



Caerphilly County Borough
2nd Replacement Local Development Plan 2020-2035

EB8: Local Housing Market Assessment (LHMA)

April 2024

Caerphilly County Borough Council

Local Housing Market Assessment

April 2024

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Preface

Local housing market assessments are regarded as an important aspect in the evidence base local authorities in Wales will use when preparing local development plans and local housing strategies. They also inform the preparation of programme development plans by local authorities, which are submitted to Welsh Government, and aid negotiations on Section 106 agreements between local authorities and private sector developers (planning obligations as set out in the Town & Country Planning Act 1990¹).

Welsh Government has set out the time frame for local authorities to undertake local housing market assessments - every five years for a rewrite and a refresh once during that five year period (between years two and three). Where local authorities refresh their local housing market assessments more frequently, they will not be reviewed nor signed off by Welsh Government.

This local housing market assessment has been prepared in accordance with guidance issued by Welsh Government². The guidance has been designed to provide a consistent approach and basis for all local authorities in Wales, and replaces all previous guidance issued by Welsh Government on the undertaking of local housing market assessments.

This local housing market assessment covers the period April 2024 to March 2028 and is structured into the following sections:

Section 1 – provides an overview of the national and local context framing the production of local housing market assessments and sets out the governance arrangements and consultation framework covering the production of this specific report;

Section 2 – sets out the methodology used by the Council to produce the local housing market assessment and the method used to identify the 20 housing market areas over which the analysis of data has been conducted;

Section 3 – provides an overview of the housing market within Caerphilly county borough, including any socio-economic and demographic trends, and summarises the results from the 2021 Local Housing Survey. The section concludes with detailed analysis of the specific housing needs requirements of specific groups of people identified by Welsh Government.

Section 4 – provides a series of tables showing the estimated affordable housing requirements for Caerphilly county borough by housing market area over the first 5

¹ S.106 Town & Country Planning Act (UK Government) - <https://www.legislation.gov.uk/ukpga/1990/8/section/106>

² Undertaking Local Housing Market Assessments (Welsh Government, 2022) - https://www.gov.wales/sites/default/files/publications/2022-03/local-housing-market-assessment-guidance-2022_0.pdf

years of the Local Housing Market Assessment and further tables showing estimates over the remaining 10 years;

Section 5 – provides an analysis of additional housing need estimates and compares these estimates against the estimates produced by the 2018-based Local Housing Market Assessment;

Section 6 – is the concluding section which sets out the steps taken by the Council to ensure the completion of a comprehensive and robust assessment of the local housing market and the process undertaken to secure approval of the report by the Council prior to its submission to Welsh Government for review and sign-off.

Appendices A to B set out any key issues identified with either the calculations or outputs, output summary table for the Local Housing Market Assessment tool and an analysis of change in the additional housing need estimates.

1: Introduction

1.1 National Policy Background

The national policy framework for the development of Local Housing Market Assessments in Wales emanates from the following pieces of legislation:

- **Section 8 of the Housing Act 1985** - Section 8 of the Housing Act 1985³ places a statutory duty on local authorities to periodically assess the level of housing need in their area. It is vital that authorities have a comprehensive understanding of their local housing market(s) and provide a robust evidence base for effective strategic housing and planning services. Production of a Local Housing Market Assessment falls under this duty, building upon the requirement to review housing needs through a more holistic review of the whole housing market. Local authorities are expected to rewrite Local Housing Market Assessments every five years and refresh that Local Housing Market Assessment once during that five year period (between years two and three) utilising section 87 of the Local Government Act 2003⁴.
- **Independent Review of Affordable Housing Supply** - The importance of Local Housing Market Assessments and using the best possible data on housing need and demand to inform housing policy and decisions regarding affordable housing supply, was underlined in the 2019 Independent Review of Affordable Housing Supply⁵. The Review placed significant emphasis on understanding exactly how many homes are needed, in which geographical areas and in what tenures. A robust Local Housing Market Assessment is the key means of identifying this evidence at the local level.
- **Planning Policy Wales** - Planning Policy Wales⁶ also stresses that Local Housing Market Assessments form a fundamental part of the evidence base for development plans.
- **Housing (Wales) Act 2014** - In addition, local authorities must develop a homelessness strategy every four years under sections 50, 51 and 52 of the Housing (Wales) Act 2014⁷. The Local Housing Market Assessment plays a fundamental role in informing this strategy which must include a review of the resources available to the local authority and other bodies associated with supporting people who are or may become homeless.

³ 1985 Housing Act - <https://www.legislation.gov.uk/ukpga/1985/68/section/8>

⁴ 2003 Local Government Act - <https://www.legislation.gov.uk/ukpga/2003/26/part/7>

⁵ Independent Review of Affordable Housing Supply - https://gov.wales/sites/default/files/publications/2019-04/independent-review-of-affordable-housing-supply-report_0.pdf

⁶ Planning Policy Wales https://gov.wales/sites/default/files/publications/2021-02/planning-policy-wales-edition-11_0.pdf

⁷ Housing (Wales) Act 2014 <https://www.legislation.gov.uk/anaw/2014/7/contents/enacted>

- **Equality Act 2010** - It is essential also for local authorities to consider their equality duties under the Equality Act 2010⁸ and the Welsh Public Sector Equality Duties.
- **The Well-being of Future Generations (Wales) Act 2015** – the Act⁹ seeks to improve the social, economic, environmental and cultural well-being of Wales to create a place where people want to live in, now and in the future. The Act sets out seven well-being goals and the provision of good quality, affordable housing will help deliver many of the well-being goals.

1.2 Local Policy Background

The local policy framework for the development of Local Housing Market Assessments in Wales consists of the following pieces of policies, strategies and plans:

- **Corporate Plan with well-being objectives** – The plan¹⁰ sets out the Council's aspirations and priorities over a 5 year period. The plan also includes a range of well-being objectives, with one linked to the provision of good quality housing and related services.
- **Local Housing Strategy** - Caerphilly County Borough Housing Strategy: An Agenda for Change (2021 – 2026)¹¹ sets out 5 priorities identified by the Council and its partners to address the housing challenges in the county borough. Its vision is to provide homes that are of good quality and affordable and to provide a range of services that help people to live safely and independently in their own home, meeting the needs and aspirations of the current and future generations.
- **2nd Replacement Local Development Plan** – The plan¹² is currently being prepared by the Council and will cover the period 2021-2035. The purpose of the plan is to set out the Council's proposals for future developments and land use. The Local Housing Market Assessment forms a key part of the evidence base for the development of housing policies in the plan.

1.3 Governance and Consultation

The Local Housing Market Assessment has been prepared by the Council in accordance with guidance¹³ issued by Welsh Government. The assessment was

⁸ Equality Act 2010 - <https://www.legislation.gov.uk/ukpga/2010/15/contents>

⁹ Well-Being of Future Generations Act 2015 - [Well-being of Future Generations \(Wales\) Act 2015 \(legislation.gov.uk\)](https://www.legislation.gov.uk/ukpga/2015/5/contents)

¹⁰ The Corporate Plan (CCBC) - <https://www.legislation.gov.uk/anaw/2015/2/contents/enacted>

¹¹ Local Housing Strategy (CCBC) - <https://www.caerphilly.gov.uk/my-council/strategies,-plans-and-policies/housing/local-housing-strategy>

¹² Local Development Plan (CCBC) - <https://www.caerphilly.gov.uk/business/planning-and-building-control-for-business/local-development-plan/2nd-replacement-ldp-up-to-2035>

¹³ LHMA Guidance 2022 (WG) - <https://www.gov.wales/local-housing-market-assessment-lhma-guidance-local-authorities>

carried out in-house by Council officers from the Housing and Planning departments, with input from other departments when required.

At various stages of production the Council consulted with relevant stakeholders using a variety of different methods including meetings, emails and surveys. The result of stakeholder engagement will be outlined in section 2 of this report.

This Local Housing Market Assessment is supplemented by the results of the Local Housing Survey undertaken in 2021, as shown in section 2. Although the survey was undertaken for inclusion in an earlier version of the Local Housing Market Assessment, which was halted following the issue of new guidance on undertaking Local Housing Market Assessments issued by Welsh Government in 2022, the results provide a valuable insight into the housing situation and aspirations of people living in Caerphilly county borough.

In the wider context the Aneurin Bevan University Health Board have commissioned consultants to undertake a series of strategic needs assessments on the following population groups:

- Older people
- People with Dementia
- People with Learning Disabilities
- People with Mental Health Conditions
- People with Hoarding Disorder
- People with Physical Disabilities
- Children with Complex Needs

It is expected that the assessments will be completed by the summer of 2024 and will provide supplementary information to underpin the Local Housing Market Assessment of the 6 local authorities which are covered by the health board. In addition, this work will include the mapping of capital assets, thereby providing a baseline assessment of current assets in use to deliver services to the population groups, together with decommissioned estate and a more detailed assessment of current service delivery hubs. Where applicable, the Local Housing Market Assessment will be updated with the findings from both the assessments and the mapping exercise.

The Council has prepared a tender document setting out its intention to commission consultants to undertake research, in early 2024, into the barriers which prevent people, living in Caerphilly county borough, in later life from moving into age appropriate accommodation. The outputs from the research will help to inform the Local Housing Market Assessment, which will be updated following conclusion of the research in the summer of 2024.

Progress on the production of the Local Housing Market Assessment was reported at frequent intervals to the Caerphilly Affordable Homes Partnership and was regularly discussed with housing association partners as part of the Programme Delivery Plan process.

Prior to submission of the Local Housing Market Assessment report to Welsh Government for review and sign-off the report was approved by the Council's Cabinet on 26th June 2024, following initial consideration by the Housing & Regeneration Scrutiny Committee.

2: Overview of Assessment & Methodology

This section sets out the methodology used by the Council to produce the Local Housing Market Assessment and to identify the 20 housing market areas in the county borough over which the analysis of data has been conducted.

2.1 Methodology, inputs and assumptions

The additional housing needs estimates for Caerphilly county borough have been determined in accordance with the guidance issued to local authorities in Wales by Welsh Government and the accompanying Local Housing Market Assessment Tool. The Tool, which was developed by Welsh Government, uses a formulaic approach to allocate any additional housing needs (existing unmet need and newly arising need), to the different housing tenures. All existing unmet need is allocated to affordable housing and assumed to be covered during the first five years of the Local Housing Market Assessment period. The newly arising need has been allocated between market and affordable housing using a formulaic approach.

