

2018-based Estimates of Housing Need in Wales

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

Melanie Brown - 09/05/19

Introduction

- Background
- User Need
- Approach
- Methodology
- Estimates
- Comparison
- Next Steps
- Questions

Cyflwyniad

- Cefndir
- Angen defnyddwyr
- Dull
- Methodoleg
- Amcangyfrifon
- Cymhariaeth
- Camau nesaf
- Cwestiynau

Background

- Previous estimates were published by the Public Policy Institute for Wales (PPIW) in October 2015 (Alan Holmans)
- 2014-based household projections published March 2017
- Holmans estimates now out of date and do not reflect latest demographic trends
- Agreement mid 2018 to explore methodologies used elsewhere in UK

Cefndir

- Cyhoeddwyd yr amcangyfrifon blaenorol gan y Sefydliad Polisi Cyhoeddus i Gymru (PPIW) yn Hydref 2015 (Alan Holmans)
- Cyhoeddwyd amcanestyniadau aelwydydd sail-2014 ym Mawrth 2017
- Amcangyfrifon Holmans bellach wedi dyddio a ddim yn adlewyrchu'r tueddiadau demograffeg diweddaraf
- Cytunwyd ganol 2018 i edrych ar fethodolegau eraill o fewn y DU

User Need

- Housing and planning policy decision making
- Inform National Development Framework
- Support assessments of well-being under Wellbeing of Future Generations (Wales) Act

Angen Defnyddwyr

- Gwneud penderfyniadau am bolisi tai a chynllunio
- Bwydo mewn i'r Fframwaith Datblygu Cenedlaethol
- Cefnogi asesiadau llesiant o dan Ddeddf Llesiant Cenedlaethau'r Dyfodol (Cymru)

Approach

- Established an external stakeholder (technical) group
- Gathered information about approaches used across the UK
- This identified the model produced and used by the Scottish Government to be the most appropriate
- English model has been subject to some criticism due to simplicity, Northern Ireland are also exploring the Scottish model

Dull

- Sefydlwyd grwp rhanddeiliaid (technegol)
- Casglu gwybodaeth am ddulliau a ddefnyddir ar draws y DU
- Hyn yn awgrymu mai model Llywodraeth yr Alban yw'r mwyaf addas
- Model Lloegr wedi ei feirniadu oherwydd symlrwydd, Gogledd Iwerddon hefyd yn ystyried model yr Alban

Methodology

- Estimates relate to the need for **additional** housing units.
- Estimates are based on:
 - Estimates of existing unmet need
 - Newly arising need

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

Methodoleg

- Amcangyfrifon yn ymwneud â'r angan am dai newydd ychwanegol
- Amcangyfrifon yn seiliedig ar:
 - Amcangyfrifon o angen presennol nas diwallwyd
 - Angen newydd

Mae'r Amcangyfrifon hyn yn: ✓

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

Nid yw'r Amcangyfrifon 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)




Statistical Article
Erthygl Ystadegol

Estimates of housing need in Wales at a national and regional level (2018-based)¹

Background

This statistical article presents 2018-based estimates of overall additional housing need in Wales from 2018/19 to 2037/38. Estimates of housing need are key to future planning at a national and regional level and will be used to inform the [National Development Framework](#) (NDF) and housing policy development. Estimates of housing demand in terms of tenure will follow in spring 2019.

The previous estimates of housing need and demand were produced by the late Alan Holmes and




Statistical Article
Erthygl Ystadegol

Amcangyfrifon o'r angen am dai yng Nghymru ar lefel genedlaethol a rhanbarthol (yn seiliedig ar 2018)¹

Cefndir

Rhydd yr erthygl ystadegol hon amcangyfrifon sy'n seiliedig ar 2018 o'r angen cyffredinol am dai ychwanegol yng Nghymru rhwng 2018/19 a 2037/8. Mae amcangyfrifon o'r angen am dai yn chwarae

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


Amcangyfrifon o'r Angen am Dai fesul Amrywiolyn a Blwyddyn

Camau Gweithredu | Siart

Dychwelyd
 Dolen
 Allforio
 Argraffu
 Sgrin Lawn

Rhanbarth (Cymru)

Rhanbarth Cód 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	7,000
Amrywiolyn is	7,200	6,800	6,716	7,024	6,518	5,063	4,593	4,209	3,774	3,333	2,887
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

Existing Unmet Need

- It is difficult to consistently measure existing unmet need for additional housing units
- The technical group considered potential data sources and agreed on:
 - Homeless households in temporary accommodation
 - Households that are both overcrowded **and** concealed
- We recognised this provides an incomplete picture and are likely to be an undercount

Angen presennol nas diwallwyd

- Mae'n anodd mesur yr angen presennol am dai ychwanegol nas diwallwyd yn gyson
- Ystyriodd y grwp technegol ffynonellau data posib a chytunwyd ar:
 - Aelwydydd digartref mewn llety dros dro
 - Aelwydydd gorlawn **a** chudd
- Cydnabyddwn fod y rhain yn darparu darlun anghyflawn o'r rheini sydd angen tai ychwanegol, ac maent yn debygol o fod yn dangyfrif.

Existing Unmet Need – cont.

- Total of **2,142** households in temporary accommodation at the end of June 2018
- On census day in 2011 there were a total of **3,503** overcrowded **and** concealed households
- This gives a total estimate of existing unmet need in Wales of **5,645**
- This figure is incorporated into the first 5 years of estimates

Angen presennol nas diwallwyd – parhad

- Cyfanswm o **2,142** o aelwydydd mewn llety dros dro ar ddiwedd mehefin 2018
- Ar ddiwrnod cyfrifiad 2011 roedd **3,503** o aelwydydd gorlawn a chudd
- Mae hyn yn rhoi cyfanswm o angen presennol nas diwallwyd o **5,645**
- Caiff y ffigwr yma ei gynnwys ym mhum mlynedd cyntaf yr amcangyfrifon

