Angus Housing Market Partnership

Housing Need & Demand Assessment Final Report

November 2022

Donna Milton (MCIH)
Managing Director

Elaine Byrne (CPFA)
Director of Housing Consultancy

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Arneil Johnston
50 Scott Street
Motherwell
ML1 1PN

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Key Findings Template: Estimate of Additional (New) Future Housing Units				
NumFer of years to clear existing need				
Total households with **existing need (net)**	1,336		5	
Household Projection Period				
	2021-2041			
Total number of new households over the projection period	1,099		1,680	0
HNDA Projection Period				
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ANNUAL NEED - YEARS 1 TO 5				
Total households over the projection period who may afford:	Scenario 1	Scenario 2	Scenario 3	Scenario 4
OWNER OCCUPATION	253	285		
PRIVATE RENT	162	182		
FELOW MARKET RENT	168	189		
SOCIAL RENT	1,497	1,517		
Total additional future housing units	**2,080**	**2,173**		
ANNUAL NEED - YEARS 5 TO 10				
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SOCIAL RENT	24	48		
Total additional future housing units	**123**	**245**		

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Tayside HNDA Glossary: Commonly Used Abbreviations

ASHE	Annual Survey of Hours and Earnings
BTS	Below Tolerable Standard
CACI	CACI Paycheck – commercially developed income dataset
CHMA	Centre for Housing Market Analysis
CHR	Common Housing Register
CML	Council of Mortgage Lenders
CTR	Council Tax Register
DWP	Department for Work and Pensions
FTB	First Time Buyers
FTE	Full time equivalent
HLA	Housing Land Audit
HLR	Housing Land Requirement
HMA	Housing Market Area
HMO	Houses in Multiple Occupation
HMP	Housing Market Partnership
HNDA	Housing Need and Demand Assessment
HMA	Housing Market Area
HoTOC	Homeless & Temporary Accommodation Plus Overcrowding AND Concealed
HSCP	Health and Social Care Partnership
HST	Housing Supply Target
LCHO	Low Cost Home Ownership
LDP	Local Development Plan
LHA	Local Housing Allowance
LHS	Local Housing Strategy
LIFT	Low Cost Initiative for First Time Buyers
LLTI	Limiting Long Term Illness
LTV	Loan to value
MATLHR	Minimum All Tenure Housing Land Requirement
NRS	National Records of Scotland
NSSE	New Supply Shared Equity
PRS	Private rented sector
RoS	Registers of Scotland
RSL	Registered Social Landlord
SDS	Self Directed Support
SFC	Scottish Funding Council
SHCS	Scottish House Condition Survey
SHIP	Strategic Housing Investment Plan
SHQS	Scottish Housing Quality Standard
SHS	Scottish Household Survey
SIMD	Scottish Index of Multiple Deprivation
SNS	Scottish Neighbourhood Statistics
SPP	Scottish Planning Policy

2021 Angus HNDA Housing Market Partnership Signatories

The following named senior housing and planning managers from Angus Council have signed this document confirming that they have produced this HNDA and agreed the Core Outputs.

This statement is in fulfilment of the requirements of Core Process 6 as detailed in the HNDA Practitioners Guide (December 2020).

Authorised by	Local Authority	Signature
Name: John Morrow Designation: Service Leader - Housing Email address: morrowj@angus.gov.uk	Angus Council	*John Morrow*
Name: Jill Paterson Designation: Service Leader – Planning and Sustainable Growth Email address PatersonJF@angus.gov.uk		

1   Introduction

A Housing Need and Demand Assessment (HNDA) is an important evidence base required by the Scottish Government to inform the preparation of Local Housing Strategies (LHS), under the Housing (Scotland) Act 2001; and the preparation of Local Development Plans, under the Town and Country Planning (Scotland) Act 1997, as amended by the Planning Scotland Act 2019.

The purpose of the HNDA is to provide an evidence base to inform the Local Housing Strategy and Development Plan. Specifically, it is expected that the HNDA should underpin the following key areas of housing policy and planning:

- **Housing Supply Target(s)** (HSTs): to inform the setting of a HST for use in the LHS and Local Development Plan. The HST sets out the extent and nature of housing to be delivered over the period of the plan(s)

- **Stock management**: to assist understanding of the current and future demand for housing by size, type, tenure and location in order to optimise the provision, management and use of housing stock. This in turns feeds into policy and planning decisions about future stock in the LHS

- **Housing investment**: to inform future housing investment decisions, for example through Strategic Housing Investment Plans (SHIPs)

- **Specialist Provision:** to inform the provision and use of specialist housing and housing related services to enable independent living for all, as expressed in policy in the LHS and to inform planning decisions e.g. land for Gypsy/Travellers

- **Geographic distribution of land:** to inform the spatial allocation of land through the Development Plan for new housing at both Housing Market Area level and local authority level.

1.1   Purpose of the HNDA

Housing need refers to households lacking their own housing or living in housing which is not adequate or suitable and who are unlikely to be able to meet their needs in the housing market without some assistance. Housing demand is the quantity and type of housing which households wish to buy or rent and can afford.

An important element of the HNDA involves assembling evidence to produce a range of 'housing estimates' – that is, estimates of the number of new homes partners will need to plan for in the future. Estimates of housing need described in two categories:

- future need for households yet to form or migrating into an area

- existing (or backlog) need experienced by households currently living in unsuitable housing which cannot be adapted or improved to meet the needs of the household.

HNDAs are designed to give broad, long-run estimates of what future housing need might be, rather than precision estimates. They provide an evidence-base to inform housing policy decisions in Local Housing Strategy (LHS) and land allocation decisions in Local Development Plans.

Producing an HNDA is the first stage in the housing planning process

The HNDA methodology and process is detailed in Scottish Government Guidance, which offers a toolkit and sets out the approach to build the evidence needed to:

Assess the contextual factors that influence housing requirements and delivery **Housing market drivers** **Housing pressures & solutions**	Calculate the number of additional homes that are needed in the Tayside area over the next 20 years **HNDA Calculation Tool**	Produce long term broad housing estimates to inform local decision making **Housing Supply Targets** **Housing land allocations**	HNDA estimates provide evidence to set Housing Supply Targets in Local Housing Strategies and Local Development Plans Considers local factors but should provide basis for a generous supply of housing land

The previous Housing Need & Demand Assessment for the Tayside Region was produced by the TAYplan Strategic Development Plan Authority. The Planning (Scotland) Act 2019 removed the requirement for strategic development plans and the associated authorities. Local Authorities may now choose to work together in regional partnerships to assess housing need and demand across functional housing market areas. On this basis, four local authority partners from across the Tayside region have come together to produce the 2021 HNDA.

The Tayside Housing Market Partnership is made up by the following partners

Angus Council Dundee City Council Fife Council — In relation to the North Fife area Perth & Kinross Council

1.2   Tayside HNDA Methodology

Arneil Johnston was commissioned to deliver a Housing Need & Demand Assessment for Tayside Housing Market Partners in October 2020. To produce the evidence and calculations required, a nine-stage methodology was developed and agreed with the Tayside Housing Market Partnership.

The methodology focuses on producing the prescribed requirements for a robust and credible HNDA, through extensive desk based analysis and research. As secondary data has major limitations in providing consistent, real time data on the circumstances, needs, aspirations and future expectations of households living in the Tayside area; a primary research study was also commissioned to address gaps in insight and to allow credible analysis at a Housing Market Sub-area level. Working in partnership with Arneil Johnston, Resource Research carried out an extensive household survey across the Tayside area, reporting in April 2021.

As well as producing analysis to deliver the contextual insight on what's driving housing need and demand, and how housing need could be met by the existing housing stock or through specialist forms of provision (HNDA Core Outputs 1, 2 and 3); the HNDA evidence base was used to produce housing estimates detailing the number of new homes required to meet future housing need across the Tayside area and in each partner area including Angus.

The HNDA methodology assembles a detailed evidence base of contextual information to inform decision making on developing the HNDA calculation including:

Housing market drivers

detailed analysis of the key factors which might influence the housing market providing evidence of:

• Demographic projections
• Household migration
• Housing affordability (incomes, rents and house prices)
• Economic outlook

Housing stock profile

detailed analysis of the key factors which might influence the ability of the existing housing stock to meet housing need:

• Dwelling characteristics – profile, tenure, condition
• Housing stock pressures – occupancy, concealed HHs and turnover
• In-situ solutions – movement, adaptations, improvement, housing management

Future need & demand

detailed evidence to build evidence to assess future housing requirements:

• Existing need – current housing who need alternative housing
• New need – household formation and migration
• Housing affordability – need for new units by housing tenure

Specialist housing

detailed analysis of the requirement for specialist forms of provision including:

• Property needs – accessible, adapted, wheelchair & non-permanent housing
• Care & support needs
• Land needs: Gypsy traveller provision, student accommodation

1.3 HNDA Final Report Structure

To achieve a "robust and credible" appraisal from the Scottish Government's Centre for Housing Market Analysis (CHMA), the HNDA must deliver four 'Core Outputs'.

Each stage of the HNDA is detailed in the chapters of this final report, with the insight delivered by each Core Output detailed within the template prescribed by the CHMA, which summarises the key issues to be considered within Local Housing Strategies and Local Development Plans.

This final report reflects the structure and approach set out in the HNDA Practitioner's Guide. The details of each Core Output are summarised in Table 1.1.

Core Outputs	Final Report References/Materials
Core Output 1: Housing Market Drivers	Angus HNDA Report, Chapter 4: Key findings/HNDA key issues table Tayside HNDA Report, Appendix G: Core Output 1 Briefing Tayside HNDA Report, Appendix H: Core Output 1 Databook
Core Output 2: Estimating Future Need & Demand	Angus HNDA Report, Chapter 5: Key findings/HNDA key issues table Tayside HNDA Report, Appendix I: Core Output 2 Briefing Tayside HNDA Report, Appendix J: Core Output 2 Databook
Core Output 3: Specialist Provision	Angus HNDA Report, Chapter 6: Key findings/HNDA key issues table Tayside HNDA Report, Appendix K: Core Output 3 Briefing Tayside HNDA Report, Appendix L: Core Output 3 Data Analysis
Core Output 4: Housing Stock Profiles and Pressures	Angus HNDA Report, Chapter 7: Key findings/HNDA key issues table Tayside HNDA Report, Appendix M: Core Output 4 Briefing Tayside HNDA Report, Appendix N: Core Output 4 Databook

Table 1.1: Final Reporting Evidence of Angus HNDA Core Outputs

This final report focuses on Angus HNDA evidence, outcomes and key issues, providing a high level overview of each Core Output as well as outcomes from the primary research and stakeholder engagement processes.

1.4 Quality Control

HNDA processes and outcomes have been scrutinised rigorously throughout the study period and are subject to detailed quality assurance procedures. This includes triangulating a range of data sources to ensure variations or anomalies are accounted for, and that HNDA calculations are based on, or derived from, evidence that is high quality, fit-for-purpose and aligns with local, professional validation.

The Tayside HMP governance arrangements, which apply to the Angus HMP, have provided project management and quality control oversight in relation to key HNDA processes and activities including:

- project managing the overall programme for HNDA production

- coordinating and validating the production of Core Output materials including proofing interactive briefings, data-books and stakeholder engagement materials

- coordinating and validating primary research materials including the production of survey tools, final reporting materials, crosstabulations

- validating the accuracy and credibility of HNDA calculation inputs and assumptions and providing final sign off on HNDA calculation scenarios and housing estimates

- proofing and validating all final HNDA reporting outputs and digital materials.

Consultants commissioned to produce HNDA outcomes were selected on their commitment to complying with professional standards and Codes of Conduct, as well as the quality systems in place to ensure data accuracy and integrity e.g.

- Arneil Johnston: Quality system based on requirement of BS EN ISO 9000, plus CIH and CIPFA professional practice standards

- Research Resource: MRS Code of Conduct and ISO20252:2012 – Market, Opinion and Social Research

Final drafts of the individual chapters of the HNDA have been subject to thorough proof-reading to ensure both narrative and tabulated figures are accurate, consistent and fully evidenced.

2 Validating Housing Market Areas

At an early stage in the development of 2021 Tayside HNDA, analysis was performed to validate functional Housing Market Areas (HMAs) across the Tayside region; testing whether the spatial structure agreed in the 2012 HMA refresh process continued to provide a credible basis to assess housing system operation and to produce housing estimates.

The purpose of the validation exercise was to:

- determine whether any statistical evidence exists to justify a change to current housing market area boundaries (validated in 2012)

- evidence the extent and nature of any cross-boundary housing market areas including the Greater Dundee Housing Market Area and any other cross-boundary market areas within or crossing the Tayside regional boundary

- validate the functional market area boundaries operating across the Tayside region to provide a spatial basis for HNDA primary research and calculation purposes.

The validation began with the functional market area boundaries refreshed in 2012 and undertook origin-based containment analysis using Registers of Scotland data for private house sales for the last 2 years of available transactions, namely: 2018-2019. This analysis identifies the origins of households purchasing residential properties within each existing housing market area. A series of more detailed analyses took place at boundaries and in locations where cross-boundary links were possible e.g. in the North and South Angus HMAs. This exercise was reinforced by local knowledge and triangulation using the socio-economic, housing stock and demographic datasets produced in parallel to HMA analysis, to build each HNDA Core Output.

The validation of HMA boundaries reveals that the functional housing market areas refreshed in 2012 remain robust. Furthermore, the Greater Dundee boundary continues to offer a robust representation of this cross-boundary market area.

Tayside HMA boundaries have therefore been used as the spatial basis for preparing HNDA evidence, insight and planning and housing evidence. They will also be used as a spatial basis for future housing and development planning policy decisions including the setting of Housing Supply Targets using HNDA housing estimates.

The evidence underpinning the validation of HMAs in Angus is set out below:

2.1 Angus Housing Market Area Validation Outcomes

Analysis of the origins of households purchasing residential properties in each Angus HMA reveals that:

- 63% of property purchasers in Angus originate from Angus therefore the global Angus area can be regarded as a relatively self-contained Housing Market

- More than 65% of purchasers in East, North and West HMA originate from these HMAs and are therefore close to being fully self-contained

- The South Angus HMA is the least self-contained with only 46% of purchasers coming from this Sub-area. The South Angus HMA is highly influenced by purchasers from Dundee, with 36% of properties being sold to Dundee purchasers. 25% of these transactions are new build

- There is only limited movement between each of the HMAs within Angus.

Purchaser Origin	East HMA	North HMA	South HMA	West HMA	Grand Total
East HMA	62%	6%	2%	4%	19%
North HMA	5%	56%	0%	4%	14%
South HMA	5%	1%	41%	2%	15%
West HMA	4%	5%	3%	56%	15%
Angus	76%	68%	46%	66%	63%
Adjoining Councils	9%	17%	42% Overall /38% Dundee City	18%	23%
Glasgow & Edinburgh	2%	2%	1%	1%	1%
Other Scotland	13%	13%	11%	15%	13%
Self containment	62%	56%	41%	56%	63%
Other HMAs in Angus	14%	12%	5%	10%	
2nd main origin	Dundee City	Aberdeenshire	Dundee city	Dundee City	Dundee City

Table 2.1: HMA Self Containment/Migration Outcomes in Angus HMAs

3 Housing Need & Demand Assessment Primary Research

A priority for the Tayside Housing Market Partners in producing a robust and credible HNDA was to commission primary research to provide consistent, current and reliable intelligence on the extent and nature of housing need and demand across the Tayside region. Furthermore, partners identified major limitations in relying solely on secondary data to produce HNDA Core Outputs and housing estimates, namely:

- no credible information on the housing suitability or housing affordability drivers of Tayside households (including limited intelligence on household income and financial circumstances)

- no credible, recent information on household circumstances, housing intensions or aspirations

- no insights on the impact of the Covid-19 pandemic on the extent and nature of housing need across Tayside

- limited sample sizes in national secondary data sources offering poor statistical confidence in key measures of housing need

- inconsistencies in data collection, assembly and reporting across Tayside partners, leading to poor data reliability across several key measures of housing need (and particularly in relation to specialist housing requirements)

- very limited ability to disaggregate data to functional HMAs (or sub-areas) using many secondary datasets (which often report by local authority administrative boundaries only).