By housing market area the Local Housing Market Assessment Tool provides default data inputs for rent, house price paid and household projections (used to generate the newly arising need) with local authorities providing the income percentile distributions, existing unmet need and the planned supply and turnover of existing stock. The latter two data inputs are considered over the first five years only of the Local Housing Market Assessment period and are fully allocated to affordable housing. This is because it becomes less accurate to predict supply beyond the first five years of the Local Housing Market Assessment period. This Local Housing Market Assessment is based on 20 housing market areas, which consist of one or more electoral division ward – see section 2.2 for further information.

A variety of data has been used by the Council to complete the Local Housing Market Assessment Tool inputs including a range of data held by the Council in relation to existing and newly arising need and in relation to the housing supply, expected re-lets and planned disposals, rental income data from the Rent Officer for Wales and CACI income data from Hometrack – see Figure 2.1 below. In addition, the Council was also required to make several key assumptions as to how housing need requirements would change over a 15 year period.

Figure 2.1 below shows the key data inputs and assumptions required to run the Local Housing Market Assessment Tool. Text in blue denotes default data provided by Welsh Government.

Figure 2.1: Excerpt from Welsh Government guidance

Chart 1: Chart of key data inputs and assumptions needed to run the LHMA Tool

Housing Market Areas (HMAs)	Household Projections	Private Rent Data	Income Data	House Price Paid	Existing Unmet Need	Key Assumptions	Existing Stock and Planned Supply
Practitioners to allocate the relevant geography codes (ward, MSOA, LSOA) to the Housing Market Areas (HMAs).	Default data source: Welsh Government latest household projections by local authority. Data required: Projected change in the number of households over the 15 year projection period of the LHMA.	Default data source: Rent Officers Wales. Data required: 30th and 50th percentile rent values by HMA.	Practitioners to provide the data at HMA level. Data required: Gross unequivalised income percentile distribution.	Default data source: Land Registry data. Data required: Practitioners will need a house price paid percentile distribution by HMA, first time buyer house values by HMA.	Practitioners to provide the data at HMA level and by number of bedrooms: - Concealed and overcrowded households - Households in temporary accommodation - Other social housing - Intermediate rent - LCHO.	Practitioners can use the default assumptions or set their own covering: - Affordability criteria for owner occupier and social rent tenures - First time buyers house values and income multipliers - Five year financial forecast for changes in income, rent and house prices - Percentage of eligible households for owner occupier that go onto buy - Method for splitting the intermediate housing by intermediate rent and LCHO.	Practitioners to provide affordable housing data for the first 5 years of the LHMA review period (this will be shared equally over the first 5 years) Practitioners to provide for social rent at HMA level and by number of bedrooms: - Committed supply - Expected re-lets - Planned removals. Practitioners to provide by HMA level for intermediate rent and LCHO: - Committed supply - Expected turnover.

Key: text in blue denotes default data provided by Welsh Government

Source: Welsh Government

The Tool uses the input data together with the key assumptions to generate the price for entry level market housing. The tool assumes those people with an income above the entry level for market housing will meet their need through market housing. The Tool also generates an income level for intermediate housing and then assumes the people above this income level but below the income level for entry level market housing will meet their needs through intermediate housing. Finally, the model assumes that those people unable to meet their needs through intermediate housing will meet their needs through the social rented sector. The Local Housing Market Assessment Tool also forecasts how the data inputs may change over the first five years of the Local Housing Market Assessment period.

The output tables from the Local Housing Market Assessment Tool will be used by the Council for:

- Local Development Plan – providing the range of Local Housing Market Assessment additional housing need estimates.
- Local Housing Market Assessment Prospectus and Social Housing Grant Programme – determining the Council's strategic housing priorities and using these to assess potential affordable housing development for inclusion in the Social Housing Grant Programme.
- Rapid Rehousing Action Plan & Housing Support Programme - ensuring the provision of accommodation to reducing the length of stay in temporary accommodation and supporting people transition in settled accommodation.
- Equality & Welsh Language - understanding the diverse needs of people with a protected characteristic and meeting their needs through the provision of appropriate homes.

In Appendix A the Council sets out the key issues identified with the population of the Tool in relation to data, input assumptions, calculation and outputs. Although this section requires the Council to provide a clear rationale and evidence for deviating from the methodology and default data, the Council followed the methodology and used all default data. Any limitations found with the data sources and assumptions are outlined in this section.

2.2 Housing Market Areas

The Local Housing Market Assessment guidance allows the Council to use local intelligence to determine appropriate geographical areas that make up the housing market areas which have been used in this report to carry out the analysis of data. 20 housing market areas were identified taking into consideration a range of factors which influence how communities form and operate including the broad price of housing, the connectivity between areas, transportation links and resident preferences (taken from Local Housing Survey). These areas are based on the 31 electoral wards within the county borough (October 2022). This approach differs from previous Local Housing Market Assessments undertaken by the Council, which used electoral wards as the primary method for analysis and aggregated ward data to provide analysis of 4 housing market areas, reflecting a similar spatial analysis as used by the 2011 Local Development Plan.

A consultation paper¹⁴ on the appropriate geography to be used to determine the housing market areas was prepared by the Council then sent to all estate and letting agents working in the county borough, all housing association partners and the Housing Building Federation Wales. The paper set out the Council's preferred geography and asked for organisations with direct knowledge of how the housing market in the county borough works to provide feedback on this approach. The Council received a response from one organisation, which supported the approach.

Following the consultation the housing market areas to be used in the 2024 Local Housing Market Assessment were confirmed as:

Aberbargoed & Bargoed, Gilfach
Argoed
Darran Valley
Moriah & Pontlloftyn, Twyn Carno
New Tredegar
Crumlin, Newbridge
Blackwood, Cefn Fforest & Pengam
Hengoed, Ystrad Mynach
Maesycwmmwr
Nelson
Penmaen
Pontllanfraith
St Cattwg

¹⁴ LHMA Spatial Analysis Rationale Paper – [\[insert web address here\]](#)

Abercarn
Crosskeys, Risca East, Risca West
Ynysddu
Aber Valley
Bedwas & Trethomas, Machen & Rudry
Llanbradach
Morgan Jones, Penyrheol, St Martins, Van

3: Overview of Housing Market & Socio-economic & Demographic Trends

3.1 Housing Market Analysis by Tenure

This section provides an overview of the local housing market that exists within the county borough using 2021 Census data and other data sources. All tables relate to the county borough unless specified otherwise.

Please note that data shown from the Office of National Statistics may not tally in every instance due to rounding of data and/or the use of statistical disclosure control techniques.

Geographical size

Caerphilly county borough is located in south-east Wales to the north of Cardiff. It was formed in April 1996 by the merger of the Rhymney Valley district of Mid Glamorgan with the Islwyn borough of Gwent and shares boundaries with several local authorities including Blaenau Gwent, Cardiff, Merthyr Tydfil, Newport, Powys, Rhondda Cynon Taf and Torfaen. The main and largest town is Caerphilly. Other towns in the county borough include Bargoed, Bedwas, Blackwood, Newbridge, New Tredegar Risca, Rhymney and Ystrad Mynach.

By area, the county borough measures some 278 km² (107 mi²), approximately 80% of which is defined as countryside.

Total population

Data from the 2021 Census¹⁵ shows:

- a total population in the county borough of 175,900 (90,000 – female, 86,000 – male);
- Caerphilly ranked 5th for total population out of the 22 local authority areas in Wales;
- the population size has decreased by 1.6%, from around 178,800 in 2011; and
- Caerphilly is the 4th most densely populated area in Wales with 634 residents per square kilometre, compared to 150 in Wales.

Table 3.1 below provides a breakdown of economic activity by status. It shows that 55.41% of the population, excluding full-time students, are economically active. 42.97% of the population are economically inactive, including 23.62% regarded as retired.

¹⁵ Office of National Statistics 2021 Census - <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/populationandhouseholdestimatesenglandandwales/census2021>

Table 3.1: Economic Activity Status - All usual residents aged 16 years and over

	Count	Percent
Economically active (excluding full-time students)	79,503	55.41%
In employment	75,799	52.83%
Unemployed	3,704	2.58%
Economically active and a full-time student	2,326	1.62%
In employment	1,640	1.14%
Unemployed	686	0.48%
Economically inactive	61,655	42.97%
Retired	33,893	23.62%
Student	5,848	4.08%
Looking after home or family	6,900	4.81%
Long-term sick or disabled	10,856	7.57%
Other	4,158	2.90%
Total	143,484	100%

Source: Office for National Statistics

Population by protected characteristic

Table 3.2 below provides a breakdown of the total population by sex and age group. It shows that there are 2.29% more females than males. By sex and age the highest count is female, aged 50 to 54 years.

Table 3.2: Sex by age

	Female	Percent	Male	Percent
Aged 2 years and under	2,610	1.48%	2,655	1.51%
Aged 3 to 4 years	1,944	1.10%	2,009	1.14%
Aged 5 to 7 years	3,053	1.74%	3,135	1.78%
Aged 8 to 9 years	2,079	1.18%	2,145	1.22%
Aged 10 to 14 years	5,292	3.01%	5,521	3.14%
Aged 15 years	968	0.55%	1,059	0.60%
Aged 16 to 17 years	1,960	1.11%	2,168	1.23%
Aged 18 to 19 years	1,590	0.90%	1,849	1.05%
Aged 20 to 24 years	4,380	2.49%	4,677	2.66%
Aged 25 to 29 years	5,592	3.18%	5,087	2.89%
Aged 30 to 34 years	6,005	3.41%	5,576	3.17%
Aged 35 to 39 years	5,894	3.35%	5,346	3.04%
Aged 40 to 44 years	5,472	3.11%	5,103	2.90%
Aged 45 to 49 years	5,638	3.20%	5,380	3.06%
Aged 50 to 54 years	6,456	3.67%	6,193	3.52%
Aged 55 to 59 years	6,411	3.64%	6,305	3.58%
Aged 60 to 64 years	5,573	3.17%	5,416	3.08%
Aged 65 years	1,063	0.60%	906	0.51%
Aged 66 to 69 years	4,074	2.32%	3,809	2.16%
Aged 70 to 74 years	5,231	2.97%	4,798	2.73%
Aged 75 to 79 years	3,749	2.13%	3,309	1.88%
Aged 80 to 84 years	2,529	1.44%	2,122	1.21%
Aged 85 years and over	2,424	1.38%	1,396	0.79%
Total	89,987	51.14%	85,964	48.86%

Source: Office for National Statistics

Table 3.3 below provides a breakdown of the usual resident population by five-year age group, Wales & Caerphilly. It shows that the highest count in Wales is people aged 55 to 59 years. In Caerphilly, the highest count is people aged 50 to 54 years and people aged 54-59 years. In both Wales and Caerphilly the count of people decreases each age group from the ages of 55 to 59 years.