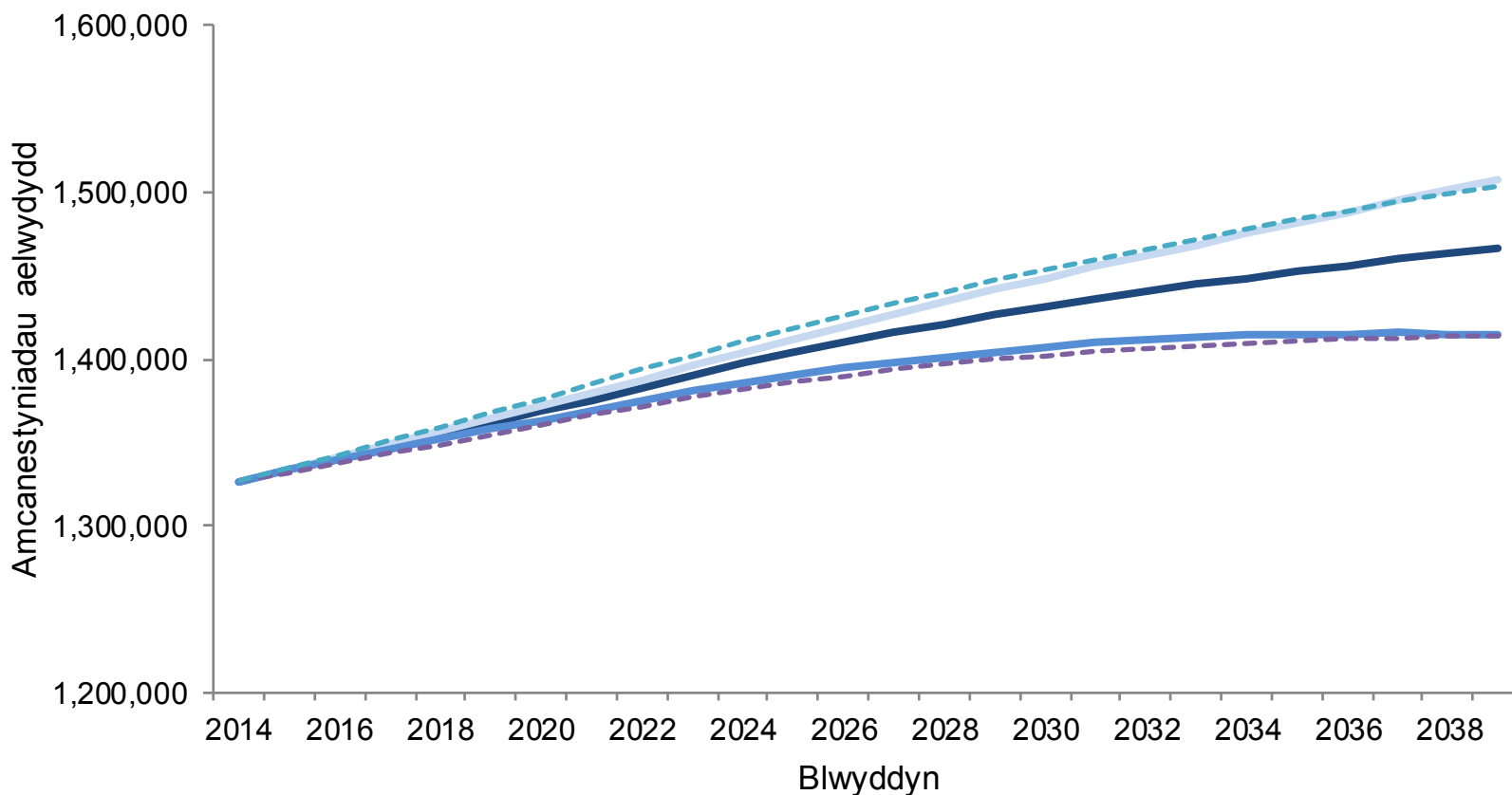
Newly Arising Need

- Newly arising need is the main component of future estimates of additional housing need
- Newly arising need is calculated as the difference in household projections from one year to the next
- To illustrate the uncertainty associated with the projections, all variants of household projections are included.

Angen Newydd

- Angen newydd yw prif elfen amcangyfrifon o'r angen am dai ychwanegol yn y dyfodol.
- Cyfrifir angen newydd fel y gwahaniaeth mewn amcanestyniadau aelwydydd o un flwyddyn i'r llall.
- I ddangos yr ansicrwydd sy'n gysylltiedig â'r amcanestyniadau, caiff holl amrywiadau amcanestyniadau aelwydydd eu cynnwys.

Amcanestyniadau Aelwydydd



Nodyn: Nid yw'r echelyn-y yn dechrau ar

— Prif amcanestyniadau

— Amrywiolyn is

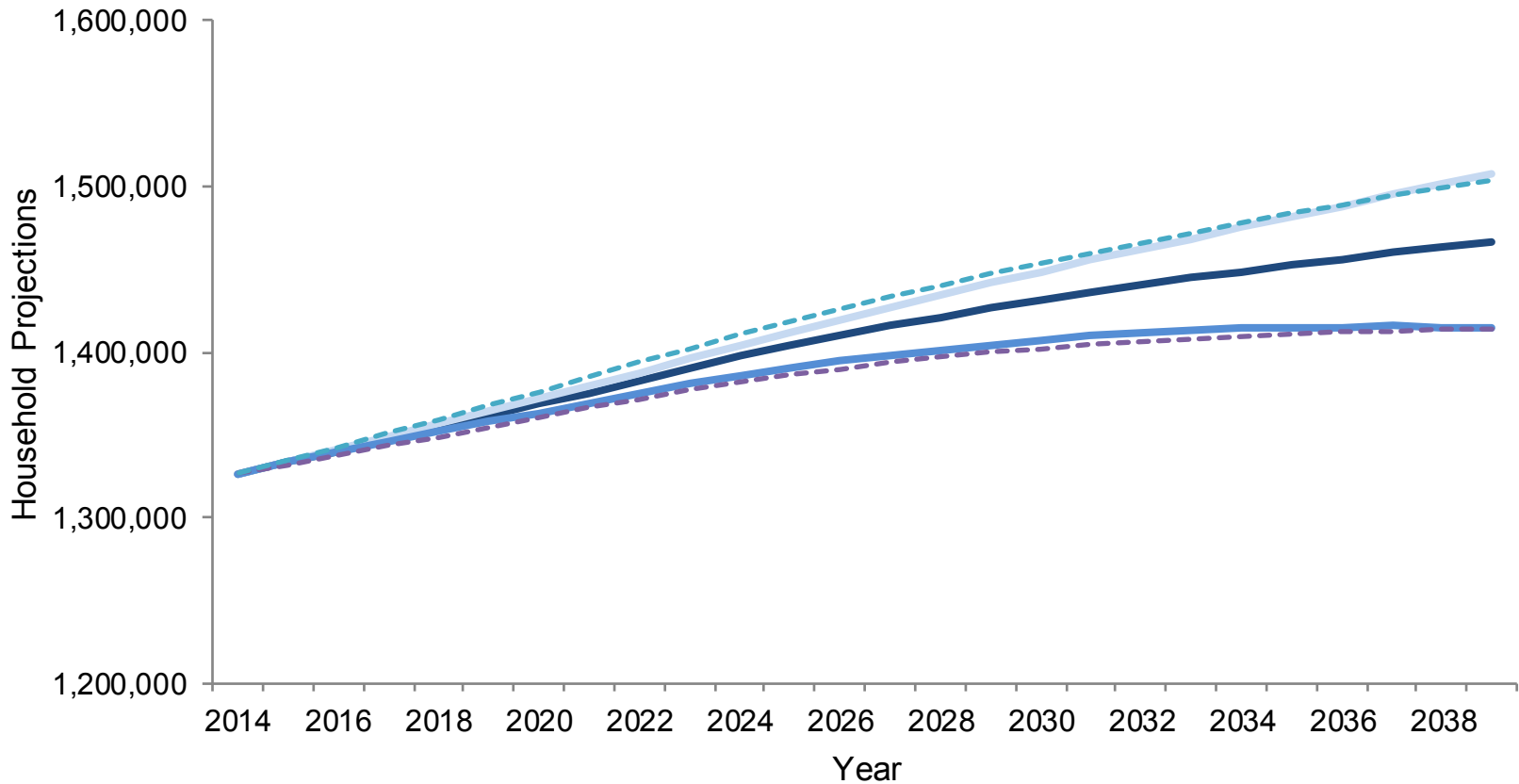
- - - Amrywiolyn ymfudo cymedrig deng mlynedd