A key aspect of the 2021 Tayside HNDA study was therefore to commission a large-scale HNDA survey of households living in the Tayside area. The purpose of the HNDA survey was to provide a credible assessment of housing need by property size, type and tenure across each Tayside partner area, including Angus. Arneil Johnston commissioned Research Resource (a professional market research consultancy) to deliver the HNDA household survey, with fieldwork taking place between March and April 2021.

The primary research was designed to meet the information needs of the partners and fill the gaps identified in a risk assessment of the HNDA evidence base built via secondary data. In addition, the survey was designed to provide insight on the impact of Covid-19 on housing need and demand, including financial impacts associated with the pandemic.

3.1 Sample Size and Data Confidence

The survey was designed to deliver research which would achieve statistically robust data, enabling confident conclusions to be drawn regarding housing need and demand across the Tayside area. The telephone survey was designed to provide a robust and representative sample at a Tayside level to ensure this objective was achieved. A total of 500 interviews were completed through the telephone survey, providing data accurate to a minimum of +/-4.4% (based upon a 95% level of confidence at the 50% estimate).

The online survey sought to augment the telephone survey, further boosting the confidence levels and the representativeness of survey outcomes. A total of 1,652 online survey interviews were achieved across the Tayside area. This means that at a Tayside area level, a total of 2,152 interviews were achieved across both surveys, providing statistically robust data accurate to the level of +/-2.1% (based upon a 50% estimate at the 95% level of confidence).

At an Angus level, a total of 848 interviews were achieved across both surveys, providing statistically robust data accurate to the level of +/-3.4% (based upon a 50% estimate at the 95% level of confidence).

3.2   2021 HNDA Household Survey: Angus Outcomes

The 2021 Tayside HNDA household survey succeeded in delivering credible insight into housing need and demand across Angus, providing consistent up to date measures of housing need for the purposes of calculating housing estimates. The level of data accuracy achieved by the survey sample ensures that partners can be confident in using this research to inform housing and development planning policy judgements.

Furthermore, the survey intelligence provides crucial contextual evidence of housing market drivers, housing stock pressures and the need for specialist housing solutions across the region. This insight has been used to meet the requirements of HNDA Core Outputs detailed in Chapters 4 – 7 of this report.

Headline findings from 2021 HNDA Survey for Angus can be summarised as follows:

12%	23%	6%	24%	24%	26%
need to move to a more suitable home	would like to move elsewhere	are sharing amenities with another household	have too few rooms in their current homes	have property condition or disrepair issues in their current home	Spend more than 25% of their income on housing costs

29%	24%	35%	23%	5%
moved home in the last 5 years	have someone living in their household who will form a new household in the next 5 years	have life limiting illness or disability	with a LLTI or disability live in a home not suitable for their needs	have a household member who needs specialist accommodation

4   Core Output 1: Housing Market Drivers

Chapter 4 provides an overview and insight into the market drivers across the Angus area as described in 'Core Output 1' of the Housing Need and Demand Assessment Practitioners Guide (December 2020).

Core output 1 evidence:

'identifies the key factors driving the local housing market.

This should consider household formation, population and migration, housing affordability including income, house prices, rent levels, access to finance and key drivers of the local and national economy.

This analysis should reflect the data that have been input into the HNDA Tool and the choice of scenarios that are chosen to run the Tool'.

4.1   Core Output 1: Key Issues – Angus Housing Market Area

The assembly of Core Output 1 of the HNDA has provided Angus Housing Market Partners with a clear, evidence-based understanding of:

- key demographic factors and how these are driving the Angus housing market

- key affordability factors and how these are driving the Angus housing market

- key economic factors and how these are driving the Angus housing market

Angus HNDA: Core Output 1: Housing Market Drivers	
LHS & Development Plan	**Key Issues identified in the HNDA**
Demographic issues for the local housing market	• **Ageing population**: Since 2010 the population in Angus has grown by less than 1% indicating a slowdown in population growth relative to the period between 2000 and 2010 where there was 7% growth. Angus saw only a 1% increase in the population of working age between 16 and 64, whilst there was a 44% increase in those 65+ between 2000 and 2019. • Angus is set for a steady decline in overall population with a 4% change between 2018-2043 however the 75+ demographic is expected to increase by 62% over the same period. The reduction in working age people and significant increase in the 75+ cohort could impact on the sustainability of the economy, but it will also drive the need for housing, health and care interventions to meet the increasing needs of the growing older people population. • **Increasing household numbers**: Angus has had the largest decrease in average household size over all Tayside partners, with a reduction from 2.23 to 2.12 from 2008 to 2018. This will be exacerbated further as household composition projections from 2018 to 2038 show an increase in single person households (9.08%) and 2 adults' households (5.48%) with larger family household projected to decrease over the same period. Reducing household size and an increase in the older population should be key housing considerations for Angus in terms of housing delivery plans.

Affordability issues for the local housing market	• **Household incomes:** According to Scottish Government income estimates for 2018, the median income in Angus in 2018 was £28,080. It is the second highest median income in the Tayside partner area with only Perth & Kinross (£33,280) being higher. This profile reflects the median income benchmarks which populate the HNDA Tool v4.0 (sourced from CACI Paycheck data).
	• Between 2014-2018, Angus median household incomes remained static at £28,080.
	• Analysis of data from the Scottish House Condition Survey (SHCS) 2017-19 reveals that the average income in Angus was £27,800, this is lower than Scotland (£29,100).
	• CACI Paycheck data (2020) sets the median income in Angus at £29,464 which is higher than both Scottish Government 2018 estimates and SHCS estimates 2019. This more recent dataset is the preferred measure of Angus Council. Angus median incomes are reasonably similar to Fife (£30,303) but lower than those in Perth & Kinross (£33,706).
	• ONS Annual Survey of Hours and Earnings (2020) suggests a median weekly pay for all employees in Angus is £433, the lowest of all Tayside partners.
	• **Access to Mortgage Finance:** Analysis from Bank of England data detailing residential loans provided via the FCA, shows that first time buyer mortgages accounted for 21-24% of all mortgage loans between 2015-22, with a rise of almost 3% taking place between 2019 and 2020.
	• The percentage of home-owners re-mortgaging accounted for 28% of all mortgages in Q4 2021 which is its highest rate since 2017. The Covid pandemic coupled with stricter bank lending requirements on large LTV mortgages have played a role with the figure for 2021 bouncing back to previously seen levels.
	• In Q4 2021, the mean Loan-to-Value (LTV) ratio on new mortgages to first-time buyers in Scotland stood at 82%, an annual increase of 4.8 percentage points. Meanwhile, the mean LTV ratio for home movers in Scotland stood at 71% in Q4 2021, up 1.4 percentage points on the previous year (Source: UK Finance).
	• Analysis of Bank of Income data on lending multiples reveals that for buyers on a single income, the most consistent lending multiple is 4.0 or over in 2021 (the highest in the 7 year period of data). For joint income borrowers, the most consistent LTV income multiple is 3 or over, representing 43% of all loans in Q4 of 2021. As the affordability calculation in the HNDA Toolkit uses a default LTI of 3.2 this analysis suggests there is no strong case to change this with 3.00 or over LTI (joint income) being the most recurring lending multiplier between 2015 and 2021.
	• **Home Ownership:** In Angus 44% of households cannot afford a lower quartile market home. Households would need to spend 4.53 times the average local income to afford the average house price – a factor in excess of the typical 3.9 multiplier

	• **Private Renting:** The Local Housing Allowance across Angus is on average 30% less than the costs of market rent housing and as a result 4 in 10 households cannot afford to rent privately. • **Social Renting:** RSL rents are on average 43% higher than local authority rents with a monthly average of £437 compared to £305. • **Diminishing affordability levels:** Survey data estimates 15% of households in the Angus area are spending more than 30% of their income to meet rent or mortgage costs. The Covid-19 pandemic has seen housing affordability levels diminish across Angus with more than double the number of households experiencing financial difficulties post pandemic than pre pandemic. Housing solutions for lower income households need careful consideration as most options, even at market entry level, are unaffordable.
Economic issues for the local housing market	• **Economic Growth**: From 2008-18, Angus had the lowest growth (24%) in Gross Value Added (GVA) per head of all Tayside partners and at £43,373 sits well below the Scottish average of £52,549. • **Employment**: In Angus there are more part time workers (33%) than full time workers (31%) which is unlike all other Tayside areas. Across Angus, just under 55,000 people were employed in 2019, and whilst there has been a modest growth (1.1%) since 2009 this level of growth is the lowest of all the Tayside partners. Key industries in Angus include (i) agriculture, forestry and fishing, (ii) professional, scientific & technical sectors and (iii) construction which between them account for almost half of all employment opportunities in the area. Average Angus weekly pay equals £506 which is lower than the mean for Scotland (£558). • **Unemployment**: The claimant count rate in Angus for all ages (5.4) is lower than the rate for Scotland (6.0) whereas the rate for the 16-24 cohort (7.6) sits marginally above the rate for Scotland (7.38). • **Travel to work:** Angus has the highest travel to work outflow rate of all Tayside partners with almost 5 times as many people travelling out of Angus for work as travel into Angus. • **Deprivation:** between 2016 and 2020 the number of data-zones, in the top 15% most deprived areas, increased by 4.

Table 4.1: 2021 Angus HNDA Key Issues -Core Output 1 Housing Market Drivers

5   Core Output 2: Estimating Future Housing Need and Demand

Chapter 5 explains how Angus Council has estimated the number of new homes that are likely to be required over the next 20 years to meet local need and demand. These housing estimates are then disaggregated by tenure, based primarily on a household's ability to afford:

- Market housing (owner occupation)

- Market rents (the PRS)

- Below market housing (a range of subsidised intermediate housing tenures including mid-market rent, shared equity/ownership and other forms of low cost home ownership)

- Social housing rents.

Estimates are based on the outputs of the HNDA Tool, which has been developed by the Scottish Government's Centre for Housing Market Analysis (CHMA). The tool is an Excel-based platform intended to produce broad, long-term measures of future housing need rather than precise estimates.

The Scottish Government's HNDA calculation tool is prepopulated with data to estimate the number of new homes needed in the area. The HNDA tool works by projecting the number of new households who will require housing in Angus by considering existing households who need new homes PLUS new households who will need homes in the next 20 years.

Partners can adjust the tool using local evidence of housing need and housing pressures.

Underpinning the primary inputs to the tool, which form the basis of the HNDA calculation, is an affordability assessment which splits overall housing estimates into the requirement for different housing tenures.

This calculation works by applying the following assumptions to input data on household incomes and housing costs (including house prices and rental values).

Scenarios on housing affordability can then be developed by varying

Market Housing Affordability
Households with lower quartile incomes can afford lower quartile house prices when a 3.9 X's mortgage multiplier is applied

Those who cannot afford to purchase a home are split into the following tenures based on their ability to afford:

Market Rent (PRS) Affordability
Households who spend less than 25% of their income on market rents can afford to live in the private rented sector

Below Market Housing Affordability
Households who spend between 25%-35% of their income on rents could afford to live in the mid-market rented sector

Social Housing Affordability
Households who spend more than 35% of their income on rents could only afford to live in the social housing sector

economic, market and affordability assumptions, which affect the tenure split of housing estimates, but which do not have an impact on the overall totals. These assumptions include testing scenarios on income growth, income distribution, house prices and market rent inflation.

The model also assumes how long it will take to address the backlog of households in existing homes which are not suitable for the needs of the household. Whilst this can be varied, it is typically assumed that existing housing need will be met over a five-year period (which is the default assumptions within the HNDA toolkit) and the assumption made in Angus.

The HNDA tool enables partners to test a range of scenarios to derive housing estimates, with the HNDA Guidance encouraging partnerships to prepare a range of estimates for consideration. Angus partners produced two baseline scenarios against the default calculation in the pre-populated HNDA toolkit. The various assumptions which underpin each scenario are set out as follows:

Household Projections	Default	Scenario 1: Principal Household Formation	Scenario 2: High Migration
Household Projections	2018 Principal	2018 Principal	2018 High Migration
Growth +	0%	0%	0%
Existing Need	**Default**	**S1**	**s2**
Existing Need	Default	LA HOTOC	LA HOTOC
Years to clear backlog	5.0	5.0	5.0
Income, Growth & Distribution	**Default**	**S1**	**s2**
Income Data	SG Income Data		
Growth in median income scenario	Moderate Real term (Default)		
Change in income distribution	No Change (Core Default)		
Prices and Afforability	**Default**	**S1**	**s2**
Trend Growth	Trend Growth (Core default)		
Percentile	25%	25%	25%
Income Ratio	3.9	3.9	3.9
Split Need into tenure	**Default**	**S1**	**s2**
Rent Growth Assumption	Trend Growth (Core default)		
Proportion of market who buy	60%	60%	60%
Upper income-to-rent threshold	25%	25%	25%
Lower income-to-rent treshohld	35%	35%	35%

Table 5.1: 2021 Angus HNDA Calculation Baseline Assumptions

5.1   Angus HNDA Scenarios and Assumptions

Informed by the evidence assembled in Core Output 1: Housing Market Drivers; two HNDA scenarios have been developed providing an upper and lower range of housing estimates across the Angus area. Tables 5.2 – 5.4 set out the assumptions that underpin each scenario and as a benchmark, the assumptions which offer default settings in the HNDA toolkit. The evidence that has underpinned the selection of each assumption is also detailed:

HNDA Scenario: HNDA Toolkit Default for Tayside		
HNDA Model Input	Assumption	Evidence/justification
Households	Principle household growth	HNDA Toolkit Default Settings
Existing need	HoTOC utilised and affordability filter is off (i.e. all households in existing need to be met by social rent)	
Years to clear existing need	5 years	
Income growth	Moderate real terms growth 2.5%	
Income distribution	No change in income distribution. Point of income distribution set at 25th and 75th percentile	
House prices	Trend growth 1.6% per annum	
Affordability	Entry to home ownership set at the 25th percentile house price; 3.9x lower quartile income	
Rental threshold	If 35% of income spent on rent – household is suitable for social rent	
Rental growth	Trend growth 1.6% per annum	

Table 5.2: Angus HNDA Tool Default Assumptions

HNDA Scenario 1: Angus Principal Scenario		
Overview: This scenario represents the HNDA Tool default settings with all income and house price assumptions being based on the economic outlook for Scotland in 2020. Existing need is updated based on local authority generated existing need figures.		
HNDA Model Input	Assumption	Evidence/justification
Households	Tayside principal household growth = 4% Angus principal = 2%	NRS principal household projections for the Tayside area project a growth in the number of households of 4% over the next 25 years, which is half of the projected growth rate in Scotland (8%). This projection is lower than household growth rates across Angus over the last decade (6.42%) and therefore likely to be a conservative measure based on recent trends.
Existing need	Tayside existing need = 5,624 Angus existing need = 1,336	Detailed in Section 5.1: HNDA Backlog: Estimate of Households in Existing Need.
Years to clear existing need	5 years	Based on recent social housing turnover rates (9%, c. 4,300 per annum) and capacity for new social housing delivery projected in future Strategic Housing Investment Plans (c. 4,100 units); meeting existing housing need fully over 5 years would require c. 20% of all affordable supply to address the current estimated backlog. This is considered a realistic and feasible assumption by the Tayside HMP. Furthermore, partners including Angus Council had no appetite to extend the period that households in Tayside would spend in unsuitable housing for longer than a 5 year term.
Income growth	Moderate real terms growth 2.5%	Moderate real term growth is selected by Tayside HMP given the economic uncertainty associated with recovery from Covid-19 (13% of households experiencing financial difficulty post Covid compared to 8% pre-Covid) and the UK's departure from the European Union. Whilst both factors may negatively impact on income growth, the Tay Cities Deal and implementation of a transformational economic development strategy should at a minimum balance these risks.