Table 3.3: Usual resident population by five-year age group, Wales & Caerphilly

	Wales	Percent	Caerphilly	Percent
Aged 4 years & under	155,100	4.99%	9,200	5.23%
Aged 5 to 9 years	175,900	5.66%	10,400	5.91%
Aged 10 to 14 years	182,800	5.88%	10,800	6.14%
Aged 15 to 19 years	175,700	5.65%	9,600	5.46%
Aged 20 to 24 years	187,700	6.04%	9,100	5.17%
Aged 25 to 29 years	186,500	6.00%	10,700	6.08%
Aged 30 to 34 years	196,200	6.31%	11,600	6.59%
Aged 35 to 39 years	186,200	5.99%	11,200	6.37%
Aged 40 to 44 years	175,400	5.64%	10,600	6.03%
Aged 45 to 49 years	186,100	5.99%	11,000	6.25%
Aged 50 to 54 years	215,700	6.94%	12,700	7.22%
Aged 55 to 59 years	222,700	7.17%	12,700	7.22%
Aged 60 to 64 years	199,600	6.42%	11,000	6.25%
Aged 65 to 69 years	177,600	5.72%	9,900	5.63%
Aged 70 to 74 years	181,300	5.83%	10,000	5.69%
Aged 75 to 79 years	131,500	4.23%	7,100	4.04%
Aged 80 to 84 years	89,100	2.87%	4,700	2.67%
Aged 85 to 89 years	52,800	1.70%	2,600	1.48%
Aged 90 years & over	29,700	0.96%	1,200	0.68%
All persons	3,107,500	100%	175,900	100%

Source: Office for National Statistics

The Census data shows that between 2011 and 2021, in the county borough, there has been an increase of 20.1% in people aged 65 years and over, a decrease of 5.4% in people aged 15 to 64 years, and a decrease of 7.1% in children aged under 15 years. Whereas in Wales, there has been an increase of 17.7% in people aged 65 years and over, a decrease of 2.5% in people aged 15 to 64 years, and a decrease of 1.0% in children aged under 15 years.

Population by economic activity

Table 3.4 below provides a breakdown of people aged 16 years and over in employment by the hours worked. It shows that 73.33% of people work full-time, with 7.15% of people working 15 hours or less.

Table 3.4: Hours Worked

	Count	Percent
Part-time	20,652	26.67%
15 hours or less worked	5,540	7.15%
16 to 30 hours worked	15,112	19.51%
Full-time	56,786	73.33%
31 to 48 hours worked	50,176	64.80%
49 or more hours worked	6,610	8.54%
Total	77,438	100%

Source: Office for National Statistics

Table 3.5 below provides a breakdown of people aged 16 years and over in employment by industry. It shows a broad range of industries are represented with the that highest cohort being human health & social work activities (15.12%).

Table 3.5: Industry

	Count	Percent
A: Agriculture, Forestry & fishing	252	0.33%
B: Mining & quarrying	114	0.15%
C: Manufacturing	10,059	12.99%
D: Electricity, gas, steam & air conditioning supply	623	0.80%
E: Water supply; Sewerage, Waste management & Remediation activities	1,242	1.60%
F: Construction	7,296	9.42%
G: Wholesale & retail trade; repair of motor vehicles & motorcycles	10,959	14.15%
H: Transport & storage	2,986	3.86%
I: Accommodation & food service activities	2,931	3.78%
J: Information & communication	1,842	2.38%
K: Financial & insurance activities	2,648	3.42%
L: Real estate activities	797	1.03%
M: Professional, scientific & technical activities	2,855	3.69%
N: Administrative & support service activities	3,434	4.43%
O: Public administration & defence; compulsory social security	8,188	10.57%
P: Education	6,810	8.79%
Q: Human health & social work activities	11,706	15.12%
R, S, T, U Other	2,699	3.49%
Total	77,441	100%

Source: Office for National Statistics

Table 3.6 below provides a breakdown of people aged 16 years and over in employment by occupation. It shows an even spread amongst the occupation categories, with the highest cohort being professional occupations (15.48%).

Table 3.6: Occupation

	Count	Percent
1. Managers, directors and senior officials	7,248	9.36%
2. Professional occupations	11,986	15.48%
3. Associate professional and technical occupations	9,388	12.12%
4. Administrative and secretarial occupations	7,980	10.30%
5. Skilled trades occupations	9,026	11.66%
6. Caring, leisure and other service occupations	8,644	11.16%
7. Sales and customer service occupations	6,628	8.56%
8. Process, plant and machine operatives	7,859	10.15%
9. Elementary occupations	8,680	11.21%
Total	77,439	100%

Source: Office for National Statistics

Population by housing situation

Table 3.7 Below provides a breakdown of the total number of households in the county borough by year. It shows that the percentage of households when compared to the total number of households in Wales has decreased year on year.

Table 3.7: Households by area and year

	Wales	Caerphilly	Percent
2011	1,303,826	74,469	5.71%
2012	1,311,561	74,771	5.70%
2013	1,318,571	75,047	5.69%
2014	1,326,441	75,539	5.69%
2015	1,332,350	75,767	5.69%
2016	1,341,594	76,087	5.67%
2017	1,349,911	76,400	5.66%
2018	1,358,755	76,658	5.64%
2019	1,368,708	76,894	5.62%
2020	1,378,226	77,242	5.60%

Source: Welsh Government

Table 3.8a shows housing situation of people aged 16 to 64 by disability status (Wales) year ending June 2014 to year ending June 2021. Data is not available at the Caerphilly level. When considering a count of tenure, the table shows that there is a high level of people with a disability living in the social rented sector. There has been a moderate decrease in the percentage of people living in the owner-occupied sector, a slight decrease in the social rented sector and a small increase in the private rented sector.

Table 3.8b shows the same parameters as table 3.13a but for people without a disability. Data is not available at the Caerphilly level.

Table 3.8a: Housing situation of people aged 16 to 64 by disability status (Wales) - year ending June 2014 to year ending June 2021

	Owner Occupier	Social rented housing	Private rented housing	Living with parents	Other
2013/14	48.30%	23.80%	14.00%	11.70%	2.10%
2014/15	47.50%	25.20%	15.70%	9.80%	1.80%
2015/16	45.30%	24.50%	14.30%	13.60%	2.30%
2016/17	45.30%	23.60%	14.60%	14.40%	2.10%
2017/18	43.30%	24.50%	14.80%	14.70%	2.70%
2018/19	43.80%	22.60%	16.80%	14.10%	2.70%
2019/20	43.70%	22.90%	15.20%	15.60%	2.60%
2020/21	41.30%	23.20%	15.40%	17.40%	2.70%

Source: Office for National Statistics

Table 3.8b: Housing situation of people aged 16 to 64 without a disability (Wales) - year ending June 2014 to year ending June 2021

	Owner Occupier	Social rented housing	Private rented housing	Living with parents	Other
2013/14	56.10%	8.50%	14.30%	19.10%	2.00%
2014/15	57.70%	8.30%	16.90%	15.20%	1.90%
2015/16	55.40%	8.00%	15.10%	19.50%	2.10%
2016/17	56.10%	7.50%	15.50%	18.80%	2.10%
2017/18	56.20%	7.60%	15.00%	18.70%	2.40%
2018/19	56.30%	7.30%	14.50%	19.60%	2.20%
2019/20	57.70%	7.10%	12.80%	19.90%	2.50%
2020/21	56.40%	7.10%	12.60%	21.10%	2.80%

Source: Office for National Statistics

Table 3.9 below provides a breakdown of households by composition. It shows there to be 76,258 households, of which 65.94% are single family households. One-person households account for 30.12% of all households.

Table 3.9: Household Composition

	Count	Percent
One-person household	22,966	30.12%
Single family household	50,282	65.94%
Other household types	3,010	3.95%
Total	76,258	100%

Source: Office for National Statistics

Table 3.10 below provides a breakdown by accommodation type. It shows that the most common property type to be 'Semi-detached' (39.71%), with 'Terraced' the second most common property type (34.70%).

Table 3.10: Accommodation Type

	Value	Percent
Detached	13,093	17.17%
Semi-detached	30,283	39.71%
Terraced	26,464	34.70%
In a purpose-built block of flats or tenement	5,090	6.67%
Part of a converted or shared house, including bedsits	525	0.69%
Part of another converted building, for example, former school, church or warehouse	221	0.29%
In a commercial building, for example, in an office building, hotel or over a shop	540	0.71%
A caravan or other mobile or temporary structure	41	0.05%
Total: All households	76,257	100%

Source: Office for National Statistics

Table 3.11 below provides a breakdown of all dwellings in Caerphilly county borough by the number of bedrooms. It shows that most dwellings contain 3 bedrooms (58.08%). 1 bed dwellings accounts for 5.73% of all dwellings.

Table 3.11: Number of bedrooms

	Count	Percent
1 bedroom	4,366	5.73%
2 bedrooms	16,475	21.60%
3 bedrooms	44,290	58.08%
4 or more bedrooms	11,126	14.59%
Total	76,257	100%

Source: Office for National Statistics

Table 3.12 provides a breakdown of housing by occupancy rating for bedroom. It shows that just 20.48% of households live in accommodation with the correct number of bedrooms. 40.94% of households living in accommodation with 2 or more bedrooms that required, while 0.24% live in accommodation lacking 2 bedrooms.