— Amrywiolyn uwch

- - - Amrywiolyn dim ymfudo

Ffynhonnell: Amcanestyniadau aelwydydd sail 2014

Household Projections

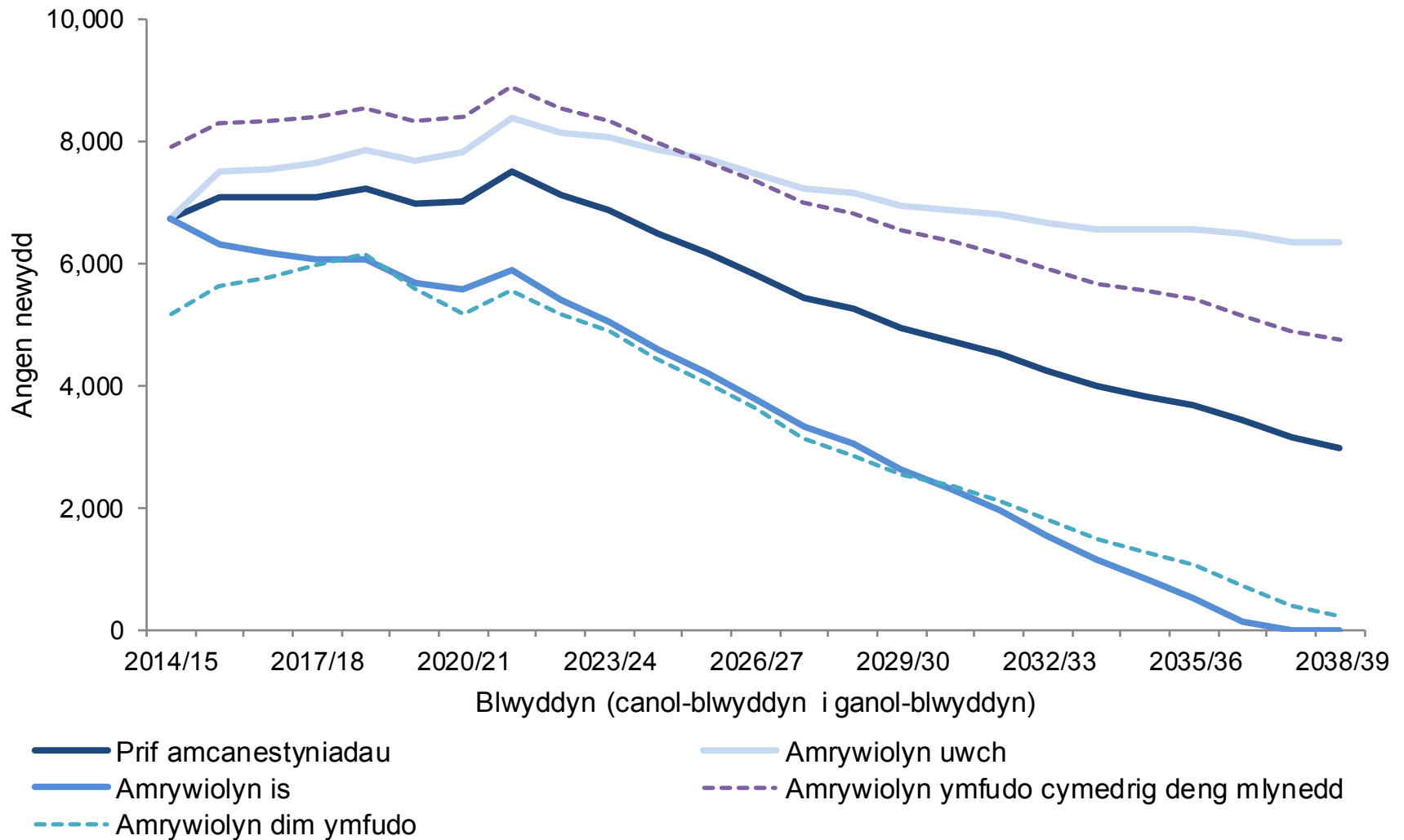


NOTE: y-axis does not start at 0

Principal Projections Higher Variant Lower Variant
Zero Migration Ten Year Migration