Income distribution	No change in income distribution. Point of income distribution set at 25th and 75th percentile	Income distribution stability selected despite evidence of a higher % of Tayside households experiencing financial hardship (13%) in a post Covid environment; given scale of ambition to grow the Tayside economy via the Tay Cities Deal and associated £400M of investment in jobs and infrastructure.
House prices	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside house prices over the last 10 years has equaled 1.3%.
Affordability	Entry to home ownership set at the 25th percentile house price; 3.9x lower quartile income	Default assumptions selected – despite uncertainty in the economic context for Tayside in 2021, the scale of ambition in Tay Cities Deal should at a minimum hold any worsening of housing induced poverty.
Rental threshold	If 35% of income spent on rent – household is suitable for social rent	
Rental growth	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside BRMA rents (excluding St Andrews) over the last 10 years has equaled 2%.

Table 5.3: Angus HNDA Scenario1: Principal

HNDA Scenario 2: Angus High Migration Scenario		
Overview: This scenario assumes limited impacts of the Covid-19 pandemic and Brexit, with economic risks mitigated by an ambitious Tay Cities Growth Deal which drives migration to the Tayside region as a result of committed investment in jobs and infrastructure. This scenario is characterised by moderate real terms income growth, static income distribution, real term trend house price and rental growth.		
HNDA Model Input	Assumption	Evidence/justification
Households	Tayside high migration = 6% Angus high migration = 3%	NRS high migration household projections for the Angus region project a growth in the number of households over the next 25 years of 6%, which is equal to the household growth rate in Angus over the last decade (6.42%). As this growth rate is a consistent increase in household growth, Angus Council has assumed this as a prudent growth assumption in the context of the Tay Cites Deal investment framework.
Existing need	Tayside existing need = 5,624 Angus existing need = 1,336	Detailed in Section 5.1: HNDA Backlog: Estimate of Households in Existing Need.
Years to clear existing need	5 years	Based on recent social housing turnover rates (9%, c. 4,300 per annum) and capacity for new social housing delivery projected in future Strategic Housing Investment Plans (c. 4,100 units); meeting existing housing need fully over 5 years would require c. 20% of all affordable supply to address the current estimated backlog. This is considered a realistic and feasible assumption by the Tayside HMP. Furthermore, partners including Angus Council had no appetite to extend the period that households in Tayside would spend in unsuitable housing for longer than a 5 year term.
Income growth	Moderate real terms growth 2.5%	Moderate real term growth is selected by Tayside HMP given the economic uncertainty associated with recovery from Covid-19 (13% of households experiencing financial difficulty post Covid compared to 8% pre-Covid) and the UK's departure from the European Union. Whilst both factors may negatively impact on income growth, the Tay Cities Deal and implementation of a transformational economic development strategy should at a minimum balance these risks.

Income distribution	No change in income distribution. Point of income distribution set at 25th and 75th percentile	Income distribution stability selected despite evidence of a higher % of Tayside households experiencing financial hardship (13%) in a post Covid environment; given scale of ambition to grow the Tayside economy via the Tay Cities Deal and associated £400M of investment in jobs and infrastructure.
House prices	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside house prices over the last 10 years has equaled 1.3%.
Affordability	Entry to home ownership set at the 25th percentile house price; 3.9x lower quartile income	Default assumptions selected – despite uncertainty in the economic context for Tayside in 2021, the scale of ambition in Tay Cities Deal should at a minimum hold any worsening of housing induced poverty.
Rental threshold	If 35% of income spent on rent – household is suitable for social rent	
Rental growth	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside BRMA rents (excluding St Andrews) over the last 10 years has equaled 2%.

Table 5.4: Angus HNDA Scenario 2: High Migration

The assumptions tested and selected by Angus have been informed by evidence of housing market drivers, stock profiles and pressures and specialist housing requirements.

The outcomes associated with each scenario are detailed below, ranging from HNDA tool default settings for the Angus area (1,286) to an upper range of 3,016 (more than double HNDA tool default settings).

Cumulative need all tenures	2021-2025	2026-2030	2031-2035	2036-2040
2018 Principal	904	1,026	1,162	1,286
Scenario 1	2,080	2,202	2,311	2,435
Scenario 2	2,173	2,418	2,680	3,016

Table 5.5: 2021 Angus HNDA Calculation Scenarios

Following careful scrutiny of the outcomes, Angus agreed that Scenario 1 and Scenario 2 should form the basis of the range of housing estimates that should be shared with the Angus housing market partnership for scrutiny and analysis.

The evidence which underpins the major components of each scenario are detailed below.

5.2   HNDA Backlog: Estimate of Households in Existing Need

Angus developed a local estimate of existing housing need, informed by housing system evidence of households currently in unsuitable housing and who need to move to a new home. Existing need is driven by several factors such as homelessness, insecurity of tenure, overcrowding, concealed households, poor quality housing or lack of basic amenities and unmet need for specialist housing.

In some cases, existing need can be met using in-situ solutions as Core Output 3 of the HNDA e.g. through aids, adaptations or repairs to existing properties. However, a proportion of need must be met through additional housing where an in-situ solution cannot be found e.g. for homeless households in temporary accommodation.

The basis of the local estimate of existing housing need is as follows:
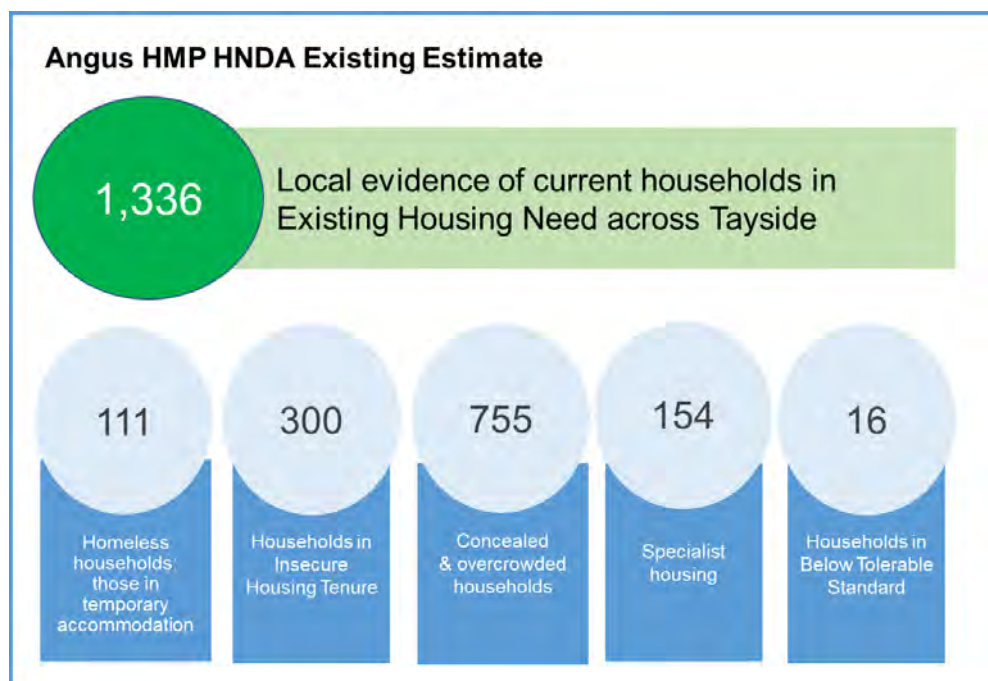
Each element of existing housing need with source evidence is evidenced in detail in Appendix A: Core Output 2 Angus Databook, with the basis of each Angus measure detailed below:

- Homeless households in temporary accommodation were established using an average of HL1 statistics for 2020/21 detailing the number of households in temporary accommodation on 31st March 2021 and a snapshot of households in temporary accommodation derived from partner temporary accommodation stock lists

- Households in insecure tenure were established using an average of respondents to the 2021 Tayside HNDA survey who were under immediate threat of eviction, repossession or loss of housing with 2020/21 HL1 statistics on households who have become homeless as a result of insecure tenure

- Households in the 2021 HNDA survey who identified themselves as overcrowded **OR** sharing amenities with another household with double counting eliminated from total respondent numbers

- Households who need to move due to medical needs or who require specialist housing applications as a measure of housing waiting lists

- Local estimates of poor housing quality using housing list analysis of households in poor quality housing.

Combining these requirements results in a local existing need estimate of 1,336 households across Angus who require to move to a new property.

	East	North	South	West	Total
Homeless households in temporary accommodation	40	30	20	22	**111**
Households in insecure tenure	62	84	92	63	**300**
Concealed households & Overcrowding	396	77	167	115	**755**
Specialist Housing and Housing Related Services	30	26	19	79	**154**
Poor Quality	3	1	11	1	**16**
Total	**530**	**218**	**309**	**279**	**1,336**

Table 5.6: Local Estimate of Existing Housing Need across Angus Partners

For the purposes of the HNDA calculation, Angus has assumed that the backlog of households in existing housing need will be addressed over a 5-year period and in the first 5 years of the 20-year projections.
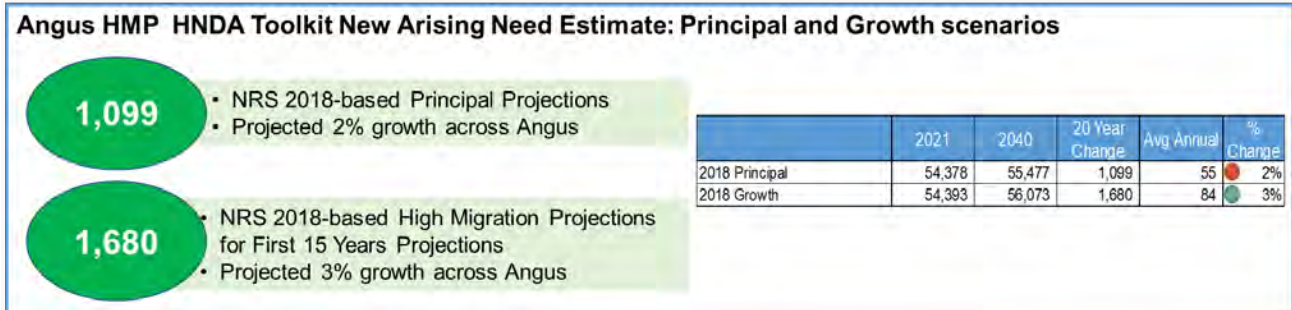
5.3   New Need: Household Projection Scenarios

The HNDA Calculation tool uses household projections produced by the National Records of Scotland (NRS) to provide broad estimates of the future number of new households who will require housing in the area.

Informed by demographic analysis presented in Core Output 1 (Housing Market Drivers), the Angus area has shown positive household growth in the last decade (6.1% between 2008 and 2018) and given the economic growth strategy associated with the Tay Cities Deal, partners felt that a high migration projection could be justified as a reasonable scenario with the HNDA calculation.

On this basis, Angus opted to create two scenarios: one using the NRS principal household projection for the Angus area and one that reflects the NRS high migration projection for the area.

The outcomes of household projection scenarios create an estimate of new households emerging in Angus over the next 20 years of between 1,099 using the principal household projections and 1,680 using the high migration scenario.

Angus HMP HNDA Toolkit New Arising Need Estimate: Principal and Growth scenarios

	2021	2040	20 Year Change	Avg Annual	% Change
2018 Principal	54,378	55,477	1,099	55	2%
2018 Growth	54,393	56,073	1,680	84	3%

- NRS 2018-based Principal Projections
- Projected 2% growth across Angus

- NRS 2018-based High Migration Projections for First 15 Years Projections
- Projected 3% growth across Angus

The principal household projection estimates an overall growth in households across the Angus area of 2%. These projections create an average annual increase of 55 households across Angus.
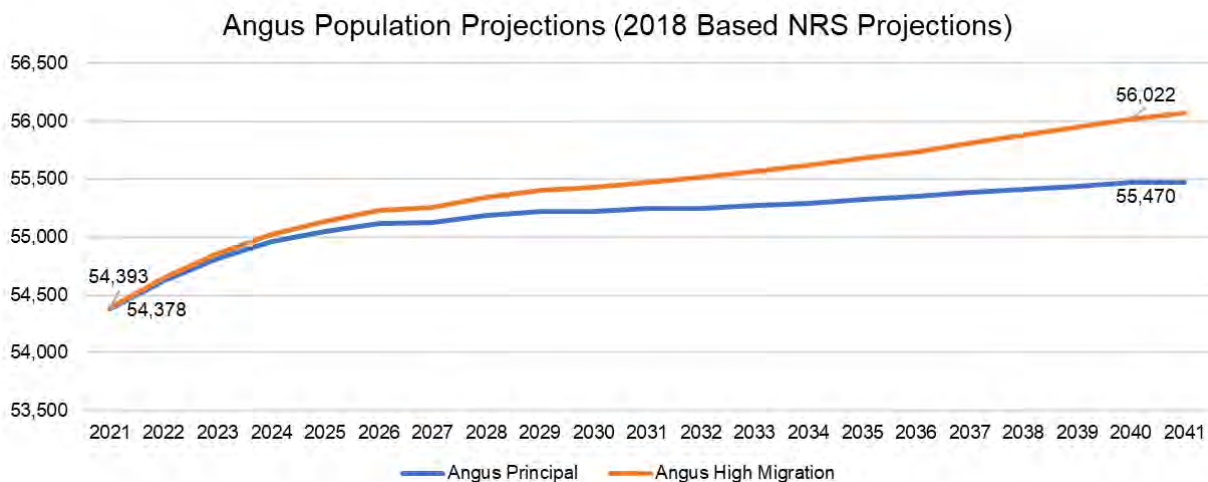
The high migration scenario estimates an overall growth in households across the Angus area of 3% over the next 20 years. These projections create an average annual increase of 84 households across Angus.

5.4   Angus Housing Estimates

The Angus HNDA calculation combines each component of housing need to create a 20-year range of housing estimates.

Angus HNDA housing estimates range from 2,435 to 3,016 over the next 20 years. The high migration scenario projects a 24% increase in need from the principal scenario. This results in an

additional net housing requirement of 29 per annum. Table 5.7 sets out the 20 year HNDA projections in 5 year bandings:

Cumulative need all tenures	2021-2025	2026-2030	2031-2035	2036-2040
Principal Scenario	2,080	2,202	2,311	2,435
High Migration	2,173	2,418	2,680	3,016

Table 5.7: Angus HNDA Housing Estimates 2021-2040 (Principal and High Migration Scenarios)

5.5 Housing Estimates by Housing Market Area

Future housing estimates for the Angus area estimate a requirement for new homes in the range of 2,435 to 3,016 over the next 20 years. At a housing market area, based on the principal projection:

- 33% of this global housing estimate should be met in East Angus

- 24% of this global housing estimate should be met in South Angus

- 23% of this global housing estimate should be met in West Angus

- 20% of this global housing estimate should be met in North Angus.

Principal	East	Greater Dundee/South	North	West
2021-2025	717	497	388	477
2026-2030	31	31	28	32
2031-2035	27	28	25	29
2036-2040	31	31	28	33
Total	**807**	**587**	**470**	**572**
Average per annum	**40**	**29**	**23**	**29**
	33%	**24%**	**19%**	**23%**

Table 5.8: Angus HNDA Housing Estimates 2021-2040 by Sub-area (Principal Scenarios)

5.6 Housing Estimates by Housing Tenure

The HNDA calculation tool applies the housing affordability assumptions outlined above to create housing estimates by tenure. The Angus HNDA affordability calculation is driven by the same income and economic assumptions for both the principal and growth scenarios, namely:

- Moderate, real term growth in incomes of 2.5% per annum is projected

- No change in income distribution from the baseline Scottish Government banded income dataset is projected

- House price growth reflects historic market trends at 1.6% per annum

- House price to income ratios will bench lower quartile house prices to lower quartile incomes as a benchmark for market housing affordability

- A loan to value mortgage multiplier of 3.9 times income is applied

- Rental growth reflects historic market trends at 1.6% per annum.