Table 3.12: Households by occupancy rating for bedroom

	Count	Percent
Occupancy rating of bedrooms: +2 or more	31,219	40.94%
Occupancy rating of bedrooms: +1	27,810	36.47%
Occupancy rating of bedrooms: 0	15,614	20.48%
Occupancy rating of bedrooms: -1	1,434	1.88%
Occupancy rating of bedrooms: -2 or less	180	0.24%
Total	76,257	100%

Source: Office for National Statistics

Table 3.13 provides a breakdown of households by tenure. It shows that 67.54% of households own their property, outright or with a mortgage or loan. The social rented sector accounts for 18.78% of all households which is a similar percentage to the 2011 Census.

Table 3.13: Households by tenure

	Count	Percent
Owned: Owns outright	27,449	36.00%
Owned: Owns with a mortgage or loan	24,053	31.54%
Shared ownership: Shared ownership	228	0.30%
Social rented: Rents from council or Local Authority	10,065	13.20%
Social rented: Other social rented	4,258	5.58%
Private rented: Private landlord or letting agency	8,598	11.28%
Private rented: Other private rented	1,556	2.04%
Lives rent free	48	0.06%
Total	76,255	100%

Source: Office for National Statistics

Table 3.14 below provides a breakdown of usual residents in Caerphilly with a second address by the purpose of that second address. It shows that the most common purpose is 'Another parent or guardian's address' (47.88%). The true number of people recording a second address as "armed forces base address" is likely to be higher than the estimate because of instructions given to armed forces personnel.

Table 3.14: Usual residents with a second address by the purpose of that second address

	Count	Percent
Armed forces base address	138	2.26%
Another address when working away from home	358	5.86%
Holiday home	1,243	20.36%
Student's term-time address	102	1.67%
Student's home address	83	1.36%
Another parent or guardian's address	2,923	47.88%
Partner's address	533	8.73%
Other	725	11.88%
Second address type not specified	-	0.00%
Total	6,105	100%

Source: Office for National Statistics

Table 3.15 below provides a breakdown of Welsh Government household projections by household size for Caerphilly county borough. It shows that the total number of households are projected to grow by 4,187 (5.46%). There is a predicted increase in 6 of the 12 household sizes and a decrease in the other 6. The highest increase is predicted in '1 person households' (3,034) and the highest decrease in '4 person (2+ adults, 1+ children)' (776). Over the projected period, the average household size is predicted to decrease by 0.08.

Table 3.15: Household projections 2018 to 2043

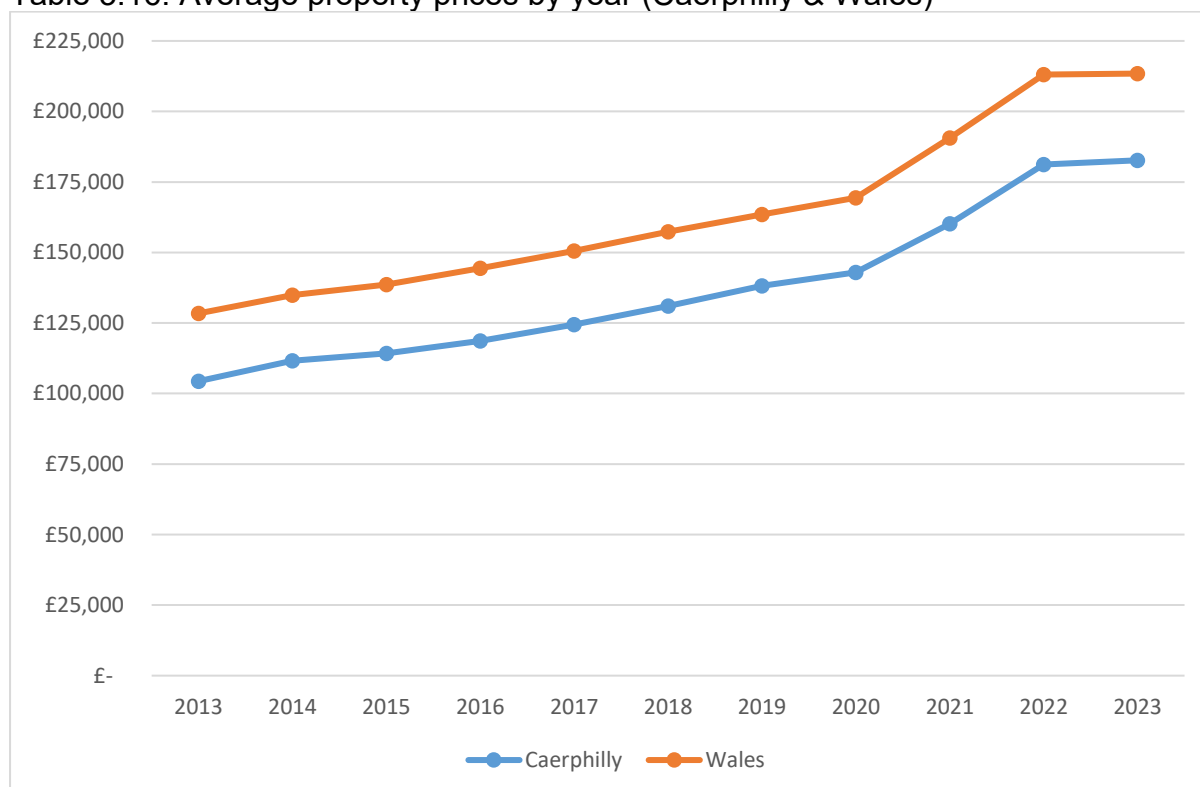
	2018	2043	Change	Percent
1 person	21,475	24,509	3,034	14.13%
2 person (No children)	23,966	24,981	1,015	4.23%
2 person (1 adult, 1 child)	3,762	5,070	1,308	34.78%
3 person (No children)	5,869	5,675	-194	-3.31%
3 person (2 adults, 1 child)	5,562	5,244	-318	-5.72%
3 person (1 adult, 2 children)	1,595	1,466	-129	-8.11%
4 person (No children)	1,986	2,490	504	25.38%
4 person (2+ adults, 1+ children)	7,493	6,717	-776	-10.35%
4 person (1 adult, 3 children)	565	501	-64	-11.36%
5+ person (No children)	344	493	149	43.32%
5+ person (2+ adults, 1+ children)	3,756	3,276	-480	-12.79%
5+ person (1 adult, 4+ children)	285	423	139	48.75%
Total	76,658	80,845	4,187	5.46%
Average household size	2.35	2.27		

Source: Stats Wales

Overview of the owner-occupied sector

Table 3.16 below provides a comparison of average property prices (all property types) between Caerphilly county borough and Wales. It shows that, over a 10-year period, the average property prices in Caerphilly have been between £23,000 to £32,000 lower than the national average.

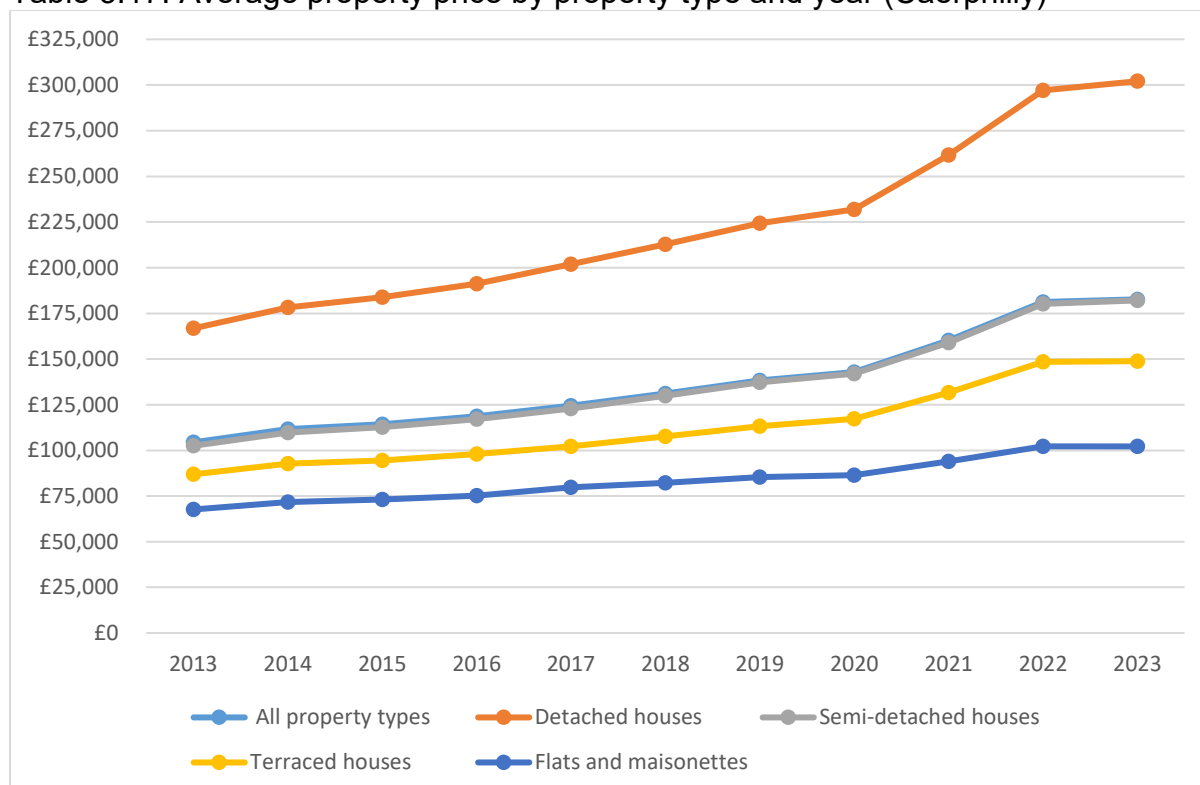
Table 3.16: Average property prices by year (Caerphilly & Wales)



Source: Land Registry UK House price data

Table 3.17 below provides a breakdown of average property prices, over the last 10 years taken in August each year, by property type. It shows that during this period average property prices have increased by 175%. Detached properties have recorded the highest rise (181%) and flats and maisonettes the lowest (151%). Based on a 25-year repayment mortgage with a fixed rate of 4.5%¹⁶ the monthly repayment for an average priced detached house would be £1,678, whereas for an average priced flat or maisonette it would be £568.