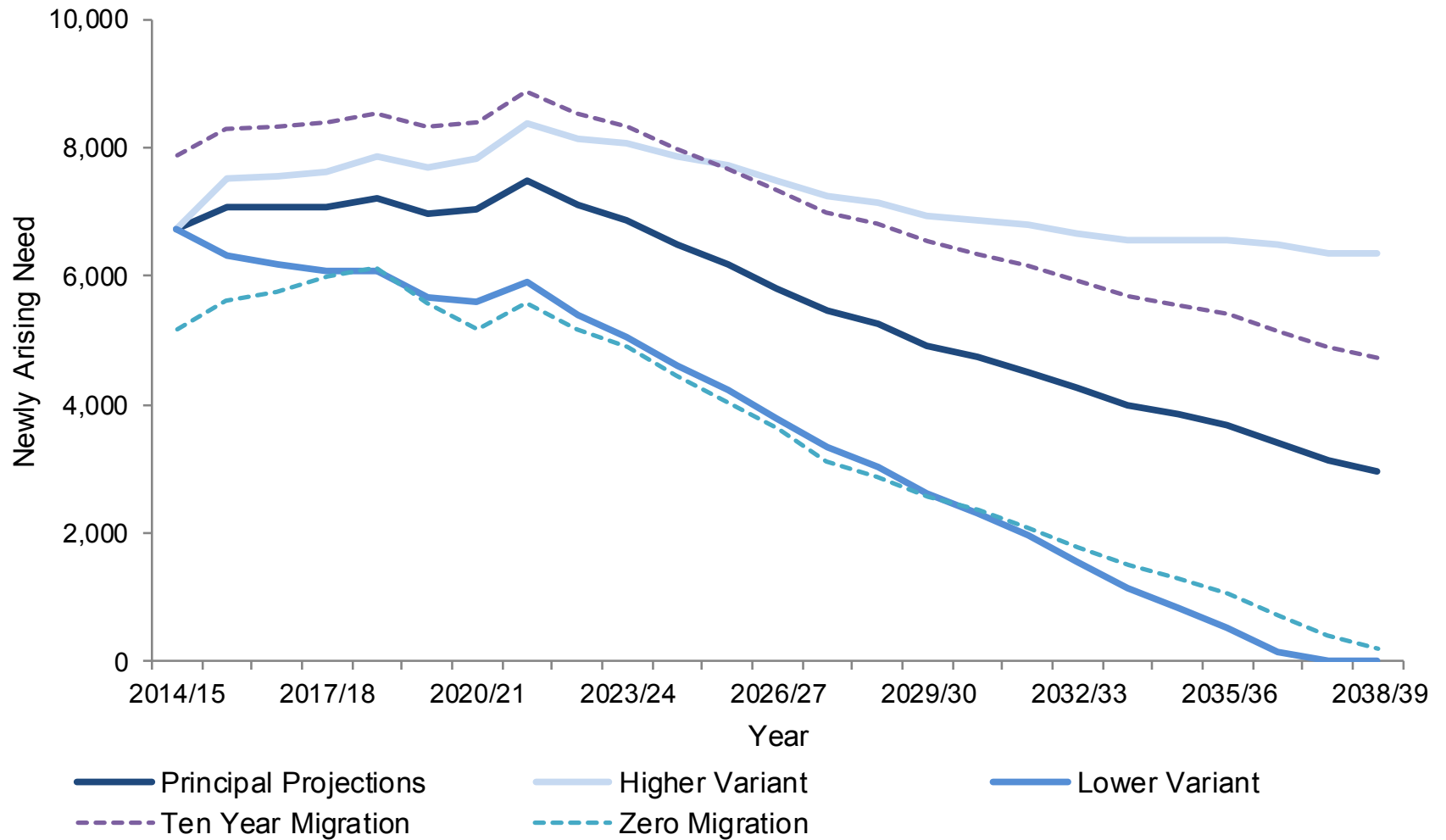
Source: 2014-based household projections

Angen Newydd



Ffynhonnell: Amcanestyniadau aelwydydd sail 2014

Newly Arising Need



Source: 2014-based household projections

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.

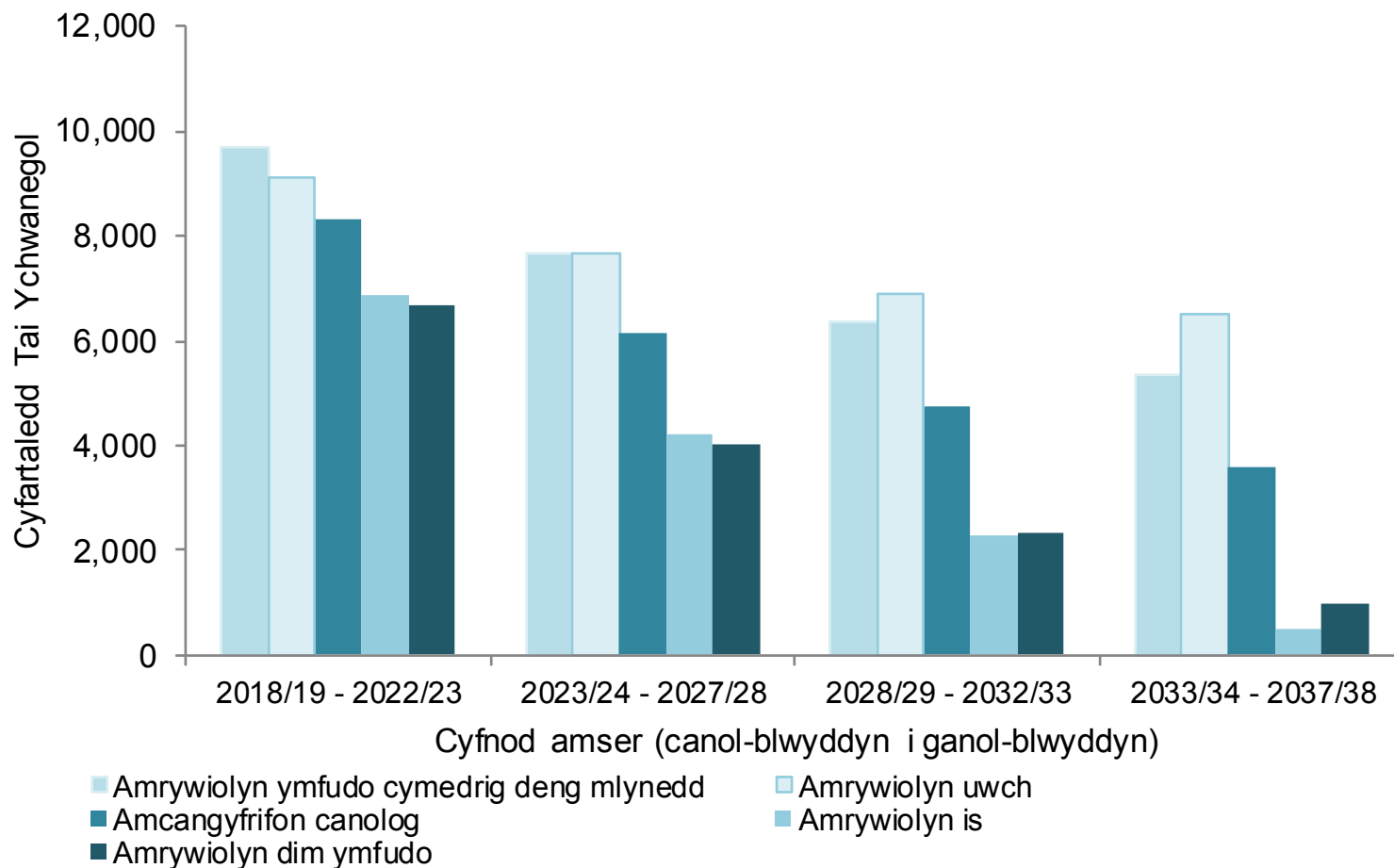
Amcangyfrifon (Cymru)