Given the economic uncertainty associated with the Covid-19 pandemic, partners opted to used standard default economic measures within the HNDA toolkit, until firmer evidence of economic impact is established.

At an overall Angus level, the tenure split of future estimates arising from the high migration scenario is detailed below:

High Migration/Growth Scenario: Housing Estimates by Tenure

20%	**Market Housing Affordability** Households with lower quartile incomes can afford lower quartile house prices when a 3.9 X's mortgage multiplier is applied	**= 600** new Market Homes

Those who cannot afford to purchase a home are split into the following tenures based on their ability to afford:

13%	**Market Rent (PRS) Affordability** Households who spend less than 25% of their income on market rents can afford to live in the private rented sector	**= 385** new Market Rent Homes
12%	**Below Market Housing Affordability** Households who spend between 25%-35% of their income on rents could afford to live in the mid-market rented sector	**= 364** new Below Market Homes
55%	**Social Housing Affordability** Households who spend more than 35% of their income on rents could only afford to live in the social housing sector	**= 1,667** new Social Homes

The tenure split associated with the principal and high migration scenario differs as follows:

Principal	Housing Estimates		%
Social Housing	1,561	🟢	64%
Below Market Housing	242	🔴	10%
Market Rent (PRS)	247	🔴	10%
Market Housing	385	🔴	16%
Total	2,435		100%
High Migration	Housing Estimates		%
Social Housing	1,667	🟢	55%
Below Market Housing	364	🔴	12%
Market Rent (PRS)	385	🔴	13%
Market Housing	600	🔴	20%
Total	3,016		100%

Table 5.9: 2021 Angus HNDA Housing Estimates by Housing Tenure

The 2021 HNDA calculation show that between 55% - 64% of households will require social housing to meet future housing need in the Angus area, in the region of 1,500 – 1,670 new homes. A further 10% - 12% of households who could benefit from below market homes or market rents (10% - 13%).

The requirement for market housing ranges from 16% - 20% over the next 20 years, in the region of 385 - 600 new homes. Housing estimates by housing market area and tenure are detailed in Table 5.10 below:

2018 Principal Projections: Housing Estimates by Tenure and HMA								
	East	South	North	West	East	South	North	West
Social Rent	588	368	272	333	73%	63%	58%	58%
Below Market Housing	61	63	53	65	8%	11%	11%	11%
Market Rent (PRS)	71	62	42	71	9%	11%	9%	12%
Market Housing	87	94	102	102	11%	16%	22%	18%
Total	807	587	470	572	100%	100%	100%	100%
High Migration Scenario: Housing Estimates by Tenure and HMA								
	East	South	North	West	East	South	North	West
Social Rent	615	396	297	359	65%	54%	49%	49%
Below Market Housing	92	95	81	97	10%	13%	13%	13%
Market Rent (PRS)	110	97	67	111	12%	13%	11%	15%
Market Housing	136	146	159	159	14%	20%	26%	22%
Total	953	734	603	726	100%	100%	100%	100%

Table 5.10: 2021 Angus HNDA Housing Estimates by Partner Area and Tenure

Under the principal projections, most housing market areas show a higher proportion of need to be met by social housing relative to other tenures, this ranges from 73% of housing estimates in East Angus to 58% in North and West Angus.

The requirement for below market comprises roughly 8% to 13% of the overall housing estimate in each partner area, with requirements for market rent housing ranging from just 9% to 15%. The requirement for market housing ranges from 11% in East Angus to 26% in North Angus driven by an increasing demand for the area.

The high scenario boosts the requirements for market tenures across the board but largely mirrors the overall pattern of the principal household projections.

5.7   Estimating Housing Need & Demand: Key Issues

LHS & Local Development Plan	Key Issues identified in the HNDA
Future need for additional housing broken down by household who are likely to be able to afford: • owner-occupation • private rent • below market housing • social rent	The Local Housing Strategy and Local Development Plan for the Angus area should set achievable and deliverable Housing Supply Targets based on the housing estimates produced by the 2021 HNDA calculation, considering deliverability within the area context, as well as local strategic landscape. Between 2021 – 2040 the housing estimates for the Angus HMAs, range from: • 807 – 953 in East Angus • 587 - 734 in South Angus • 470 – 603 in North Angus • 572 – 726 in West Angus In the next 5 years (2021-26), the housing estimates for the Angus area range from: • 717 – 741 in East Angus • 497 – 521 in South Angus • 388 – 410 in North Angus • 477 – 502 in West Angus By tenure, across the Angus area, it is estimated that: • 55% - 64% of housing estimates will be met by social housing • 10% - 12% of housing estimates will be met by below market housing • 10% - 13% will be met by market rented housing • 16% - 20% will be met by market housing The LHS and LDP should consider the need for housing supply targets that extend beyond the duration of the 5-year LHS period by reviewing historic new build completion rates, considering the wider policy and economic context at a local level. Strategic drivers to inform longer term and short term housing and development planning policy decisions, using HNDA housing estimates as a starting point, are set out in more detail in Chapter 8, based on the views and perspectives of Angus partners and stakeholders.

6   Core Output 3: Specialist Provision

Chapter 6 provides an overview and insight into specialist housing provision across the Angus area as described in 'Core Output 3' of the Housing Need and Demand Assessment Practitioners Guide (December 2020).

Core output 3 evidence:

'Identifies the contribution that Specialist Provision plays in enabling people to live well, with dignity and independently for as long as possible.

Identifies any gap(s)/ shortfall(s) in that provision and the future level and type of provision required.

Considers evidence regarding property needs, care and support needs and locational/land needs.

Assessing specialist housing profile and pressures across Angus has enabled the partnership to identify what existing stock is available to meet local housing needs, whilst identifying requirements for future provision including:

- estimated number of new accessible houses required in future

- estimated number of wheelchair accessible homes required in future

- estimated need for future residential/care homeplaces

The evidence also indicates where the existing housing stock could be managed more effectively to meet housing need including more effective use of adapted housing, the role of in-situ solutions such as aids and adaptations, and the delivery of home care and housing support services to enable independent living. The need for additional site provision for the Gypsy/Traveller and Travelling Showpeople community is also considered.

6.1   Core Output 3: Key Issues – Angus Housing Market Area

The assembly of Core Output 3 of the HNDA has provided Angus Housing Market Partners with a clear, evidence-based understanding of:

- future property requirements associated with specialist housing provision including accessible and adapted housing, wheelchair housing and non-permanent accommodation for key client groups

- future care and support requirements to enable independent living including supported housing for key client groups, plus housing support and homecare services

- future site provision to meet the needs of the Gypsy/Traveller and Travelling Showpeople communities.

The 2020 HNDA Guidance sets out a number of specialist housing categories as the basis of evidencing gaps or shortfalls in provision to guide policy on future provision including on the type of specialist housing to deliver and how to reduce specialist housing pressures.

The evidence should also indicate where the existing housing stock could be managed more effectively to meet housing need including more effective use of adapted housing, the role of in-situ solutions such as aids and adaptations, and the delivery of home care and housing support services to enable independent living. The need for additional site provision for the Gypsy/Traveller

and Travelling Showpeople community is also considered. Specifically, there are five categories of specialist provision to be considered including:

Accessible, adapted and wheelchair housing	Non-permanent housing	Supported provision	Care & support for independent living	Site provision

Tables 6.1-6.5 detail the policy context, property needs, client groups and specialist housing requirements associated with each category.

6.2   Accessible, Adapted and Wheelchair Housing Evidence

Accessible, adapted and wheelchair housing	
National policies	• **National Planning Framework (NPF4 Position Statement)** • **Scottish Homes (1998) Housing for Varying Needs, A Design Guide** • **Housing to 2040** - Scottish Accessible Homes Standard 2025-26 • **Accessible housing standards** including Scottish Building Standards • **Relevant Adjustments to Common Parts (Disabled Persons) (Scotland) Regulations 2020** • **A Fairer Scotland for Disabled People Progress Report** • **Local Housing Strategy Guidance** requirement for an all-tenure wheelchair accessible housing target. • **Still Minding the Step:** Recommends three-tier approach 1) design and supply 2) adaptations 3) effective allocation of wheelchair accessible and adapted homes.
Local policies/strategies	**Strategic Housing Investment Plans:** **Angus (2021-2026)** To address the growing need for specialist housing, the LHS sets a target that at least 20% of new affordable housing will be delivered to meet particular needs and at least 10% to full wheelchair standard. Since 2017 considerable partnership working has happened to increase the understanding and need for these types of specialist housing provision and as a result delivery from 2020/21 onwards has improved provision of specialist housing. The SHIP plans to deliver around 117 units for particular needs housing over the 5 year period, this represents 23% of planned delivery. There may be scope to increase this number further on a site by site basis and individual needs are regularly reviewed through a well-established joint working process. A target for specialist housing in the private sector has not been set and there are no current plans to do so. The lack of robust information on which to set any target with an equal lack of ability to control or monitor

	any target set. This will be reviewed again for the next iteration of the LHS.
Property needs	**<u>Accessible Housing</u>** An accessible home is one where the design and layout of the property is free from physical barriers that might limit its suitability for households with disability, mobility or health conditions. It is sufficiently flexible and convenient to meet the existing and changing requirements of most households with an interior fabric that can be adapted to accommodate aids, adaptations or equipment. Across Tayside there are a range of property types that are commonly defined as accessible housing. These include amenity accommodation; ambulant disabled; medium dependency; and other specially adapted properties. Some ground floor accessible mainstream housing may also be considered within this category and generally new build homes in the social rented sector will be designed to accessible standards. **<u>Adapted Housing</u>** An adapted property is usually described as one that was not originally designed with accessibility features for households with disability, mobility or health conditions but has since been altered to accommodate these requirements. An adaptation is defined in housing legislation as an alteration or addition to the home to support the accommodation, welfare or employment of a disabled person or older person and their independent living. Adaptations to properties can include both large and small-scale provision; ranging from minor modifications such as grab rails, up to major property extensions or remodelling work. Common adaptations can include low level appliances, stair lifts, wet rooms, door widening, suitable external surfaces, ramps, grab rails as well as a range of equipment to enable independent living. Delivering the right adaptations can reduce the need for personal care services, as well as the need for admission to a hospital/care home, or the move to a purpose-designed property. Currently, the funding streams for adaptations remain tenure-specific and there are variations in the processes for delivering adaptations to local authority, RSL and private sector properties. Tayside local authorities provide both mandatory and discretionary grant assistance for adaptations in the private sector, with RSL adaptations funded via a separate, central, Scottish Government budget. **<u>Wheelchair Housing</u>** The Scottish Government define wheelchair housing as homes suitable for wheelchair users to live in, as set out in Section 3 of the guidance on the 'Housing for Varying Needs Standard' (HfVN). Over and above this, developers are encouraged to meet 'desirable' wheelchair design criteria. HfVN states that wheelchair accessible housing "is for people who use a wheelchair most or all of the time. The home will be level access throughout, have space for a wheelchair to circulate and access all rooms, and offer a kitchen and bathroom that suits the occupant's particular needs and fittings and services that are within reach and easy to use.

Suitable for	People with disabilities and limiting health conditions
	People with limited mobility and/or dexterity
	People who need for low level care
	Wheelchair users
	People with complex care needs including learning disability, sensory impairment, dementia, learning disabilities and autism.
Evidence	The key findings from the evidence on accessible, adapted and wheelchair housing is summarised as follows:
	Health and Disability Profile
	Within Angus 35% of households contain a long term sick or disabled person with the most common long term health conditions or disabilities being Mental Ill Health (15%) followed by Physical Health Problems (14.5%) and then Learning Disabilities (6.8%).
	The proportion of households with disabilities differ across housing tenures with 47% of households in owner-occupied housing containing one or more long term sick or disabled person, with 59% in social housing.
	5% of households with long term illness of disability in Angus are limited by their current property, which is lower than the rate across Scotland (7%).
	Specialist Housing
	It is estimated that there are 7,085 units of specialist housing provided by social landlords in Tayside. 18% of all specialist housing in Tayside is located in Angus.
	11% of all homes in the social housing sector in Angus offer specialist forms of housing provision (1,242 homes). 64% of specialist homes provide housing for older people including sheltered accommodation and 22% of specialist homes provide accessible housing for people with mobility needs in Angus. Across all Tayside partner areas, there has been an 8% turnover in specialist housing stock over the last three years. In Angus turnover was 5% on average over the last four years, significantly lower than the regional average.
	Accessible Housing
	2% of the total housing stock in Angus can be described as accessible housing. Across Tayside partners, Angus accounts for 17% of all accessible housing provision.
	5% of all lets in Angus 2019-20 were for accessible housing equal to the rate of turnover in specialist housing stock (5%) across the last three years.
	Households in Angus reported the least percentage of overall unmet demand for accessible housing at 3.8%, significantly lower than for Tayside at 8.1%.
	Adapted Housing

	Projecting future adaptation requirements is challenging due to the changing demographics across Angus. It is likely the current requirement will increase given there is an ageing population. This means targets in relation to specialist housing and adaptations will require continuous review to understand requirements as population demographics change. Angus Council will undertake this as part of their Local Housing Strategy development work. In some instances where adaptation is not possible there may be need to identify alternative suitable housing options for such households.
	The Scottish House Condition Survey provides estimates of properties requiring adaptations by local authority area. SHCS data suggests that 28% of the housing stock in Angus has been adapted (54,000). The majority of adaptations have been in social rented stock (45%). Scottish Government Housing Statistics also show that 28 properties have benefited from Grants since 2014 through Angus Council Scheme of Assistance.
	2021 Tayside Housing Need and Demand Survey indicates 30% of households across the Tayside partner areas have property adaptations. This figure is likely to be more representative of the current requirement for adapted housing given the level of statistical confidence achieved in each housing tenure.
	Wheelchair Housing
	There are 81 units of wheelchair housing in Angus with the proportion of wheelchair accessible housing in Angus which makes up just under 1% of the total social housing stock in the area. This is equal to the proportion of wheelchair homes across Tayside (1%).
	Whilst there are currently 81 wheelchair properties available across the Angus area, there is a waiting list of 168 people. Overall, 3.6% of all specialist housing demand on the waiting list is for wheelchair housing. With around 3 wheelchair properties being let per annum this indicates a pressure of 63 applicants per available let.
	1.1% of survey respondents who said they had a specialist housing need indicated that they had an unmet need for wheelchair accessible accommodation in Angus.
	Key findings supporting the evidence on accessible, adapted and wheelchair housing is provided in Appendix L Specialist Provision Databook
Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, health and social care partners has been instrumental in building the evidence required on the need for accessible, adapted and wheelchair housing across Angus. This work is taken forward by the Housing Market Partnership in the Angus area, to support the development and implementation of the Housing Contribution Statement. This work includes consultation, engagement and data-sharing to assess the needs of those who require accessible, adapted and wheelchair housing.

