more appropriate measure of income to focus on, although this obviously varies considerably across the locality.

To consider the distribution of incomes across geographical areas **Error! Reference source not found.**26 below shows the median household income at ward level across the Vale of Glamorgan. Clearly, the clusters of high income earners are in the north of the county, in primarily rural settlements including Llandow, Cowbridge, Peterson-Super-Ely, St Nicholas & Llancarfan and St Brides Major. Conversely, it is wards located across the south of the county; Llantwit Major, St Athan and Barry which have the lowest average median incomes.

Figure 26: Median Income across the Vale of Glamorgan by HMA

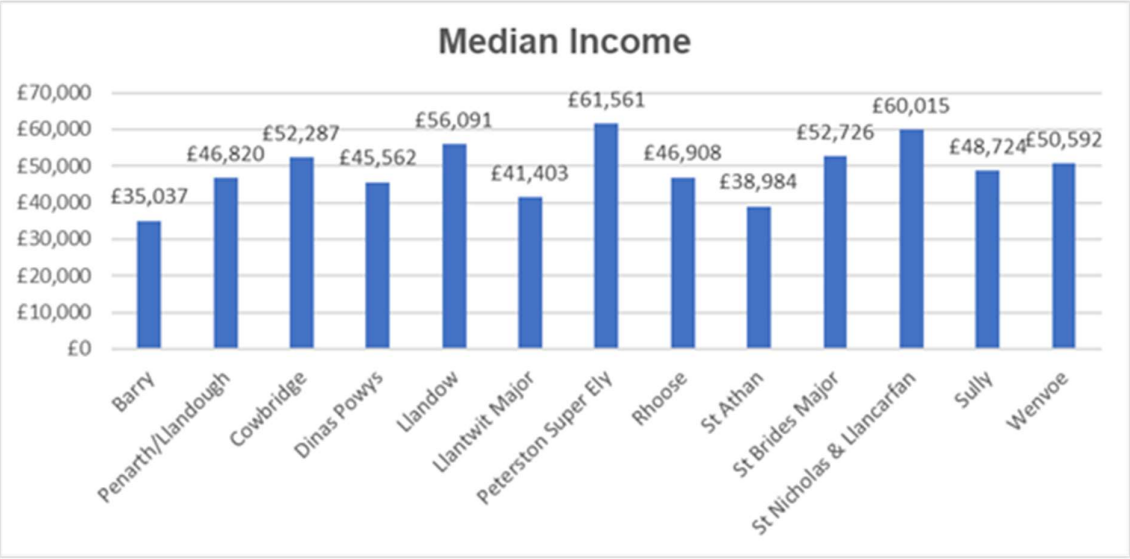


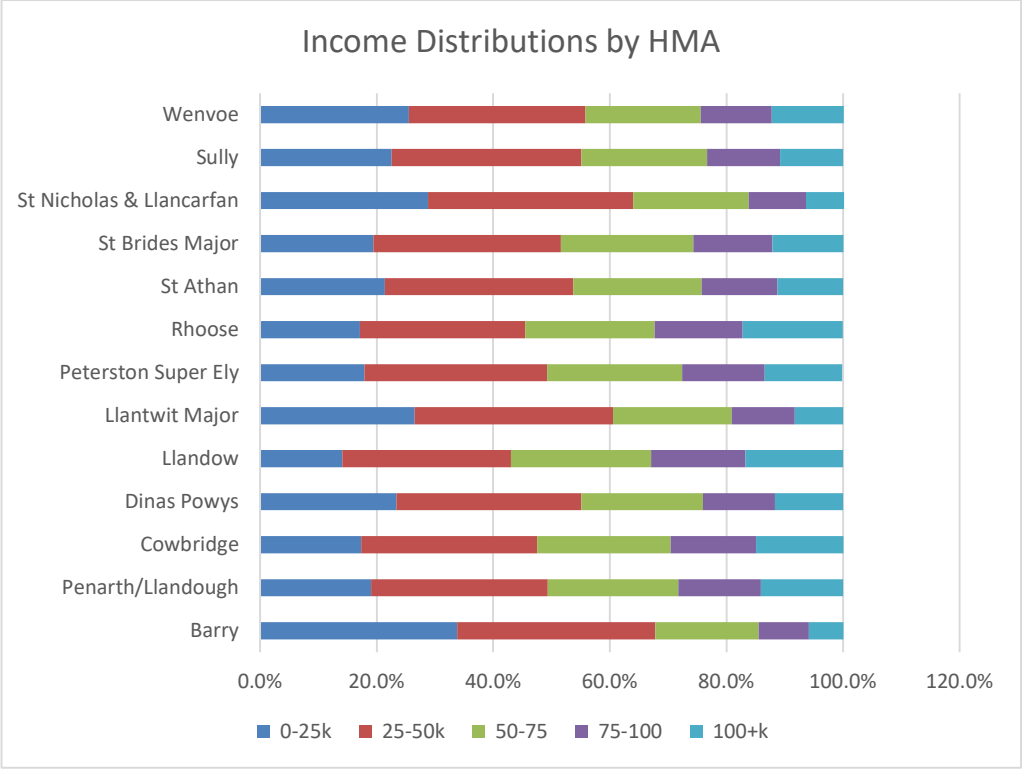
Figure 27: CACI 2023 Household Income by level and HMA.