Table 3.17: Average property price by property type and year (Caerphilly)



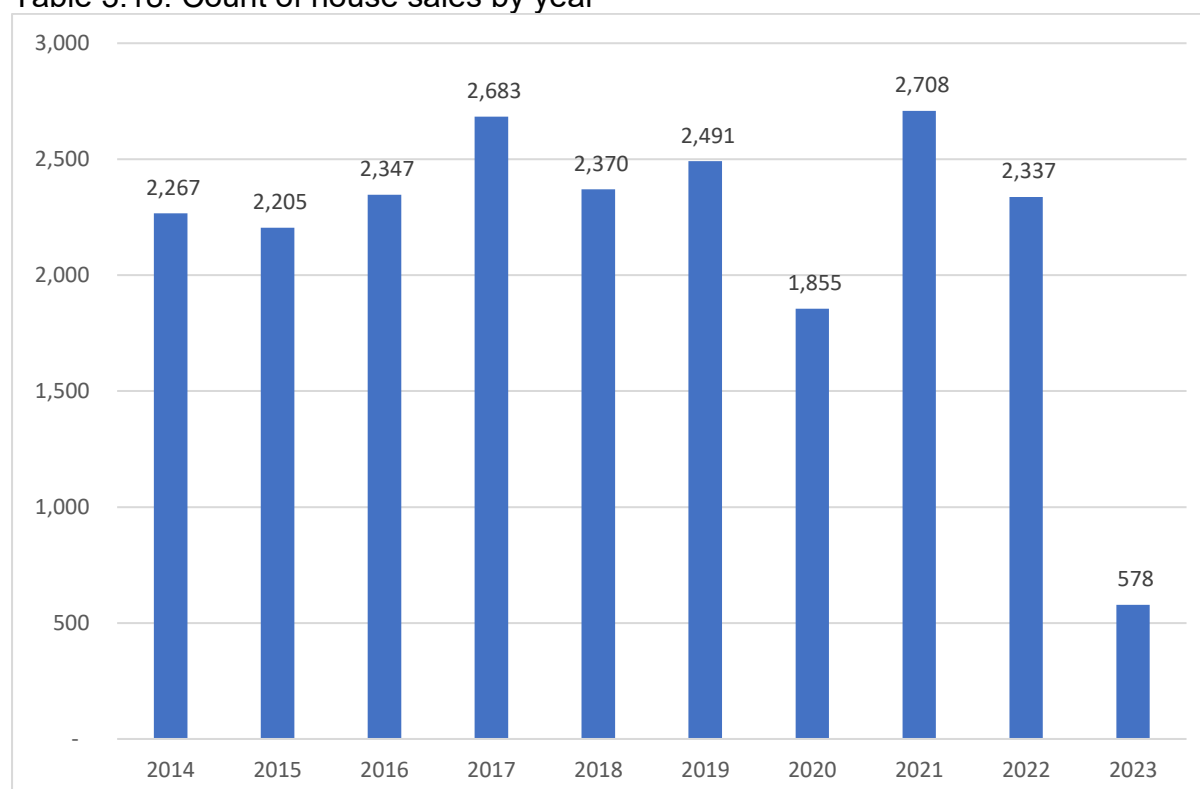
Source: Land Registry UK House price data

Sales Volume

Table 3.18 below shows the number of house sales by calendar year for Caerphilly county borough for all property types. It shows that the number of sales has remained around the 2,500 mark over the last 10 years except for 2020, where the number of sales declined during the onset of the Covid-19 pandemic. 2023 is a part year and, therefore, not representative.

¹⁶ Basic mortgage calculator (Money Saving Expert) - <https://www.moneysavingexpert.com/mortgages/mortgage-rate-calculator/>

Table 3.18: Count of house sales by year

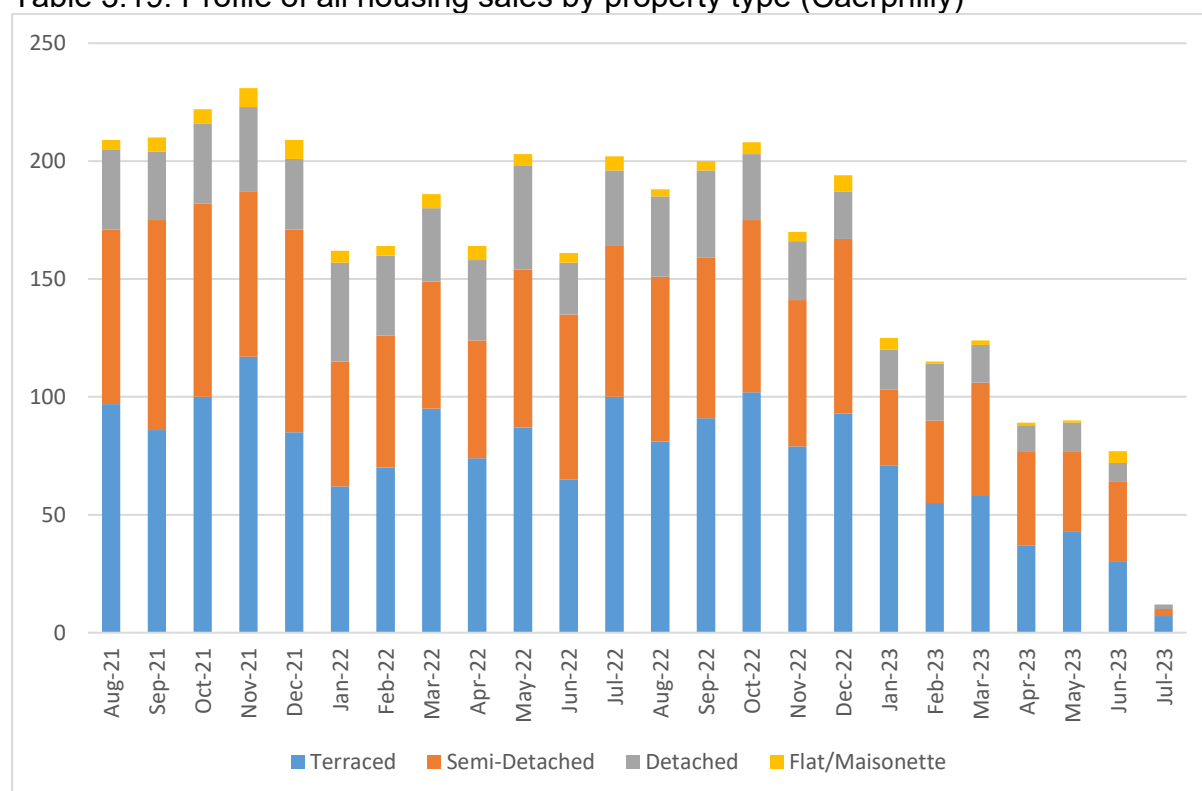


Source: Land Registry UK House price data

Table 3.19 provides a breakdown of house sales by property over the last 3 years. It shows that from August 2021 to December 2022, property sales average 193. Since December 2022 property sales have fallen steeply in reaction to increases in the Bank of England's Bank Rate¹⁷. 3,915 property sales have taken place of which 46% were terraced housing, 35% semi-detached housing, 16% detached housing and 3% flats and maisonettes.

¹⁷ Bank of England's Bank Rate - <https://www.bankofengland.co.uk/boeapps/database/Bank-Rate.asp>

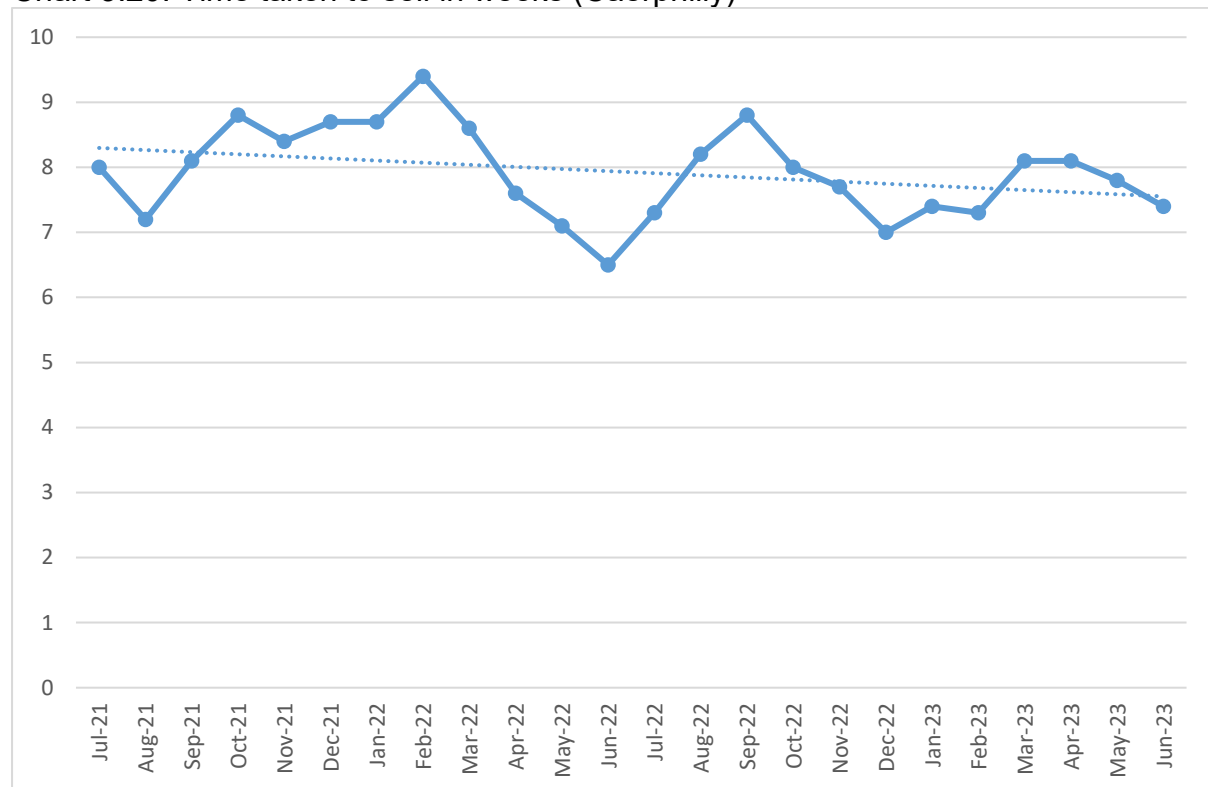
Table 3.19: Profile of all housing sales by property type (Caerphilly)



Source: Hometrack

Chart 3.20 below provides a breakdown of the time taken to sell a property in the county borough over the last two years. The time taken to sell a property is a useful indicator of how well the market may be performing. The time is taken from when the property is first advertised on Zoopla compared to when the sale is recorded on the Land Registry. The chart shows that over this period the average time to sell a property was 8 weeks, with the trend showing the time taken decreasing. In the 2018 based local housing market assessment the average was 11 weeks.