Table 6.1: Angus Accessible, Adapted and Wheelchair Housing Requirements

6.3 Non-Permanent Housing Evidence

Non-permanent housing	
National policies	**Homelessness: Code of Guidance (2019)** states homeless people should not be placed in temporary accommodation unnecessarily and time there should be as short as possible with care taken to avoid moves.
	Homeless etc (Scotland) Act 2003 (Commencement No.4) Order 2019 removed local connection enabling presentation by homeless households at any Scottish local authority area of their choice.
	Homeless Persons (Unsuitable Accommodation) (Scotland) Order 2020 amendment extends the Unsuitable Accommodation Order to all homeless households meaning that anyone staying in accommodation deemed as 'unsuitable' for more than 7 days will constitute a breach of the Order. At present, this only applies to children and pregnant women in bed and breakfast accommodation.
	The Homelessness & Rough Sleeping Action Group (HARSAG) was set up by the Scottish Government to produce solutions to end homelessness and rough sleeping with a move towards a Rapid Rehousing approach. A requirement was placed on local authorities to produce 'Rapid Rehousing Transition Plans' (RRTP) with significant implications on the management and availability of non-permanent housing.
	Ending Homelessness Together Action Plan
	Migrant Workers - Non-EEA nationals may apply to work or train in the UK under a number of different schemes and categories. Some categories require the worker to obtain an Immigration Employment Document (IED), for example the Work Permits and Sectors Based Schemes, while others such as Fresh Talent Working In Scotland do not. Where and IED is required, this does not entitle the holder to enter or remain in the UK; they must also apply for leave separately, either as an Entry Clearance if outside the UK or Leave to Remain if already in the UK.
	Armed Forces - Taking the Strategy Forward (Jan 2020) outlines how Scottish Government will move this agenda forward and achieve the best possible outcomes for veterans now and in the future. A refreshed action plan was launched in August 2022 along with commitments to provide annual progress reports. The 'Welcome to Scotland' Guide published in 2022 provides advice for service personnel and their families in relation to housing, education, and healthcare in Scotland.
	Legislation in relation to armed forces personnel can be found in Armed Forces Act 2021 and Housing legislation.
	Housing to 2040 reflects the 2020-21 Programme for Government which states that the Scottish Government will undertake a review of purpose-built student accommodation which will help inform changes in the sector alongside the wider Rented Sector Strategy.

Local policies/ strategies	**Local Housing Strategies and Rapid Rehousing Transition Plans**
	RRTPs
	Rapid Rehousing Transition Plans outline how each local authority approaches providing a settled, mainstream housing outcome as quickly as possible through minimising the time spent in any form of temporary accommodation, with the fewer transitions and how local authorities will move to use of mainstream furnished temporary accommodation within a local community.
	Angus RRTP
	The Rapid Rehousing Transition Plan (RRTP) is a planning framework for Angus Council and its partners to transition to a rapid rehousing approach. The RRTP 2019-24 will deliver the overall strategic outcome 'Ensure people who experience homelessness reach a settled housing outcome as quickly as possible' by delivering the 5 priorities:
	1. Increase focus on prevention to stop homelessness happening in the first place Ensure households get through the homeless system faster
	2. Ensure homeless households can access existing housing
	3. Ensure homeless households can access the right type of support
	4. Increase affordable housing supply to meet needs of homeless households
	Across Angus the vision for rapid rehousing is to prevent homelessness wherever it is possible to do so, eradicate the need for bed and breakfast accommodation, reduce the number of temporary accommodation units in use, minimise the length of time homeless households spend in temporary accommodation, reshape temporary accommodation to offer less congregate options and more community based dispersed accommodation, and increase the range of supported accommodation options including the delivery of Housing First tenancies. Original RRTP assumptions projected that by 2024 the following outcomes would be achieved:
	• a reduction in homelessness by at least 20% as a result of prevention
	• a reduction in mainstream temporary accommodation in the region of 100 units
	• a reduction in the length of stay in temporary accommodation to an average target of 60 days.
	Whilst Angus Council remains fully committed to the delivery of RRTP targets the impact of the Covid-19 pandemic, cost of living pressures and the Ukraine resettlement programme has undoubtedly had a material impact on progress. However, a reduction in homelessness of 42% between 2018/19 and 2021/22 has been achieved, notably higher than the Scottish reduction over the same period (4%).
	Furthermore, whilst the number of households in temporary accommodation has decreased in Angus by 11% in the last four years, the Scottish average has increased by 27%. Within this trend, significant reductions in the number of households in temporary accommodation are also evident in Angus (-11%).
	The target on the length of stay has not yet been achieved across Angus.

	Angus Council continues to progress with the delivery of the RRTP vision for the area and achievement of the goal to provide a settled, mainstream housing outcome as quickly as possible through minimising the time spent in any form of temporary accommodation.
Property needs	As well as assessing the need for permanent housing, it is important the HNDA assesses the requirement for transitional accommodation, including temporary accommodation, houses in multiple occupation, refuges, hostels, tied/key worker housing, serviced accommodation or student accommodation. Non-permanent housing plays an important role in meeting a range of housing needs, including for transient populations such as seasonal/temporary workers and students; and those experiencing housing crisis who require temporary housing until a settled housing outcome can be achieved. Those living in non-permanent housing include homeless people, asylum seekers/refugees, people leaving care settings or institutions and students. This is usually delivered via the acquisition or reconfiguration of existing stock; however, the development of new build units can also be an option, particularly for specific client or economic groups e.g. key workers or students. Provision can include temporary accommodation, specialist provision for homeless households, serviced accommodation, key/seasonal worker housing, student accommodation and housing for armed forces personnel.
Suitable for	Care leavers Homeless households Individuals leaving prison or institutional settings such as hospital Those with experience of criminal justice system Households experiencing domestic abuse Migrant/seasonal workers Refugee and asylum seekers Young People Students Armed Forces Veterans
Evidence	**Temporary Accommodation for Homeless Households** Angus has had a 44% reduction in Homeless applications between 2011-12 and 2019-20. The general trend in Angus has been a steady decline year on year. On average there are 52 fewer applications year on year in this area. There are 195 units of temporary accommodation, which makes up 22% of the Tayplan total temporary accommodation supply. 78% of this temporary accommodation stock is self-contained accommodation within the community. Angus had the highest average time spent in days in temporary accommodation (229 days in 2020/21) of all Tayside partners. This is higher than the Scottish average of 199 days.

	The rate of households in temporary accommodation in Angus as of 31/03/2021 is 1.1 per 1,000 population.
	Students
	The Scottish Household Survey 2020 indicates that there are 1,428 full-time students in Angus aged 18-74 in employment and 282 unemployed. There are a higher proportion of full-time students living in the owner occupied sector.
	Migrant Worker Accommodation
	Seasonal Agricultural Workers Scheme (SAWS) registration totals in Angus are traditionally one of the highest of all local authorities in Scotland. Angus is one of the main regions for migrant workers, accommodating 1,143 workers or 5.7% UK total.
	Analysis of the 2015 June Agricultural Census data in Scotland highlights how important farms located in Angus are, accounting for 31% of work-days.
	The overarching recommendation from Scottish Government research in 2018 'Farm Workers in Scottish Agriculture: Case Studies in the International Seasonal Migrant Labour Market' is the *'development of clear commitments and statements on the part of the UK and Scottish Governments, expressing support for the horticultural industry and identifying/agreeing the ongoing need for access to sufficient numbers of seasonal migrant workers'*. Aligned to this, promoting best practice includes relating to worker induction and training, accommodation and other factors, across the sector are considered beneficial.
	Armed Forces
	Analysis of Angus Council HL1/CHR datasets indicates there were 11 housing applications in 2020/21 from ex-service personnel with 11 allocations being made to ex-service personnel the same year. There were no homeless applications from ex-service personnel within Angus in 2020/21.
	Key findings supporting the evidence on non-permanent accommodation is provided in Appendix L Specialist Provision Databook.
Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, homelessness, health and social care partners has been instrumental in building the evidence required on the need for non-permanent housing across Angus. This work is taken forward by the Housing Market Partnership in the Angus area, to support the development and implementation of the Housing Contribution Statement, Rapid Rehousing Transition Plan and Strategic Commissioning Plan. This work includes consultation, engagement and data-sharing to assess the needs of those who non-permanent housing.

Table 6.2: Non-Permanent Housing Requirements

6.4   Supported Provision Evidence

Supported Provision

National policies	**Shared Spaces was commissioned by Homeless Network Scotland** to explore permanent and non-permanent provision for individuals experiencing homelessness with multiple and complex needs. There is recognition that some individuals may benefit from shared and supportive provision.
	Building Better Care Homes for Adults Guidance by the Care Inspectorate illustrates what good building design looks like for care homes for adults post-Covid. It promotes self-contained small group living settings.
	Independent Review of Adult Social Care offers recommended improvements to the adult social care system in Scotland and recommends that the safety and quality of homes must improve with more joint working between services to ensure support is provided to enable people to stay in their homes and communities.
Local policies/ strategies	**Housing Contribution Statements:**
	Housing Contribution Statements (HCS) were introduced in 2013 and provided an initial link between the strategic planning process in housing at a local level and that of health & social care. At that time the HCS had a specific focus on older people and most Local Authorities based their initial HCS on their existing Local Housing Strategy. With the establishment of Integration Authorities and localities, Housing Contribution Statements **now become an integral part of the Strategic Commissioning Plan** and have been expanded and strengthened to consider the role of supported housing provision in enabling key client groups to live well in the community they choose.
	Angus: The Angus LHS contains a number of actions which underpin the Strategic Plan outcomes with particular focus on increasing the supply of housing to meet the needs of older and disabled people. Further aims focus on delivering enough suitable affordable housing for the ageing population to live independently in their own homes, minimising newly arising need by supporting vulnerable households, and tackling and preventing homelessness.
Property needs	In assessing the need for supported accommodation, as well as considering the future requirements associated with housing for older people, the HNDA guidance should also consider the provision of care homes and residential homes for this client group. Future requirements for accommodation based support services for key client groups including those with metal health conditions, physical disabilities, learning disabilities, developmental disorders and other complex need; should also be considered.
	Supported accommodation provision is often commissioned by health and social care partnerships to meet the requirements of households with complex care needs providing accommodation and on-site support to enable people to live well and with as much independence as possible.
	Supported accommodation covers a wide range of commissioned housing models. The common factor is that properties are typically built, designed, or adapted for the needs of the client group. Generally, there is a national shift away from large-scale congregate developments for all client groups with support needs, to housing based within a community setting which provide flexible care and support to meet individual needs.

Care homes

Care homes are designed to care for adults (aged over 18+) with high levels of dependency, who need a complete package of 24-hour care. As well as accommodation care homes offer nursing, personal and/or personal support to vulnerable adults who are unable to live independently. Residential Care is open to people with a range of care needs when a vulnerable person cannot return home safely so resides in a hospital/care setting for a prolonged period. These can include up to 24-hour supervision/monitoring.

Housing for Older People

Housing for older people takes many forms across the Tayside region but includes sheltered housing, extra care provision, retirement housing and other types of provision which offer accessible homes and neighbourhoods with some form of warden or on site supervision for households aged 60+.

Supported accommodation for key client groups

Types of supported housing provision could include:

- Core and cluster developments: smaller scale, community based housing provision where care and support services are available to increase independence.

- Specialist support housing projects: open to client groups with a range of care needs. Typically, 24 hour support is available as well as self-contained accommodation spaces and communal living spaces. Depending on the client group, personal care, medical support and wellbeing activities are also provided on site.

- Group homes: small scale shared housing projects, where individuals live in a group setting typically with no more than 4 others. This is often in singled shared property with communal cooking facilities and living space. Support and/or care is provided typically 24/7.

Care & support needs	The housing care and support needs of households across the Tayside region will include: - Housing support services - Tenancy sustainment support - HSCP and NHS commissioned services for key client groups including those listed below - Third Sector support and advocacy services - Nursing staff - Social work support staff - Care/Home care workers offering personal care - Warden, kitchen and cleaning staff
Suitable for	Households with high support and care needs, including - Frailty - Dementia - Long-term illness, disease or condition

	• Mental health conditions
	• Physical disability
	• Learning disabilities
	• Neurological disorder
	• Developmental disorder
	• Drug/alcohol dependency
	• Multiple complex needs
Evidence	**Care Homes**
	There were 41 registered places in care homes for older people per 1,000 population in 2017 in Angus, which represents a reduction of 9.7 places per 1,000 population since 2007.
	Furthermore, there were 31 care homes in Angus in 2017 which represents a 21% reduction between 2007 and 2017.
	Angus had 1,003 residents in care homes in 2017, representing a 5% reduction from 2007. However, it also has the highest occupancy rate of all Tayplan partner areas at 90%.
	Housing for Older People
	There are 794 units of housing for older people in Angus, 7% of the total social housing stock and 64% of all specialist housing in the area.
	In Angus there are 132 waiting list applications for housing for older people amounting to 3% of all applications, with 11.31 applications for every available tenancy.
	Supported accommodation for key client groups
	There are 99 supported tenancies provided by social housing providers across Angus, which accounts for just under 1% of the total housing stock in the area. There are 28 waiting list applications for supported housing, with 9.33 applications for every available tenancy.
	Over and above this, there are 119 units of supported housing located in Angus (HSCP commissioned tenancies). The majority of these are for mixed client groups (62) with learning disability accounting for 38 units and mental health 16 units. In terms of need there is a requirement for 159 HSCP commissioned tenancies within Angus with the majority of need coming from households with learning disability (133).
	Supported accommodation for homeless households
	Angus RRTP indicates that 2% of homeless households 2018 and 2019 had residential/supported accommodation requirements with this increasing to 3% in relation to future requirements. There were 316 homeless households who had at least one support need identified with the majority of those requiring support having challenges with housing management/independent living and/or mental health problems.
	Key findings supporting the evidence on supported housing is provided in [Appendix L Specialist Provision Databook]().

Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, health and social care partners has been instrumental in building the evidence required on the need for supported housing across Angus. This work is taken forward by the Housing Market Partnership in the Angus area, to support the development and implementation of the Housing Contribution Statement and Strategic Commissioning Plan. This work includes consultation, engagement and data-sharing to assess the needs of those who require supported housing.

Table 6.3: Supported Provision Requirements

6.5 Care and Support for Independent Living at Home Evidence

Care & Support for Independent Living at Home	
National policies	**The Carers (Scotland) Act 2016** places a duty on each local authority and Health & Social Care Partnership to jointly prepare a Carers Strategy which sets out plans for identifying carers, understanding the demands for support, an assessment of unmet needs and timescales involved in preparing adult carer support plans.
	Social Care (Self-directed Support) (Scotland) Act 2013 ensures social care is controlled by the supported person and personalised to their own outcomes and respects the person's right to participate in society. Individuals should be involved in developing their support plan, understand the options available to them and be aware of the budget available to them.
	Age, Home and Community: **A strategy for housing for Scotland's older people 2012-2021** was published in 2011. It sets out Scottish Government's vision that older people in Scotland are valued as an asset, their voices are heard, and they are supported to enjoy full and positive lives in their own home or in a homely setting.
	Housing to 2040 aims to 'modernise and develop the core services in social housing to deliver cross-sector support for aspects such as welfare advice, tenancy sustainment, wellbeing and care and support'. There is a Route Map indicating the importance of digital connectivity as a key dimension of supporting independent living.
	Housing Support Duty - The purpose of the housing support duty ('the duty') is to help prevent homelessness among people that the local authority believe may have difficulty in sustaining their tenancy. The duty is intended to complement the preventative approach developed in recent years through the Housing Options Hubs across Scotland rather than to shift focus and resources from prevention to dealing with the crisis of homelessness. Local authority staff are already providing housing support and advice to applicants through homelessness prevention activity.
	Care and Repair Scotland, Good Practice Guide highlights the standards expected during the management and delivery of Care and Repairs services throughout Scotland.
Local policies/strategies	**Angus Strategic Commissioning Plan** Angus Strategic Commissioning Plan has three main areas of ambition that will assist with developing and improving services in relation to care and

	support with housing partners. This includes promotion of wellbeing, supporting people to be as independent as possible and shifting the balance of care from hospital to home as well as supporting more people in communities.
Property needs Care & support needs	The delivery of preventative housing solutions which enable households to live independently in the communities they prefer, reflects the policy shift away from institutional settings and congregate environments in Scotland, towards the delivery of practical care, support and assistance personalised to each individual. Individuals may require care and support at different points in their life, or not at all.
	There are a wide range of relevant care and support services available across Tayside to enable residents to live independently in their own housing setting. These are services generally unconnected with the forms of specialist housing outlined in previous templates. These services will include:
	• Property related interventions or assistance such as: o Mobility aids and equipment o Property adaptations o Small repairs services including handypersons o Care & Repair services including support to manage repair, maintenance or improvement works o Telecare/Telehealth and community alarms
	• Care and support interventions or services such as: o Self-directed support o Home care workers o Specialist support workers o Carers o Social workers o Welfare Rights Advisors o Housing/tenancy support workers
Suitable for	Households who require some form of support or care service to enable independent living at home could include: • Frailty • Dementia • Long-term illness, disease or condition • Mental health conditions • Physical disability • Learning disabilities • Neurological disorder • Developmental disorder • Drug/alcohol dependency • Multiple complex needs