HMA	Total Households	0-5k	5-10k	10-15k	15-20k	20-25k	25-30k	30-35k	35-40k	40-45k	45-50k	50-55k	55-60k	60-65k	65-70k	70-75k	75-80k	80-85k	85-90k	90-95k	95-100k	100+k
Barry	41%	1.4%	5.1%	8.4%	9.4%	9.4%	8.4%	7.4%	6.6%	6.1%	5.5%	4.8%	4.3%	3.2%	3.0%	2.4%	2.0%	2.1%	1.6%	1.3%	1.6%	5.9%
Penarth/Llandough	11%	0.5%	2.2%	4.3%	5.6%	6.4%	6.4%	6.1%	6.0%	6.0%	5.8%	5.4%	5.2%	4.2%	4.1%	3.4%	3.1%	3.3%	2.7%	2.2%	2.9%	14.1%
Cowbridge	5%	0.4%	1.8%	3.8%	5.2%	6.1%	6.2%	6.1%	6.0%	6.0%	5.9%	5.5%	5.3%	4.3%	4.2%	3.6%	3.2%	3.5%	2.8%	2.3%	3.0%	14.9%
Dinas Powys	6%	0.7%	2.9%	5.5%	6.8%	7.4%	7.1%	6.6%	6.2%	6.1%	5.7%	5.2%	4.9%	3.9%	3.7%	3.1%	2.7%	2.9%	2.3%	1.9%	2.5%	11.7%
Llandow	1%	0.2%	1.3%	3.0%	4.3%	5.3%	5.6%	5.7%	5.8%	5.9%	5.9%	5.7%	5.6%	4.5%	4.5%	3.8%	3.4%	3.8%	3.1%	2.6%	3.3%	16.7%
Llantwit Major	8%	0.8%	3.4%	6.3%	7.7%	8.3%	7.8%	7.2%	6.7%	6.4%	5.9%	5.3%	4.9%	3.8%	3.5%	2.9%	2.5%	2.6%	2.0%	1.7%	2.0%	8.3%
Peterston Super Ely	2%	0.4%	1.8%	3.9%	5.4%	6.3%	6.4%	6.3%	6.2%	6.2%	6.1%	5.7%	5.4%	4.3%	4.2%	3.5%	3.1%	3.4%	2.7%	2.2%	2.8%	13.2%
Rhoose	4%	0.4%	1.9%	3.8%	5.1%	5.9%	5.9%	5.7%	5.6%	5.7%	5.5%	5.3%	5.1%	4.2%	4.1%	3.5%	3.2%	3.5%	2.9%	2.4%	3.1%	17.2%
St Athan	5%	0.5%	2.5%	4.9%	6.3%	7.1%	7.0%	6.7%	6.4%	6.3%	6.0%	5.5%	5.2%	4.1%	4.0%	3.3%	2.9%	3.1%	2.5%	2.0%	2.5%	11.3%
St Brides Major	4%	0.4%	2.1%	4.3%	5.8%	6.8%	6.8%	6.6%	6.4%	6.4%	6.1%	5.6%	5.3%	4.2%	4.1%	3.4%	3.0%	3.2%	2.6%	2.1%	2.6%	12.2%
St Nicholas & Llancarfan	3%	0.9%	3.8%	6.9%	8.4%	8.9%	8.2%	7.5%	6.9%	6.6%	6.0%	5.3%	4.8%	3.7%	3.4%	2.7%	2.3%	2.4%	1.9%	1.5%	1.8%	6.5%
Sully	6%	0.6%	2.7%	5.2%	6.7%	7.4%	7.2%	6.8%	6.4%	6.3%	5.9%	5.4%	5.1%	4.0%	3.9%	3.2%	2.8%	3.0%	2.4%	2.0%	2.4%	10.8%
Wenvoe	3%	0.9%	3.6%	6.2%	7.2%	7.5%	7.0%	6.3%	5.9%	5.7%	5.4%	4.9%	4.7%	3.7%	3.6%	3.0%	2.6%	2.9%	2.3%	1.9%	2.4%	12.3%

