

Estimates of Housing Need in Wales by tenure (2018-based)

Amcangyfrifon o'r Angen am Dai yng Nghymru fesul deiliadaeth (sail 2018)

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Outline

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Background

- Previous estimates published by the Public Policy Institute for Wales (PPIW) in 2015 (Holmans) out of date.
- User requirement:
 - Housing and planning policy decision making
 - Inform National Development Framework
- Agreement mid 2018 to explore methodologies used elsewhere in UK
- Reviewed approaches used across the UK....decided model produced and used by the Scottish Government was most appropriate

Cefndir

- Yr amcangyfrifon blaenorol gan y Sefydliad Polisi Cyhoeddus i Gymru (PPIW) 2015 (Holmans) wedi dyddio.
- Angen defnyddwyr:
 - Gwneud penderfyniadau am bolisi tai a chynllunio
 - Bwydo mewn i'r Fframwaith Datblygu Cenedlaethol
- Cytunwyd ganol 2018 i edrych ar fethodolegau eraill o fewn y DU
- Casglu gwybodaeth am ddulliau a ddefnyddir ar draws y DU....hyn yn awgrymu mai model Llywodraeth yr Alban yw'r mwyaf addas

Methodology

Estimates relate to the need for **additional** housing units. Based on:

(1) Estimates of existing unmet need (total 5,645)

- Homeless households in temporary accommodation (2,142)
- Households that are both overcrowded **and** concealed (3,503)

This figure is incorporated into the first 5 years of estimates

(2) Newly arising need (household projections). Main component.

Methodoleg

Amcangyfrifon yn ymwneud â'r angen am dai newydd **ychwanegol**. Yn seiliedig ar:

(1) Amcangyfrif o'r angen presennol nas ddiwallwyd (cyfanswm 5,645)

- Aelwydydd digartref mewn llety dros dro (2,142)
- Aelwydydd gorlawn a chudd (3,503)

Caiff y ffigwr yma ei gynnwys ym mhum mlynedd cyntaf yr amcangyfrifon

(2) Angen newydd sy'n codi (amcanestyniadau aelwydydd). Prif gydran.

Limitations

These Estimates: ✓

- Provide a range of need for additional housing units based on past trends and best available data
- Form a basis of discussion for policy decisions

These Estimates: ✗

- Cannot forecast exactly what is going to happen in the future
- Should not be used as a housing target in Wales
- Do not attempt to estimate the number of households in unsuitable accommodation

Cyfyngiadau

Mae'r Amcangyfrithon hyn yn: ✓

- Darparu amrywiaeth o angen am dai ychwanegol yn seiliedig ar dueddiadau blaenorol a'r data gorau sydd ar gael
- Sail i drafodaeth am benderfyniadau polisi

Nid yw'r Amcangyfrithon hyn yn: ✗

- Gallu darogan beth yn union sy'n mynd i ddigwydd yn y dyfodol
- Ffordd o bennu targed tai yng Nghymru
- Ceisio amcangyfrif nifer yr aelwydydd mewn llety anaddas

Phase 1 Publication (30 January 2019)

Cyhoeddiad Rhan 1 (30 Ionawr 2019)



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Catalogue

- Housing
- Affordable housing
- Assistance for housing improvement
- Demolitions
- Disabled facilities grants
- Dwelling stock estimates
- Hazards and licences
- Help to Buy

Housing need

Information on the estimates of additional housing units needed in Wales at both a National and regional level

Reports

-   [Estimates of Housing Need by Variant and Year \(2018-based\)](#)
-   [Estimates of Housing Need by Region, Variant and Year \(2018-based\)](#)
-   [Average Annual Estimates of Housing Need by Region, Variant and Year \(2018-based\)](#)
-   [Average Annual Estimates of Housing Need in Wales by Variant and Year \(2018-based\)](#)