Evidence	**Care at home services**
	The Scottish House Condition Survey (2017-19) estimates that 8% of all households in Angus are receiving care services, which compares well to the Scottish average (8%). There is a higher proportion of households receiving care in social housing (14%) than owner-occupation (6%).
	In total there was 1,360 households receiving care in Angus in 2017, roughly 11.6 households for every 1,000 households in the area. The proportion of all Tayside home care clients receiving 8 hours of care per day residing in Angus is 23%. The top 3 services used to deliver independent living in Angus are Social worker (40%), Community Alarm (25%) and Home Care (13%).
	There were 10,580 unpaid carers in Angus recorded by the 2011 Census, 9.1% of the population. This is equal to the proportion across Tayside (9.15%) and Scotland (9.3%).
	Aids & adaptations
	The Scottish House Condition Survey 2017-19 indicates 14,988 dwellings require adaptations in Angus with a total of 54,000 properties already being adapted (28% of all homes in the Angus area). The highest proportion of adapted properties is within social rented sector (45%). Furthermore, the HNDA survey confirms that 29% of households in Angus have adaptation installed in their homes.
	The most popular housing adaptations currently fitted in homes in Angus are Handrails (33%), level access showers (14%) and adapted bath/shower seats (12%).
	The Scottish Housing Regulator ARC shows that Angus had 601 approved adaptation applications at the start of 2019/20 with 509 completions. The total cost of these adaptations was £683,372.
	The Scottish Government Scheme of Assistance Grants provided 28 adaptations to households in private sector housing from 2014 to 2021 at a cost of £93,673.
	11.6% of household in Angus report an unmet need for housing adaptations, over 6,300 households. This is a lower rate of unmet need for adaptation the wider Tayside area (16.4%).
	Telecare & Personal Care
	The Social Care Survey 2017 indicates that there were 2,640 households in Angus receiving telecare services, with the majority of households over the age of 85+ (70%). This is well in excess of the number of households in Angus receiving homecare services (790 households).
	Self-directed support
	The Social Care Survey 2017 also shows that there were 10,390 social care clients in Angus with 1,050 of these receiving self-directed supported (all options).
	Key findings supporting the evidence on care and support for independent living is provided in Appendix L Specialist Provision Databook.

Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, health and social care partners has been instrumental in building the evidence required on the need for support to enable independent living across Angus. This work is taken forward by the Housing Market Partnership in the Angus area, to support the development and implementation of the Housing Contribution Statement. This work includes consultation, engagement and data-sharing to assess the needs of those who require independent living support.

Table 6.4: Care & Support for Independent Living Requirements

6.6 Special Housing/Site Provision Evidence

Site Provision	
National policies/strategies	**Gypsy/Travellers and Care** published in 2021 by the Equal Opportunities Committee (EOC) sets out that Gypsy/Travellers do not enjoy the benefits of universal health care.
	Scottish Government (2020) Gypsy/Traveller accommodation needs: evidence review
	Improving Gypsy/Traveller Sites: Guidance on minimum site standards and site tenants' core rights
	Thematic Report on Gypsy/Traveller Sites commissioned by the Scottish Housing Regulator **'Improving the Lives of Scotland's Gypsy/Travellers'** (2019)
	The Planning Act (Scotland) 2019 sets out the need for planning authorities to embed stronger engagement with Gypsy/Travellers in local development planning as a statutory requirement.
	Equality and Human Right's Commission's report Developing Successful Site Provision for Scotland's Gypsy/Traveller Communities
	Scottish Government (2019) Improving the Lives of Gypsy Traveller: 2019-21
	Scottish Government (2019) Gypsy/Traveller Sites in Scotland
	Scottish Government (2020) Gypsy/Travellers-accommodation needs: evidence review
	Housing to 2040 made a commitment to make available up to £20M over five years for more and better Gypsy/Traveller accommodation from 2021-22
Local policies/strategies	**LHS Commitments to Gypsy/Travellers**
	The 2017-22 Angus Council Local Housing Strategy makes a commitment to 'work with neighbouring authorities and other partners, including private sector, to identify opportunities to improve and/or extend the provision of appropriate permanent sites for Gypsy/Travellers'. The LHS also indicates that there is no identified need for accommodation for travelling showpeople and that the position will continue to be monitored.
Land needs	The HNDA should set out current need and demand for the provision of sites and pitches for both Gypsy/Travellers and Travelling Showpeople. Gypsy/Travellers are recognised as a distinct ethnic group by the Scottish

Government. There is a large body of evidence, both in Scotland and in the UK, which shows a lack of access to culturally appropriate housing which is a major contributory factor in poor health, education and societal outcomes experienced by Gypsy/Travellers.

As defined in the Scottish Government's Local Housing Strategy Guidance, the term Gypsy/Traveller refers to a range of distinct groups including Romanies, Scottish, Irish, English and Welsh Travellers, who regard the travelling lifestyle as part of their cultural and ethnic identity. Travelling Showpeople are not an ethnic minority and do not seek this status, however they do have a distinctive cultural and historic identity and are explicitly identified as a key client group in their own right, distinct from Gypsy/Travellers.

Land needs

Land need for both communities will include either permanent or temporary (transit) sites and pitches for caravans and mobile homes, with offer communal facilities and which are made available to meet the accommodation needs of Gypsy/Travellers and/or Travelling Showpeople.

This will include sites suited for residential and yard storage/ maintenance areas, as well as ensuring appropriate access to the sites. Primary sites are likely to be public sector/local authority provision but could also include private sites and parks. The Scottish Government has published formal guidance on site and pitch standards, in terms of space, amenities and so on, and all landlords are required to ensure these are met in full. It should be noted that Gypsy/Travellers across Tayside do seek, or are required by circumstances to consider, permanent housing in mainstream homes which are delivered and accessed through allocation procedures.

Care and support needs

Gypsy/Travellers require the same access to a range of public services as the rest of the resident population, including health care and education. They may also require additional care and support to enable independent living in their community.

Suitable for	Gypsy/Travellers Travelling Showpeople
Evidence	**Angus 2021 Site Provision for Gypsy/Travellers:** In 2016, Angus had 270 Gypsy/Travellers and Travelling Showpeople with 50% living in settled housing. There are currently 4 Gypsy/Traveller households with live housing applications on Angus CHR. Five households received settled accommodation through the CHR in 2020/21. In 2021/22 there were 20 unauthorised encampments, the majority being in the North (12). This consisted of around 90 caravans, however, 4 encampments moved on prior to count. There has been a considerable increase (50%) from 2017/18 in the number of unauthorised encampments in Angus.

	There is one public site at St Christophers, Montrose with 18 pitches. The site is currently 100% occupied and has been since 2018.
	All council sites for Gypsy/Travellers and Travelling Showpeople (2016) in Angus were occupied with less than 1 average vacancy each year and 4 households on the waiting list.
	Weekly Pitch Rent in Angus is approximately £20 cheaper than the average rent on a 2 bed council property at £51.69.
	The 2016 Tayplan study included a Housing Need & Demand Calculation specifically for the Gypsy/Traveller population. It concluded that over a 5 year period (taking into account existing and newly emerging need) in Angus, there is a -7 to -15 shortfall in Gypsy/Traveller site pitches across the next 5 years.
	Travelling Showpeople
	The 2017-22 Angus LHS indicates that there is no identified need for accommodation for travelling showpeople and that the position will continue to be monitored.
	Key findings supporting the evidence on site provision is provided in Appendix L Specialist Provision Databook.
Stakeholder consultation & engagement	In 2016, Tayside partners commissioned a research study into the 'Accommodation Needs of Gypsy/Travellers and Travelling Showpeople in the Tayplan area'. This study offers the most recent estimates of accommodation/site requirements for Gypsy/Travellers across the Tayside region. Tayside housing market partners await the publication of Supplementary Scottish Government guidance on Gypsy/Traveller Needs Assessment (scheduled under the 'More and Better Accommodation' element of the Gypsy/Traveller Action Plan in 2022) to guide the approach to updating this analysis.

Table 6.5: Tayside Site Provision Requirements

6.7   Core Output 3: Key Issues – Tayside Housing Market Area

The assembly of Core Output 3 of the HNDA has provided Angus Housing Market Partners with a clear, evidence-based understanding of:

- future property requirements associated with specialist housing provision including accessible and adapted housing, wheelchair housing and non-permanent accommodation for key client groups
- future care and support requirements to enable independent living including supported housing for key client groups, plus housing support and homecare services
- future site provision to meet the needs of the Gypsy/Traveller and Travelling Showpeople communities.

Synthesising the evidence assembled from Core Output 3, allows Angus to establish a starting point in estimating the extent and nature of future provision required across each category of specialist housing as follows:

Specialist Housing Requirements: Future Provision

Accessible, adapted and wheelchair housing	• It is estimated that up to 1,400 households across Angus may require a more accessible form of housing such as accommodation without stairs • It is estimated that 600 households across Angus may require wheelchair housing • It is estimated that 6,000 households across Angus may require adaptations to their current home	2021 Tayside HNDA survey
Non-permanent housing	• There is no estimated requirement for student accommodation in Angus • There is no estimated requirement for provision to meet current or former MOD personnel in Angus	Local evidence
Supported housing	• It is estimated that roughly 1,000 households across Angus may require housing for older people • 6% of the annual homeless population in Angus (600) have complex support needs and may benefit from Housing First tenancies (36 Housing First tenancies) • 2% of the annual homeless population in Angus (600) is estimated to require housing with support (12 supported tenancies) • There is a need for 120 commissioned tenancies/spaces for key care groups with a flexible morel catering for mixed client groups accounting for most anticipated future need.	• 2021 Tayside HNDA survey • Local evidence

It should be noted that estimates arising from the Tayside HNDA household survey provide a self-assessment measure of requirements for specialist housing provision. Whilst this insight offers a helpful, cross tenure estimate of existing households who require specialist housing, further validation will be required to determine the both the extent of assessed need for specialist housing and the potential role that in-situ solutions could perform in meeting housing need.

Future Housing First and supported accommodation needs for homeless households should also be carefully assessed as temporary accommodation provision is reshaped through the delivery of the Rapid Rehousing Transition Plan. There are also gaps in insight associated with estimated requirements for future provision around care and support services for independent living.

Furthermore, whilst the most recent insight suggests that there is a surplus of provision in site provision for gypsy travellers in Angus, the need to update this analysis is acknowledged aligned to the publication of Supplementary Scottish Government guidance on Gypsy/Traveller Needs Assessment (scheduled under the 'More and Better Accommodation' element of the Gypsy/Traveller Action Plan in 2022).

Tayside partners are committed to using the evidence provided in HNDA Core Output 3 as starting point to robustly evidence future requirements for each form of specialist provision within the development and delivery of their future Local Housing Strategies.

Angus HNDA: Core Output 3: Specialist Housing Provision	
LHS & Development Plan	Key Issues identified in the HNDA
Property needs	• **Accessible and adapted housing:** It is estimated that there are 1,242 units of specialist housing provided by social landlords in Angus, representing 10.9% of all social housing stock. There are 268 accessible homes which represents 22% of all specialist provision. 1.7% of waiting list applications across Angus require accessible housing. 28% of households currently have a special form of adaptation in their home, with handrails being most common. 12% (6,323) of households surveyed have an unmet need for adaptations. • **Wheelchair housing:** 6.5% of specialist homes in Angus are fully wheelchair accessible. 1.1% of households (583) have an unmet need for wheelchair accessible housing. There are 168 applicants on the waiting list for wheelchair accommodation in Angus. Based on the last three years, the average annual turnover of wheelchair social wheelchair properties in Angus was 3. • **Non-permanent housing:** There are 195 temporary accommodation units in the Angus area to meet the needs of homeless households. Most households live in self-contained temporary accommodation within the community (78%) or in supported housing (18%), with the remainder living in Refuge/sanctuary accommodation (4%). • There were 105 households in temporary accommodation across Angus on 31st March 2021. Angus has the highest average time spent in days in temporary accommodation at 229 days in 2020/21. • The 2017 June Agricultural Survey reports that 72% of Scotland's seasonal migrant labour use is in Tayside and predominately Perth & Kinross (33%) and Angus (31%). It should be noted that this data will not reflect the impact of Brexit on the migrant agricultural workforce.
Care and support needs	• **Supported provision:** There were 1,003 total residents in care homes inclusive of long, short stay and respite patients in 2017 across Angus, with an occupancy rate in care homes of 90%. There were 31 care homes for Adults across Angus in 2017. • 64% (794) of specialist homes provide housing for older people including sheltered housing. • There is a need for 119 HSCP commissioned tenancies/spaces for key care groups across Angus, with half of half of this requirement for flexible models meeting the needs of mixed use client groups. • **Care/support services for independent living:** Across Angus the proportion of households receiving care services is marginally higher than the Scottish figure (7%) at 8%. In

	Angus, those households residing in social housing (14%) are more likely to be in receipt of care services than any other tenure (owner occupied 6% and private rented 10%). The total number of homecare clients in Angus is 1,360 with a total of 10,900 hours of care provided, which amounts to around 8 hours of care per client on average. The top 3 social care services received by clients in Angus are Social worker (40%), Community Alarm/Telecare (25%) and Home Care (13%).
	• Over 2,600 households across Angus are supported to live independently as a result of using assistive technology (Telecare). 70% of telecare clients across Angus are not currently receiving a homecare service.
Locational or land needs	• In 2016, Tayside partners commissioned a research study into the 'Accommodation Needs of Gypsy/Travellers and Travelling Showpeople in the Tayplan area'. This study offers the most recent estimates of accommodation/site requirements for Gypsy/Travellers across the Angus area. Tayside housing market partners await the publication of Supplementary Scottish Government guidance on Gypsy/Traveller Needs Assessment (scheduled under the 'More and Better Accommodation' element of the Gypsy/Traveller Action Plan in 2022) to guide the approach to updating this analysis. Key findings from the 2016-21 study for the Angus area are as follows:
	• **Site provision:** In 2016, Angus had 270 Gypsy/Travellers and Travelling Showpeople across 150 households, with 50% living in settled housing. Angus has one council site with a capacity of 18 pitches. In 2016, all Council sites for Gypsy/Travellers and Travelling Showpeople in Angus were occupied with less than 1 average vacancy each year and 4 households on the waiting list. Weekly Pitch Rent in Angus is approximately £20 cheaper than the average rent on a 2 bed council property at £51.69.
	• The 2016 Tayside HNDA found that there was projected to be a -7 to -15 shortfall in Gypsy/Traveller site pitches across Angus over the next 5 years.

Table 6.6: 2021 Angus HNDA Key Issues -Core Output 3 Specialist Housing Provision

7 Core Output 4: Housing Stock Profile and Pressures

Chapter 7 provides an overview and insight into housing stock profile and pressures across the Angus area as described in 'Core Output 4' of the Housing Need and Demand Assessment Practitioners Guide (December 2020).

Core output 4 evidence should:

'profile the local housing stock and identifying stock pressures (e.g. hard to let properties, stock in high demand and identify those in existing need whose housing need can be met using an in-situ stock solution.

This should consider housing issues faced by existing tenants which would be addressed by managing the existing stock i.e. transfers, improving house condition, reducing overcrowding'.

Assessing the housing stock profile and pressures across Angus has enabled the council to identify what existing stock is available to meet local housing needs, whilst identifying any under-supply or surplus of housing types. The evidence also indicates where there is scope for the existing housing stock to be managed more effectively to meet housing need through allocations, investment or improving accessibility.

