

# Local Housing Market Assessment 2022-2037



Cyngor Bwrdeistref Sirol  
**MERTHYR TUDFUL**  
**MERTHYR TYDFIL**  
County Borough Council



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## Executive Summary

This Local Housing Market Assessment (LHMA), endorsed and approved by the full council on April 17th, 2024, leverages Welsh Government guidance, specifically “Undertaking Local Housing Market Assessments” (March 2022) and Version 3.2 of the Local Housing Market Assessment Tool, to assess Merthyr Tydfil’s housing needs from 2022 to 2037.

A range of information sources were utilised to feed into the assessment. These included an analysis of the local housing registers, household projections, homelessness data, house prices, rental prices, household incomes, dwelling stock turnover and housing supply data.

Based on the Welsh Government Principal household projections, the LHMA estimates a need for 453 affordable homes per annum. Given our existing development programme and projected existing re-lets, this equates to a net need of 114 additional affordable homes per year until 2027 across the whole of Merthyr Tydfil.

Of the net need of 114 additional affordable homes, the assessment identified a particularly high need for one-bedroom social rent accommodation within the borough. Over the first five years (2022-2027), this category accounts for an estimated 99 % of all social housing needs.

For the remaining 10 years of the LHMA period, there is an estimated unmet need for 11 affordable homes per annum.

This surge can be attributed to several factors, including legislative reforms, socio-economic factors and post pandemic economic factors which has resulted in a significant increase in homelessness presentations. Although this need is particularly high, it is important to ensure that a mix of house types and tenures is provided on new developments in order to achieve the Council’s objective of creating sustainable and resilient communities.

The assessment currently highlights a need to increase our provision of adapted homes, with, as of March 2024, 9.4 % of households registered for housing reported a need for adaptations, ranging from basic low-level aids and adaptations to fully adapted and accessible homes.

The LHMA also estimates the need for 35 market homes throughout the county per annum, consisting of 23 private rented (66 %) and 12 owner occupier properties (33 %).

The figures in the LHMA outline the additional housing need for the County Borough of Merthyr, and not those of planned developments. However, the Authority are working to increase the development of affordable homes at pace and scale, working closely with our partner developing Community Landlords.



# 1. Introduction

## 1.1 National Policy Background

Local authorities have a legal obligation (Section 8 of the Housing Act 1985) to assess housing demand within their jurisdiction. This critical process, known as a Local Housing Market Assessment (LHMA), provides a comprehensive understanding of the local housing market's complexities. This understanding is essential for effective housing planning and service delivery.

### **Why are LHMA's Important?**

LHMA's go beyond simply identifying housing needs. They offer a holistic view of the entire housing market, including:

- The exact number of homes needed.
- Their geographical distribution.
- The types of tenures required (e.g., social housing, private ownership)

This data is crucial for sound housing policymaking, as highlighted in the 2019 Independent Review of Affordable Housing Supply. The review emphasised the need for accurate and comprehensive data to guide decisions regarding affordable housing supply. LHMA's serve as the primary tool for gathering this essential local-level evidence.

### **LHMA's and Planning:**

Planning Policy Wales emphasises the fundamental role of LHMA's in shaping the evidence base for development plans. LHMA's, when used in conjunction with other types of data, contribute to creating a well-rounded strategy for housing delivery within a specific area.

### **LHMA's and Homelessness Strategies:**

Local authorities in Wales are required to develop homelessness strategies every four years (Housing (Wales) Act 2014, sections 50-52). LHMA's play a vital role in informing these strategies. The strategies must consider the resources available to the local authority and other organisations supporting those who are homeless or at risk of homelessness.

### **Conclusion:**

LHMA's are essential tools for local authorities to understand their housing markets and make informed decisions about housing policy, planning, and homelessness strategies. By providing a comprehensive view of local housing needs and demands, LHMA's contribute to creating sustainable and equitable housing solutions.

## 1.2 Local Policy Background

### Corporate Policy

The current Merthyr Tydfil County Borough Council Corporate Wellbeing Plan is titled 'Acting today for a better tomorrow' and covers the period 2023-2028, setting out the Council's vision, values and priorities. The plan contains four corporate well-being objectives that aim to directly address the identified needs of our communities and contribute to the seven national goals set out in Welsh Government's Well-being of Future Generations (Wales) Act 2015.

The objectives we want to achieve are:

- An Aspirational Merthyr Tydfil, focused on learning
- A Healthier Merthyr Tydfil
- A Safe and Prosperous Merthyr Tydfil
- A Clean and Green Merthyr Tydfil

A well evidenced and up to date LHMA will contribute to achieving of many of these principles, through providing a better understanding of the housing market and housing need in the County Borough, and then highlighting specific areas where intervention may be required.

### Housing & Planning Policy

Aligned with the Councils well-being goals, Replacement Local Development Plan (RLDP) was adopted in January 2020 and provide the land use planning framework for the County Borough up until 2031. The Vision of the RLDP aims:

To strengthen Merthyr Tydfil's position as the regional centre for the Heads of the Valleys within the Cardiff Capital Region, to encourage a sustainable level of population growth and be a place to be proud of where:

- People learn and develop skills to fulfil their ambitions.
- People live, work, have a safe, healthy and fulfilled life; and
- People visit, enjoy and return.

The Replacement LDP policies are cross-cutting in their nature and cross-reference the goals and objectives of the Well-being of Future Generations (Wales) Act 2015 and previous versions of the Corporate Plan. The LDP Vision will be delivered through four Strategic Objectives which seek to reflect updated national policy and legislation and address the issues facing the County Borough.

The findings of this LHMA (and future updates) will form a key part of the evidence base as the statutory review of the RLDP commences in 2024. The LHMA will facilitate a detailed understanding of the nature and level of need for market and affordable housing in the County Borough, which can be used to inform affordable housing policies and targets included in the LDP, recognising that the Plan will not be the only source of affordable housing delivery.

The area specific evidence outlined in this LHMA will also prove fundamental in identifying how planning contributions will help meet this target alongside other sources of affordable housing delivery. The data will inform the appropriate mix of dwellings for new developments, particularly the sizes and types of affordable housing in short supply.



## Legislative Reform and Guidance Revisions

It is pertinent to include a brief overview of some of the Homelessness Legislation and Guidance revisions to the development of the LHMA due to its' impact on how Local Authorities process homeless applications and wider consequences in providing the current context in which Local Authorities find themselves.

Due to the social and economic impact, the pandemic period understandably triggered a sharp rise in homelessness applications. During the early stages of the Covid 19 Pandemic, WG instructed all Welsh Local 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.

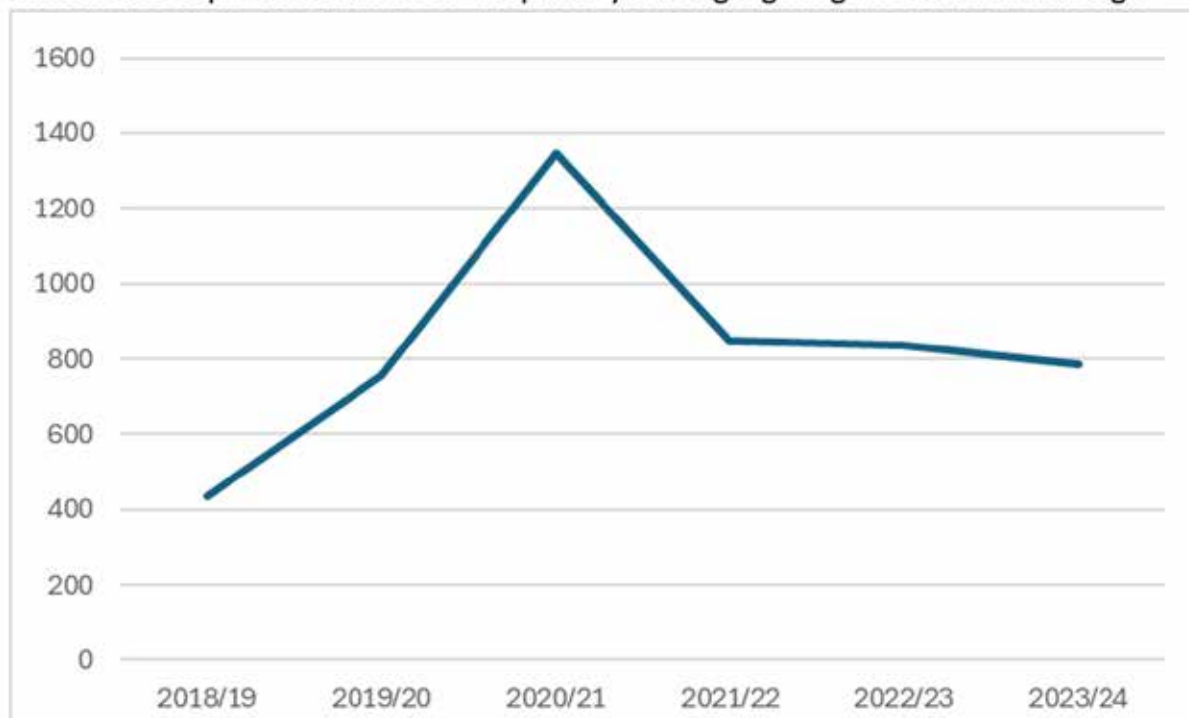
In 2022/23, Welsh Government published an addendum to the Housing (Wales) Act 2014 which added an 11th category to Priority Need of street homelessness. The addendum, which came into force in October 2022, now means that anyone who presents as homeless who has no other accommodation options must be treated as at risk of street homelessness and therefore in Priority Need.

Following the Public Health emergency, Merthyr Tydfil CBC has reverted back to the former position of applying 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 Merthyr Tydfil's statutory duties.

**Homelessness presentations over the past 6 years highlighting the scale of challenge:**







It is worth noting that whilst the numbers of homeless presentations have appeared to stagnate, this can be attributed to the large numbers of those remaining in TA.

## Rapid Rehousing Transition Plan (RRTP)

To reach Welsh Government's vision for homelessness to be 'rare, brief and unrepeatable', Merthyr Tydfil CBC along with all other Welsh Local Authorities have drafted plans to adopt 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, to reduce overreliance on emergency unsuitable accommodation and move people into safe and suitable homes.

Within the Rapid Rehousing Plan, we aim to reduce and subsequently remove the prolonged and potentially damaging spells in temporary accommodation seen over recent years and are developing a strategic approach that links housing development, support and supply to housing need.

The Council's Rapid Rehousing Transition Plan (RRTP) has four broad priorities as part of the housing led approach with prevention at the core:

1. Strengthen early intervention and prevention services and specialised support to prevent homelessness.
2. Ensuring people who are homeless or threatened with homelessness access the right home at the right time and in the right place, as part of our Rapid Rehousing approach
3. Further strengthen Housing Support services

Work collaboratively to provide holistic, person-centred support with effective specialist interventions where necessary.

The development of homes in line with need is fundamental to Authorities being able to work in line with the Rapid Rehousing Transition Plan.

## 1.3 Governance and Consultation

The production of this LHMA for Merthyr Tydfil has been guided by a collaborative approach, recognising the importance of stakeholder input. We actively engaged with a diverse range of organisations and groups to gain a comprehensive understanding of local housing needs. These stakeholders included:

- **Community Housing Providers:** Their insights were crucial in understanding the demand for affordable housing and the challenges faced by vulnerable residents.
- **Planning consultants and developers:** These are private landlords who operate with a social purpose, similar to housing associations. Their input can be valuable in understanding the landscape of affordable housing options.
- **Internal Local Gov. Dept:** This includes consultation with Environmental Health, Planning, Estates, Community Safety and Social Service departments when understanding local housing need.

- **Community development organisations:** They provided valuable perspectives on the needs of specific demographics within Merthyr Tydfil.
- **Residents' groups and tenant representatives:** The LHMA has been developed in partnership with our partner Community Landlords regularly consult with all residents and develop policies co-productively.

Engagement methods included workshops, online surveys, and targeted meetings with specific stakeholder groups. Feedback received through these channels has significantly influenced the LHMA. For example, concerns raised regarding limited availability of family-sized affordable housing informed our analysis of housing needs by tenure and dwelling type.

Internally, the LHMA has undergone a rigorous sign-off process, reviewed by relevant Council departments, including Housing, Planning, and Public Health. This ensures the LHMA aligns with the Council's wider strategic objectives and well-being goals as outlined in the Corporate Wellbeing Plan.

## 2. Overview of Assessment and Methodology

### Methodology, inputs and assumptions

The LHMA has been developed using version 3.2 of the LHMA Tool issued by Welsh Government, this has been done to ensure all Local Authorities across Wales adopt a consistent and clear approach to develop the LHMA and inform future development policy.

The Tool uses a formulaic approach to allocate the additional housing need, the methodology of which is quite complex utilising several sources of grouped data, whilst applying various assumptions.

More detail on the methodology and formulaic approach to calculating additional housing need and projections can be found in the Welsh Government Guidance: [Undertaking Local Housing Market Assessments: Guidance, March 2022](#).

Please see [Appendix A – Key Issues Tables](#) to set out any deviation from the methodology and default data and assumptions provided in the Tool.

### 2.1 Data Inputs

A range of data sets have been utilised to prepare this LHMA. The Primary sources of data are as follows:

- Living Merthyr Tydfil (Choice Based Housing Register)
- Hometrack – Property valuation and housing market data
- ONS – Office for National Statistics
- CACI Paycheck Data (gross household income estimates)
- NOMIS (labour market statistics and Census data)
- Land Registry Data
- Community Landlord stock and rental data

#### 2.1.1 Existing affordable housing need

The Living Merthyr Tydfil register reflects the number of households within the county whose housing needs cannot be met through the open market and who have consequently registered for social housing.

As of the latest data update, there were 2,210 active applications for affordable housing. Of these, 1,740 resided within the Primary Growth Area, while the remaining 470 resided in the Secondary Growth Area.