Whilst median averages are useful to provide a broad picture of income in an area, it is also important to consider the distribution of incomes within the housing market areas as in Figure 27

Barry has the highest proportion of low income earners with 14.9% earning less than £15,000 and the lowest number of high earners earning over £75,000 14.5%, while Llandow has the lowest proportion of low earners at 4.5% and the largest proportion of high earners at 32.94%. This can be seen in Figure 28 below.

Figure 28: Income Distributions by HMA



This data demonstrates just how diverse the Vale of Glamorgan is in terms of income distribution. This data is key when estimating how many newly forming households are likely to be priced out of the housing market when calculating housing need in different area.

2.2 Key Assumptions

Income thresholds are applied to allocate existing and newly arising need to the appropriate tenure of housing. The thresholds have been set according to the recommendations made by the WG technical working group. For reference, these do not form the policy basis for the allocation of social rented housing, details are available in the Vale of Glamorgan's Allocations Policy:

Homes4U Allocations Policy (valeofglamorgan.gov.uk)

The input data together with several assumptions is used to generate an income level above which households would be considered able to meet their needs in the market and a lower income level below which households are considered to be in

need of social rent. The intermediate households are those not allocated to market housing or social rent. The LHMA Tool also forecasts how the data inputs may change over the first five years of the LHMA period.

2.2.1 Social Rent

The LHMA tool assumes that the maximum income for social housing is where the 30th percentile of private rent equates to no more than 35% of household income.

2.2.2 Market Housing

Households are assumed to be able to afford market housing where median rent equates to no more than 30% of income.

2.2.3 Intermediate Housing

Households with an annual income between the thresholds for social rent and market housing were allocated to intermediate housing. There will be some overlap between the need for the different tenures of intermediate housing, the maximum income for intermediate rent was set to 80% of market rents meaning households earning above this were allocated to low cost home ownership.

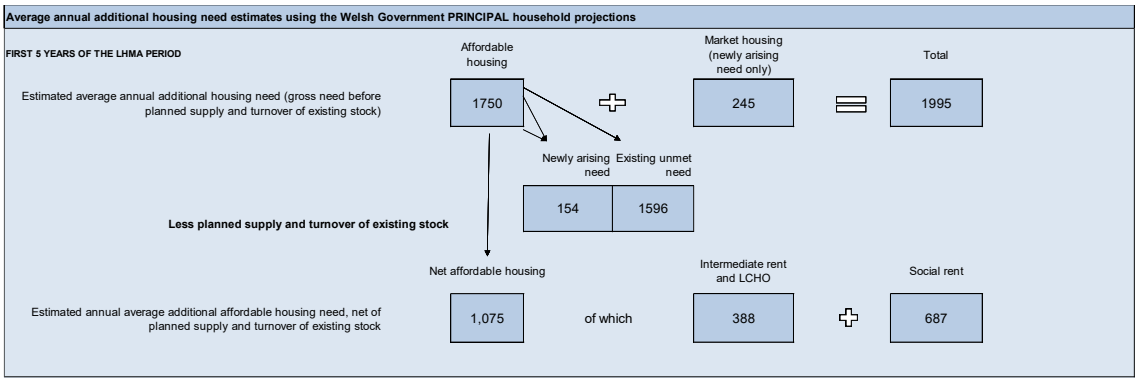
2.2.4 Five year forecast for variables.