7.1 Core Output 4: Key Issues – Angus Housing Market Area

The assembly of Core Output 2 of the HNDA has provided Angus Housing Market Partners with a clear, evidence-based understanding of:

- key stock condition issues influencing the operation of the Angus housing system

- key housing stock pressures influencing the operation of the Angus housing system

- key stock profile issues influencing the operation of the Angus housing system

Angus HNDA: Core Output 4: Housing Stock Profile & Pressures	
LHS & Development Plan	**Key Issues identified in the HNDA**
Housing (condition) quality	• **Occupation profile**: As of September 2019, Angus has the highest proportion of dwellings that are vacant of any of the Tayside partner areas at 5%. 26% of the total ineffective housing stock across Tayside is found in Angus with a total of 5,765 units. • **Tenure profile:** According to the HNDA Survey outcomes, 65% of households owned their property in the Angus area, the highest proportion of all Tayside partners. This is broadly in line with other data sources such as 2011 census (65%) and 2017-19 Scottish House Condition survey (63%). Angus has a similar percentage of private renting (survey - 12%) to the Scottish average (c12% depending on data source). The survey also indicates that 21% of households reside in social housing. 70% of those privately renting in Angus live in a dwelling built pre 1945, which is the highest proportion of any Tayside partner areas. Angus has the greatest proportion of privately rented accommodation with 3+ bedrooms at 39%

	(Scotland 31%) and the smallest proportion of social housing with 3+ bedrooms at 10% (Scotland 25%).
	• **Dwelling type and size:** The HNDA survey outcomes suggest 18% of dwellings in Angus are flats/tenements, the lowest proportion of all Tayside partners, and houses/bungalows account for 82% of dwelling types. The survey also highlights that across Angus, 2 and 3 bedroom properties account for 73% of all dwellings.
	• Angus has the lowest number of registered HMOs in the Tayside area as of 2020, with 38% having 6 to 10 occupants.
Size, type, tenure and location of future social housing supply	• **Dwelling type and size**: According to Scottish Government Statistics, in 2017, 42% dwellings in Angus had up to 3 rooms, with the majority (58%) offering 4+ rooms per dwelling. This dwelling size profile has changed only marginally since 2007 and echoes with Census outcomes in 2001
	• The 2021 survey results indicate that across Angus, 30% of homes offer 1-2 bedrooms, with 62% offering 3-4 bedrooms
	• The 2021 survey results indicate that this bedroom size profile varies significantly by housing tenure with the owner occupied sector offering a much greater proportion of larger homes. In the owner occupied sector, just 33% offer 1-2 bedrooms, with the vast majority (68%) offering 3+ bedrooms.
	• In contrast in the social housing sector, a significantly higher proportion of homes have 1-2 bedrooms (81%) with fewer 4+ bedroom dwellings (3%).
	• Whilst 25% of homes across Angus offer 4+ bedrooms, the house size profile in the social housing sector will restrict the available housing options of larger household types. The growing population of smaller and single person households across Angus also raises questions over a growing mismatch of households to homes by property size.
	• According to the 2021 HNDA survey, 82% of all dwellings are houses across Angus, with 18% flats.
	• The Scottish Household Survey 2019 indicates that there is a much higher proportion of houses in the owner occupied sector (93%) than flats (7%).
	• There is a more even split between houses (45%) and flats (54%) in the social housing sector. Given the small sample size and suppression applied to Angus in the 2019 Scottish Household Survey, the 2021 survey dataset is the preferred source for this measure.
	• There are 13 registered HMOs in the Angus, the majority (5) have 6 to 10 occupants.
	• **Property condition**: 1% of dwellings in Angus are considered to be Below the Tolerable Standard (BTS). Almost half (47%) of pre 1945 dwellings have evidence of urgent disrepair. 85% of properties within the Angus area have some form of disrepair. 17% of pre 1945 dwellings have evidence of rising or penetrating damp in Angus compared to 6% in Scotland overall.

	• Around 2 in 5 private rented dwellings have evidence of condensation in Angus, the highest proportion of all property tenures over the Tayside area and over 3 times the level for private rented dwellings in Scotland. • At 10% Angus has the highest proportion of low energy efficient dwelling of all Tayside partners and is more than double the Scottish average (4%). Around 1 in 4 properties within Angus experience some form of fuel poverty. Across Angus social rented stock, 95% of properties met SHQS and 81% of properties met EESSH as of March 2021.
Housing stock pressures	• **Stock pressures:** As per CHMA estimates 1% of Angus households are overcrowded and 1% have a concealed household. Most respondents to the HNDA Survey stated that they do not share household amenities with anyone (94%) or have overcrowding issues (76%). However around 13,800 said they had one or two fewer bedrooms than needed compared to around 12,000 who had one or two too many bedrooms. • On average 7% of social rented properties with Angus have turned over in the last three years. Across Angus there are 4,724 waiting list applicants, which equates to roughly 5 applicants to every available property. The main reason for housing applications across Angus is applicants who are experiencing poor property condition in their current dwelling. • **Future Supply:** The projected SHIP completions between 2021 and 2026 are estimated at 550 units across Angus. The 5 year effective land supply per the Angus LDP equates to 1,883 units. The total historic house completions over 2010-19 vary depending on data source with MATLHR data estimating housing outputs at 2,464 for Angus and local data estimating 2,919. • 133 demolitions are programmed over 2021 and 2022 in the Angus area. • **In-situ solutions**: Angus (23%) has almost double the number of families in dwellings with adaptations when compared to the Scottish average (12%). In Angus, most common adaptation fitted is handrails at 32.8%. Angus is the only area where respondents report receiving 'Through Floor Lifts' as an adaptation. Angus is the faster Tayside partner to complete adaptations with an average of 8 days across locally operating landlords. • Angus Council funds 100% of adaptations through their own provisions whereas RSLs in the area fund 4% of their total adaptations expenditure with the remainder being grant funded. 12% of survey respondents from Angus reported unmet need in relation to housing adaptations, the lowest proportion of Tayside partners. • Analysis of Angus's housing stock profile and pressures identifies a range of factors contributing to housing needs. Across Angus, there is potential for stock management approaches to be implemented to address housing need which

maximise the use of existing housing assets. These 'in-situ' solutions offer a variety of approaches and opportunities which could be considered by partners across Angus, including:

- **Adaptations:** The Scottish Housing Condition Survey 2019 indicates that 28% of all properties have been adapted with 45% social housing tenants having adaptations in their home. Of those surveyed in 2021, 29% have special forms of adaptation. 12% of survey respondents confirmed that they had unmet demand for housing adaptations amounting to 6,323 households. Most people reporting unmet need for adaptations in Angus are seeking handrails (33%) followed by level access shower (14%) and then bath/shower seat (12%). In 2019/20 £683k was spent by social landlords on adaptations with £405k being funded by landlords and the remainder from grants or other funding sources.

- **Technology Enabled Care:** Over 2,600 households across Angus are supported to live independently as a result of using assistive technology (Telecare). Increasing investment in technology enabled care as well as other support for independent living will enable households to live well in the community they choose (detailed in Core Output 3, Chapter 6). This approach could enable Angus to meet the needs of a growing population of older people, as well as young people with complex needs without the need for new specialist housing provision.

- **Housing allocations:** 9.2% of households currently registered on social housing waiting lists across Angus (436) are overcrowded. Housing allocations policies across each partner area are designed to make best use of existing stock by awarding points to applicants who are overcrowded, under-occupying, or sharing facilities with another household; as well as those with a range of other defined needs. Incentives to encourage movement across the housing stock including encouraging under-occupiers to downsize could make a meaningful contribution to addressing housing need.

- **Housing condition and repair:** 29% of all homes across Angus show evidence of urgent disrepair. Mechanisms to support property maintenance and improvement, including funding and support to private homeowners via the Scheme of Assistance, are likely to have a major role in maximising the effectiveness of existing stock and helping to alleviate some aspects of housing need including fuel poverty.

- **Empty Homes:** 4.7% of all dwellings across Angus are currently classified as empty (2,663 properties). 2.4% of all dwellings are long-term empty homes. Investing in long term empty properties not only increases the supply of local housing but improves condition of housing stock and

	helps to regenerate communities. Continued investment in bringing empty homes back into use could make a positive contribution to meeting housing across Angus. • **Second homes and holidays lets:** Options for future policy around the 439 second homes in Angus could also be considered by partners aligned to new powers to license regulate and control short terms lets in areas of identified housing pressure.
Sustaining Communities	• **Support for Private Owners:** The Council promotes and encourages best use of existing private sector stock via a range of empty home initiatives (including advice and assistance; loan and grant funding; matchmaker scheme) to bring these homes back into use. Properties in poor condition also remain a focus, ensuring owners are assisted to help their properties meet the tolerable standard and are in a habitable condition contributing to the supply of effective housing stock. The Angus Health & Social Care Partnership promotes and encourages independent living via a range of assistance available to help people adapt and remain in their homes. • **Strategic Investment:** The Council operates Disposal, Buy-Back and Open Market Acquisition Schemes where properties are bought and sold on the open market. The Disposal & Buyback Scheme is self-funding along with a grant through our Affordable Housing Supply Programme (AHSP). We dispose of properties that do not meet our future business needs, where for example properties are not viable to improve or where we are in minority ownership in a multi-tenure block. The Council re-invest the Disposal funds to purchase ex-council stock where we can gain a majority share or facilitate regeneration activity. The Open Market Acquisition Scheme is utilised to target properties that meet an identified strategic requirement using a scoring matrix (type, size, quality and location) and are purchased through a combination of capital borrowing and grant. • **Utilising existing stock differently:** The Council actively contributes to sustaining local communities via improving and increasing local stock, whether this be wholesale regeneration, stock restructuring or building acquisition and repurposing. Examples include repurposing surplus school buildings and grounds to create properties in existing buildings and where appropriate adding additional new build properties on a site or restructuring an existing block of flats into family houses. Such projects play an integral role in our new build programmes and are a critical element in wider town centre regeneration. • **Tenure Diversification (including demand for intermediate housing):** The Council actively seeks to improve the structure of local housing markets through the (assisted) provision of intermediate housing products, e.g. mid-market rent; shared equity; & low cost home ownership options. Such products

	help encourage a flexible and well-functioning housing system and have proven popular, suggesting the local economy and customer-base view these as viable housing options. The LHS (2017-22) outlines the targets set for intermediate tenure delivery, and whilst challenging we continue to explore all opportunities to maximise delivery. • The Council also supports alternative models such as self/custom build. In adherence to the Planning (Scotland) Act 2019 which sets out for local authorities to prepare and maintain a list of persons who have registered an interest of their intention to acquire land for self-building, the Council anticipates further needs assessment feasibility to gauge local interest and the registry mechanisms. • **Regeneration Proposal arising from the Tay Cities Deal:** The Mercury Programme (The Mercury Programme is the overarching ambition driving the projects that will be stimulated by the Angus Fund component of the Tay Cities Deal. This programme is Angus Council's visionary £1bn partnership between government, public, private and community sectors – focussed on Clean Growth, <u>Low Carbon</u> & Agri Tech) • The low carbon demonstrator housing project aims to demonstrate how technological innovation in renewables, alongside energy-efficient construction, can achieve zero-carbon targets in new and existing homes at a large scale. These technological innovations include solar photovoltaic (PV) panels, battery storage and hydrogen renewable energy sources. The project plans to transform Arbroath into a low carbon town by delivering affordable housing at zero carbon standards for both new-build and existing affordable housing.

Table 7.1: 2021 Angus HNDA Key Issues - Core Output 4 Housing Stock Profile and Pressures

8   Stakeholder Engagement & Consultation

A crucial element in producing the 2021 Tayside HNDA study focused on securing the scrutiny, feedback and support of external partners and stakeholders in building the HNDA evidence base and in validating Core Outputs and housing estimates.

To ensure external stakeholders have had meaningful opportunities to engage in the HNDA process, two major stakeholder engagement events were held on 25th May 2021 and 10th December 2021. As a result of Government Guidance on Covid-19, both events were held in a virtual environment using interactive consultation techniques to encourage stakeholder participation and engagement.

Whilst the purpose of the first conference on 25th May 2021 was to inform MATHLR[1] submission responses to the Scottish Government as part of the delivery of the new National Planning Framework in Scotland; this consultation event served a dual purpose of allowing external stakeholders to apply scrutiny to key components of the Angus HNDA calculation, namely estimates of newly arising and existing housing need. In total, over 80 delegates attended the stakeholder engagement event including local authorities, RSLs, private developers, economic development agencies, health and social care partnerships and third sector organisations.

Stakeholder feedback from the May 2021 Conference was used to inform HNDA calculation scenarios as well as HMP judgements on the most credible range of housing estimates to form the basis of final HNDA outputs. A briefing report outlining the outcomes of the May 2021 Conference is detailed in Appendix B: Angus HNDA Stakeholder Engagement Outcomes Report.

The second stakeholder engagement conference was held on the 10th December 2021 providing external stakeholders with a meaningful opportunity to scrutinise HNDA evidence and validate final HNDA housing estimates by sub-area and tenure. A total of 54 partners and stakeholders attended the event.

The second HNDA stakeholder conference proved to be a successful and engaging event, providing meaningful feedback to the Angus HMP, validating the range of housing estimates presented and providing crucial feedback on the contextual factors which should be given serious consideration when using housing estimates as the basis for future policy development. The outcomes of the event are detailed below.

8.1   Angus HNDA Stakeholder Engagement Workshops

Given ongoing Covid-19 restrictions, the event was held digitally via Microsoft Teams. A total of 54 partners and stakeholders attended the event. The programme for the consultation event was as follows:

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[1] Minimum All Tenure Housing Land Requirement
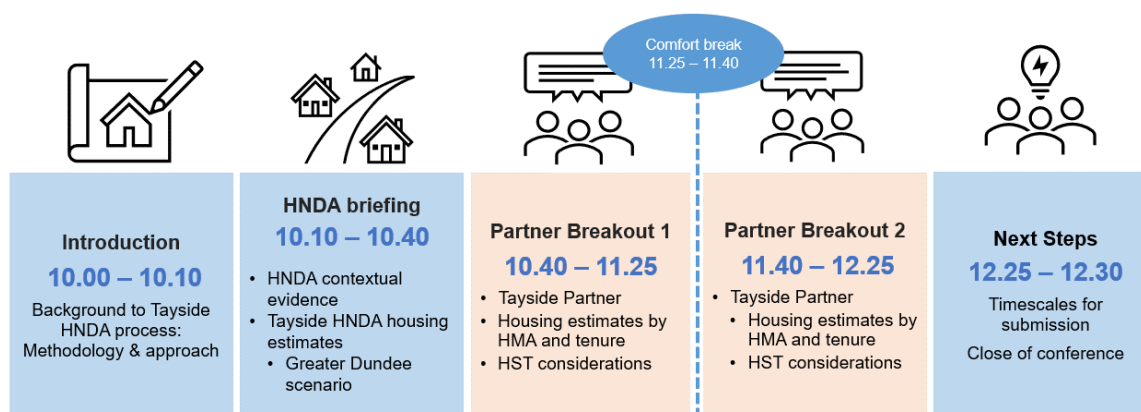
Delegates were presented with background information on the Tayside HNDA process including the methodology and approach. Following this, stakeholders received a detailed presentation on the inputs and assumptions that inform HNDA calculations, as well as an overview of the HNDA evidence base on housing market drivers including demographics, the economy, housing profile, housing pressures and housing affordability. The headline outcomes of the 2021 HNDA household survey were also presented.

A total of 21 partners and stakeholders attended the Angus HNDA workshop sessions, including representatives from the following organisations:

- Angus Council
- About Planning
- Angus Housing Association
- Barratt Homes
- Caledonia Housing Association
- DJ Laing Homes Ltd
- Guild Homes
- Homes for Scotland
- Ristol Consulting
- Sanctuary Housing
- Stewart Milne Homes

The objectives for the breakout session were to:

- share and discuss housing estimates for Angus by submarket area
- share and discuss housing estimates for Angus by tenure split
- to discuss further considerations that should be considered when using housing estimates to inform housing supply targets in Angus.