#### Existing households falling into need

The LHMA must also factor in the annual number of existing households entering homelessness. Analysing homeless presentations for temporary accommodation over the past three years provides a good estimate of the potential increase in housing need. Duplicate applications are removed to avoid double-counting.



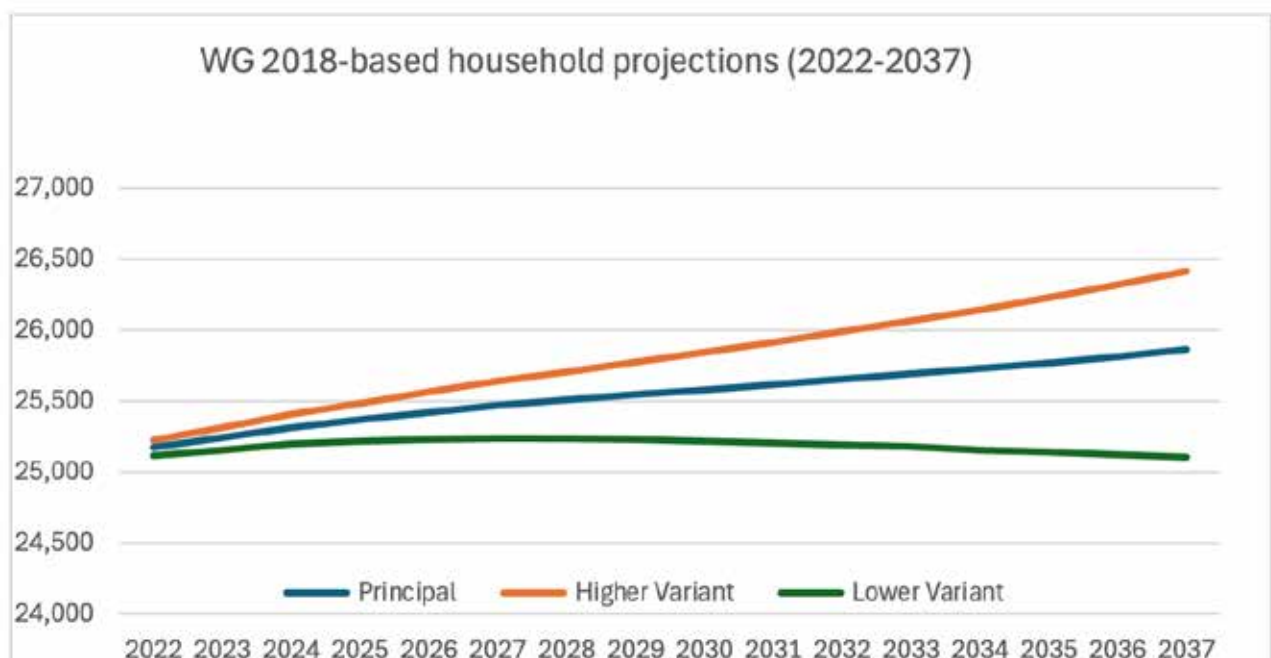


There were 1,467 homelessness presentations between April 2020 and March 2023.

### 2.1.2 Newly Arising need

The LHMA calculation requires incorporating newly arising housing needs. To estimate these needs, the Welsh Government utilizes 2018-based household projections. These projections come in three variants: Principal, “higher variant” (which assumes a longer lifespan, increased migration, and higher fertility rates), and “lower variant” which assumes a shorter lifespan, lower migration, and lower fertility rates. This allows for the estimation of various levels of future household growth.

The chart below highlights Welsh Government’s household projections for Merthyr Tydfil across the LHMA period. The principal variant forecasts an increase of 687 households by 2037. This figure varies under the lower and higher variants, ranging from a minimum of -13 lost households to a maximum of 1,193.



Not all new households will require affordable housing. Some will be able to find suitable housing on the open market. Data on house prices and household income has been used to estimate the likely need for affordable housing by tenure. This estimated need was then distributed proportionally across both housing market areas, based on population data from the 2021 Census.

### 2.1.3 Committed Supply and Turnover of Existing Stock

The LHMA tool incorporates data on the committed supply of affordable housing, anticipated re-lets, and planned removals to estimate the net stock and available supply of affordable housing.

**Committed Supply:** 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 and planning permissions requiring affordable housing as part of a Section 106 agreement.

Planned removals: Housing slated for disposal or demolition within the first five years of the plan. This information is obtained from RSLs managing Merthyr Tydfil's affordable housing stock. It's important to note that planned removals are anticipated to be minimal, only undertaken as a last resort for properties deemed unable to meet the required standards.

Turnover of existing stock: Data on lettings for all affordable housing tenures over the past three years was analysed from the Common Housing Register.

These data sets were combined to give the estimated net annual supply of affordable housing, illustrated below.

Summary of additional annual (gross and net) affordable housing need estimates over the first 5 years:2022/23 to 2026/27;

	Annual additional affordable housing need		Social Rents by Bedrooms			
HMA's	Affordable housing need	social rent element	one bedroom	two bedrooms	three bedrooms	four+ bedrooms
<b>Total Households for LA :Merthyr Tydfil</b>	<b>453</b>	<b>453</b>	<b>279</b>	<b>122</b>	<b>41</b>	<b>11</b>
Primary Growth Area (Merthyr Tydfil)	357	356	223	92	33	8
Secondary Growth Area (Lower Valley)	96	96	55	30	8	3

#### 2.1.4 Private Rent Data

Data for calendar year 2022-23 on private rental properties within each housing market area was obtained from Rent Officers Wales. This data includes the number of rental properties, along with the 30th and 50th percentile rent figures. It's important to note that Rent Officers Wales data only considers confirmed lettings for both renewals and new tenancies, excluding properties where Local Housing Allowance is claimed.

Merthyr Tydfil's monthly average private rent data

<b>Rent Officers Wales data collection</b>	one bedroom	two bedrooms	three bedrooms	four+ bedrooms
<b>Primary Growth Area (Merthyr Tydfil)</b>	<b>£486</b>	<b>£550</b>	<b>£550</b>	<b>£890</b>
<b>Secondary Growth Area (Lower Valley)</b>	<b>£475</b>	<b>£525</b>	<b>£527</b>	<b>£895</b>

However, it is worth noting there is a discrepancy between the figures provided by Rent Officers Wales and the experience of our local officers. The Rent Officer figures seem to be considerably lower.

#### 2.1.5 House Price data

The LHMA tool incorporates the latest house price data from the Land Registry for Merthyr Tydfil, covering the period from January 2022 to December 2023. This data highlights the differences in median house prices across the boroughs two housing market areas. The

secondary growth area has the most affordable option with a median of £111,491, while the Primary Growth area has a slightly higher median price at £120,761.

### 2.1.6 Household Income data

Data on household income, broken down by ward, is provided by CACI Paycheck and incorporated into the tool. The figures, representing 2023, show a median household income of £29,239 in Merthyr Tydfil, which sits just below the Welsh average of £29,265.

## 2.2 Key Assumptions

Income thresholds need to be 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 Welsh Government technical working group. For reference, these do not form the policy basis for the allocation of affordable housing, details are available in Merthyr Tydfil's Allocation Policy (Allocations Policy for Community Housing ([merthyr.gov.uk](http://merthyr.gov.uk)))

It is important to note that due to the absence of low-cost homeownership and intermediate rent options in Merthyr Tydfil, the standard definition of market housing thresholds wouldn't accurately reflect the local housing landscape. To address this, we adjusted the market criterion used in the assessment. The market threshold was set at 40.7 % of the median rent. This specific percentage ensures that the upper limit for social rent aligns with the lower limit for market housing, creating a more accurate representation of the housing needs in Merthyr Tydfil.

However, it is worth noting that if we were to use the WG prescribed guidelines, we would require 6 LCHO/intermediate rent units per annum over the first 5 years. This would comprise of 5 units within the PGA and 1 in the SGA. This will be considered on future larger developments subject to local need.

## 2.3 Housing Market Areas

Housing Market Areas (HMAs) are geographic regions defined on where people live and work. They acknowledge that housing markets extend beyond strict administrative boundaries, allowing residents to consider options within a reasonable commute. These areas are delineated using several key factors:

- **Housing Pricing:** This assesses how easily someone can move within the HMA without facing a significant housing cost increase.
- **Transportation Links:** Major roads and rail connections are considered to understand commuting patterns within the HMA.

### Merthyr Tydfil's Growth Areas

This report focuses on two key HMAs designated within the Replacement Local Development Plan (RLDP):

- **Primary Growth Area (Merthyr Tydfil):** This area focuses on the main urban centre of Merthyr Tydfil, where most future housing needs are anticipated.
- **Secondary Growth Area (Lower Valley):** This area encompasses communities south of the borough.



Area	Ward Code:
<b>Primary Growth Area</b>	
Cyfarthfa	W05000708
<u>Dowlais and Pant</u>	W05000709
<u>Gurnos</u>	W05000710
Park	W05000712
<u>Penydarren</u>	W05000713
Town	W05000715
<u>Vaynor</u>	W05000895
<b>Secondary Growth Area</b>	
<u>Bedlinog and Trelewis</u>	W05000707
Merthyr Vale	W05000711
Plymouth	W05000714
<u>Treharris</u>	W05000716

Analysis of Housing Register applications reveals a significantly higher need for housing in the Primary Growth Area (72 %) compared to the Secondary Growth Area (28 %).

The Primary Growth Area (PGA) within Merthyr Tydfil encompasses a diverse range of wards, each with distinct housing characteristics. Cyfarthfa boasts a mix of housing tenures, with social housing demand varying based on location and amenities. Dowlais offers a blend of owner-occupied properties and a substantial social housing sector, particularly concentrated in urban areas. Gurnos stands out for its dominance of social housing with a well-balanced mix of property types and resident ages. Park, though largely owner-occupied, experiences significant demand for social housing options. Penydarren presents a varied tenure landscape, with a more desirable southern half contrasting with a higher proportion of social housing in the north. Town itself is primarily owner-occupied, featuring both detached/semi-detached homes in the east and terraced housing in the central areas. Finally, Vaynor boasts a significantly higher proportion of owner-occupied detached and semi-detached homes compared to the Merthyr Tydfil average. This diverse mix of housing options within the PGA caters to a variety of needs and preferences.

The Secondary Growth Area (SGA) in Merthyr Tydfil offers a more limited selection of housing options compared to the PGA. Bedlinog is characterised by a strong owner-occupier presence with limited market reach, suggesting a less transient population. Merthyr Vale reflects a similar trend, with a high owner-occupation rate primarily featuring terraced properties. Plymouth presents a mix of tenures, with Pentrebach and Abercanaid boasting significant owner-occupied presence, while Troed-y-rhiw offers a more balanced spread across owner-occupation, social housing, and private rentals. Treharris, though also predominantly owner-occupied, exhibits some variation. The Quakers Yard area, with its modern housing options, attracts a younger population. Conversely, areas with a higher concentration of terraced housing tend to have a larger share of older residents. This highlights a more limited range of housing options within the SGA, with a focus on owner-occupied properties and a potentially less diverse resident demographic.

The figure below illustrates these eleven Wards in Merthyr Tydfil;

Key:

Vay – Vaynor  
Dow – Dowlais  
Gu – Gurnos  
Pe – Penydarren  
Pa – Park  
Cy – Cyfarthfa  
To – Town  
Ply – Plymouth  
MV – Merthyr Vale  
Bed – Bedlinog  
Tre – Treharris





# 3. Overview of Housing Market and Socio-economic and Demographic Trends

## 3.1 Housing Market Analysis by Tenure

At just 55 square miles, Merthyr Tydfil is the most compact Unitary Authority in Wales. Despite its size, it plays a vital role as the main retail and service centre for the Heads of the Valleys region. The town itself, located about 20 miles north of Cardiff, boasts a population of roughly 44,000 residents within the Primary Growth area.

The secondary growth area, south of the main town encompasses the additional settlements of Bedlinog, Merthyr Vale, Plymouth and Treharris. These communities have a combined population of around 15,000.

### 3.1.1 Transformation and Growth

The past two decades have witnessed significant economic and structural changes in Merthyr Tydfil. The town has transitioned from a focus on primary and secondary industries to a more service-oriented economy. Recent developments like the Bike Park Wales, Cyfarthfa Retail Park, and the new Leisure Village have spurred economic growth, creating local jobs and attracting visitors and investment.

### 3.1.2 Population

Despite a slight rise in households (24,281 in 2011 to 25,783 in 2021), Merthyr Tydfil's population has held steady at around 58,866 since 2011. However, the age composition is changing. The median age remains 40, but there's a noteworthy trend:

- **Aging Population:** The 65-74 age group grew by 18.2 %, while the 35-49 group declined by 9.9 % (approximately 1,200 residents).

This trend suggests a need for more age-appropriate housing options in the future, such as retirement communities, assisted living facilities, and accessible, safe housing designed for older adults.

### 3.1.3 Austerity's Impact and Pockets of Deprivation

Austerity measures and welfare reforms have impacted Merthyr Tydfil more significantly than other parts of Wales. Areas like Merthyr Tydfil Town, Penydarren, Merthyr Vale, and Gurnos face high levels of housing deprivation, particularly concentrated in the north (Penydarren, Gurnos, and Gellideg) within the Cyfarthfa Ward. While the south experiences lower deprivation, Merthyr Vale remains a concern, sharing the "deep-rooted deprivation" classification with Penydarren.