Office for Budget Responsibility (OBR) financial forecasts have been built into the LHMA tool for key variables including household income, rents & house prices for the next five years. The default OBR assumptions have been applied which forecast:

- A slight yearly increase in median household income
- A yearly increase in private rent prices of 5% for the first year with lower increases for subsequent years
- A decrease in house prices for the first two years followed by slight increases for subsequent years.

2.3 Additional housing need estimates over the first five years of the LHMA using the Welsh Government Principal Household Projections in figure 29 following:

Figure 29: Average annual housing need estimates using the Welsh Government Principal household projections.



3 SUMMARY

3.1 Headline housing need

This Assessment identified an annual need for **1075 Affordable Housing Units**, comprising 687 social rented units and 388 units of intermediate housing.

Whilst it is necessary to provide a net affordable housing figure across all property types, affordable tenures and areas, this figure is misleading as it distorts local differences. For example, housing which is surplus or has a relatively high turnover rate mask the gross need for affordable housing in the Vale. Consequently, even if the headline net social housing need were delivered every year in the Vale of Glamorgan, this would by no means meet the actual need present in many of the housing market areas. More attention should be paid to the type of housing needed and characteristics identified within each localised HMA to enable effective strategic planning.

Variant Projections

As explained in Section 2, three alternative scenarios were run using different household projections to inform newly arising need. The headline figures from the WG 2018-based projection, the higher and lower variants and the RLDP projection are summarised below in figure 30. The full tables are included in Appendix A.

Figure 30: Variant Projections

Projection	Net affordable housing first 5 years	Net affordable housing remaining 10 years
Principal	1,075	154
Lower Variant	1,031	109
Higher Variant	1,109	190
RLDP	1,114	196

The RLDP assessment of housing need is the highest of the four projections assessed, albeit all four projections are similar, as the household projections only influence the newly arising need figure, with all other inputs – existing unmet need, existing stock, planned supply, rents and income remaining the same across all four scenarios.

3.2 Affordable social rent

Properties for social rent remain the highest in demand, exacerbated by the current cost of living and housing crisis.

3.3 Intermediate housing including intermediate rent and assisted home ownership.

Intermediate housing is aimed at those who are not eligible for social rent but whose income is insufficient to allow them to rent or buy on the open market. This sector is growing due to current economic conditions.

The scope for an intermediate rental product has been considered, using guidance issued by WG and to date viability issues have meant very few schemes with properties for intermediate rent have been developed.

Assisted home ownership has been provided in the Vale of Glamorgan by since 2013 by way of a successful partnership scheme with social landlords operating in the Vale of Glamorgan. The scheme, Aspire2Own is a form of Homebuy where a property is sold for 70% of its open market value (OMV) and where the partner housing association retains a 30% equity only share. This scheme is now showing signs of affordability issues due to the current economic climate. Turnover is low and an ongoing supply of new build properties remains key to achieving success in this area.

3.4 Key policy considerations

3.4.1 Need for smaller units.

Much of the need for affordable housing consists of smaller one- and two-bedroom units for social rent across many parts the Vale of Glamorgan. There has been a historical misconception that this need was created by the removal of the Spare Room Subsidy and that need, and delivery of such units would have been short term, a reactive response to this policy change. However, this need reflects societal trends in household composition and the high prevalence of single person households and households comprising of couples with no children.

In some areas developments of just one- and two-bedroom properties should be considered or clusters of smaller units among market housing. When flats are provided to meet the demand, walk up flats are preferable to blocks with communal spaces. Walk up flats are more easily made accessible, and the minimise management issues, whilst maximising tenancy sustainability.

When possible two-bedroom properties should be provided in the form of houses as two-bedroom flats are less suitable to meet the needs of couples with young children and single people and couples without children may be unable to under-occupy such properties without paying a subsidy.

3.4.2 Older persons accommodation

In 2022 the Council commissioned Housing LIN to provide an Older Persons Accommodation Strategy for the Vale of Glamorgan. The strategy and recommendations were published in early 2023 and are designed to respond to the current identified needs of the older population. Unsuitable housing has a considerable impact on older people's physical and mental health, and it is important that older people have a choice of different types of housing to support them in maintaining independence.