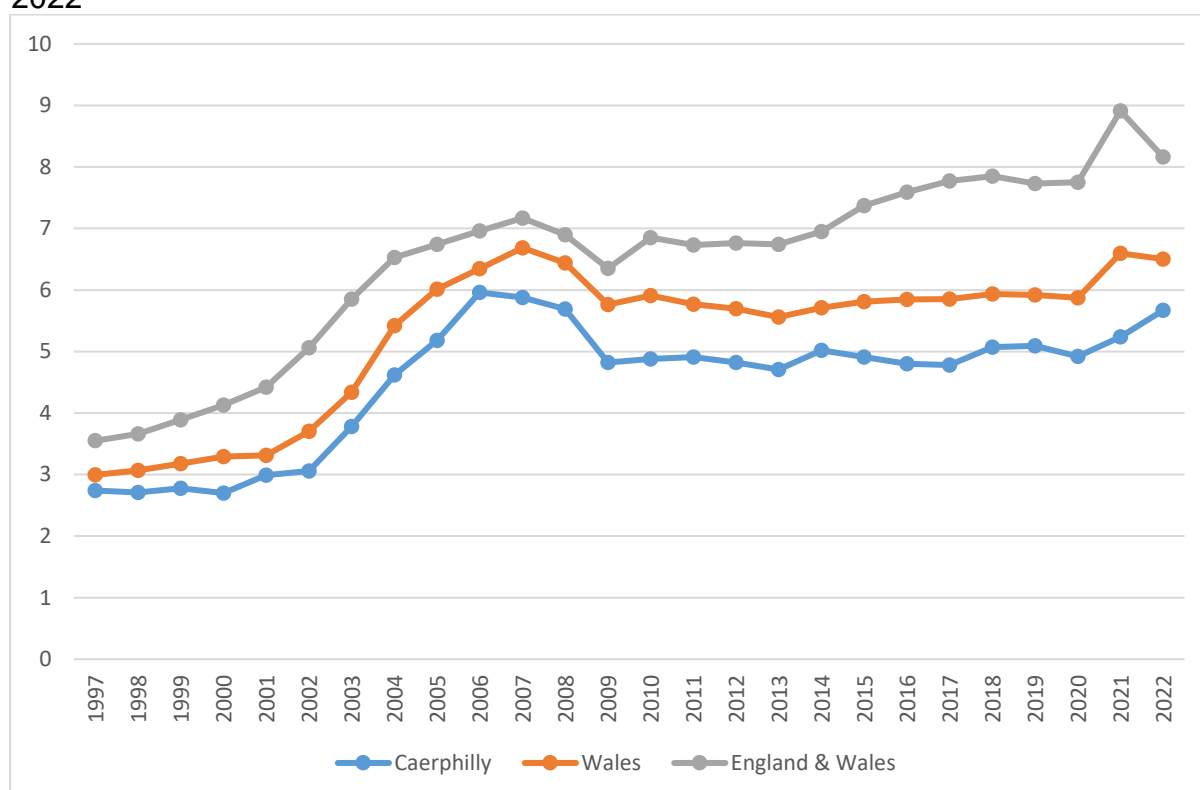
Chart 3.20: Time taken to sell in weeks (Caerphilly)



Source: Hometrack

Chart 3.21 provides a breakdown of housing affordability using the ratio of median house price to median gross annual (where available) workplace-based earnings for the county borough, Wales and England and Wales for the period 1997 to 2022. It shows that during this period the ratio in Caerphilly has increased by 207% from 2.74 to 5.67, meaning housing is becoming less affordable. In Wales, the ratio has increased 217% and in England & Wales the ratio has increased 230%.

Chart 3.21: Ratio of median house price to median gross annual (where available) workplace-based earnings by local authority district, England and Wales, 1997 to 2022



Source: Office of National Statistics

Table 3.22 below provides an analysis by the Halifax¹⁸ of first-time buyer activity for Wales. It shows that the number of purchases has increased 77% since 2012 but have fallen 12% in the last year as the market corrects itself following a spike in 2021 following the Covid-19 pandemic. The data is not available at a level lower than is currently presented.

Table 3.22: Number of first-time buyers by region (Wales)

Region	2012	2017	2021	2022	10-year change	1-year change
Wales	8,560	15,790	17,270	15,114	77%	-12%

Source: Halifax

¹⁸ Number of first-time buyers by nations and regions - <https://www.lloydsbankinggroup.com/media/press-releases/2023/halifax-2023/more-than-six-in-10-first-time-buyers-go-joint-to-get-on-housing-ladder.html>

Overview of the private rented sector

Table 3.23 below provides a breakdown of the number of privately rented homes in Caerphilly county borough by year and as a percentage of the total number of homes. It shows that since 2012 the number of privately rented homes has increased by 12,000 (110%). Since 2020, there has been a year-on-year reduction in the number of homes which may be a response to several factors including greater regulation on the sector from Welsh Government, the Covid-19 pandemic and the economic situation.

Table 3.23: Dwelling stock estimates by year and tenure (Caerphilly)

	All tenures (Number)	Privately rented (Number)	Percent
2012	77,500	8,300	10.71%
2013	78,000	7,600	9.74%
2014	78,400	7,900	10.08%
2015	78,800	8,700	11.04%
2016	79,100	9,100	11.50%
2017	79,300	9,400	11.85%
2018	79,500	9,700	12.20%
2019	79,700	9,800	12.30%
2020	79,900	9,800	12.27%
2021	80,200	9,500	11.85%
2022	80,400	9,500	11.82%

Source: Stats Wales

The 2018 based Local Housing Market Assessment reported that in 2001, there were 3,402 households privately renting and by 2011 this figure risen to 7,995. The rise in the number of privately rented homes between 2012-2022 is less than between 2001 and 2011.

Table 3.24 below provides a breakdown of households in Caerphilly living in the private rented sector by household size and the by number of bedrooms. It shows that 34.07% of all households live in 1 bed accommodation, 29.73% in 2 beds, 18.32% in 3 beds and 17.88% in 4 or more beds. The data also shows that a considerable number of households are living in accommodation which is either smaller or larger than their household requirement.

Table 3.24: Households in Caerphilly by tenure, by household size, and by number of bedrooms

Household Size	Number of bedrooms	Count	Percent
1 person in household	1 bedroom	792	7.76%
1 person in household	2 bedrooms	1,408	13.80%
1 person in household	3 bedrooms	1,183	11.60%
1 person in household	4 or more bedrooms	93	0.91%
2 people in household	1 bedroom	135	1.32%
2 people in household	2 bedrooms	1,218	11.94%
2 people in household	3 bedrooms	1,570	15.39%
2 people in household	4 or more bedrooms	110	1.08%
3 people in household	1 bedroom	21	0.21%
3 people in household	2 bedrooms	395	3.87%
3 people in household	3 bedrooms	1,327	13.01%
3 people in household	4 or more bedrooms	126	1.24%
4 or more people in household	1 bedroom	6	0.06%
4 or more people in household	2 bedrooms	125	1.23%
4 or more people in household	3 bedrooms	1,389	13.61%
4 or more people in household	4 or more bedrooms	304	2.98%
Total		10,202	100%

Source: Office of National Statistics

Table 3.25 below provides a breakdown of households in Caerphilly County Borough living in the private rented sector by housing market area. It shows there to be a wide variation of the number of privately rented homes by housing market area from less than 1% to over 16%. The highest number of privately rented homes is in Morgan Jones, Van, Penyrheol and St Martins housing market area, with the lowest number in Maesycwmmmer.

Table 3.25: Households in County Borough living in the private rented sector by housing market area (Caerphilly)

	Other private rented	Private landlord or letting agency	Total	Percent
Aberbargoed & Bargoed, Gilfach	118	766	884	8.71%
Argoed	24	111	135	1.33%
Darran Valley	29	102	131	1.29%
Moriah & Pontlottyn, Twyn Carno	81	411	492	4.85%
New Tredegar	49	396	445	4.38%
Crumlin, Newbridge	107	555	662	6.52%
Blackwood, Cefn Forest & Pengam	103	687	790	7.78%
Hengoed, Ystrad Mynach	87	551	638	6.28%
Maesycwmmmer	27	72	99	0.98%
Nelson	43	152	195	1.92%
Penmaen	45	203	248	2.44%
Pontllanfraith	48	377	425	4.19%
St Cattwg	80	357	437	4.30%
Abercarn	64	316	380	3.74%
Crosskeys, Risca East, Risca West	129	777	906	8.92%
Ynysddu	50	241	291	2.87%
Aber Valley	82	447	529	5.21%
Bedwas & Trethomas, Machen & Rudry	95	415	510	5.02%
Llanbradach	30	249	279	2.75%
Morgan Jones, Van, Penyrheol, St Martins	269	1,408	1,677	16.52%
Total	1,560	8,593	10,153	100%

Source: Office of National Statistics

Table 3.26 below provides a breakdown of homes in Caerphilly county borough situated in the private rented set by accommodation type and housing market area. It shows that 83.73% of all households live in a house or bungalow, 16.54% in a flat or maisonette and 0.10% in a caravan or other mobile or temporary structure.