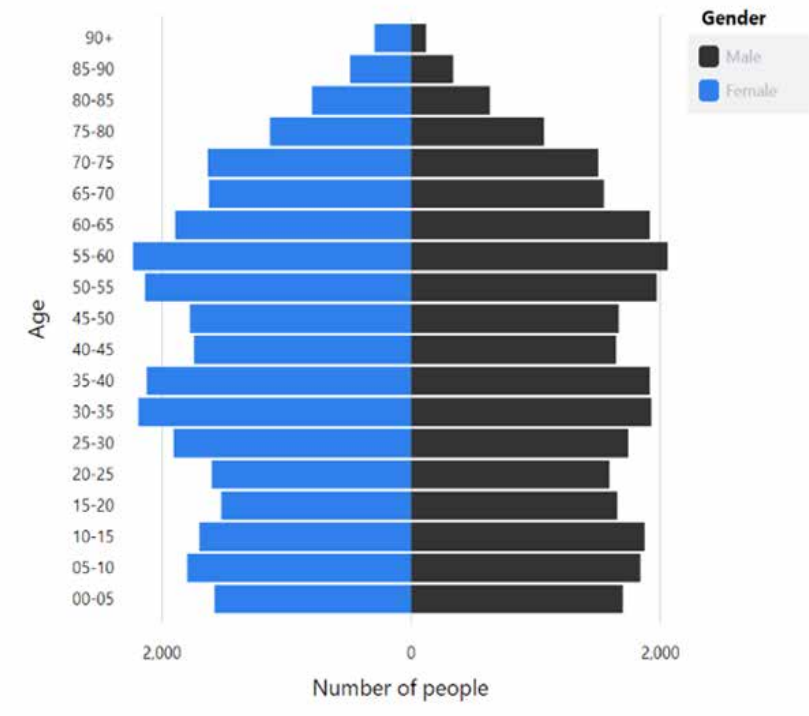
### 3.1.4 Age and Gender Demographics

Merthyr Tydfil's population of 58,866 is divided by gender as follows:

Males make up 48.9 % of the total, while females constitute 51.1 %.

In 2021, the sex ratio in Merthyr Tydfil was 95.731 males for every 100 females.

Data from the ONS regarding age distribution indicate that the adult population in Merthyr Tydfil, which includes individuals aged 18 and above, is 48,375.



### 3.1.5 Ethnicity Composition in Merthyr Tydfil

The 2021 census reveals that Merthyr Tydfil's population is overwhelmingly White (97.1 %). However, the town also boasts a diverse range of ethnicities within the remaining 2.9 %.

- Asian: Forming the largest minority group, Asians make up 1.5 % of the population.
- Mixed Race: Individuals identifying as mixed race comprise 0.9 % of the residents.
- Other Ethnicities: A further 0.4 % of the population belongs to other ethnic groups.
- Black: The Black population in Merthyr Tydfil is relatively small, accounting for 0.2 %.

### 3.1.6 Disability Rates in Merthyr Tydfil

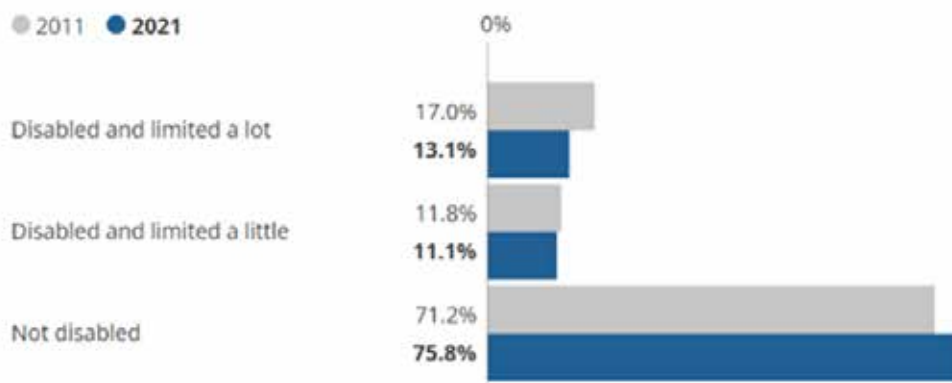
Data from the 2021 census shows a decrease in the percentage of Merthyr Tydfil residents with disabilities that severely limit their daily activities. This figure dropped from 17.0 % in 2011 to 13.1 % in 2021 (adjusted for age differences). However, it's important to consider some factors:

- **Wales-Wide Trend:** This decline wasn't unique to Merthyr Tydfil, as all Welsh local authorities experienced a similar decrease.
- **Potential Pandemic Influence:** The 2021 census occurred during COVID-19, which might have impacted how people perceived their limitations.
- **Data Comparability:** Changes in the way disability questions were phrased between censuses could affect the results.

While the data suggests a decrease in disability rates, interpreting it requires caution due to the factors mentioned above.

### The percentage of people who were identified as being disabled and limited a lot in Merthyr Tydfil decreased by 3.9 percentage points

Age-standardised proportion of usual residents by long-term health condition or illness, Merthyr Tydfil



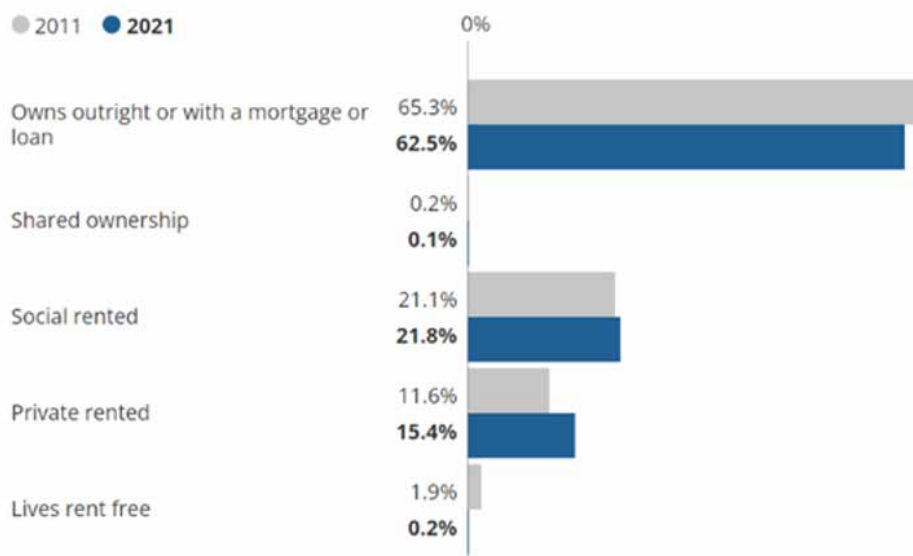
Source: Office for National Statistics – 2011 Census and Census 2021

### 3.1.7 Households by tenure

Based on data from the 2021 Census, Merthyr Tydfil currently has a total of 25,783 households. The predominant property tenure type in Merthyr Tydfil is Owner Occupier, making up 62.6% of the market. This is followed by Social Rented at 21.8% and Private rented / rent free at 15.6%.

### The rate of home ownership in Merthyr Tydfil decreased by 2.8 percentage points

Percentage of households by housing tenure, Merthyr Tydfil



Source: Office for National Statistics – 2011 Census and Census 2021

It's important to note that Merthyr Tydfil has a significantly higher proportion of older housing stock compared to other areas in Wales. This contributes to a notably higher rate of housing unfitness, especially within terraced housing.

In terms of changes over time, Merthyr Tydfil experienced a significant decrease in the percentage of households owning their homes, declining from 65.3 % in 2011 to 62.5 % in 2021. Consequently, during this period, Merthyr Tydfil shifted from being the sixth lowest to being jointly ranked as the fourth lowest in terms of the percentage of home ownership among all areas.

### 3.1.8 Overview of Owner Occupier Position

The average house price in Merthyr Tydfil sits at £153,057, considerably lower than the Welsh average of £213,816 (based on Land Registry data). This might seem like a positive aspect, offering potentially more affordable housing options.

However, despite the lower average house price, the affordability picture becomes more complex when considering the house price to income ratio. In Merthyr Tydfil, this ratio stands at 7:1 (Land Registry / ONS 2024). This means that, on average, a typical property costs seven times the average household income.

A higher house price to income ratio suggests potential affordability challenges for residents. With an average house priced at seven times the average income, saving for a down payment and managing mortgage repayments can be difficult.

Several factors contribute to this affordability gap:

- Lower average wages in Merthyr Tydfil compared to the Welsh average.
- A higher proportion of older housing stock, which might be more affordable to purchase but could require significant renovation costs.

### 3.1.9 Overview of Private Rented Sector

Merthyr Tydfil's housing landscape relies heavily on the private rented sector to meet the needs of a diverse population. This sector caters to young professionals, students, individuals with limited savings, and those on waiting lists for affordable social housing. Census data from 2011 to 2021 underscores this growing dependence, with the proportion of households within the private rented sector increasing from 11.6 % to 15.4 %. This significant shift reflects the crucial role this sector plays in fulfilling housing requirements within the borough.

The introduction of the Renting Homes (Wales) Act 2016 in December 2022 significantly reshaped the landscape of private renting in Merthyr Tydfil. This landmark legislation brought about several key changes that impact both landlords and tenants:

**Shifting Terminology:** Previously referred to as “tenants” or “licensees,” occupants in the private rented sector are now designated as “contract holders.” This change emphasises the contractual nature of the tenancy agreement and strengthens the rights and responsibilities of both parties involved.

**Enhanced Security of Tenure:** A cornerstone of the Act is the increased security it provides to contract holders. The minimum notice period for “no-fault” evictions has trebled, from







two months to six months. This allows contract holders additional time to secure alternative accommodation, promoting greater stability and peace of mind.

**Guaranteed Property Standards:** The Act establishes minimum property standards that all rental properties must meet. This ensures that contract holders reside in safe, healthy, and well-maintained dwellings, contributing to improved living conditions and tenant well-being.

These are just some of the key ways the Renting Homes (Wales) Act 2016 has impacted the private rented sector in Merthyr Tydfil. The Act aims to create a fairer and more balanced environment for both landlords and contract holders, promoting a more secure and stable rental market within the borough.

There are currently 3566 landlords registered with Rent Smart Wales, accounting for 89 % of the 4011 properties within the borough.

In Merthyr Tydfil, while social housing is crucial for many residents, finding affordable private rentals can be a significant challenge. This difficulty stems from two key factors. Firstly, market rents have been steadily rising in recent years, outpacing inflation and making private rentals generally more expensive. Secondly, the Local Housing Allowance (LHA) rates, which are intended to help those on low to moderate incomes or benefits afford private rent, are simply too low in Merthyr Tydfil to cover the high market rents. This combination makes it very difficult for these groups to find suitable and affordable housing in the private sector.

LHA Rates from 1st April 2024:

Room allocation	Weekly rate
1 bedroom with shared facilities	£69.04
1 bedroom	£100.00
2 bedrooms	£115.07
3 bedrooms	£126.58
4 bedrooms	£166.85

The table below shows the gap between cheapest monthly rent and LHA rate in Merthyr by bedroom size, highlighting the affordability challenge for those accessing benefits and on low incomes. (full report can be found here: [Wales-Housing-Crisis-Winter-2023.pdf](#) (bevanfoundation.org))

Local Authority	One	Two	Three	Four
Merthyr Tydfil	£60.90	£76.03	£151.16	£451.78

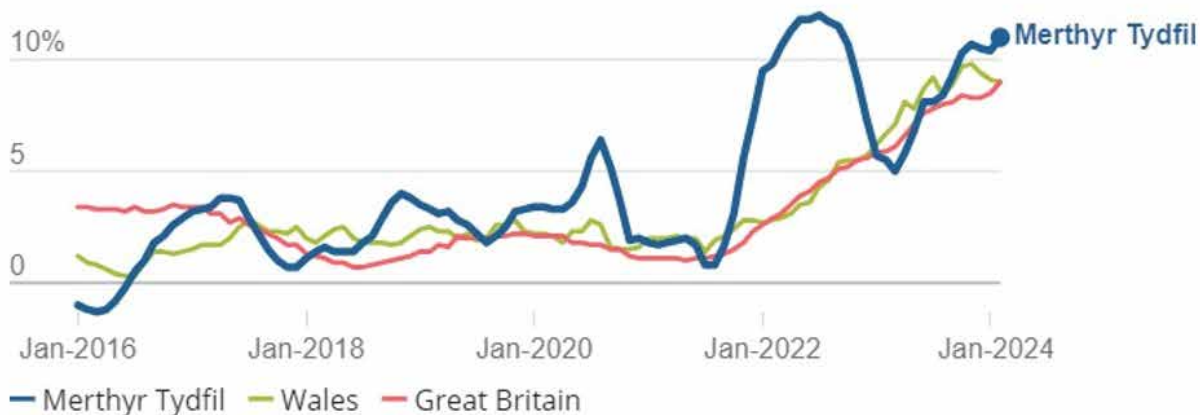
Please note: the LHA figures have increased very recently, for the first time in several years, in April 2024, where the Bevan Foundation Report was written in 2023. However, as the market rents are also rising significantly, the gaps in lowest rent levels and LHA rates are still comparable to those outlined in the table above.

[Housing prices in Merthyr Tydfil \(ons.gov.uk\)](#)

The chart below highlights the annual changes in rents in the private sector in previous years of which Merthyr is higher than the national averages further creating affordability challenges:

### Annual change in rents in Merthyr Tydfil

Private rental price annual inflation, Merthyr Tydfil, January 2016 to February 2024



Source: Price Index of Private Rents from the Office for National Statistics

In conclusion there is a shortage of properties available to rent for low-income households in the private rented sector in Merthyr Tydfil.

Across Wales, as of February 2023, finding affordable housing is extremely difficult, especially for low-income tenants. A mere 1 % of properties were advertised for rent at or below the Local Housing Allowance (LHA) rate, and nearly three-quarters of local authorities had no properties available at that rate. This leaves many tenants with a tough choice: either move into a property that costs more than their LHA covers, putting a strain on their budgets for necessities like food and heating, or settle for poor-quality housing. Unfortunately, for some, the situation becomes dire, forcing them to seek help from the homelessness system.