The report can be found here:

Older Persons Housing Strategy (valeofglamorgan.gov.uk)

3.4.3 Private rented sector

Work continues maximising the housing opportunities in the Private Rented Sector. Support is delivered to both tenants and landlords across the Vale of Glamorgan, which has been acknowledged as best practice in the sector. A very well attended Local Landlord Forum is established, facilitated by the Council's Housing Solutions Service. There is also a significant focus on the Empty Homes initiatives. A new Empty Homes Strategy has recently been developed and there is excellent ongoing joined up working taking place in the Authority.

However, it should be noted that finding good quality affordable private rented accommodation within the Vale of Glamorgan is becoming increasingly challenging. This is because of several factors outside of the control of the authority, including the rising house prices in the area which are incentivising landlords to sell their properties; the ever increasing gap between Local Housing Allowance (LHA) rates and market rents; changes to taxation on certain types of mortgages and legislative changes including the changes resulting from the Renting Homes Wales Act 2014 and the extended notice period required to be given to private tenants. The picture is similar across Wales as a whole.

The Vale of Glamorgan Housing Solutions Team continues to look at new incentives to encourage private landlords to work with people in need of private rented accommodation, as well as working closely with Welsh Government to consider these issues.

4. QUALITY ASSURANCE STATEMENT

This report has been prepared following Welsh Government guidance *Undertaking Local Housing Market Assessments, March 2022* and Version 3.2 of the *Local Housing Market Assessment Tool* to provide an accurate and reliable estimation of the housing need in the Vale of Glamorgan.

The methodology and assumptions have been clearly explained in Section 2 of this report. The default data and assumptions provided in the tool have been applied throughout the assessment.

The data utilised within this assessment comes from verified, approved sources such as Welsh Government, Land Registry, Census 2021 and Office for National Statistics. The data analysis has been thoroughly reviewed to ensure its validity and integrity.

Throughout the report, figures have been rounded for ease of representation and to facilitate understanding of the data, however it has led to some information not summing correctly which is a common statistical reporting issue.

APPENDIX A

Higher Variant

Average annual additional housing need estimates using the Welsh Government HIGHER VARIANT household projections

FIRST 5 YEARS OF THE LHMA PERIOD

	Affordable housing		Market housing (newly arising need only)		Total
Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)	1786	+	301	=	2087

Newly arising need	Existing unmet need
190	1596

Less planned supply and turnover of existing stock

	Net affordable housing		Intermediate rent and LCHO		Social rent
Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock	1,109	of which	397	+	711

Basis of the household projections: Higher Variant

Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period

LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

The first table provides the additional affordable housing need estimates on the following basis:
*at HMA level
*by tenure (LCHO, intermediate rent and social rent)
*annual estimate for the first 5 years of the LHMA period
*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
HMA	**one bedroom**	**two bedrooms**	**three bedrooms**	**four+ bedrooms**	**Social rent (a) + (b) + (c) + (d) = (e)**	**Intermediate rent**	**LCHO**	**Affordable Housing (h) = (e) + (f) + (g)**
Additional housing need estimates by tenure	**451**	**179**	**49**	**32**	**711**	**58**	**339**	**1,109**
Barry	244	76	18	17	355	28	134	517
Penarth/Llandough	58	37	16	6	116	11	54	181
Cowbridge	11	4	0	-	14	2	19	36
Dinas Powys	31	12	8	2	53	4	27	84
Llandow	2	3	-	0	5	1	2	7
Llantwit Major	40	25	-	2	67	1	40	108
Peterston Super Ely	5	5	1	1	11	1	1	13
Rhoose	21	6	3	2	31	3	14	47
St Athan	10	-	-	1	11	2	6	19
St Brides Major	7	2	-	1	10	2	3	14
St Nicholas & Llancarfan	3	0	-	0	4	1	-	5
Sully	10	-	-	0	10	2	24	36
Wenvoe	11	3	3	2	24	1	14	40