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



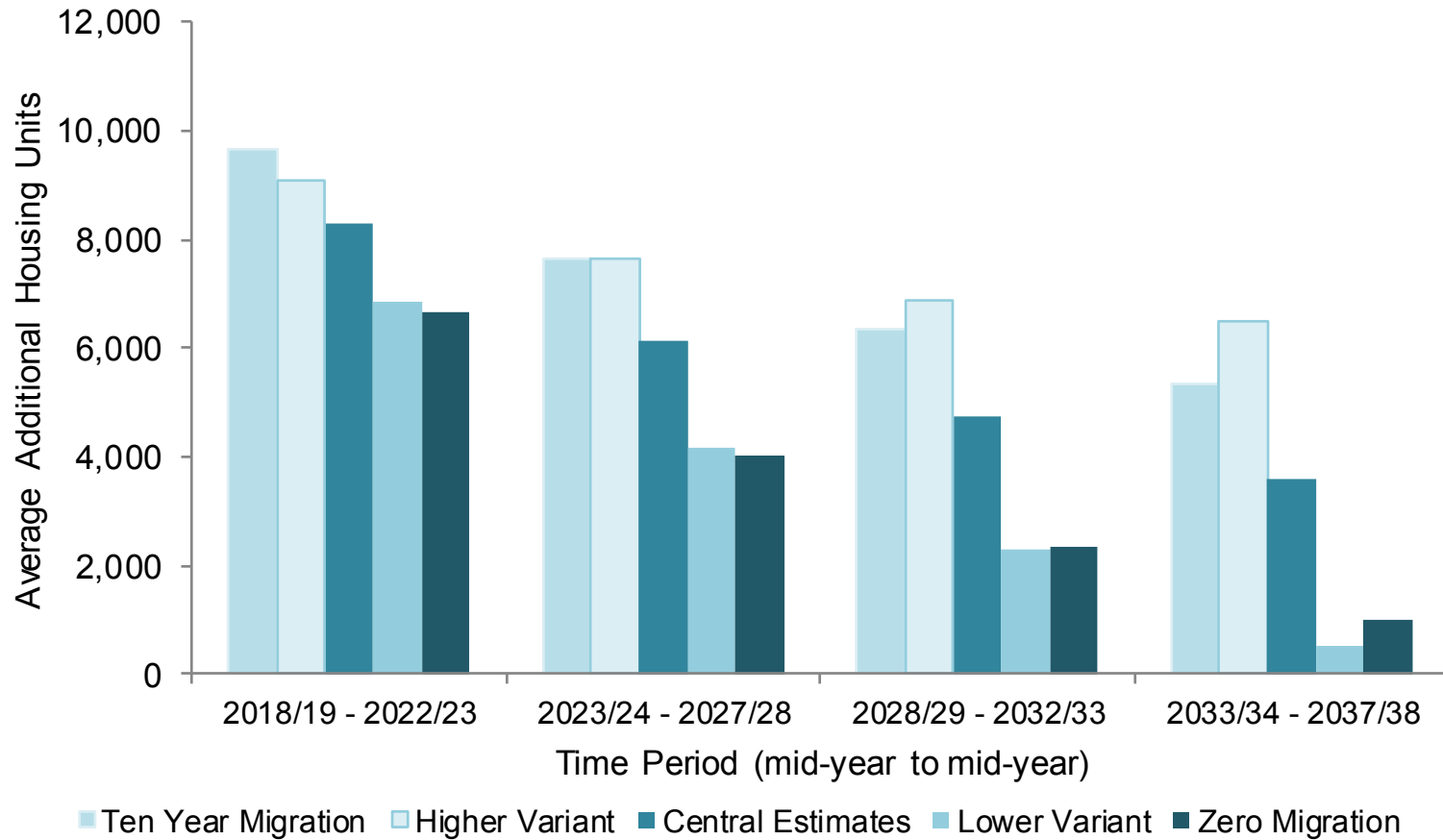
- Amcangyfrifon yn gostwng yn raddol dros 15 mlynedd dilynol.

Amcangyfrifon - Cymru



Ffynonellau: Amcanestyniadau aelwydydd sail 2014 LIC , Aelwydydd digartref mewn llety dros dro, Cyfrifiad 2011