#### 3.1.10 Leasing Scheme Wales

In March 2022, Merthyr Tydfil County Borough Council (MTCBC) joined the Welsh Government's Private Sector Leasing Scheme. This initiative aims to improve access to good quality, affordable housing with tenancy support in the private rented sector (PRS) for those at risk of homelessness. The scheme offers tenants:

Longer-term security of tenure (between 5 and 20 years)

Rents set at the Local Housing Allowance (LHA) level

This program has the potential to address several key housing challenges in Merthyr Tydfil, including:

**Housing cost-induced poverty:** By increasing the availability of affordable options, the scheme can make housing more accessible for low-income households.

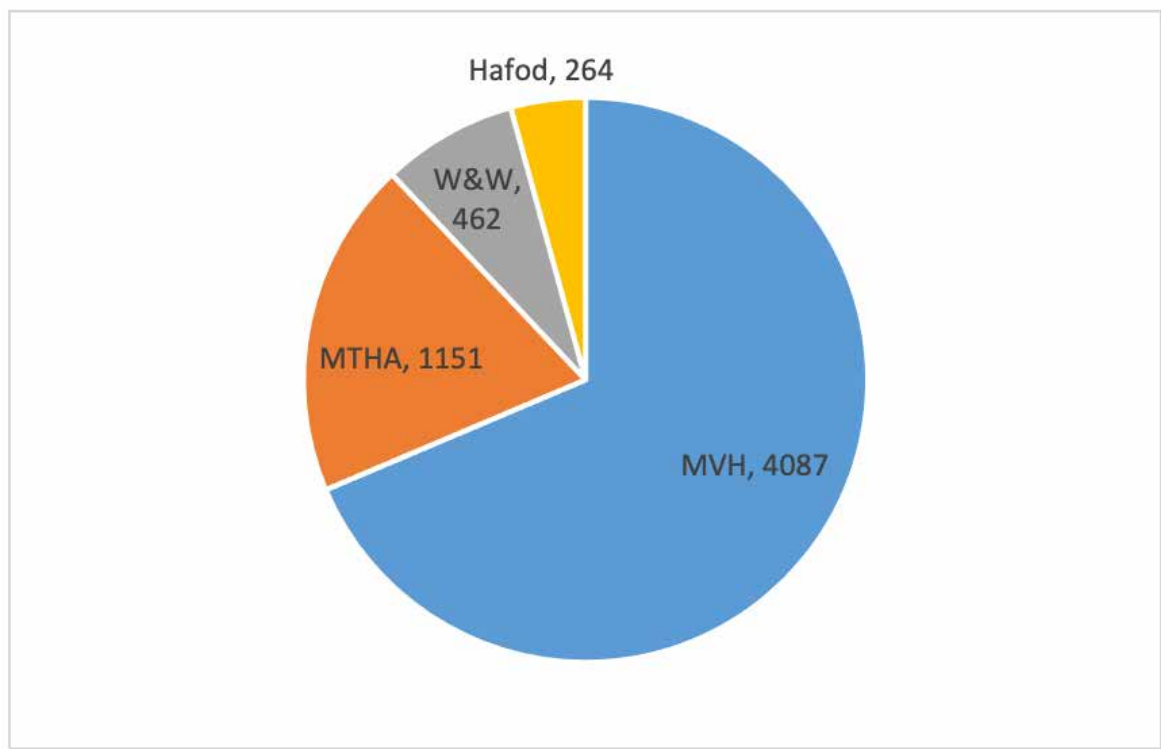
**Homelessness prevention:** The longer-term tenancies can provide stability and reduce the risk of future homelessness.

While the Leasing Scheme Wales presents a positive initiative, initial take-up has proven to be challenging.

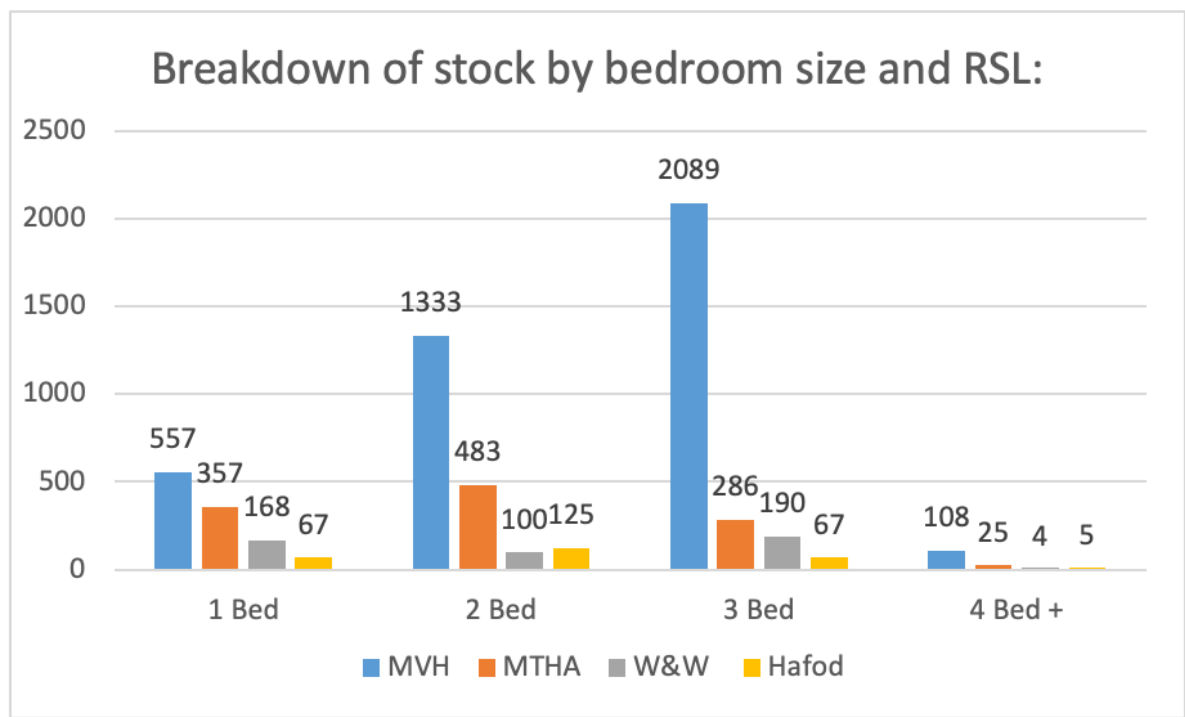
3.1.11 Overview of Social Rented Sector

Since transferring its housing stock to Merthyr Valleys Homes in 2009, Merthyr Tydfil now boasts four Registered Social Landlords (RSLs) providing social housing options. These RSLs are; Merthyr Valleys Homes (MVH), Merthyr Tydfil Housing Association (MTHA), Hafod and Wales & West. Together, they manage a total of 5,964 social housing units within the borough.

Breakdown of affordable housing by RSL:



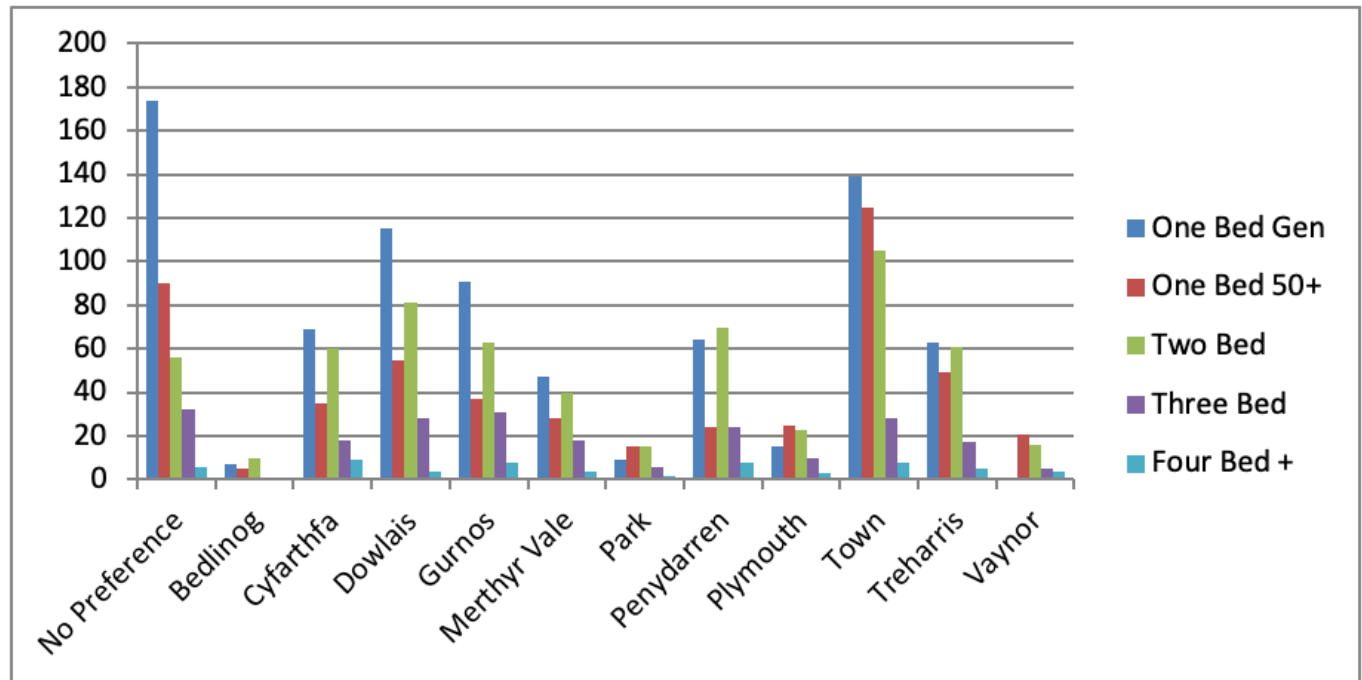
Breakdown of stock by bedroom size;



## Housing Need Snapshot

The current social housing need for the borough has been analysed from the current Housing Register. This data covers all active housing applications. The data was downloaded on April 26th 2023 and is a snapshot of the waiting list at this current moment in time. The Housing need has been separated out into house size and ward plus an age profile for single person accommodation need for each ward in the Local Authority.

### Housing Need April 2023:



### Housing Need Data April 2023:

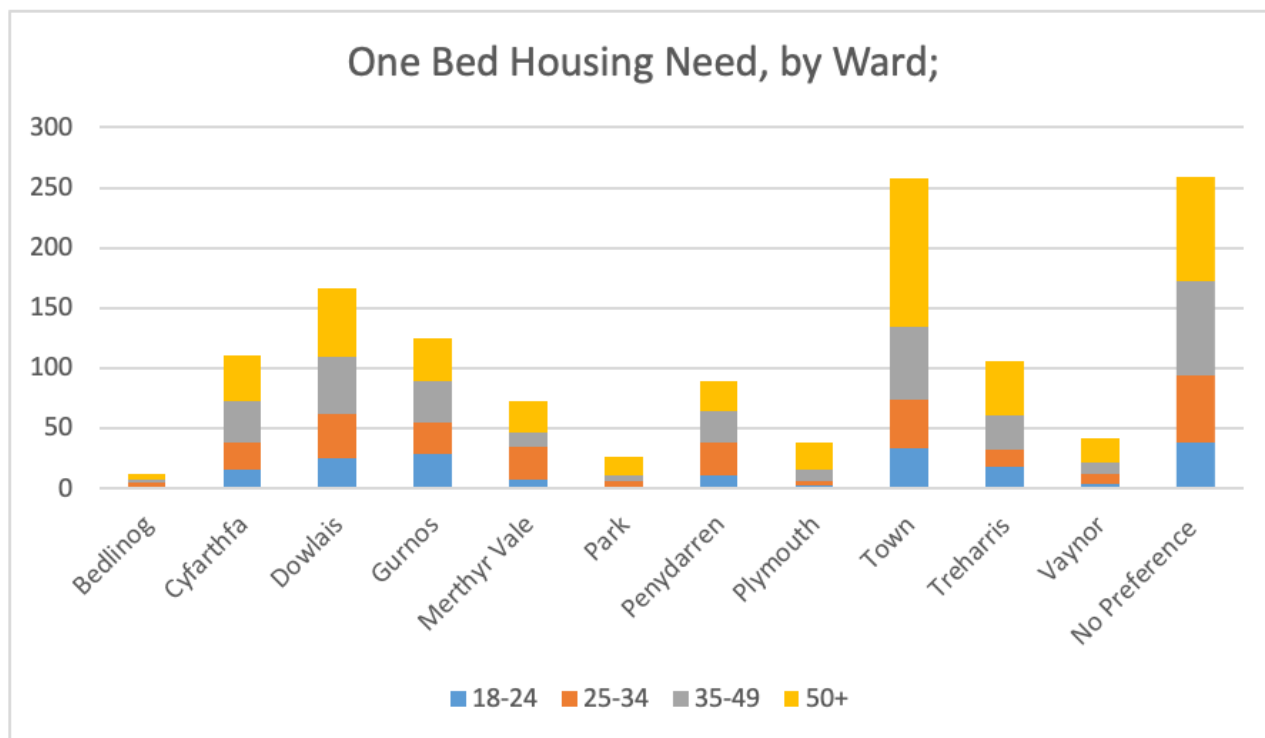
	One Bed General	One Bed 50+	Two Bed	Three Bed	Four Bed +	Total
Bedlinog	7	5	10	1	1	24
Cyfarthfa	69	35	60	18	9	191
Dowlais	115	55	81	28	4	283
Gurnos	91	37	63	31	8	230
Merthyr Vale	47	28	40	18	4	137
Park	9	15	15	6	2	47
Penydarren	64	24	70	24	8	190
Plymouth	15	25	23	10	3	76
Town	139	125	105	28	8	405
Treharris	63	49	61	17	5	195
Vaynor	0	21	16	5	4	46
No preference	174	90	56	32	6	184
Total	793	509	600	218	62	2182



The data on housing need has been analysed from the current housing applications system. It includes the breakdown of Housing Need by ward and includes a category titled 'No preference' - this category is used for applicants who have not specified a ward in the borough.