Table 3.26: Tenure by accommodation type and housing market area (Caerphilly)

	House or bungalow	Flat, maisonette or apartment	Caravan, other mobile or temporary structure	Total	Percent
Aberbargoed & Bargoed, Gilfach	718	172	0	890	8.72%
Argoed	127	9	0	136	1.33%
Darran Valley	125	6	0	131	1.28%
Moriah & Pontlloftyn, Twyn Carno	408	84	0	492	4.82%
New Tredegar	400	47	0	447	4.38%
Crumlin, Newbridge	574	94	0	668	6.55%
Blackwood, Cefn Forest & Pengam	658	142	0	800	7.84%
Hengoed, Ystrad Mynach	513	127	0	640	6.27%
Maesycwmmmer	88	8	0	96	0.94%
Nelson	184	16	0	200	1.96%
Penmaen	232	15	0	247	2.42%
Pontllanfraith	352	75	0	427	4.19%
St Cattwg	394	44	0	438	4.29%
Abercarn	280	100	0	380	3.72%
Crosskeys, Risca East, Risca West	685	216	8	909	8.91%
Ynysddu	257	34	0	291	2.85%
Aber Valley	444	86	1	531	5.20%
Bedwas & Trethomas, Machen & Rudry	415	98	0	513	5.03%
Llanbradach	223	58	0	281	2.75%
Morgan Jones, Van, Penyrheol, St Martins	1,428	256	1	1,685	16.52%
Total	8,505	1,687	10	10,202	100%

Source: Office of National Statistics

Tables 3.27a and 3.27b provide a breakdown of the 30th percentile and 50th percentile rental data by bed count and housing market area. It shows the cost of renting a private property increases as the number of bedrooms increases. Rent levels vary throughout the county borough, showing a clear north south divide. Renting is more expensive in the south of the county borough due to the proximity to the Cardiff housing market and the type of accommodation available in these areas.

Table 3.27a: Rent at the 30th percentile position (Caerphilly)

	1	2	3	4
Aberbargoed & Bargoed, Gilfach	£390	£458	£500	£650
Argoed	£433	£650	£590	£675
Darran Valley	£433	£500	£506	£675
Moriah & Pontlottyn, Twyn Carno	£433	£385	£409	£700
New Tredegar	£475	£506	£528	£675
Crumlin, Newbridge	£531	£478	£498	£738
Blackwood, Cefn Forest & Pengam	£370	£530	£576	£955
Hengoed, Ystrad Mynach	£450	£495	£525	£668
Maesycwmmmer	£507	£490	£545	£1,200
Nelson	£419	£558	£625	£883
Penmaen	£507	£595	£755	£886
Pontllanfraith	£507	£602	£524	£883
St Cattwg	£379	£450	£523	£850
Abercarn	£450	£475	£472	£510
Crosskeys, Risca East, Risca West	£450	£525	£550	£850
Ynysddu	£450	£485	£683	£680
Aber Valley	£425	£506	£613	£745
Bedwas & Trethomas, Machen & Rudry	£414	£595	£655	£830
Llanbradach	£424	£508	£550	£801
Morgan Jones, Penyrheol, St Martins, Van	£550	£650	£650	£914
Caerphilly county borough	£425	£525	£550	£725

Source: Rent Office Wales & Hometrack

Table 3.27b: Rent at the 50th percentile position (Caerphilly)

	1	2	3	4
Aberbargoed & Bargoed, Gilfach	£408	£493	£550	£650
Argoed	£444	£545	£600	£675
Darran Valley	£444	£545	£557	£675
Moriah & Pontlloftyn, Twyn Carno	£444	£488	£480	£700
New Tredegar	£480	£550	£598	£675
Crumlin, Newbridge	£569	£555	£550	£850
Blackwood, Cefn Forest & Pengam	£413	£600	£609	£1,025
Hengoed, Ystrad Mynach	£465	£550	£550	£725
Maesycwmmwr	£548	£500	£575	£1,200
Nelson	£435	£613	£638	£1,000
Penmaen	£548	£598	£823	£1,250
Pontllanfraith	£548	£650	£690	£1,000
St Cattwg	£395	£495	£555	£950
Abercarn	£450	£525	£550	£550
Crosskeys, Risca East, Risca West	£458	£555	£643	£850
Ynysddu	£454	£525	£700	£700
Aber Valley	£450	£650	£678	£775
Bedwas & Trethomas, Machen & Rudry	£424	£630	£774	£850
Llanbradach	£425	£585	£650	£828
Morgan Jones, Penyrheol, St Martins, Van	£575	£725	£720	£1,050
Caerphilly county borough	£450	£583	£625	£798

Source: Rent Office Wales & Hometrack

Local Housing Allowance is designed help people on low incomes cover the cost of renting a typical home. Table 3.28 below provides a breakdown of Local Housing Allowance rates for Caerphilly county borough by number of bedrooms and shows the weekly rate that people can receive. When comparing this table with table ???a, it is evident that in some areas in the county borough the Local Housing Allowance will not fully cover the cost of renting.

Table 3.28: Weekly Local Housing Allowance Rate by bedroom count for 2023/24 (Caerphilly)

Single room (in a shared property)	£75.95
1 bedroom	£79.40
2 bedrooms	£103.56
3 bedrooms	£108.16
4 bedrooms	£138.08

Source: Caerphilly County Borough Council

Table 3.29 below provides a breakdown of those households living in the private rented sector by economic status. It shows that 69.92% are economically active and 30.08% are economically inactive.

Table 3.29: Private rented or lives rent free - economic activity status

	Count	Percent
Economically active (excluding full-time students): In employment	6,684	65.56%
Economically active (excluding full-time students): Unemployed: Seeking work or waiting to start a job already obtained: Available to start working within 2 weeks	346	3.39%
Economically active and a full-time student: In employment	83	0.81%
Economically active and a full-time student: Unemployed: Seeking work or waiting to start a job already obtained: Available to start working within 2 weeks	16	0.16%
Economically inactive: Retired	936	9.18%
Economically inactive: Student	133	1.30%
Economically inactive: Looking after home or family	603	5.91%
Economically inactive: Long-term sick or disabled	1,041	10.21%
Economically inactive: Other	354	3.47%
Total	10,196	100%

Source: Office of National Statistics

Overview of the social rented sector

The social rented sector is defined as those homes owned and managed by the Council and those by housing associations partner to the common housing register, which are provided at rents lower than the private rented sector and let to contract holders on a secure basis. Of the 14,938 social homes provided in Caerphilly county borough, 71% are owned by the Council, with the remainder being owned by the housing associations.

Table 3.30 below provides a breakdown of all social housing in the county borough, for all designations, by bed count and housing market area. It shows that housing is present in all housing market areas, although, the number of homes per area varies. The number of homes per housing market area ranges from 130 (Maesycwmmer) to 2,727 (Morgan Jones, Penyrheol, St Martins & Van). In terms of bed count there is a wide variation by provision and housing market area. The highest percentage of homes is 3 bed (42.70%) and the lowest number is 5 bed (0.01%). 5 bed homes are only provided in two of the twenty housing market areas, with all other bed counts present in all housing market areas except for 4 bed properties, which are present in 16 out of 20 areas.

Table 3.30: Total social housing stock (all designations) by number of bedroom and housing market area

	1	2	3	4+	Total	Percent
Aberbargoed & Bargoed, Gilfach	145	577	505	10	1,237	8.28%
Argoed	5	139	135	-	279	1.87%
Darran Valley	14	65	106	-	185	1.24%
Moriah & Pontlloftyn, Twyn Carno	252	508	519	9	1,288	8.62%
New Tredegar	104	134	213	2	453	3.03%
Crumlin, Newbridge	166	230	506	17	919	6.15%
Blackwood, Cefn Forest & Pengam	307	379	751	26	1,463	9.79%
Hengoed, Ystrad Mynach	137	174	359	37	707	4.73%
Maesycwmmmer	37	47	46	-	130	0.87%
Nelson	87	92	145	10	334	2.24%
Penmaen	29	53	53	1	136	0.91%
Pontllanfraith	161	211	382	8	762	5.10%
St Cattwg	56	356	129	9	550	3.68%
Abercarn	74	119	138	33	364	2.44%
Crosskeys, Risca East, Risca West	333	437	484	58	1,312	8.78%
Ynysddu	55	55	75	-	185	1.24%
Aber Valley	143	177	183	14	517	3.46%
Bedwas & Trethomas, Machen & Rudry	250	453	333	2	1,038	6.95%
Llanbradach	92	145	111	4	352	2.36%
Morgan Jones, Penyrheol, St Martins, Van	660	809	1,205	53	2,727	18.26%
Caerphilly county borough	3,107	5,160	6,378	291	14,938	100%

Source: Caerphilly CBC

General needs homes account for 75% of the total number of social homes. Table 3.31 below provides a breakdown of general needs, social housing stock by bed count and housing market area. Similarly to table 3.35, it shows that housing is present in all housing market areas, although, the number of homes per area varies. The number of homes per housing market area ranges from 54 (Maesycwmmmer) to 2,129 (Morgan Jones, Penyrheol, St Martins & Van). In terms of bed count there is a wide variation by provision and housing market area. The highest percentage of homes is 3 bed (56.35%) and the lowest number is 5 bed (0.02%). The percentage of 1 bed is 11%.

Table 3.31: Total general needs, social housing stock by bed count and housing market area

	1	2	3	4+	Total	Percent
Aberbargoed & Bargoed, Gilfach	81	369	505	10	965	8.56%
Argoed	-	99	135	-	234	2.08%
Darran Valley	-	35	105	-	140	1.24%
Moriah & Pontlloftyn, Twyn Carno	89	344	517	9	959	8.51%
New Tredegar	19	69	213	2	303	2.69%
Crumlin, Newbridge	63	140	502	17	722	6.40%
Blackwood, Cefn Forest & Pengam	134	240	751	26	1,151	10.21%
Hengoed, Ystrad Mynach	65	104	359	37	565	5.01%
Maesycwmmmer	2	8	44	-	54	0.48%
Nelson	12	70	144	10	236	2.09%
Penmaen	21	41	50	1	113	1.00%
Pontllanfraith	29	127	382	8	546	4.84%
St Cattwg	50	261	128	9	448	3.97%
Abercarn	28	41	138	33	240	2.13%
Crosskeys, Risca East, Risca West	114	328	481	58	981	8.70%
Ynysddu	7	36	74	-	117	1.04%
Aber Valley	53	122	183	14	372	3.30%
Bedwas & Trethomas, Machen & Rudry	110	296	329	2	737	6.54%
Llanbradach	55	93	110	4	262	2.32%
Morgan Jones, Penyrheol, St Martins, Van	312	561	1,203	53	2,129	18.88%
Caerphilly county borough	1,244	3,384	6,353	291	11,274	100%

Source: Caerphilly CBC

Later living accommodation is available to those people typically aged 55 years plus, although there may be some exceptions due to disability. Later living homes account for 25% of the total number of social homes. Table 3.32 below provides a breakdown of later living, social housing stock by bed count and housing market area. Similarly to tables 3.30 and 3.31, it shows that housing is present in all housing market areas, although, the number of homes per area varies. The number of homes per housing market area ranges from 23 (Penmaen) to 598 (Morgan Jones, Penyrheol, St Martins & Van). In terms of bed count there is a wide variation by provision and housing market area. The highest percentage of homes is 1 bed (50.85%) and the lowest number is 3 bed (0.68%).