Amcangyfrifon o'r Angen am Dai fesul Amrywiolyn a Blwyddyn

Camau Gweithredu

Siart

 Dychwelyd

 Dolen

 Allforio

 Argraffu

 Sgrin Lawn

Rhanbarth (Cymru)

Rhanbarth

Côd Ardal

Blwyddyn

Amrywiolyn	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Amcangyfrifon canolog	8,348	8,094	8,158	8,625	8,247	6,885	6,488	6,177	5,807	5,447	5,087
Amrywiolyn uwch	8,979	8,807	8,963	9,517	9,254	8,059	7,866	7,726	7,483	7,241	6,999
Amrywiolyn is	7,200	6,800	6,716	7,024	6,518	5,063	4,593	4,209	3,774	3,333	2,888
Amrywiolyn ymfudo cymedrig deng mlynedd	9,676	9,446	9,522	10,014	9,667	8,335	7,971	7,679	7,336	6,997	6,654
Amrywiolyn dim ymfudo	7,268	6,710	6,309	6,694	6,298	4,905	4,443	4,042	3,615	3,117	2,619

Estimates (Wales)

- Central estimate for first 5 years is 8,300 (includes clearing those in existing unmet need).



- Estimates gradually decrease over the following 15 years.

Amcangyfrifon (Cymru)

- Amcangyfrif canolog o 8,300 ar gyfer y 5 mlynedd cyntaf (yn cynnwys y rhai mewn angen presennol nas diwallwyd)



- Amcangyfrifon yn gostwng yn raddol dros 15 mlynedd dilynol.