There is a substantial need for one and two bed properties in the Borough. The highest need for these is in; Town, Dowlais, Gurnos, Cyfarthfa, Penydarren, Treharris and Merthyr Vale wards.

The following graph shows the detail for single person accommodation within the borough:



A total of 68 % of Housing Register applications are for one bedroom accommodation.

35 % of the demand for one bed accommodation comes from applicants aged under 35. This is putting huge pressure on the provision of one bed accommodation, as the majority of these applicants are in band 3 and unlikely to secure social housing unless they become homeless.

The single person accommodation need is highest in; Town, Dowlais, Gurnos, Cyfarthfa and Treharris Wards. Developments in this area will need to have a 35 % set aside for single person accommodation before any grant application is approved. However, there is an expectation that there is some single person accommodation provided on all new developments. We will look to prioritise one bed accommodation where it feasible whilst considering the need for sustainable and cohesive communities.

## Supported Accommodation Need

As well as developing general need properties we also need to consider a wider range of accommodation options to suit the needs of a proportion of our residents (who would be unable to maintain their own tenancies) who are currently residing in emergency temporary accommodation (hotels and B&B).



Level of Need of people in TA as of May 2023		
Level of Need	Number of Individuals	Proportion of people residing in TA – May 2023
Low	27	20%
Medium	49	36%
High	55	42%
Intensive	3	2%

In the short term, we must increase the number of units of supported accommodation to be commissioned to support our exit planning from excessive use of Hotels and B&B's as temporary accommodation.

The development of our Marsh House scheme completed in March 2024. This innovative project offers a comprehensive approach to supporting our community. Marsh House provides 22 units of Temporary Supported Accommodation, aiding individuals in their journey towards independent living. Additionally, 11 units of dedicated young person accommodation cater specifically to the needs of those aged 16-24.

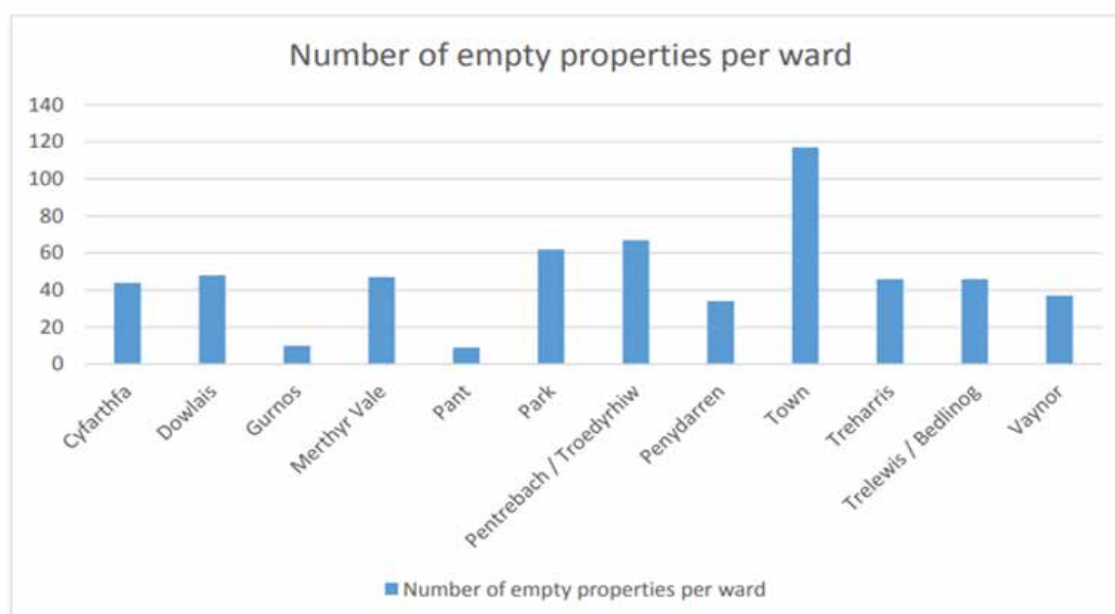
Beyond housing, Marsh House serves as a central hub, offering a one-stop shop for residents and the wider community to access essential services and support. Importantly, this development will significantly reduce our reliance on unsuitable hotel and B&B accommodation, providing a more stable and supportive environment for those in need. The co-located community hub fosters collaboration with existing partners, ensuring residents have access to a wider range of integrated support services under one roof.

Building on this success, MTCBC has secured additional funding through the 23/24 TACP fund. This grant was utilised to acquire a former empty Hotel, with plans for redevelopment into 19 quality units of supported accommodation, partnering with Merthyr Valley Homes.

### 3.1.12 Overview of Empty Homes and second homes

As of the 1st April 2020, Merthyr Tydfil had a total of 568 empty homes across the County Borough. A breakdown of these properties by HMA can be found below:

Chart 2 – The chart below shows the number of long term empty homes within each ward as at April 2020.



Merthyr Tydfil CBC recognises the negative impact of long-term empty homes on our communities. Whilst short periods of vacancy for renovations are a natural part of the housing market, homes that remain unoccupied for extended durations (over six months) represent a significant waste of resources.

These long-term empty properties create a multitude of problems:

- **Waste housing potential:** Exacerbate the housing shortage, particularly for affordable options. Bringing them back into use can meet local needs.
- **Harm communities:** Unoccupied buildings attract vandalism and anti-social behaviour, detracting from the neighbourhood and lowering property values. This discourages investment and hinders regeneration efforts.

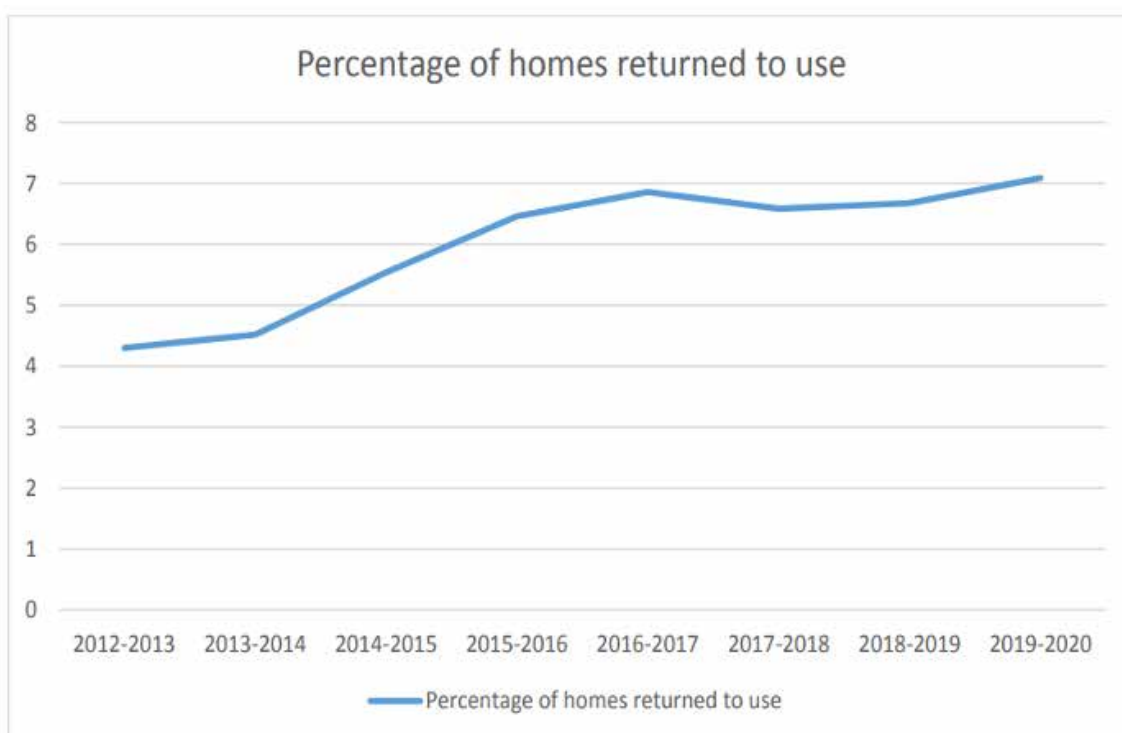
Merthyr Tydfil CBC prioritises tackling long-term empty homes to:

- **Increase housing availability:** Reduce pressure on the housing market and create a more balanced supply.
- **Enhance community well-being:** Create safer, more attractive, and vibrant neighbourhoods.
- **Boost property values:** Benefit homeowners and attract investment.

The MTCBC Empty Property Strategy 2022-2026 aims to bring 200 long-term empty homes back into use over five years (7 % annually). The plan focuses on four key areas:

- **Raising awareness:** Highlighting the issue of empty homes and available support.
- **Increasing housing options:** Providing more decent housing choices across tenures for those in need.
- **Improving neighbourhoods:** Tackling empty homes that contribute to crime and neglect.
- **Strong partnerships:** Collaborating with key stakeholders to achieve goals.

The chart below shows the gradual increase in the number of empty homes returned to use through direct action by the local authority since 2012;





Further information on empty homes can be found within the Merthyr Tydfil CBC Empty Property Strategy 2022-2026. Background Paper.pdf (merthyr.gov.uk)

<https://democracy.merthyr.gov.uk/documents/s56575/Papur%20Cefndir.pdf?LLL=1>

The issue of second homes and holiday homes in Wales and their impact on the Welsh-speaking community has been a topic of debate in recent years. According to the 2021 Census data, second home use across Wales stands at 5.2 %.

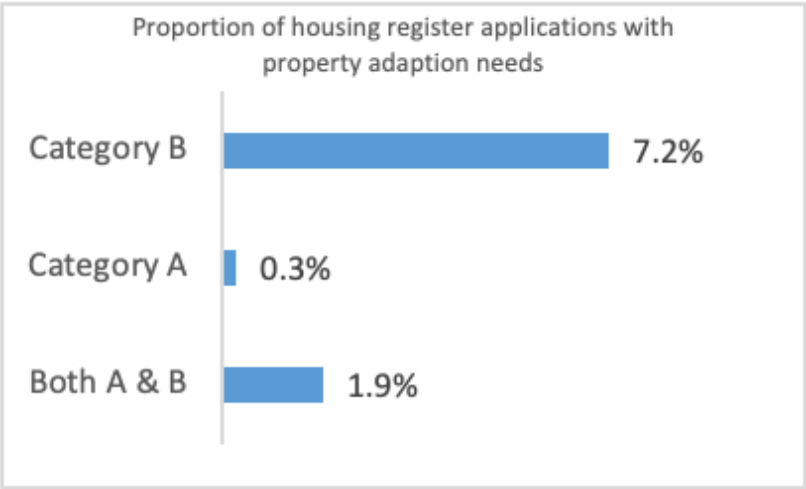
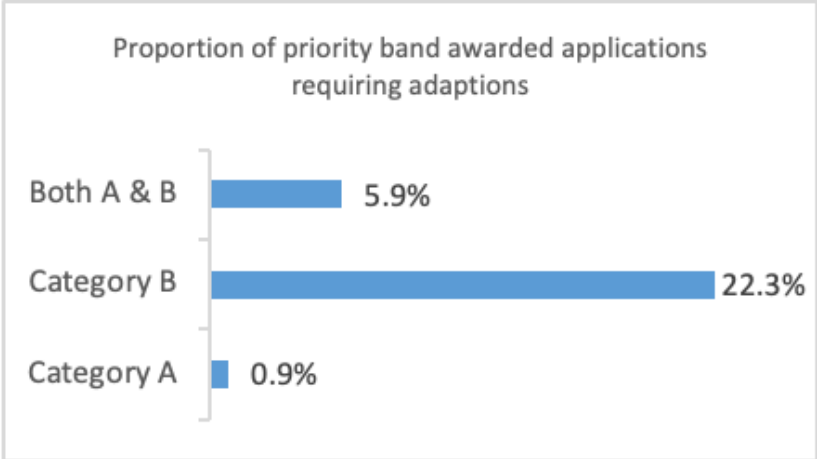
In the specific case of Merthyr, there are currently 242 properties recorded as second homes (unoccupied but furnished) throughout the borough. These properties constitute less than 1 % of the total homes in the area. While the 242 second homes in Merthyr represent a small portion of the housing stock, their impact extends beyond just statistics. These properties can contribute to a wider trend of housing market pressures, potentially affecting affordability and community cohesion. Further research is needed to understand the specific circumstances in Merthyr and develop policies that ensure a sustainable housing market that meets the needs of local residents.

## 3.2 Specific Housing Needs Requirements

Merthyr Tydfil's Local Housing Market Assessment (LHMA) identifies specific groups who need specialised housing beyond what typical affordable housing can offer. This section details these groups and the types of housing needed.

- Accessible and Adapted Housing: This includes homes modified for those with physical limitations.
- Larger Homes for Families: This addresses the need for bigger properties to accommodate multi-generational households or larger families.
- Temporary Housing Solutions: This covers options for those requiring short-term housing.
- Combined Housing and Support: This caters to individuals needing both housing and care services.
- Student Accommodation Needs: This section explores the location factors for student housing.
- Location Considerations for Specific Needs: This addresses factors like proximity to services for people with physical or cultural needs.