During the interactive breakout session, delegates were asked to give their views on the following three questions:
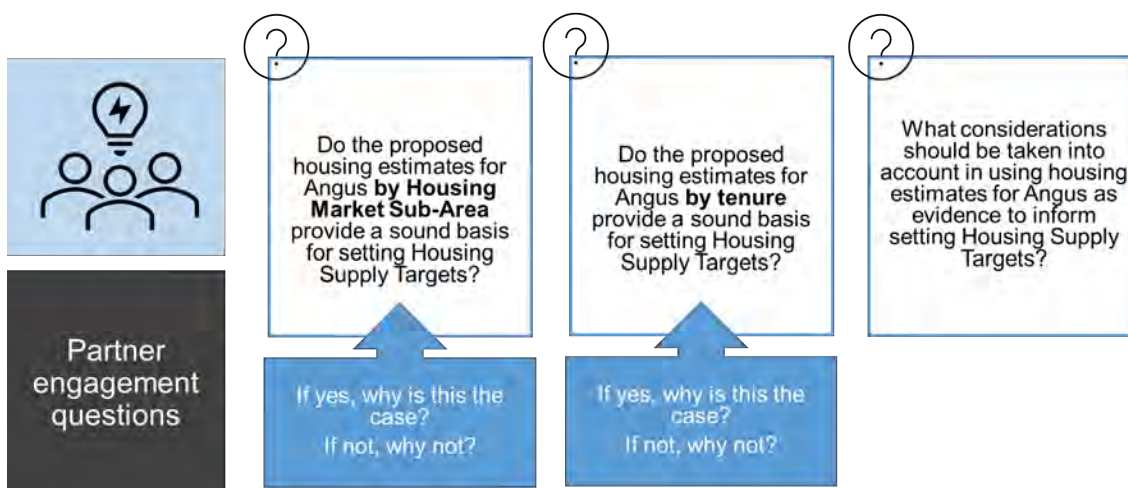
An interactive whiteboard was used at each of the sessions to record the views and opinions of stakeholders.

8.2   Housing Estimates by Sub Market Area - Consultation Feedback

The following information in relation to Angus HNDA housing estimates by Housing Market Sub-Area was shared with stakeholders:
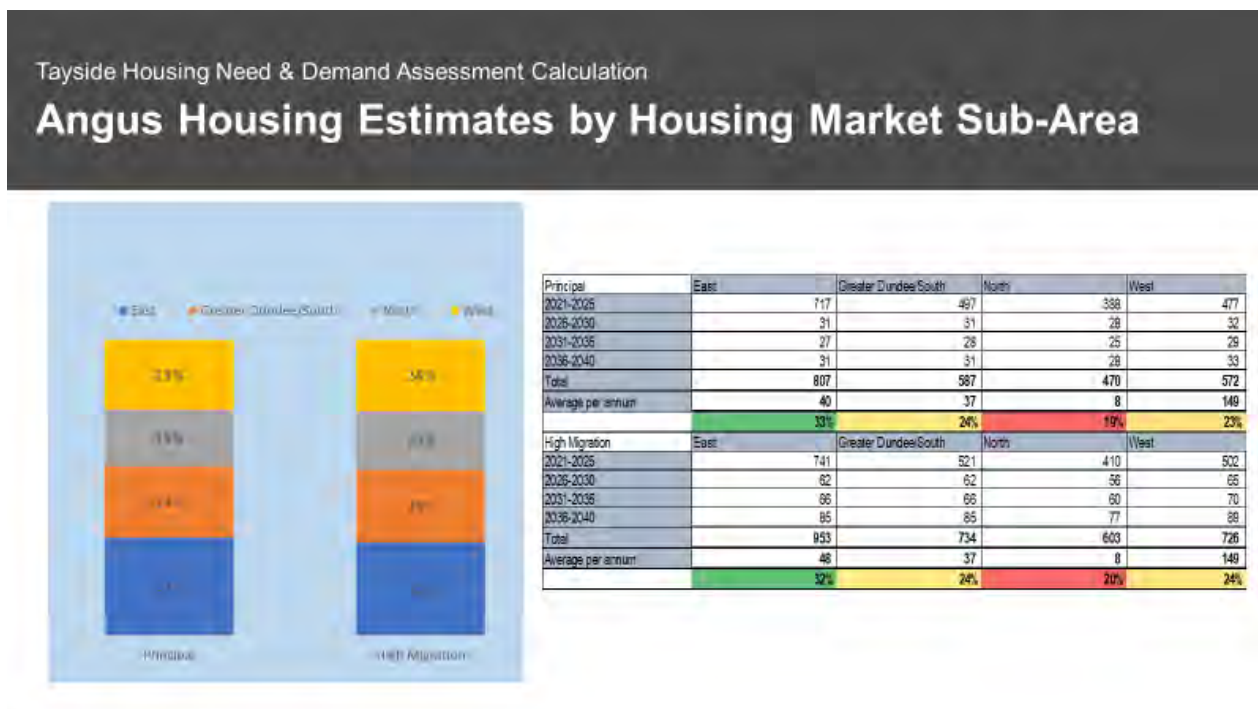
The following questions were posed to stakeholders to encourage scrutiny and stimulate debate:

Do the proposed housing estimates for Angus by Housing Market Sub-Area provide a sound basis for setting Housing Supply Targets Housing Land Requirements?

If yes, why is this the case? If not, why not?

At an overall Angus level, whilst most stakeholders agreed that the range of housing estimates provided (2,400 – 3,000 units) offer a good starting point for setting housing supply targets, many stakeholders were supportive of a more ambitious approach to increasing future housing supply in area.

Stakeholders from the first workshop were generally supportive of proposed housing estimates by Sub-Area, agreeing that they reflect the way the Angus housing system historically has operated, with East Angus typically generating most demand for housing both in terms of affordable and market housing options.

"The figures are a good starting point and reflect how the housing market operates in Angus"

"No great surprises really – the market area has always seen high demand in East Angus and this is reflected in the estimates"

However, some stakeholders raised concerns that the proposed housing estimates are too low particularly for private development.

"From our perspective, this (estimates) seem extremely low. [As a private developer] we have completed 53 houses this year already. That's just one developer, and we've experienced a strong demand, but moving forward, we still expect to experience strong demand for our properties…. it's always a benefit to have a generous supply of housing land within the area"

This view was countered by a participant from Angus Council, arguing that whilst numbers may seem on the low side, they offer a conservative estimate purely as a starting point to inform the setting of Housing Supply Targets per Sub-Area. In setting HSTs, the Council will look at recent evidence of market demand and work with delivery partners to reflect this evidence in the targets set.

Group 2 also scrutinised housing estimates for Angus by sub area, taking into consideration Group 1 feedback. Stakeholders generally agreed with Group 1 that the housing estimates presented are a useful starting point but that recent housing market performance and upturns in demand should be considered in setting future Housing Supply Targets.

Group 2 stakeholders were also keen to see housing estimates broken down into more detail across Sub-Areas in Angus and to explore how shifts in demand could influence housing and development planning policies. Furthermore, Group 2 was keen to better understand the dynamics of the South Angus HMA in the wider Greater Dundee market area, acknowledging that there is scope to absorb mobile demand from the City. Stakeholders were optimistic about the role Angus can play in meeting housing need from the Greater Dundee HMA particularly given the challenges and constraints associated with brownfield development in the City.
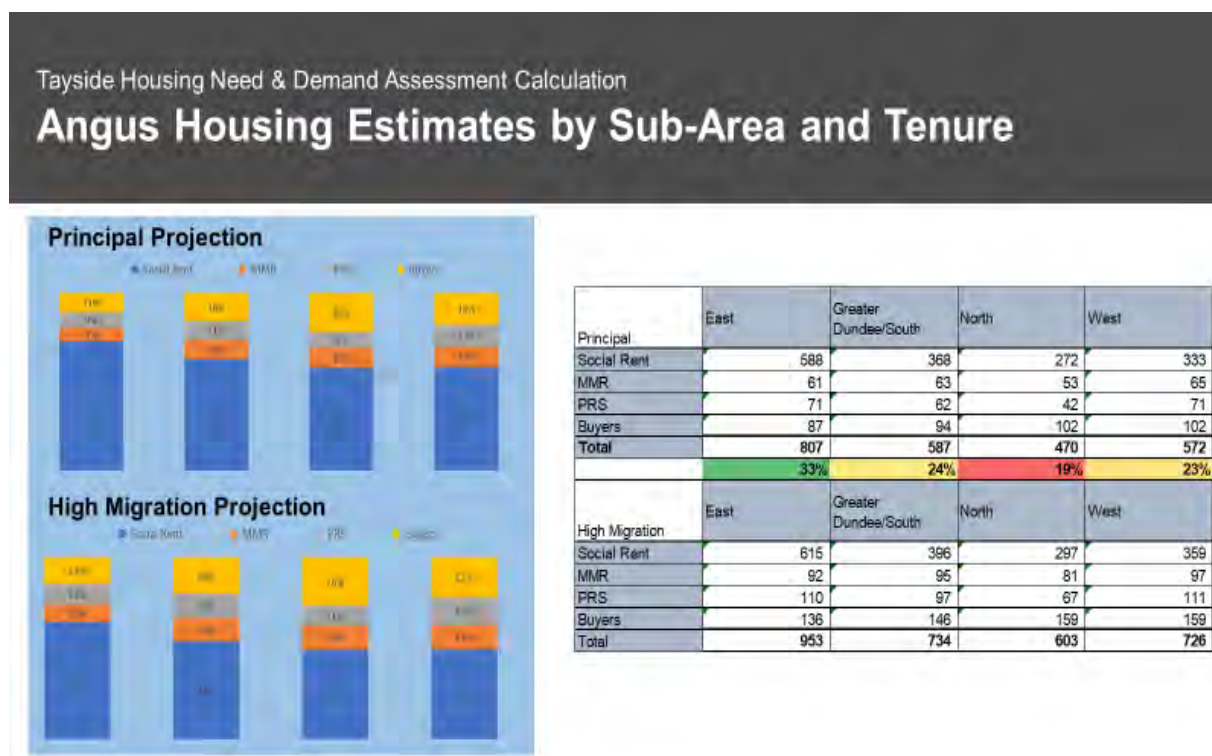
Group 2 also validated the split of housing estimates by Sub-HMAs as a reasonable staring point but were keen that the effects of both Brexit and the global Covid-19 pandemic were taken into consideration in future spatial and delivery policies. The Group discussed the post pandemic trend of households moving out of cities and into more rural parts of the UK and felt this could have an impact on demand through higher migration to the Angus area, possibly driving demand for bigger family homes in rural areas.

"The impact of Covid is that we're seeing higher migration into rural areas from City areas, and this won't be captured in household projections which use 2018 as a base date."

There was recognition that if Angus opts for the high migration scenario this will make some allowance for this emerging trend despite it being too early to fully evidence the impacts of Covid on the local housing market. Ongoing analysis of the Angus housing system will therefore become more important in tracking the impact on a longer term basis. Both sets of stakeholders were also mindful of the impact of Brexit on the local construction structure with inflation, labour shortages and supply chain issues all likely to have an impact on housing delivery at least in the short to medium term.

8.3   Housing Estimates by Tenure - Consultation Feedback

The following information in relation to Angus HNDA housing estimates split over tenures was shared with stakeholders:

Tayside Housing Need & Demand Assessment Calculation
Angus Housing Estimates by Sub-Area and Tenure

Principal Projection

Principal	East	Greater Dundee/South	North	West
Social Rent	688	368	272	333
MMR	61	63	53	65
PRS	71	62	42	71
Buyers	87	94	102	102
Total	807	587	470	572
	33%	24%	19%	23%

High Migration Projection

High Migration	East	Greater Dundee/South	North	West
Social Rent	615	396	297	359
MMR	92	95	81	97
PRS	110	97	67	111
Buyers	136	146	159	159
Total	953	734	603	726

The following questions were posed to stakeholders to encourage scrutiny and stimulate debate:

> Do the proposed housing estimates for Angus by tenure provide a sound basis for setting Housing Supply Targets Housing Land Requirements?
>
> If yes, why is this the case? If not, why not?

Group 1 scrutinised the range of housing estimates for Angus by tenure concluding again that they provide a useful starting point for setting Housing Supply Targets. The high proportion of future housing requirements to be met by social housing was validated as realistic at an overall Angus level but it was noted that shifts in demand are evident on the ground in some Sub-HMAs that are not fully reflected in the estimates. In particular and based on recent activity associated with migration into the area, demand for market housing in the North Angus area may be under represented.

> *"Market housing requirements in North Angus might be too low as Covid has changed the landscape and increased demand in the area"*

The Group also highlighted that there does need to be consideration of the impact of the pandemic on recent migration, with increased migration from Dundee into Angus in particular into West and South Angus over the past few months. This too could have an impact on the requirement for market housing, particularly given evidence of increases in house prices and unmet demand.

> *"I don't think the population projections by tenure will have taken into account some of the more recent changes and the shift of demand into more rural places"*

Stakeholders were also keen that tenure requirements are further refined to provide a better understanding of the requirement for intermediate housing tenures such as Shared Equity.

Group 2 also scrutinised the housing estimates for Angus by tenure, with the feedback from Group 1. They agreed that whilst housing estimates by tenure provide a reasonable starting point for future supply targets, future targets should also be informed by ongoing analysis of the housing market impacts of Covid-19.

Scrutiny of tenure estimates by Group 2 also suggested that more detailed analysis of a wider range of intermediate housing tenures by Housing Sub-area would also be helpful in setting future supply targets and guiding local delivery plans. For example, anecdotal evidence suggests that demand for Mid-Market Rent is currently strongest in the West and South HMAs and this could be more pronounced in the projections.

> *"As a housing association we are looking at developing more to the West and South of Angus as the demand exceeds that expressed in both the North and East HMAs for both Social Rent and MMR"*

In addition to the above, it was noted the HNDA projections do not consider housing aspirations by tenure as households may wish to move from affordable housing (social rent and MMR) on to owner occupied stock. However, it was acknowledged that considering the high migration range is encouraging as it takes a more optimistic view of future requirements rather than relying on historic completions and market intelligence as a guide to future delivery.

> *"It's quite encouraging that we are considering the high migration scenario, and I think that a lot of the projections can be quite worrying when the base figures are based on figures from the depths of a recession that we're working hard to turn around. So, I think we should be more focused on high migration and building the economy and housing led growth."*

Overall, both groups came to the same consensus that whilst they agreed the higher migration figures are a more realistic option of proposed housing estimates for Angus, this may need to be further scrutinised as the impact of Covid-19 becomes clearer over the next 5 to 10 years.

8.4 Further considerations - Consultation Feedback

For the final question stakeholders were asked:

> What considerations should be taken into account in using housing estimates for Angus as evidence to inform setting Housing Supply Targets?

Group 1 discussed the preferred scenarios from the two scenarios that had been presented, both principal and high migration. Stakeholders were of the view that principal projections would reflect net household growth from a period that includes the global recession of 2009, so agreed that the high migration scenario was preferable as a starting point, particularly given the Covid-19 impact of housing market demand for rural areas.

> *"We are seeing a lot more movement into rural areas and higher demand in the private sector. A bit more time is needed because these household projections will reflect migration figures that are based on more historical data, so I think it would be worth exploring more just to see what those migration figures into Angus look like post Covid"*

Discussion followed that the higher migration scenario provided more scope to deliver a wider range of tenures and flexibility that could consider the aspirations of people rather than simply considering current affordability. However, it was noted that pre-Covid-19, net household growth figures evidenced a relatively static population (which may be more reflective of the principal scenario) but the pandemic could have changed this moving forward.

> *"It will be a while before we fully see the impact has on Covid has had on migration into the area, so a more realistic target may be somewhere between a principal migration and high migration scenario"*

Overall, both groups agreed that a higher migration scenario was the preferred scenario to inform Housing Supply Targets.