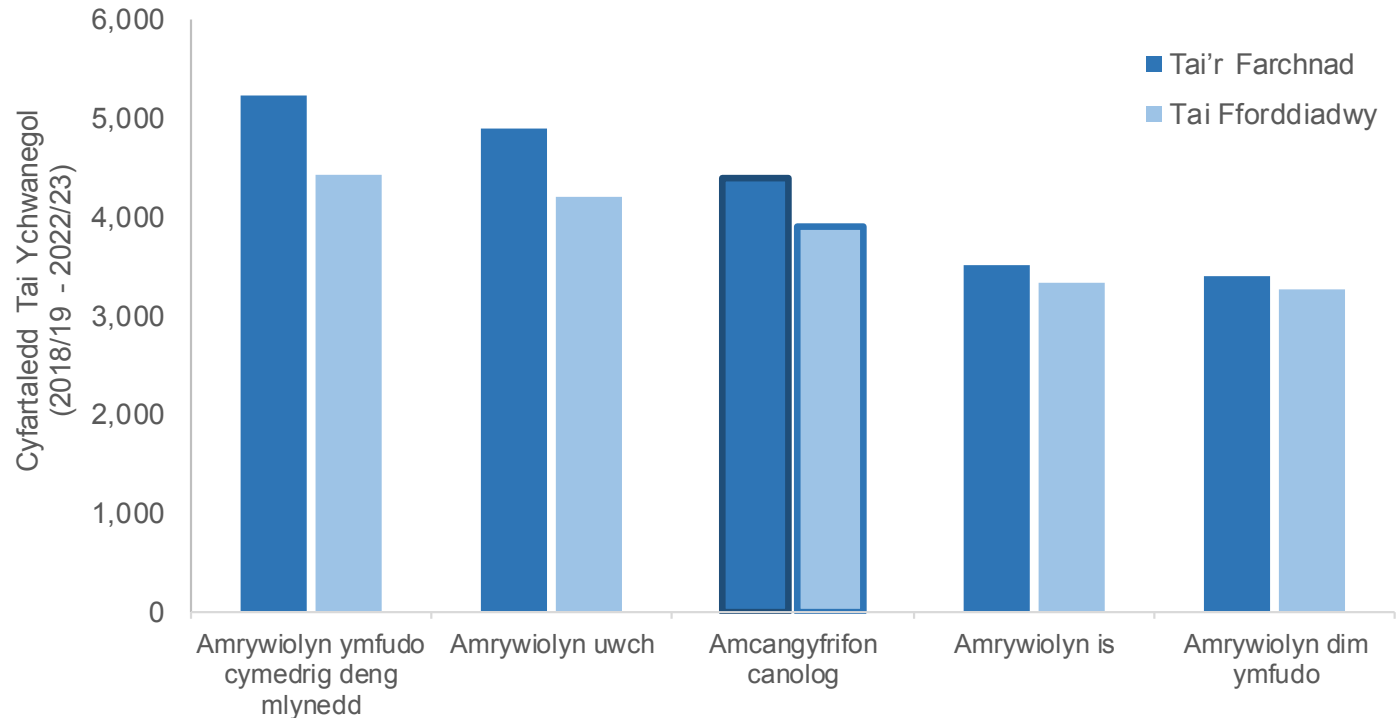
Estimates by tenure

- On 5 June published estimates of additional housing need by tenure (2018/19 to 2022/23 only) for Wales and regions:
 - Market housing (owner occupier and private rented sector)
 - Affordable housing (intermediate and social rented)
- Based on assumptions and forecasts about future household income growth and future change to private rent prices.
- Assumptions discussed and agreed by expert sub-group and peer reviewed by Welsh Government Chief Analysts

Amcangyfrifon fesul deiliadaeth

- Ar 5 Mehefin cyhoeddwyd amcangyfrifon o'r angen ychwanegol am dai fesul deiliadaeth (2018/19 i 2022/23 yn unig) ar gyfer Cymru a'r rhanbarthau
 - Tai i'r farchnad (perchentyaeth a rhentu preifat)
 - Tai fforddiadwy (rhenti canolraddol a chymdeithasol)
- Yn seiliedig ar dybiaethau a rhagolygon am dwf mewn incwm aelwydydd a newidiadau i brisiau rhenti preifat.
- Trafodwyd a chytunwyd ar y tybiaethau gan yr is-grwp arbenigol a chafwyd adolygiad gan Brif ddadansoddwyr Llywodraeth Cymru.

Amcangyfrifon o Unedau Tai Ychwanegol yn ôl Deiliadaeth



Amrywiolyn Amcanestyniadau Aelwydydd yn seiliedig ar 2014(a)

Ffynhonnell: Amcangyfrifon o'r Angen am Dai yn seiliedig ar 2018

(a)