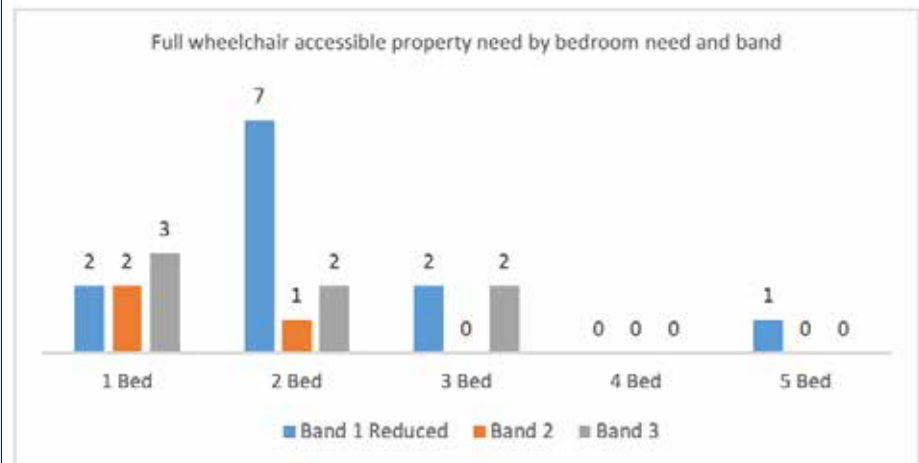
a) Accessible and adapted housing provision.	
Local policies/ strategies	MTCBC Allocations policy for Community Housing 2023
Property needs (key section)	<p>Adapted properties are typically those which have received low, moderate or high-level adaptations to facilitate independent living.</p> <p>Category A – properties will have one or more of the following:</p> <ul style="list-style-type: none"> <li>• Ceiling hoist</li> <li>• Full wheelchair access</li> <li>• Specialist bath</li> <li>• Through floor lift (for properties with 2 bedrooms or more)</li> <li>• Wheelchair accessible shower room</li> </ul> <p>Category B – properties will have one or more of the following:</p> <ul style="list-style-type: none"> <li>• Level or ramped access</li> <li>• Level (or low threshold) access shower</li> <li>• Specialist toilet</li> <li>• Stair lift</li> <li>• Widened doorways</li> </ul> <p>Applicant breakdown:</p> <p>Currently, we have applications from:</p> <ul style="list-style-type: none"> <li>• 6 households requiring advanced adaptations only (Category A) of which are 4 household over 50 years of age.</li> <li>• 152 households requiring basic adaptations only (Category B) of which 113 are households over 50 years of age.</li> </ul> <p>40 households needing both advanced and basic adaptations (Combination of A &amp; B) of which 26 are households over 50 years of age.</p>

Suitable for	Individuals and families seeking accessible and adapted housing due to limitations in modifying their current homes to meet their needs.																
Evidence including data sources (key section)	<p>Evidence has been collected from Merthyr Tydfil housing register, households are asked to indicate whether they have mobility needs and if their current housing directly worsens their mobility needs.</p> <p>Applicants on the housing register that indicate a need for adaptations are required to confirm the need by providing Community Occupational Team (COT) assessments to support the need to move to a property and that their property cannot be appropriately adapted to meet their needs.</p> <p>As of March 2024 9.4% of households registered for housing reported a need for adaptations.</p>  <table border="1"> <caption>Proportion of housing register applications with property adaption needs</caption> <thead> <tr> <th>Category</th> <th>Proportion</th> </tr> </thead> <tbody> <tr> <td>Category B</td> <td>7.2%</td> </tr> <tr> <td>Category A</td> <td>0.3%</td> </tr> <tr> <td>Both A &amp; B</td> <td>1.9%</td> </tr> </tbody> </table> <p>As of March 2023, there were 2,112 active applications on the housing register. Among these, 681 applications were designated as high priority. Additionally, nearly a third (29.1%) of all applicants require a property with adaptations.</p>  <table border="1"> <caption>Proportion of priority band awarded applications requiring adaptations</caption> <thead> <tr> <th>Category</th> <th>Proportion</th> </tr> </thead> <tbody> <tr> <td>Both A &amp; B</td> <td>5.9%</td> </tr> <tr> <td>Category B</td> <td>22.3%</td> </tr> <tr> <td>Category A</td> <td>0.9%</td> </tr> </tbody> </table>	Category	Proportion	Category B	7.2%	Category A	0.3%	Both A & B	1.9%	Category	Proportion	Both A & B	5.9%	Category B	22.3%	Category A	0.9%
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The majority of applicants with mobility needs (72 %) would benefit from properties with features like:

- Level or ramped access
- Ground floor location (for bungalows or flats)
- Single-level living accessible by a lift (for multi-storey buildings)
- Level access shower or wet room

There is a current demand for 22 full wheelchair accessible properties of various bedroom need.



Merthyr Tydfil is seeing a rise in demand for homes with adaptations for people with disabilities. This need is further strained by two factors:

- Limited funding for Disabilities Facilities Grant (DFG): there are more people applying for DFGs than there are funds available. This makes it difficult for people to adapt their current homes, whether they're renting from community Housing Landlords (Who are stock transfer organisations) or own their properties.
- Long wait times for COT assessments: Currently, there's a 4-6 month wait for a COT (occupational therapy) assessment, which is needed to show the need for a move to an adapted property. This delay can skew the data on the housing register, as it may not reflect the true number of people who require accessible/ adapted housing.

Predicting wait times for adapted properties is difficult due to the housing register bidding system.

- Applicants with medium need: these applicants can bid on properties in their preferred areas, potentially extending their wait time.



	<ul style="list-style-type: none"> <li>Applicants with high priority: Since September 2023, these applicants are automatically placed in bids for all suitable adapted properties across the borough. However, there are exceptions for those who rely on local family or friends for care, as moving away might disrupt their support network.</li> </ul> <p>Where bespoke accommodation is required to meet a households need, MTCBC Housing and development team will work with MTCBC COTs/Social services and with partner RSL's to understand the specific requirements and deliver appropriate accessible accommodation.</p>
<b>External stakeholder consultation and engagement</b>	<p>Consultation was conducted with COTs/social services, RSL's, MTCBC Housing Solutions Team and MTCBC DFG team.</p> <p>Several factors are contributing to the rise in demand for social housing with adaptations:</p> <ul style="list-style-type: none"> <li>An aging population: As the population ages, there's a growing need for accessible/adapted homes.</li> <li>Changes to DFG criteria: Changes to DFG eligibility through the removal of means testing for small and medium adaptations, making it more difficult for people to obtain grants for adaptations in their existing homes. This depletes the limited DFG budget of £850k in Merthyr Tydfil and creates long wait times, forcing people to look for alternative housing.</li> <li>Limited ability to purchase: Due to their age, many applicants cannot afford to buy a property with the necessary adaptations for their housing needs.</li> <li>Housing Register cleanse and review in late 2023 to update and refresh the housing register with those who still required to access the choice based system, subsequently reducing figures from previous years.</li> </ul> <p>Data from the 2011 and 2021 census reveals ageing population trend. Across Wales, the number of residents aged 65 and over increased by 17.7 %. Merthyr Tydfil followed a similar pattern seeing an increase of 13.3 % in this age group.</p>
<b>Key Issues identified</b>	<p>The data provides a snapshot of the mobility needs of applicants on a specific date. It is reliant on applicants providing accurate information and updating their applications if their circumstances change.</p>

## b) Multi-generational and/or larger families requiring larger properties.

Local policies/ strategies	Merthyr Tydfil C.B.C Common Allocations Policy 2023
Property needs (key section)	A need for a number of larger general needs properties (4 Bed+) on new development sites to accommodate larger families and/or multi-generational living.
Suitable for	Large families and/or multi-generational living.

**Evidence including data sources (key section)**

An analysis of the local housing register has identified that there are 51 families that require a home with 4 or more bedrooms, accounting for 2 % of all active applications.

4 bed+ Need:

HRA - Band	(Not set)	Cyfarthfa Ward   Ward Cyfarthfa	Dowlais Ward   Ward Dowlais	Gurnos Ward   Ward Gurnos	Merthyr Vale Ward   Ward Ynysowen	Penydarren Ward   Ward Penydarren	Plymouth Ward   Ward Plymouth	Town Ward   Ward y Dref	Treharris Ward   Ward Treharris	Vaynor Ward   Ward Vaynor	Grand Total
Band 1					1		1				2
Band 1 - Reduced Preference   Devils Llai	2	1		1					1		5
Band 2	1	2		4	1	4		6		1	19
Band 3	3	3	1	2	1		3	2	4		19
No Priority   Dim Blaenorieth		1	2	1				1		1	6
Grand Total	6	7	3	8	3	4	4	9	5	2	51

5 bed Need:

HRA - Band	Cyfarthfa Ward   Ward Cyfarthfa	Gurnos Ward   Ward Gurnos	Merthyr Vale Ward   Ward Ynysowen	Park Ward   Ward Y Parc	Penydarren Ward   Ward Penydarren	Treharris Ward   Ward Treharris	Grand Total
Band 1 - Reduced Preference   Devils Llai		3	1	1		1	6
Band 2	1		1		1		3
Band 3						2	2
Grand Total	1	3	2	1	1	3	11

We also have a small number of families in a 7-bed need.

The availability of 4 bed+ houses is extremely limited, and the Living Merthyr Tydfil Partnership Community Landlords may seek to make the best use of this type of accommodation by maximising occupancy. This may result in an applicant with a shorter registration date being considered above another applicant where they have a larger family and would therefore make best use of the accommodation. Decisions in cases such as this will be made by the Local Housing Panel


There is a need to consider developing larger bespoke properties within new developments.

Special consideration should be given to the design as the use of modular construction techniques could allow for future adaptations within units, such as adding accessible features in bathrooms. Strategically placed shared walls between units could also allow for future expansion.

<b>External stakeholder consultation and engagement</b>	Consultation was conducted with COTs/social services, RSL's, MTCBC Housing Solutions Team and MTCBC DFG team.
<b>Key Issues identified</b>	Developing larger, adaptable units can be more expensive, and social housing programs might struggle to secure the necessary funding.

### c) Non-permanent housing

<b>Local policies/ strategies</b>	Rapid Rehousing Transitional Plan Housing Support Programme Strategy MTCBC Allocations policy for Community Housing 2023
<b>Property needs (key section)</b>	<p>1. <u>The need for suitable temporary accommodations/triage centre for crisis presentations/HMO</u></p> <p>Following the “No-one left out” approach during the Covid pandemic and the introduction of the 11th priority need for homelessness, there’s been a notable increase in unsuitable temporary accommodation placements, such as B&amp;B’s for those experiencing homelessness. This is particularly true for single-person households. The current lack of affordable single-person housing stock hinders the ability to provide suitable “move-on”.</p> <p>Our Rapid Rehousing Transitional plan aims to decrease reliance on B&amp;B’s. However, true success requires an increase in appropriate housing stock. This will ultimately help to achieve our goal of making homelessness rare, brief and unrepeatable.</p> <p>2. <u>Supported Accommodation for those with support needs</u></p> <p>Merthyr Tydfil faces a challenge of having a disproportionate quantum of individuals with complex needs. This combined, with lack of appropriate “move-on” housing options, leads to extended stays in B&amp;Bs.</p> <p>B&amp;B’s lack the features to promote tenancy responsibility, such as paying rent and utility payments. This has led to a decline in independent living skills, ultimately increasing the intensity and complexity of support needs for residents.</p> <p>Security measures have been implemented in certain B&amp;Bs to address safety concerns arising from the situation.</p> <p>3. <u>Self-contained family accommodation</u></p> <p>While families typically experience shorter stays in temporary accommodation compared to single individuals, there’s a crucial need for dedicated family units. This ensures families are not placed in unsuitable temporary housing when homelessness becomes unavoidable.</p>

Suitable for	<ul style="list-style-type: none"><li>Homeless households: single households, couples and families</li><li>Homeless individuals with medium/high and /or complex needs.</li><li>Homeless Families</li></ul>																						
Evidence including data sources (key section)	<p>Data collated from temporary accommodation reporting and homelessness WHO12 data have been used to evidence the need. B&amp;B placements have remained at a consistent level since October 2023.</p> <p style="text-align: center;">Numbers of placements in Bed and breakfast</p>  <table data-bbox="472 530 1272 822"><tr><th>Month</th><th>Sum of</th></tr><tr><td>Feb-24</td><td>93</td></tr><tr><td>Jan-24</td><td>101</td></tr><tr><td>Dec-23</td><td>104</td></tr><tr><td>Nov-23</td><td>82</td></tr><tr><td>Oct-23</td><td>98</td></tr></table> <p>There is on average a further 50 placements in other temporary accommodations such as Hostel or other supported accommodations currently available in Merthyr Tydfil, that are impacted by the lack of suitable single person property stock for “move-on”.</p> <p>42 % of those residing in temporary accommodation were assessed as having high or intensive support needs in May 2023, this has remained consistent since May 2022 as recorded in the Rapid Rehousing Transitional Plan.</p> <p>In February 2024, all temporary accommodation placements in B&amp;Bs were single-person or couple households. While no families resided in temporary accommodation at that time, 135 families presented as homeless or at risk of homelessness since April 1st, 2023 with 53 awarded a Section 66 duty to prevent their risk of homelessness, 35 families being awarded a Section 73 duty to accommodate.</p> <p>Merthyr Tydfil experienced a surge in homelessness presentations during the COVID-19 pandemic. Although new presentations decreased in 2022-23, they remain 11 % higher compared with 2019-2020. This decline in new cases hasn’t translated to shorter stays in temporary accommodation due to the lack of suitable “move-on” options.</p> <p>Total number of presentations</p> <table data-bbox="458 1942 1487 2036"><tr><th>2019-2020</th><th>2020-2021</th><th>2021-2022</th><th>2022-2023</th><th>2023-2024</th></tr><tr><td>754</td><td>1345</td><td>848</td><td>837</td><td>787</td></tr></table>	Month	Sum of	Feb-24	93	Jan-24	101	Dec-23	104	Nov-23	82	Oct-23	98	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	754	1345	848	837	787
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2019-2020	2020-2021	2021-2022	2022-2023	2023-2024																			
754	1345	848	837	787																			



## Homeless presentations by household type

Household type	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024 (Up to end of Q3)
Single Male	527	757	435	397	409
Single female	250	321	178	167	126
Single female with dependent children	175	153	116	103	96
Single Male with dependent children	11	25	4	8	5
Couples with dependent children	33	31	44	42	34

In 2019/20 Merthyr Tydfil was the local authority with the highest rate of households assessed as homeless (under Section 73) in Wales at 166 cases per 10,000 households. The number of people being assessed as homeless and subject to duty to help secure grew substantially to 437 cases between 2019/20 and 2020/21. This has since decreased by 23 % in 2023-24 (Up to Q3) again following the trend of fewer new presentations.