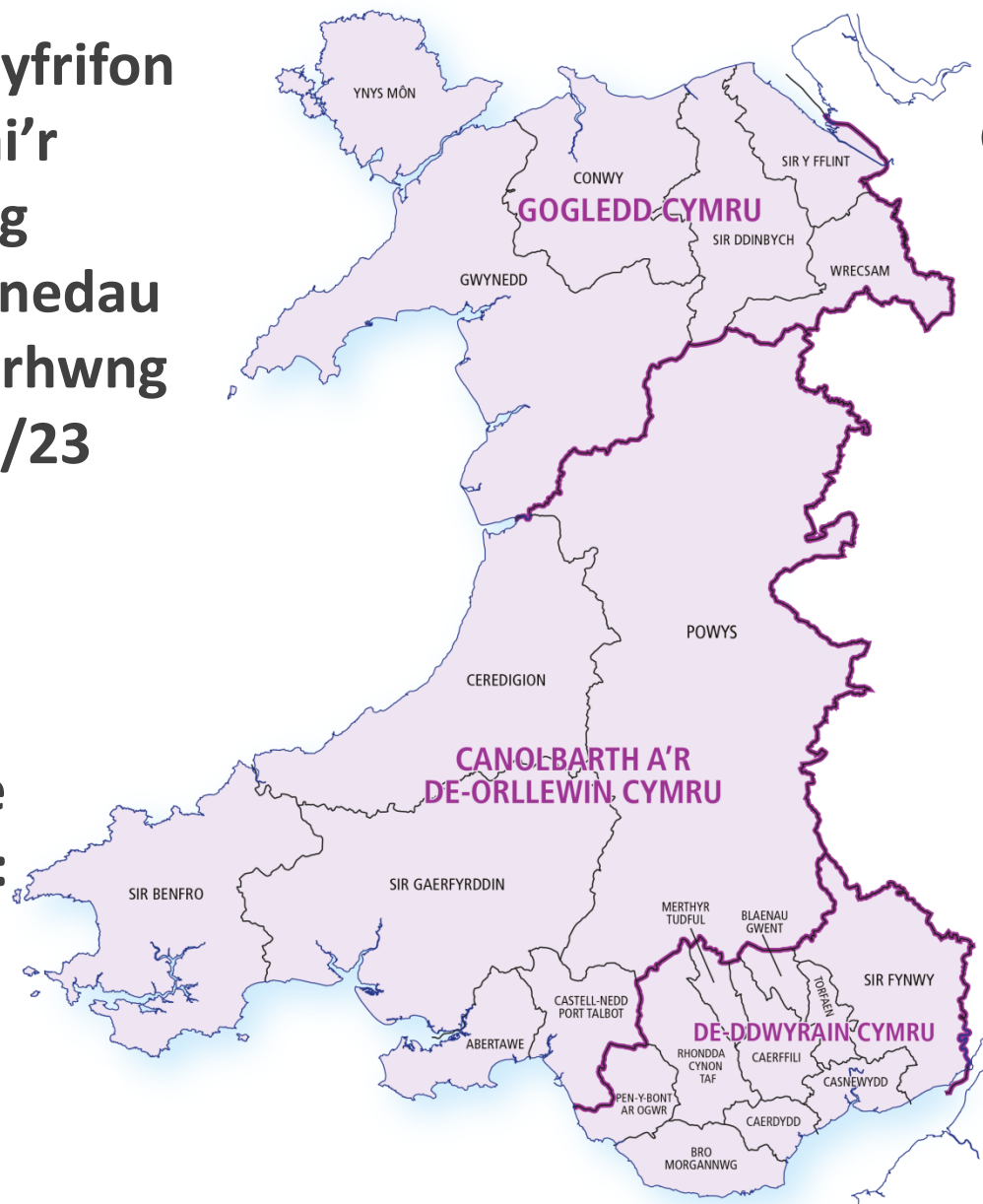
Estimates – Wales



Sources: WG 2014-based household projections , Homeless Households in Temporary accommodation, 2011 census

Dengys amcangyfrifon
rhanbarthol mai'r
angen cyfartalog
blynyddol am unedau
tai ychwanegol rhwng
2018/19 a 2022/23
fydd.....

Gogledd Cymru:
Rhwng **1,000** a
1,800



**De Ddwyrain
Cymru:**
Rhwng **4,000** a
5,300

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Cartograffeg • Llywodraeth Cymru
Tachwedd 2018

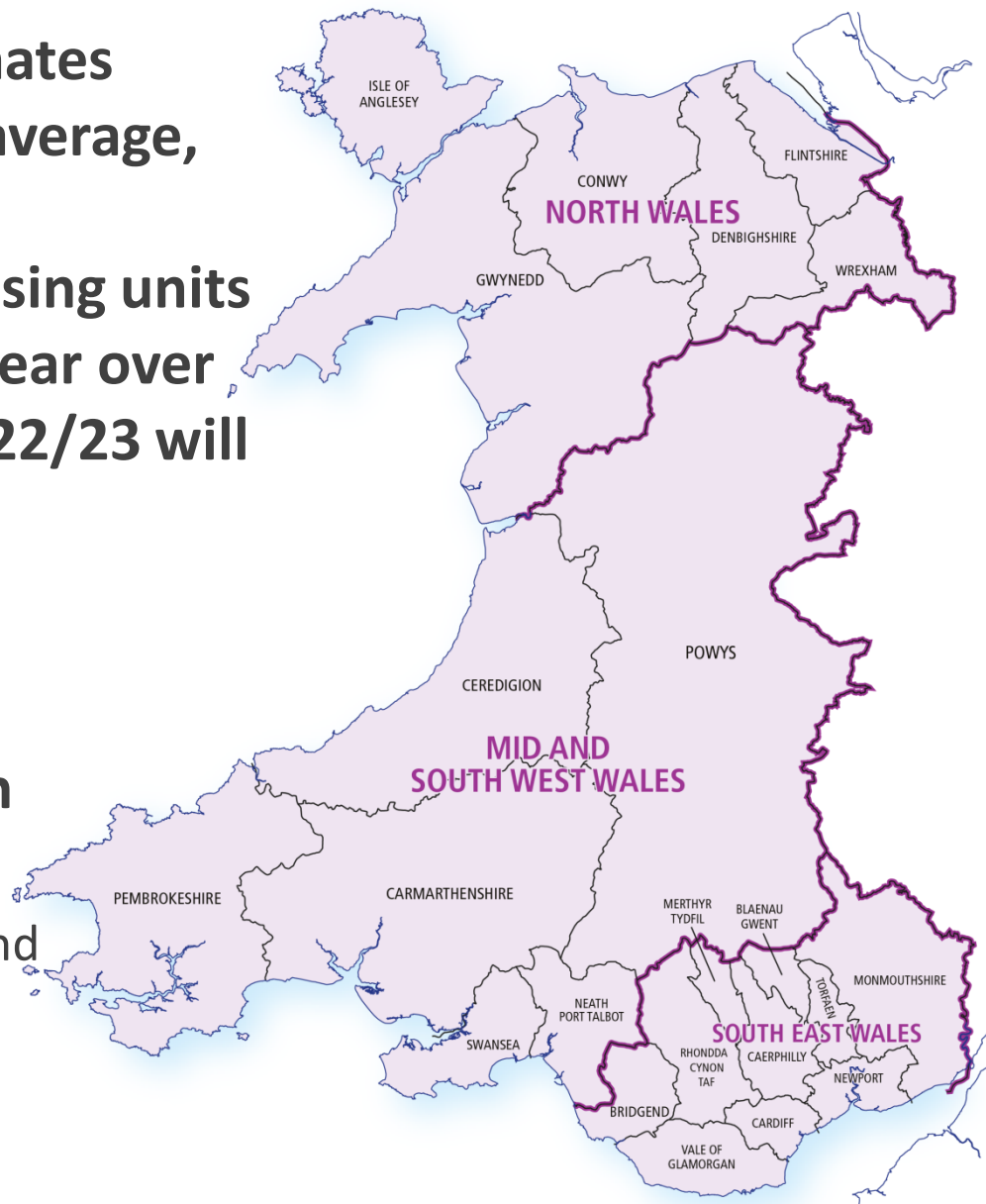
OGL

Regional estimates show that on average, the number of additional housing units needed each year over 2018/19 to 2022/23 will be...