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and sup

The second table provides the additional total housing need estimates on the following basis:
*includes market and affordable housing
*at HMA level
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)
*annual estimate for the first 5 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c)= (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	**1,356**	**430**	**1,786**	**112**	**189**	**301**	**2,087**
Barry	743	165	908	49	73	122	1,030
Penarth/Llandough	211	70	281	23	42	65	345
Cowbridge	57	34	91	4	14	18	109
Dinas Powys	75	33	107	6	10	16	123
Llandow	6	3	9	1	2	3	12
Llantwit Major	82	42	124	9	11	21	145
Peterston Super Ely	13	3	16	1	1	1	18
Rhoose	47	17	65	6	12	19	83
St Athan	35	10	44	4	6	11	55
St Brides Major	18	6	23	2	6	8	31
St Nicholas & Llancarfan	8	2	10	1	2	3	13
Sully	28	30	58	4	8	12	71
Wenvoe	33	16	49	2	2	4	53

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA peri

The third table provides the additional housing need estimates on the following basis:
*at HMA level
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)
*annual estimate for the remaining 10 years of the LHMA period
*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)
*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.
No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) +	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+
Additional housing need estimates by tenure	**142**	**48**	**190**	**112**	**189**	**301**	**491**
Barry	56	23	79	49	73	122	201
Penarth/Llandough	19	9	29	23	42	65	93
Cowbridge	5	2	7	4	14	18	25
Dinas Powys	11	3	14	6	10	16	29
Llandow	1	1	2	1	2	3	5
Llantwit Major	18	1	19	9	11	21	39
Peterston Super Ely	3	0	4	1	1	1	5
Rhoose	4	2	6	6	12	19	25
St Athan	3	2	4	4	6	11	15
St Brides Major	6	1	7	2	6	8	15
St Nicholas & Llancarfan	6	1	7	1	2	3	10
Sully	5	2	7	4	8	12	20
Wenvoe	5	1	6	2	2	4	10

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:
*at HMA level
*by tenure (intermediate housing and social rent)
*annual estimate for the 15 years of the LHMA period
*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.
(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	**Social rent**	**Intermediate rent and LCHO**	**Affordable Housing (c) = (a) +**	**Social rent**	**Intermediate rent and LCHO**	**Affordable Housing (c) = (a) +**
Additional housing need estimates by tenure	**332**	**165**	**496**	**4,975**	**2,471**	**7,445**
Barry	156	70	225	2,333	1,044	3,377
Penarth/Llandough	52	28	79	773	418	1,191
Cowbridge	8	9	17	120	128	248
Dinas Powys	25	12	37	372	186	558
Llandow	3	1	4	38	18	56
Llantwit Major	34	14	48	514	211	725
Peterston Super Ely	6	1	7	90	14	104
Rhoose	13	7	20	195	101	296
St Athan	5	4	9	82	56	138
St Brides Major	7	2	10	108	35	143
St Nicholas & Llancarfan	5	1	6	78	19	96
Sully	7	10	17	105	150	254
Wenvoe	11	6	17	167	91	258

Lower Variant

Average annual additional housing need estimates using the Welsh Government LOWER VARIANT household projections

FIRST 5 YEARS OF THE LHMA PERIOD

	Affordable housing		Market housing (newly arising need only)		Total
Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)	1704	+	172	=	1876

Newly arising need	Existing unmet need
109	1596

Less planned supply and turnover of existing stock

	Net affordable housing		Intermediate rent and LCHO		Social rent
Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock	1,031	of which	376	+	655

Basis of the household projections	Lower Variant

Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period

LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

The first table provides the additional affordable housing need estimates on the following basis:
*at HMA level
*by tenure (LCHO, intermediate rent and social rent)
*annual estimate for the first 5 years of the LHMA period
*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
HMA	**one bedroom**	**two bedrooms**	**three bedrooms**	**four+ bedrooms**	**Social rent (a) + (b) + (c)+ (d) = (e)**	**Intermediate rent**	**LCHO**	**Affordable Housing (h) = (e) + (f) + (g)**
Additional housing need estimates by tenure	**422**	**159**	**43**	**31**	**655**	**33**	**344**	**1,031**
Barry	232	68	15	16	331	16	136	483
Penarth/Llandough	54	34	15	5	107	6	55	168
Cowbridge	10	3	-	-	13	1	20	33
Dinas Powys	29	10	8	2	48	2	28	78
Llandow	2	2	-	0	4	0	2	6
Llantwit Major	36	22	-	2	60	0	40	101
Peterston Super Ely	4	5	1	1	10	0	2	12
Rhoose	20	5	3	1	29	1	14	45
St Athan	10	-	-	1	11	1	6	18
St Brides Major	5	2	-	1	8	1	3	12
St Nicholas & Llancarfan	2	-	-	0	2	1	-	3
Sully	9	-	-	0	9	1	24	34
Wenvoe	10	9	3	2	22	1	14	38