Mae ymfudo deng mlynedd yn seilio ymfudo cyfartalog dros gyfnod hwy

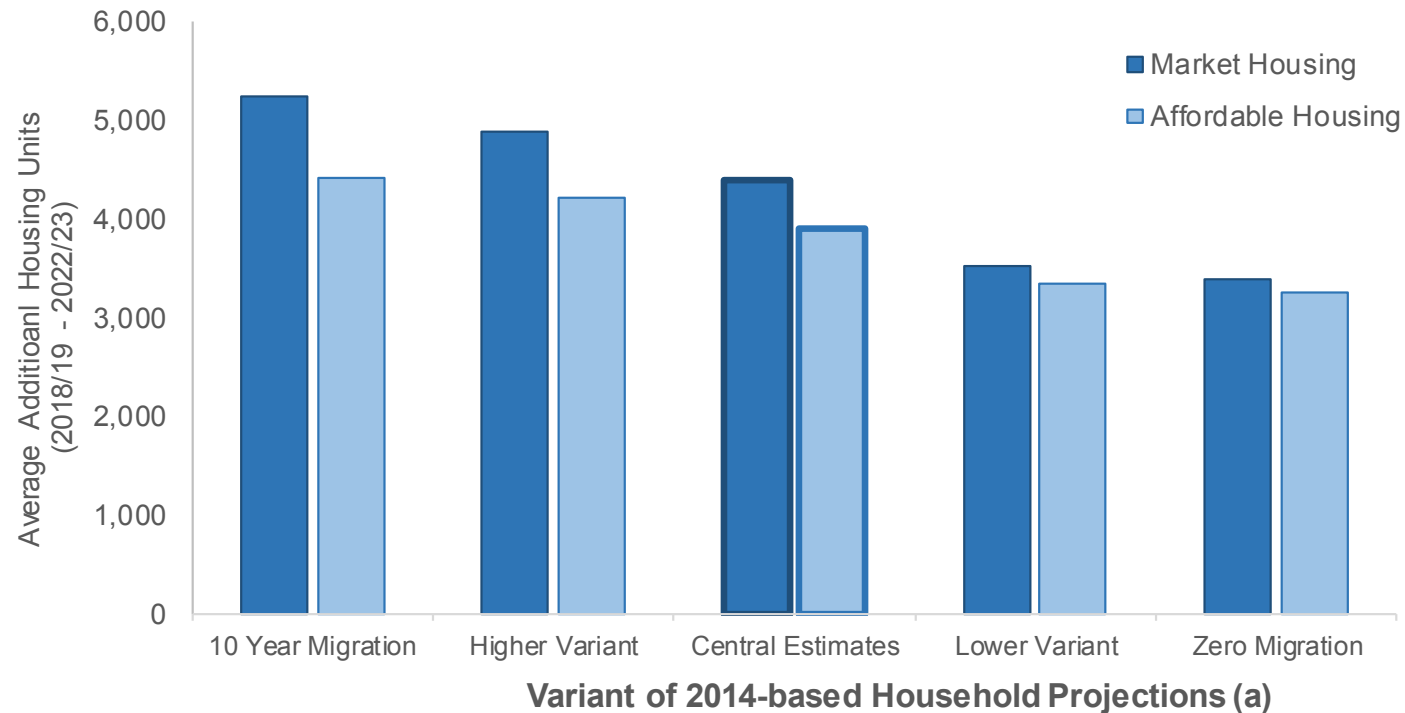
Mae amrywiolyn uwch yn seiliedig ar gyfraddau ffrwythlondeb uwch a chyfraddau marwolaeth is

Mae amcangyfrifon canolog yn seiliedig ar brif amcanestyniadau aelwydydd (yn seiliedig ar dueddiadau diweddar)

Mae amrywiolyn is yn seiliedig ar gyfraddau ffrwythlondeb is a chyfraddau marwolaeth uwch

Mae dim ymfudo yn seiliedig ar newid naturiol yn unig (genedigaethau a marwolaethau)

Estimates of Additional Housing Units split by Tenure



Source: 2018-based estimates of Housing Need

(a)

10 year migration bases the average migration over a longer period

Higher variant is based on higher fertility and lower mortality rates

Central estimates are based on principal household projections (based on recent trends)

Lower variant is based on lower fertility rates and higher mortality rates

Zero migration is based on natural change only (births and deaths)

Excel tool

- Published Excel tool with ability to split further by tenure
 - Owner occupier
 - Private rental sector
 - Intermediate renting
 - Social housing
- Based on additional assumptions including first time buyer affordability ratios, future house price changes, proportion of households able to afford going on to buy etc.
- All underlying data sources and assumptions can be altered within Excel tool.

Adnodd Excel

- Rhaglen Excel wedi ei gyhoeddi yn galluogi rhannu pellach:
 - Perchentyaeth
 - Rhentu preifat
 - Rhentu canolraddol
 - Rentu cymdeithasol
- Yn seiliedig ar dybiaethau ychwanegol yn cynnwys cymarebau fforddiadwyedd i brynwyr tro cyntaf, newidiadau ym mhrisiau tai yn y dyfodol, cyfran y cartrefi sy'n gallu fforddio mynd i brynu ac ati.
- All underlying data sources and assumptions can be altered within Excel tool.

Demo!

Questions? Cwestiynau?

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ystadegau.tai@llyw.cymru

[Estimates of Housing Need](#)
[Amcangyfrifon o'r Angen am Dai](#)