North Wales:
Between **1,000** and **1,800**

Mid and South West Wales:
Between **1,300** and **2,500**

South East Wales:
Between **4,000** and **5,300**



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November 2018

OGL

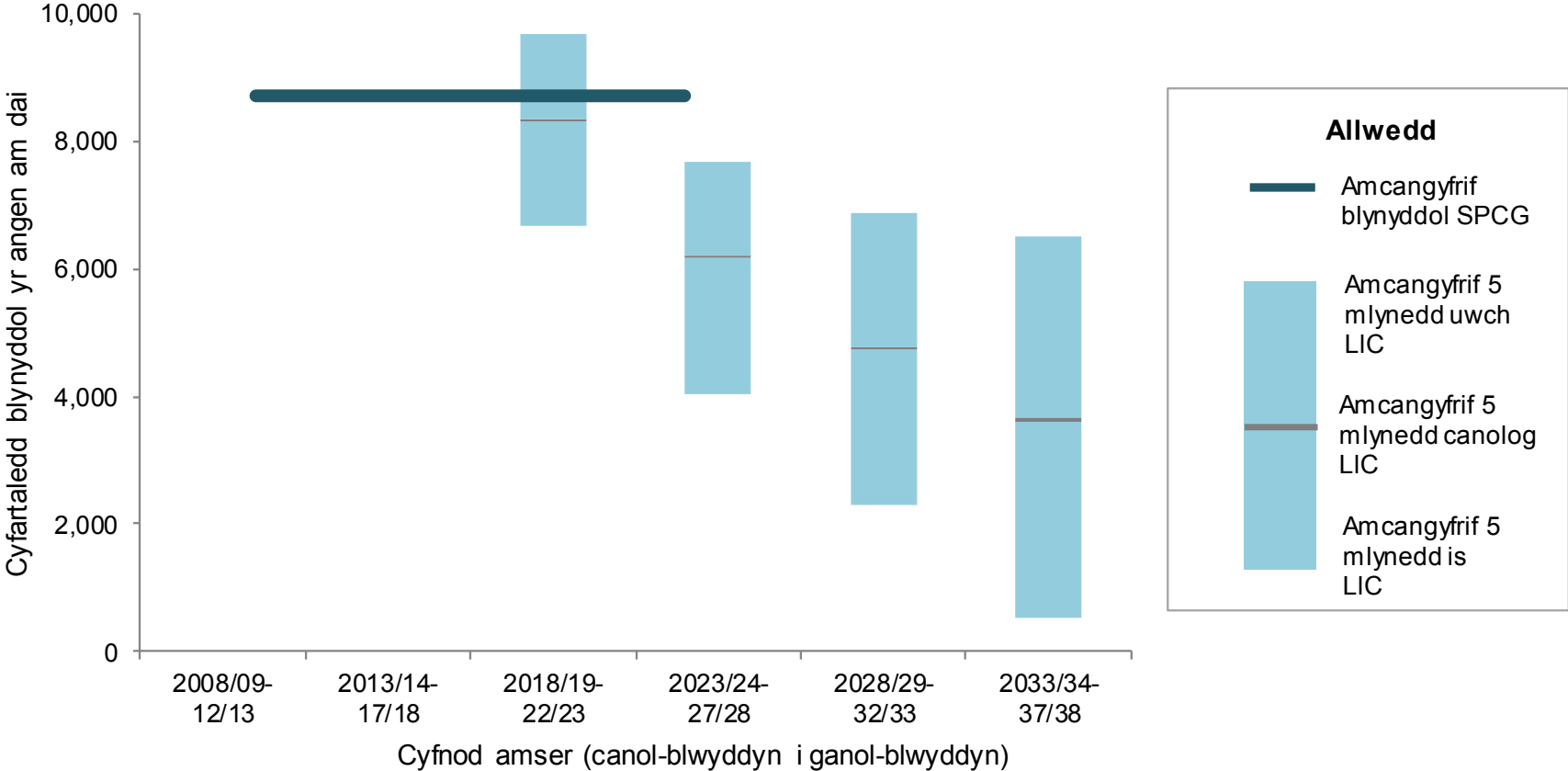
Comparison to Previous Estimates

- The presentation of the previous estimates does not enable a direct comparison with the new estimates broken down for the same 5 year periods.
- Holmans' principal estimate estimated a need of 8,700 units a year over the complete twenty year period 2011-2031.