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

The second table provides the additional total housing need estimates on the following basis:
*includes market and affordable housing
*at HMA level
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)
*annual estimate for the first 5 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c)= (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	**1,295**	**409**	**1,704**	**64**	**108**	**172**	**1,876**
Barry	719	155	874	28	42	70	944
Penarth/Llandough	202	66	268	13	24	37	305
Cowbridge	55	33	88	2	8	10	98
Dinas Powys	70	31	101	3	6	9	110
Llandow	5	2	8	0	1	2	9
Llantwit Major	75	42	116	5	6	12	128
Peterston Super Ely	11	3	15	0	0	1	15
Rhoose	45	17	62	4	7	11	73
St Athan	34	9	43	3	4	6	49
St Brides Major	15	5	20	1	3	4	25
St Nicholas & Llancarfan	5	2	7	0	1	2	9
Sully	26	29	55	2	5	7	62
Wenvoe	31	15	46	1	1	2	49

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA peri

The third table provides the additional housing need estimates on the following basis:
*at HMA level
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)
*annual estimate for the remaining 10 years of the LHMA period
*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)
*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.
No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) +	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+
Additional housing need estimates by tenure	**81**	**28**	**109**	**64**	**108**	**172**	**281**
Barry	32	13	45	28	42	70	115
Penarth/Llandough	11	5	16	13	24	37	53
Cowbridge	3	1	4	2	8	10	14
Dinas Powys	6	2	8	3	6	9	17
Llandow	1	0	1	0	1	2	3
Llantwit Major	10	0	11	5	6	12	22
Peterston Super Ely	2	0	2	0	0	1	3
Rhoose	2	1	3	4	7	11	14
St Athan	2	1	2	3	4	6	8
St Brides Major	3	1	4	1	3	4	8
St Nicholas & Llancarfan	3	1	4	0	1	2	6
Sully	3	1	4	2	5	7	11
Wenvoe	3	1	3	1	1	2	6

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:
*at HMA level
*by tenure (intermediate housing and social rent)
*annual estimate for the 15 years of the LHMA period
*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.
(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	**Social rent**	**Intermediate rent and LCHO**	**Affordable Housing (c) = (a) +**	**Social rent**	**Intermediate rent and LCHO**	**Affordable Housing (c) = (a) +**
Additional housing need estimates by tenure	**272**	**144**	**416**	**4,083**	**2,158**	**6,242**
Barry	132	60	191	1,973	894	2,867
Penarth/Llandough	43	24	67	648	358	1,005
Cowbridge	6	8	14	90	116	206
Dinas Powys	20	11	31	303	166	469
Llandow	2	1	3	29	14	43
Llantwit Major	27	14	41	404	206	610
Peterston Super Ely	5	1	5	69	11	80
Rhoose	11	6	17	170	88	258
St Athan	5	3	8	68	46	114
St Brides Major	5	2	7	72	27	99
St Nicholas & Llancarfan	3	1	4	44	11	55
Sully	5	9	14	76	138	213
Wenvoe	9	6	15	138	83	221

Replacement LDP Scenario

Template for the annual additional housing need estimates using different household projections

FIRST 5 YEARS OF THE LHMA PERIOD

	Affordable housing		Market housing (newly arising need only)		Total
Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)	1792	+	310	=	2102

Newly arising need	Existing unmet need
196	1596

Less planned supply and turnover of existing stock

	Net affordable housing		Intermediate rent and LCHO		Social rent
Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock	1,114	of which	399	+	715