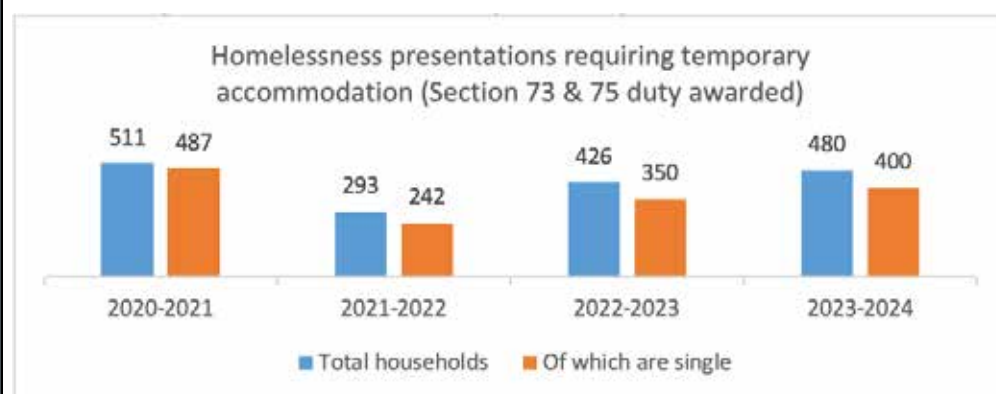
The presence of a small number of rough sleepers recorded each month in Merthyr Tydfil highlights the need for more intensive supported accommodation. Individuals with complex needs requiring such support cannot be adequately managed in B&Bs. This often leads to situations where B&B owners or MTCBC Housing department not being able to offer placement.

Total number of homeless people rough sleeping 2023 -2024 each month

Month	Total
April	0
May	0
June	3
July	3
August	2
September	1
October	3
November	3
December	3
January	3
February	1

*Please note, the table may include the same individuals across a number of months.*

While the overall demand for temporary accommodation is expected to rise, the need for single-bedroom units remains particularly acute.



To achieve our Rapid Rehousing goals, we have implemented changes to our Housing Register allocation policy. This includes the creation of a new priority band: Band 1 Urgent Homelessness. This band prioritises applicants who are currently in temporary accommodation or are ready to transition out of temporary supported accommodation into independent tenancies. Currently, 93 applicants fall under this urgent band, with 86 being single-person households.

<b>External stakeholder consultation and engagement</b>	<p>Various stakeholder engagement and consultations were carried out in the development of the Housing Support Programme Strategy and the Rapid rehousing Transitional Plan including –</p> <ul style="list-style-type: none"> <li>• Multi-agency meetings</li> <li>• Steering group meetings</li> <li>• Service mapping exercises</li> <li>• Workshops</li> <li>• Individual meetings with services and partner agencies</li> <li>• Focus group meetings</li> <li>• Stakeholder engagement exercises</li> </ul> <p>Further consultation was carried out regarding the finding outlined in this section of the LMHA including:</p> <ul style="list-style-type: none"> <li>• MTCBC Housing Solutions team</li> <li>• RSL's</li> <li>• MTCBC Housing support grant team</li> </ul>
<b>Key Issues identified</b>	<p>This analysis contains historical and current data to provide a comprehensive picture of the present demand for temporary accommodation. By leveraging this evidence, we can also make informed projections about future needs. It's important to acknowledge that individual circumstances can change, potentially affecting these projections. Additionally, upcoming legislative developments may influence the future requirements for this type of accommodation.</p>

<b>d) Housing, care and support needs</b>	
<b>Local policies/ strategies</b>	Housing Support Programme Rapid Rehousing Transition Plan
<b>Property needs (key section)</b>	Supported living for young people with a learning disability and/or ASD. Extra Care Facility
<b>Suitable for</b>	Young people coming out of care, people with a learning disability learning to live independently.

<p><b>Evidence including data sources (key section)</b></p>	<p>Data concerning the specific needs of young people with learning difficulties (as distinguished from learning disabilities) is limited. However, based on our current service provision, anecdotal evidence suggests that at least one young person in each of our four dedicated programmes (GNC, Penydre, Chaplins, Hillfort) experiences learning difficulties that impede their ability to acquire and maintain independent living skills, despite intensive support from staff.</p> <p>These young people reportedly require consistent prompting for basic daily tasks, budgeting, and most importantly, “gatekeeping.” This refers to the ability to manage access to their living space and belongings, a skill that often proves challenging even for neurotypical individuals. Unfortunately, inadequate gatekeeping is a frequent cause of tenancy loss due to anti-social behaviour (ASB) complaints.</p> <p>The vulnerability of these people to exploitation within their own residences is a major concern. Support workers consistently highlight the lack of suitable “move-on” options offering sufficient ongoing support for effective gatekeeping and tenancy maintenance. Existing options provided by Housing Support Services tend to be short-term or medium-term, which is demonstrably insufficient for young people with learning difficulties. Premature relocation often leads to failed tenancies.</p> <p>Furthermore, the specific needs of individuals with learning difficulties often fall outside the eligibility criteria for social services intervention. This creates a service gap, leaving these young people vulnerable.</p> <p><b>Proposed Solutions:</b></p> <p>The development of dedicated, staffed accommodation (potentially with 24/7 support) for young people with learning difficulties would alleviate pressure on our short-term provisions and enable them to serve more young people effectively. This would also provide the essential long-term support needed to help these individuals establish and maintain successful tenancies.</p> <p>Similarly, the establishment of additional supported accommodation for adults with learning disabilities, offering 24/7 staffing, would significantly improve their well-being and safety. This would offer crucial protection from exploitation and mitigate the negative consequences of repeated failed tenancies due to inadequate support.</p> <p>We are currently awaiting data from Social Services for the specific number of adult service users who fall into this category, which will further strengthen our proposal.</p>
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	The much of the aforementioned data refers to Young People specifically. We are currently working closely with Linc Cymru on the development of an Extra Care Housing is to provide high quality housing, support and care services which enable, support and encourage people to live independently for as long as they wish to do so. Each Extra Care housing scheme will aim to create a balanced community of people with a mix of care and support needs. The provision of Extra Care housing can reduce the likelihood of admission to hospital, with the knock-on benefits of increasing the bed capacity within hospitals, increases the number of patients discharge from hospital, and decreases those who may have a need for residential care.
<b>External stakeholder consultation and engagement</b>	Ongoing partnership across Housing and Social Services and partner RSL's.
<b>Key Issues identified</b>	Site availability Funding.

#### **e) Locational needs for student accommodation**

<b>Local policies/ strategies</b>	The guidance recommends considering student accommodation in close proximity to universities. However, this specific recommendation may not be applicable in the case of Merthyr Tydfil due to the absence of a university within its borders.
<b>Land needs (key section)</b>	N/A
<b>Evidence including data sources (key section)</b>	N/A
<b>External stakeholder consultation and engagement</b>	N/A
<b>Key Issues identified</b>	N/A

#### **f) Locational needs for people with physical or cultural needs**

<b>Local policies/ strategies</b>	Strategic Equality Plan – outlining the Council's commitment to inclusive communities free from discrimination.
<b>Property needs (key section)</b>	None of the current active applications within our HRA indicate a housing need in relation to their ethnicity, religion or culture.  Physical needs have been included within the accessibility and adaptations table.

Suitable for	N/A																																												
Evidence including data sources (key section)	<p>While we analysed waiting list data for ethnicity and religion/culture to assess this need, the incompleteness of this optional information limits our ability to draw definitive conclusions.</p> <p>In relation to ethnicity, the majority of applicants (1798) did not select an option. However, it would be fair to assume that the majority are White Welsh/English/Scottish/NI/British. This data is similar to the overall population of Merthyr at 97.1 % white (Census 2021).</p> <div><h3>Ethnicity of active Housing Applications</h3><table><thead><tr><th>Ethnicity</th><th>Count</th></tr></thead><tbody><tr><td>White Scottish   Gwyn Albanaidd</td><td>1</td></tr><tr><td>White British   Gwyn Prydeinig</td><td>134</td></tr><tr><td>Other Ethnic   Unrhyw grwp ethnig arall</td><td>22</td></tr><tr><td>Mixed white &amp; black Caribbean   Cymysg...</td><td>5</td></tr><tr><td>Black African   Du Affricanaidd</td><td>2</td></tr><tr><td>Any other ethnic group</td><td>3</td></tr></tbody></table></div> <p>In relation to religion and culture – Our HRA system does not currently collect data on the religious background of applicants. As a result, we were unable to generate a report on this topic for active applications.</p> <p><b>Religion as per 2021 census;</b></p> <div><h3>Percentage of usual residents by religion, Merthyr Tydfil</h3><p>● 2011 ● 2021</p><table><thead><tr><th>Religion</th><th>2011 (%)</th><th>2021 (%)</th></tr></thead><tbody><tr><td>No religion</td><td>35.8%</td><td>53.2%</td></tr><tr><td>Christian</td><td>56.0%</td><td>40.1%</td></tr><tr><td>Buddhist</td><td>0.2%</td><td>0.2%</td></tr><tr><td>Hindu</td><td>0.1%</td><td>0.2%</td></tr><tr><td>Jewish</td><td>0.0%</td><td>0.0%</td></tr><tr><td>Muslim</td><td>0.3%</td><td>0.5%</td></tr><tr><td>Sikh</td><td>0.1%</td><td>0.1%</td></tr><tr><td>Other</td><td>0.4%</td><td>0.4%</td></tr><tr><td>Not answered</td><td>7.0%</td><td>5.2%</td></tr></tbody></table></div> <p>Source: Office for National Statistics – 2011 Census and Census 2021</p>	Ethnicity	Count	White Scottish   Gwyn Albanaidd	1	White British   Gwyn Prydeinig	134	Other Ethnic   Unrhyw grwp ethnig arall	22	Mixed white & black Caribbean   Cymysg...	5	Black African   Du Affricanaidd	2	Any other ethnic group	3	Religion	2011 (%)	2021 (%)	No religion	35.8%	53.2%	Christian	56.0%	40.1%	Buddhist	0.2%	0.2%	Hindu	0.1%	0.2%	Jewish	0.0%	0.0%	Muslim	0.3%	0.5%	Sikh	0.1%	0.1%	Other	0.4%	0.4%	Not answered	7.0%	5.2%
Ethnicity	Count																																												
White Scottish   Gwyn Albanaidd	1																																												
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No religion	35.8%	53.2%																																											
Christian	56.0%	40.1%																																											
Buddhist	0.2%	0.2%																																											
Hindu	0.1%	0.2%																																											
Jewish	0.0%	0.0%																																											
Muslim	0.3%	0.5%																																											
Sikh	0.1%	0.1%																																											
Other	0.4%	0.4%																																											
Not answered	7.0%	5.2%																																											

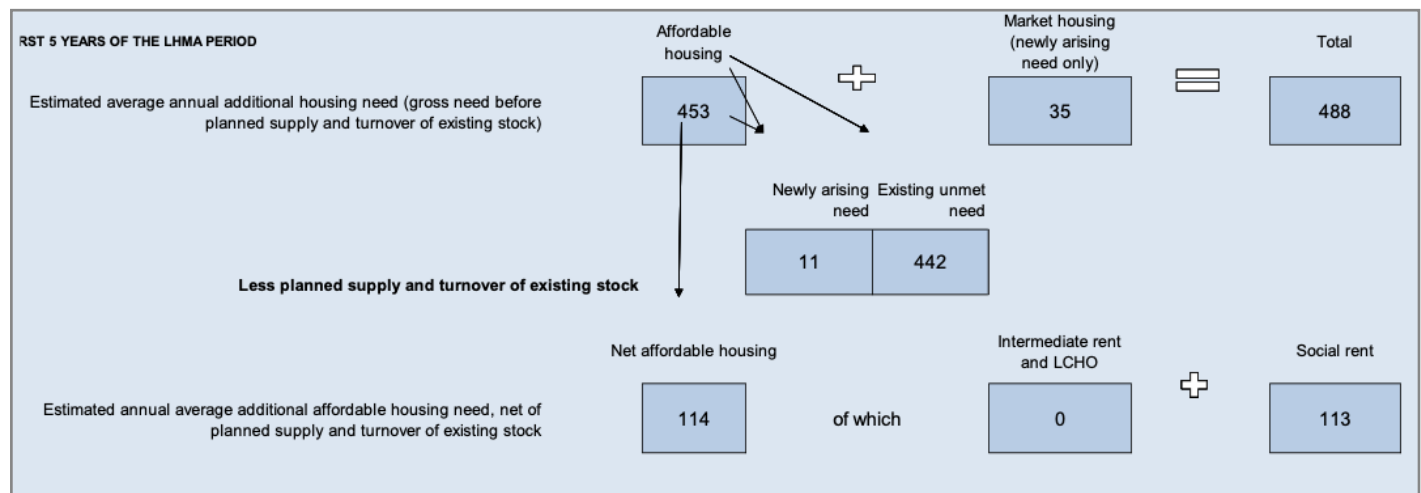
<b>External stakeholder consultation and engagement</b>	N/A
<b>Key Issues identified</b>	The lack of mandatory data collection makes this difficult to accurately measure and assess the needs of active applications based on ethnicity and religion.

# 4. Range of additional housing need estimates

The LHMA tool has been run using the three Welsh Government 2018 based household projection variants (principal, higher and lower). Each variant will produce distinct housing need estimates. These estimates are highlighted below in sections 4.1 – 4.3.