Cymhariaeth ag amcangyfrifon blaenorol

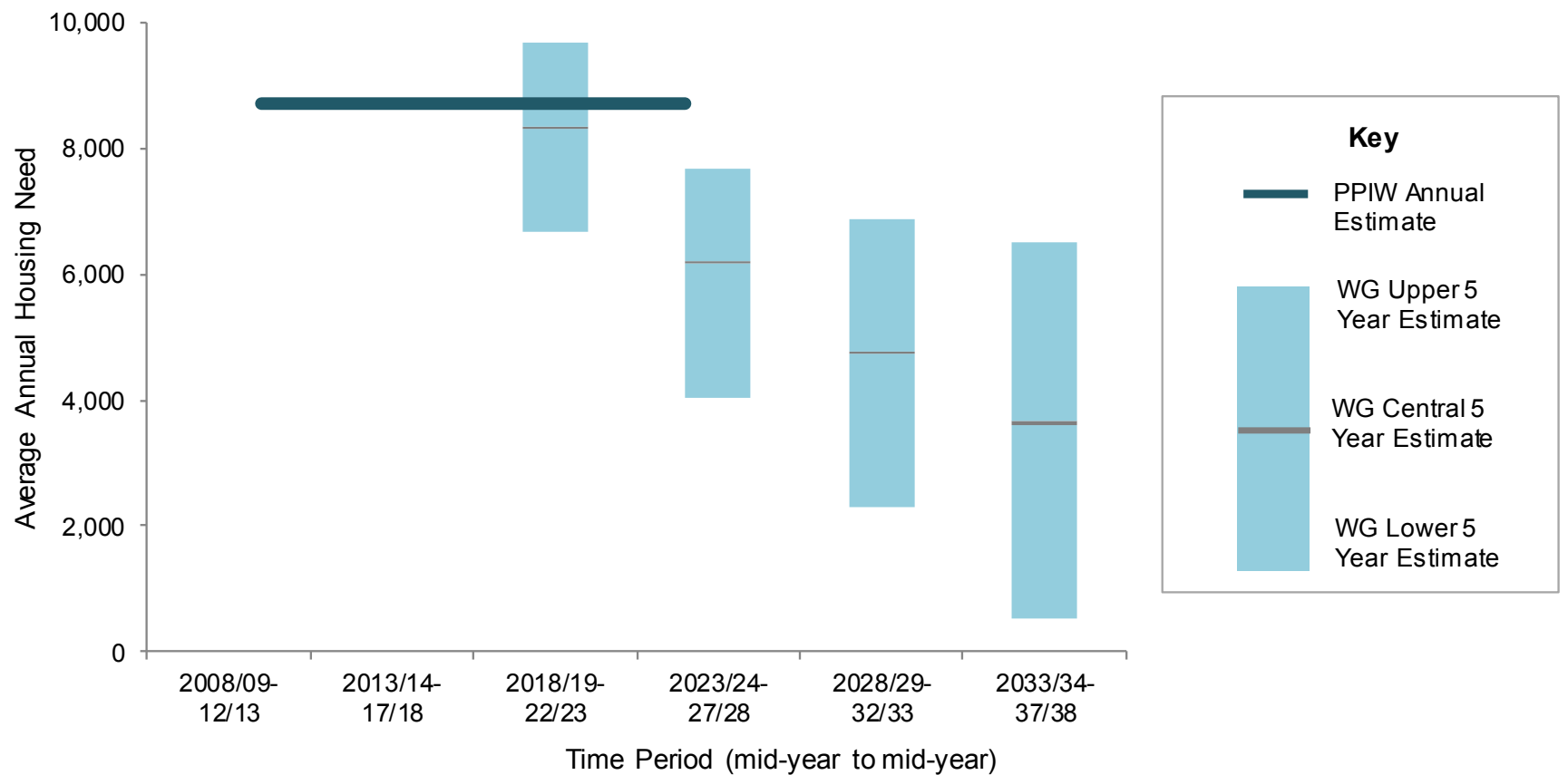
- Nid yw'r ffordd y cafodd yr amcangyfrifon blaenorol eu cyflwyno yn ei gwneud yn bosibl i'w cymharu'n uniongyrchol â'r amcangyfrifon newydd sydd fesul cyfnod o bum mlynedd.
- Amcangyfrifodd prif amcangyfrif Holmans y byddai angen 8,700 o unedau'r flwyddyn dros y cyfnod o ugain mlynedd rhwng 2011 a 2031.

Cymhariaeth ag amcangyfrifon blaenorol



FfynonellauYr Angen a'r Galw am Dai yn y dyfodol yng Nghymru SPCG,
Amcangyfrif LIC o'r Angen am Dai

Comparison to Previous Estimates



Sources: PPIW Future Need and Demand for Housing in Wales,
WG Estimates of Housing Need

Current work

- Positive feedback on 30 January statistical article
- Considered by Affordable Housing Panel and referenced in their recent report.
- Currently working on a report which will split the housing need estimates (first 5 years only) by tenure:
 - Market
 - Affordable
- A number of economic variables and assumptions will be used eg
 - House prices
 - Rental prices
 - Household income
- Assumptions discussed and agreed by expert sub-group and peer reviewed by Welsh Government Chief Analysts

Camau nesaf

- Adborth bositif i erthygl 30 Ionawr
- Ystyriwyd a chyfeiriwyd ato gan y Panel Tai Fforddiadwy yn eu hadroddiad diweddar
- Ar hyn o bryd yn gweithio ar adroddiad fydd yn rhannu'r amcangyfrifon o'r angen am dai (5 mylnedd cyntaf yn unig) fesul deiliadaeth:
 - Marchnad
 - Fforddiadwy
- Caiff nifer o amrywiolion economeg eu defnyddio megis
 - Prisiau tai
 - Prisiau rhent
 - Incwm aelwydydd
- Trafodwyd a chytunwyd ar y tybiaethau gan yr is-grwp arbenigol a chafwyd adolygiad gan Brif ddadansoddwyr Llywodraeth Cymru.

Phase 2 Publication

Early June:

- Statistical Article - Housing need by tenure for Wales and regions:
 - Market housing (owner occupier and private rented sector)
 - Affordable housing (intermediate and social)
- Estimates will not be official statistics (estimate of housing need by tenure given a set of assumptions).
- Excel tool with ability to split further:
 - Owner occupier
 - Private rental sector
 - Intermediate
 - Social housing

Cyhoeddiad Rhan 2

Ddechrau Mehefin:

- Erthygl ystadegol – yr angen am dai fesul deiliadaeth ar gyfer Cymru a'r rhanbarthau:
 - Tai l'r farchnad (perchentyaeth a rhentu preifat)
 - Tai fforddiadwy (canolraddol a chymdeithasol)
 - Mae'r cyhoeddiad hwn wedi cwmpasu amcangyfrifon o'r angen am dai yn genedlaethol a rhanbarthol
- Ni fydd yr amcangyfrifon yn ystadegau swyddogol (amcangyfrifon o'r angen am dai fesul deiliadaeth yn seiliedig ar dybiaethau).
- Rhaglen Excel yn galluogi rhannu pellach:
 - Perchentyaeth
 - Rhentu preifat
 - Rhentu canolraddol
 - Rentu cymdeithasol

Future work

- Consider Affordable Housing Review recommendations (links to LHMA's)
- Updated estimates (to be considered when next Household projections are published later this year).

Gwaith yn y dyfodol

- Ystyried Argymhellion yr Adolygiad Tai Fforddiadwy (y cyswllt gydag asesiadau o'r farchnad dai leol)
- Diweddaru'r amcangyfrifon (i'w ystyried pan gyhoeddir amcanestyniadau aelwydydd nesaf yn hwyrach eleni)

Questions? Cwestiynau?

Stats.housing@gov.wales
ystadegau.tai@llyw.cymru

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