Basis of the household projections: User Projections 1

Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period

LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

The first table provides the additional affordable housing need estimates on the following basis:
*at HMA level
*by tenure (LCHO, intermediate rent and social rent)
*annual estimate for the first 5 years of the LHMA period
*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
HMA	**one bedroom**	**two bedrooms**	**three bedrooms**	**four+ bedrooms**	**Social rent (a) + (b) + (c)+ (d) = (e)**	**Intermediate rent**	**LCHO**	**Affordable Housing (h) = (e) + (f) + (g)**
Additional housing need estimates by tenure	**454**	**180**	**49**	**32**	**715**	**60**	**339**	**1,114**
Barry	245	77	18	17	356	29	134	519
Penarth/Llandough	58	37	16	6	116	11	54	181
Cowbridge	11	4	0	-	14	2	19	36
Dinas Powys	31	12	8	2	53	4	27	84
Llandow	2	3	0	0	5	1	2	7
Llantwit Major	40	25	-	2	68	1	40	108
Peterston Super Ely	5	5	1	1	12	1	1	14
Rhoose	21	6	3	2	31	3	14	47
St Athan	10	-	-	1	11	2	6	19
St Brides Major	7	3	-	1	10	2	3	15
St Nicholas & Llancarfan	3	0	-	0	4	1	-	6
Sully	10	-	-	0	10	2	24	37
Wenvoe	11	3	3	2	24	1	14	40

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

The second table provides the additional total housing need estimates on the following basis:
*includes market and affordable housing
*at HMA level
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)
*annual estimate for the first 5 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c)= (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	**1,360**	**431**	**1,792**	**115**	**195**	**310**	**2,102**
Barry	745	165	910	51	75	126	1,036
Penarth/Llandough	211	70	282	23	43	66	348
Cowbridge	57	34	91	4	14	18	109
Dinas Powys	75	33	108	6	10	16	124
Llandow	6	3	9	1	2	3	12
Llantwit Major	83	42	125	10	12	21	146
Peterston Super Ely	13	3	16	1	1	1	18
Rhoose	47	18	65	7	13	19	84
St Athan	35	10	45	5	6	11	55
St Brides Major	18	6	24	2	6	8	32
St Nicholas & Llancarfan	8	2	10	1	2	3	13
Sully	28	30	59	4	9	13	71
Wenvoe	33	16	49	2	3	4	53

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:
*at HMA level
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)
*annual estimate for the remaining 10 years of the LHMA period
*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)
*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.
No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) +	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+
Additional housing need estimates by tenure	**146**	**50**	**196**	**115**	**195**	**310**	**506**
Barry	58	24	82	51	75	126	207
Penarth/Llandough	20	10	30	23	43	66	96
Cowbridge	5	2	7	4	14	18	25
Dinas Powys	11	3	14	6	10	16	30
Llandow	2	1	2	1	2	3	5
Llantwit Major	18	1	19	10	12	21	40
Peterston Super Ely	3	0	4	1	1	1	5
Rhoose	4	2	6	7	13	19	25
St Athan	3	2	4	5	6	11	15
St Brides Major	6	1	7	2	6	8	15
St Nicholas & Llancarfan	6	1	7	1	2	3	10
Sully	6	2	7	4	9	13	20
Wenvoe	5	1	6	2	3	4	10
14	-	-	-				
15	-	-	-				
16	-	-	-				
17	-	-	-				
18	-	-	-				
19	-	-	-				
20	-	-	-				

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:
*at HMA level
*by tenure (intermediate housing and social rent)
*annual estimate for the 15 years of the LHMA period
*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.
(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	**Social rent**	**Intermediate rent and LCHO**	**Affordable Housing (c) = (a) +**	**Social rent**	**Intermediate rent and LCHO**	**Affordable Housing (c) = (a) +**
Additional housing need estimates by tenure	**336**	**166**	**502**	**5,036**	**2,492**	**7,528**
Barry	157	70	227	2,357	1,055	3,412
Penarth/Llandough	52	28	80	781	422	1,203
Cowbridge	8	9	17	122	129	251
Dinas Powys	25	13	38	376	188	564
Llandow	3	1	4	39	18	57
Llantwit Major	35	14	49	521	212	733
Peterston Super Ely	6	1	7	91	14	105
Rhoose	13	7	20	197	102	299
St Athan	6	4	9	83	57	140
St Brides Major	7	2	10	111	36	146
St Nicholas & Llancarfan	5	1	7	80	19	99
Sully	7	10	17	107	150	257
Wenvoe	11	6	17	169	91	260

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