## 4.1 Principal household projections

Additional annual housing need estimates by tenure for the first five years of the LHMA based on principal household projections:



Additional annual housing need estimates by HMA and tenure (net need, net of turnover of existing stock and planned supply) based on **principal** household projections:

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	111	-	-	2	113	0	0	114
Primary Growth Area (Merthyr Tydfil)	110	-	-	2	112	0	0	113
Secondary Growth Area (Lower Valley)	1	-	-	-	1	0	-	1

Additional annual housing need estimates by HMA and tenure (gross need, before turnover and supply) based on **principal** household projections:

HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Owner occupier	Private rented sector	Market Housing (f) = (d) + (e)	Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	453	0	453	12	23	35	488
Primary Growth Area (Merthyr Tydfil)	356	0	357	9	18	27	383
Secondary Growth Area (Lower Valley)	96	0	96	3	5	8	105

Additional annual housing need estimates by HMA and tenure (net need) over the 15 years of the LHMA based on **principal** projections:

HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Owner occupier	Private rented sector	Market Housing (f) = (d) + (e)	Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	11	0	11	12	23	35	46
Primary Growth Area (Merthyr Tydfil)	8	0	9	9	18	27	35
Secondary Growth Area (Lower Valley)	2	0	2	3	5	8	11



Additional annual housing need estimates by HMA and tenure (net need) over the 15 years of the LHMA based on **principal** projections:

HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
<b>Additional housing need estimates by tenure</b>	<b>45</b>	<b>0</b>	<b>45</b>	<b>675</b>	<b>4</b>	<b>680</b>
Primary Growth Area (Merthyr Tydfil)	43	0	43	646	4	650
Secondary Growth Area (Lower Valley)	2	0	2	30	0	30

## 4.2 Higher variant household projections

Additional annual housing need estimates by tenure for the first five years of the LHMA based on **higher variant** household projections:



Additional annual housing need estimates by HMA and tenure (net need, net of turnover of existing stock and planned supply) based on **higher variant** household projections:

HMA	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	Social rent	Intermediate rent	LCHO	Affordable Housing
					(a) + (b) + (c) + (d) = (e)			(h) = (e) + (f) + (g)
<b>Additional housing need estimates by tenure</b>	<b>114</b>	<b>-</b>	<b>-</b>	<b>2</b>	<b>117</b>	<b>0</b>	<b>0</b>	<b>117</b>
Primary Growth Area (Merthyr Tydfil)	113	-	-	2	115	0	0	116
Secondary Growth Area (Lower Valley)	2	-	-	-	2	0	-	2

Additional annual housing need estimates by HMA and tenure (gross need, before turnover and supply) based on **higher variant** household projections:

HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
<b>Additional housing need estimates by tenure</b>	<b>461</b>	<b>0</b>	<b>461</b>	<b>20</b>	<b>40</b>	<b>60</b>	<b>522</b>
Primary Growth Area (Merthyr Tydfil)	363	0	363	15	31	46	409
Secondary Growth Area (Lower Valley)	98	0	98	5	9	14	112

Additional annual housing need estimates by HMA and tenure for the remaining 10 years of the LHMA based on **higher variant** household projections:

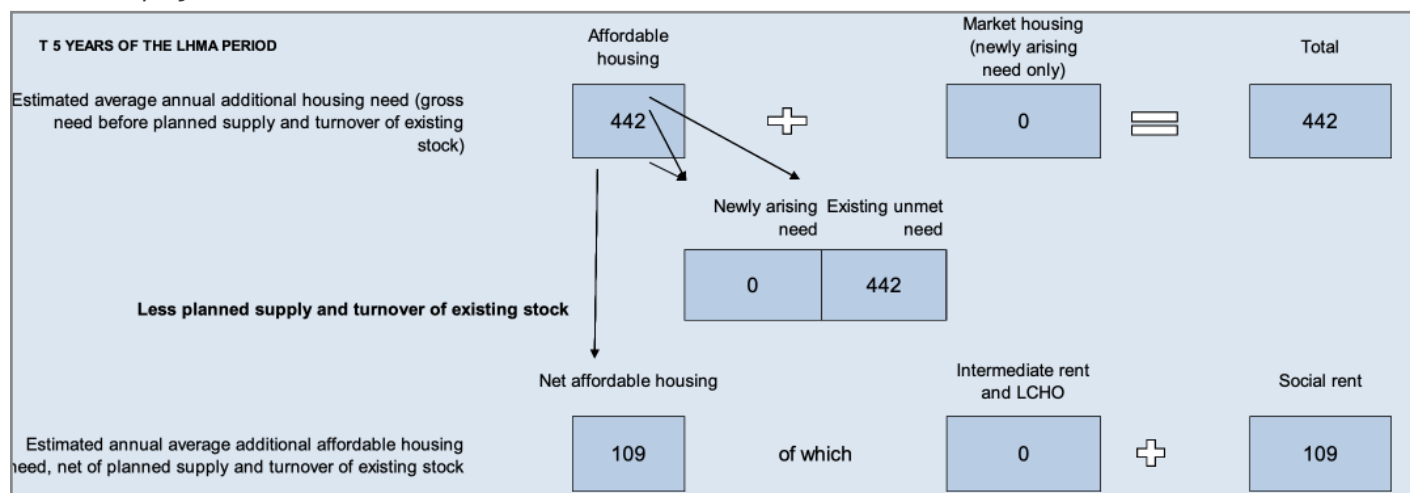
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
<b>Additional housing need estimates by tenure</b>	<b>19</b>	<b>0</b>	<b>19</b>	<b>20</b>	<b>40</b>	<b>60</b>	<b>80</b>
Primary Growth Area (Merthyr Tydfil)	15	0	15	15	31	46	61
Secondary Growth Area (Lower Valley)	4	0	4	5	9	14	18

Additional annual housing need estimates by HMA and tenure (net need) over the 15 years of the LHMA based on **higher variant** projections:

HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)
<b>Additional housing need estimates by tenure</b>	<b>52</b>	<b>0</b>	<b>52</b>	<b>773</b>	<b>7</b>	<b>780</b>
Primary Growth Area (Merthyr Tydfil)	48	0	49	721	7	729
Secondary Growth Area (Lower Valley)	3	0	3	52	0	52

## 4.3 Lower variant household projections

Additional annual housing need estimates by tenure for the first five years of the LHMA based on **lower variant** household projections:



Additional annual housing need estimates by HMA and tenure (net need, net of turnover of existing stock and planned supply) based on **lower variant** household projections:

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)
<b>Additional housing need estimates by tenure</b>	<b>107</b>	<b>-</b>	<b>-</b>	<b>2</b>	<b>109</b>	<b>-</b>	<b>-</b>	<b>109</b>
Primary Growth Area (Merthyr Tydfil)	107	-	-	2	109	-	-	109
Secondary Growth Area (Lower Valley)	-	-	-	-	-	-	-	-

Additional annual housing need estimates by HMA and tenure (gross need, before turnover and supply) based on **lower variant** household projections:

HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Owner occupier	Private rented sector	Market Housing (f) = (d) + (e)	Additional housing need (g) = (c) + (f)
<b>Additional housing need estimates by tenure</b>	<b>442</b>	<b>-</b>	<b>442</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>442</b>
Primary Growth Area (Merthyr Tydfil)	348	-	348	-	-	-	348
Secondary Growth Area (Lower Valley)	94	-	94	-	-	-	94

Additional annual housing need estimates by HMA and tenure for the remaining 10 years of the LHMA based on **lower variant** household projections:

HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Owner occupier	Private rented sector	Market Housing (f) = (d) + (e)	Additional housing need (g) = (c) + (f)
<b>Additional housing need estimates by tenure</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Primary Growth Area (Merthyr Tydfil)	-	-	-	-	-	-	-
Secondary Growth Area (Lower Valley)	-	-	-	-	-	-	-

Additional annual housing need estimates by HMA and tenure (net need) over the 15 years of the LHMA based on *lower variant* projections:

HMA	Social rent	Intermediate rent and LCHO	Affordable Housing  (c) = (a) + (b)	Social rent	Intermediate rent and LCHO	Affordable Housing  (c) = (a) + (b)
<b>Additional housing need estimates by tenure</b>	<b>36</b>	<b>-</b>	<b>36</b>	<b>543</b>	<b>-</b>	<b>543</b>
Primary Growth Area (Merthyr Tydfil)	36	-	36	543	-	543
Secondary Growth Area (Lower Valley)	-	-	-	-	-	-

## 5. LHMA additional housing need estimates

Addressing Merthyr Tydfil's critical housing needs is a top priority. To ensure our projections accurately reflect these needs, we conducted a Local Housing Market Assessment (LHMA) utilizing the Welsh Government's (WG) 2018-based principle variant household projections.

The LHMA reinforces this need, estimating a total need of 453, with a net additional requirement of 114 affordable homes annually for the first five years (2022-2027), based on the WG Principle variant projections. "Net additional requirement" refers to the number of new affordable homes needed after accounting for existing affordable housing stock, projected demolitions or conversions and planned developments.

This urgent demand for 100% affordable housing is driven by Merthyr Tydfil's unique housing market. Unlike other areas, the absence of intermediate rent or low-cost homeownership schemes creates a binary system where residents can only access social housing or market housing. Consequently, the income threshold separating these two options is very narrow. To account for this in our analysis, we adjusted the market housing threshold within the LHMA to accurately reflect this overlap and ensure a realistic assessment of local needs.

While the initial five-year period requires a significant focus on affordable housing, the need remains substantial for the remaining ten years of the LHMA period (2028-2037). Here, the estimated requirement is 11 affordable homes per annum.

The LHMA also identified a significant need for private rented housing. This sector currently faces high demand and limited supply in Merthyr Tydfil, leading to affordability issues and a lack of suitable options for specific demographics.

The additional housing need figures estimated by the LHMA are summarised in Appendix C. This appendix also provides a comparison with the previous LHMA, although some comparable data may not be available due to differing methodologies.

## 6. Quality assurance statement

This report was prepared following Welsh Government guidance, specifically “Undertaking Local Housing Market Assessments” (March 2022) and Version 3.2 of the Local Housing Market Assessment Tool. Its aim was to provide an accurate and reliable assessment of housing needs across Merthyr Tydfil.

Section 2 of this report clearly explained the methodology and assumptions used. The assessment consistently applied the default data and assumptions provided within the tool. Additionally, it followed the guidelines outlined in Section 5 by utilising the WG-2018 based principal variant household projections.

This assessment drew upon verified and approved data sources, including the Welsh Government, Land Registry, Census 2021, and the Office for National Statistics.



# Appendix A – Key Issues Tables

**Key Issues Table 1 – Key data inputs**

Key data inputs	Key issues identified with the data inputs
1. Housing Market Areas (HMAs)	1. 2. 3.
2. Household data	1. 2. 3.
3. Rent data	1. 2. 3.
4. Income data	1. 2. 3.
5. House price paid data	1. 2. 3.
6. Existing unmet need	1. 2. 3.
7. Existing stock and planned supply	1. 2. 3.

**Key Issues Table 2 – Input assumptions**

Key data assumptions	Key issues identified with the input assumptions
1. Affordability criteria	1. 2. 3.
2. First time buyer (FTB ) assumptions	1. 2. 3.
3. Percentage of households eligible for owner occupier tenure that decide to go on and buy	1. 2. 3.
4. Five-year financial forecast for key variables – income, rent and house prices	1. 2. 3.
5. Calculation of intermediate housing (IR and LCHO)	1. 2. 3.

**Key Issues Table 3: Calculations and outputs**

Calculations / outputs	Key issues identified with the calculations / outputs
1. Key issues identified with the calculations / outputs	1. 2. 3.
2. Affordable housing need covering social rent and immediate housing	1. Due to the absence of low-cost homeownership and intermediate rent options in Merthyr Tydfil, the standard definition of market housing thresholds wouldn't accurately reflect the local housing landscape. To address this, we adjusted the market criterion used in the assessment. The market threshold was set at 40.7 % of the median rent. This specific percentage ensures that the upper limit for social rent aligns with the lower limit for market housing, creating a more accurate representation of the housing needs in Merthyr Tydfil.
3. Scenario testing tables	1. 2. 3.
4. Five year outputs / 10 year outputs	1. 2. 3.

# Appendix C – Analysis of change in the additional housing need estimates

Key Issues Table 1 – Key data inputs

Annual additional housing need estimates	Column index	Current LHMA	Previous LHMA
		Over the first five years of the LHMA period	
Total housing need estimate	(a)	488	
Market housing	(b)	35	
Affordable housing	(c)	453	
Percentage split of additional housing need by market and affordable housing	(b)/(a): (c)/(a)	7 % 93 %	
Annual planned supply and turnover of existing stock for affordable housing	(e)	442	338
Affordable housing need – net of planned supply and turnover of existing stock	(f) =(c)-(e)	11	346
Annual additional housing need estimate split by tenure:			
Owner occupier	(g)	12	
Private rented sector	(h)	23	
LCHO – net basis	(i)	0	17
Intermediate rent – net basis	(j)	0	11
Social rent – net basis	(k)	114	338
One bedroom social rent	(l)	111	
Two bedrooms social rent	(m)	0	
Three bedrooms social rent	(n)	0	
Market housing percentage split: Owner occupier estimate Private rented sector estimate	(g)/(b) (h)/(b)	34 % 66 %	

Affordable housing need	(i)/(f)	0	17
percentage split:	(j)/(f)	0	11
LCHO			
Intermediate rent			
Social rent	(k)/(f)	100 %	
Social housing need			
percentage split by number			
of bedrooms			
1 bed	(l)/(k)	68 %	
2 beds	(m)/(k)	23 %	
3 beds	(n)/(k)	6 %	
4+ beds	(o)/(k)	3 %	