Table 3.32: Total later living, social housing stock by bed count and housing market area

	1	2	3	Total	Percent
Aberbargoed & Bargoed, Gilfach	64	208	-	272	7.42%
Argoed	5	40	-	45	1.23%
Darran Valley	14	30	1	45	1.23%
Moriah & Pontlottyn, Twyn Carno	163	164	2	329	8.98%
New Tredegar	85	65	-	150	4.09%
Crumlin, Newbridge	103	90	4	197	5.38%
Blackwood, Cefn Forest & Pengam	173	139	-	312	8.52%
Hengoed, Ystrad Mynach	72	70	-	142	3.88%
Maesycwmmmer	35	39	2	76	2.07%
Nelson	75	22	1	98	2.67%
Penmaen	8	12	3	23	0.63%
Pontllanfraith	132	84	-	216	5.90%
St Cattwg	6	95	1	102	2.78%
Abercarn	46	78	-	124	3.38%
Crosskeys, Risca East, Risca West	219	109	3	331	9.03%
Ynysddu	48	19	1	68	1.86%
Aber Valley	90	55	-	145	3.96%
Bedwas & Trethomas, Machen & Rudry	140	157	4	301	8.22%
Llanbradach	37	52	1	90	2.46%
Morgan Jones, Penyrheol, St Martins, Van	348	248	2	598	16.32%
Caerphilly county borough	1,863	1,776	25	3,664	100%

Source: Caerphilly CBC

Overview of second homes

A second home is defined as a dwelling that is not a person's sole or main residence and is substantially furnished. These dwellings are referred to in the Local Government Finance Act 1992¹⁹ as dwellings occupied periodically but they are commonly referred to as "second homes".

The presence of second homes is captured via Council Tax records held by the Council. Table 3.33 below provides a breakdown of second homes in Caerphilly county borough on 23rd October 2023 by housing market area. It shows there are 244 second homes in the County Borough, representing 0.3% of all Council Tax dwellings within the County Borough, a slight increase of 2 homes since 2021. There are second homes in all housing market areas except for Hengoed & Ystrad Mynach.

¹⁹ Local Government Finance Act 1992 - <https://www.legislation.gov.uk/ukpga/1992/14/contents>

Table 3.33: Second homes by housing market area

	Count of 2nd homes	Total Properties	Percentage of 2nd homes
Aberbargoed & Bargoed, Gilfach	13	5,571	0.23%
Argoed	3	1,209	0.25%
Darran Valley	3	1,109	0.27%
Moriah & Pontlottyn, Twyn Carno	10	4,148	0.24%
New Tredegar	10	2,254	0.44%
Crumlin, Newbridge	20	5,508	0.36%
Blackwood, Cefn Forest & Pengam	22	7,070	0.31%
Hengoed, Ystrad Mynach	-	-	-
Maesycwmmmer	3	1,168	0.26%
Nelson	11	2,105	0.52%
Penmaen	6	2,445	0.25%
Pontllanfraith	11	3,759	0.29%
St Cattwg	23	8,172	0.28%
Abercarn	10	2,547	0.39%
Crosskeys, Risca East, Risca West	23	6,932	0.33%
Ynysddu	6	1,775	0.34%
Aber Valley	8	2,910	0.27%
Bedwas & Trethomas, Machen & Rudry	18	5,277	0.34%
Llanbradach	8	1,995	0.40%
Morgan Jones, Penyrheol, St Martins & Van	36	14,759	0.24%
Total	244	80,713	0.30%

Source: Caerphilly CBC

As the number of second homes in Caerphilly county borough is low, the impact on the Welsh language in this area is regarded by the Council to be negligible.

Overview of empty homes by sector

Empty properties are known have a significant impact of the local environment and communities within which they are situated and are a wasted resource when the need for affordable housing in Caerphilly county borough is high. The Council understands that there several reasons why a home may be left empty by its owner and has recently introduced a new strategy and action plan to support private sector homeowners bring their properties back into beneficial use²⁰. Reducing the number of empty properties will help achieve the Council's aim of increasing the supply of affordable housing.

²⁰ Caerphilly Homes Private Sector Empty Homes Strategy (2023-2028) - <https://www.caerphilly.gov.uk/caerphillydocs/consultations/private-sector-empty-property-strategy23-28.aspx>

Table 3.34 below provides a breakdown of private sector empty homes by Council Tax band and housing market area, on 1st April 2023. The table shows there are currently 1,476 homes that have been left empty for more than 6 months. Most homes (83.47%) are situated in bands A-C, lower value homes – typically terraced. Conversely, there are only a small number of homes in the higher value bands F-1 (1.49%). By housing market area there is an uneven spread of homes throughout the county borough. The highest number of empty homes is in the ‘Morgan Jones, Penyrheol, Van, St Martins’ housing market area (13.41%), with the lowest number in the ‘Maesycwmmmer’ and ‘St Cattwg’ housing market areas (1.36%).

Table 3.34: Private sector empty homes by Council Tax band and housing market area

	Bands A & B	Bands C - E	Bands F - I	Count	Percent
Aberbargoed & Bargoed, Gilfach	127	16	1	144	9.76%
Argoed	13	13	1	27	1.83%
Darran Valley	25	0	-	25	1.69%
Moriah & Pontlottyn, Twyn Carno	77	16	1	94	6.37%
New Tredegar	80	3	-	83	5.62%
Crumlin, Newbridge	67	28	3	98	6.64%
Blackwood, Cefn Forest & Pengam	66	37	-	103	6.98%
Hengoed, Ystrad Mynach	54	49	2	105	7.11%
Maesycwmmmer	10	9	1	20	1.36%
Nelson	31	12	2	45	3.05%
Penmaen	13	19	-	32	2.17%
Pontllanfraith	36	31	3	70	4.74%
St Cattwg	16	4	-	20	1.36%
Abercarn	43	3	-	46	3.12%
Crosskeys, Risca East, Risca West	77	50	2	129	8.74%
Ynysddu	39	1	1	41	2.78%
Aber Valley	63	9	1	73	4.95%
Bedwas & Trethomas, Machen & Rudry	27	47	13	87	5.89%
Llanbradach	23	13	-	36	2.44%
Morgan Jones, Penyrheol, St Martins & Van	56	136	6	198	13.40%
Total	943	496	37	1,476	100%

Source: Caerphilly CBC

Social landlords may carry empty properties within their housing stock, usually because they have become difficult to relet due to low demand or because of the extent of repair required. With the elevated level of housing need throughout the Caerphilly county borough there is an expectation from the Council that all social landlords take efforts to minimise the number of voids properties each organisation has.

Table 3.35 below provide an analysis of empty homes that have been vacant for less than 6 months. It shows that the number of vacant homes has increased 49% over the 5 year period. There has been a slight decrease in the percentage of homes available for letting and an increase in the percentage of homes not available for letting. Due to the Coronavirus (COVID-19) pandemic, in 2020 the data was not collected.

Table 3.35: Social housing properties vacant for less than 6 months

	Available for letting	Not available for letting	Total
2021/22	73	127	200
2020/21	80	150	230
2019/20	-	-	-
2018/19	48	101	149
2017/18	56	78	134

Source: Stats Wales

Table 3.36 below provides an analysis of empty homes that have been vacant for 6 months or more. It shows that the number of vacant homes has increase 59% over the 5-year period. There has been a significant decrease in the percentage of homes available for letting and an increase in the percentage of homes not available for letting. Due to the Coronavirus (COVID-19) pandemic, in 2020 the data was not collected.

Table 3.36: Social housing properties vacant for 6 months or more

	Available for letting	Not available for letting	Total
2021/22	13	106	119
2020/21	10	83	93
2019/20	-	-	-
2018/19	13	39	52
2017/18	33	42	75

Source: Stats Wales

Table 3.37 below provides a breakdown of the social housing stock disposals that are planned to take place over the first 5 years of the Local Housing Market Assessment by bed count and housing market area. Reasons for disposal include low demand, unsuitable bedsit accommodation and property which have been assessed as being too expensive to modernise. The table shows that the disposals concentrated to the mid and southwest of the borough. Most of the disposals are for bedsit, later living accommodation, with the remainder consisting of 2 and 3 bed

properties. One later living scheme is planned within the Crosskeys, Risca East, Risca West, which will partially off-set the disposals planned in the area.

Table 3.37: Social housing property disposals by bed count and area

	1	2	3	4	Total
Aberbargoed & Bargoed, Gilfach	-	-	-	-	-
Argoed	-	-	-	-	-
Darran Valley	-	-	-	-	-
Moriah & Pontlloftyn, Twyn Carno	-	-	-	-	-
New Tredegar	-	-	-	-	-
Crumlin, Newbridge	-	-	-	-	-
Blackwood, Cefn Forest & Pengam	-	-	-	-	-
Hengoed, Ystrad Mynach	-	-	-	-	-
Maesycwmmmer	-	-	-	-	-
Nelson	-	-	-	-	-
Penmaen	32	-	1	-	33
Pontllanfraith	9	-	-	-	9
St Cattwg	-	-	-	-	-
Abercarn	4	3	1	-	8
Crosskeys, Risca East, Risca West	93	2	3	-	98
Ynysddu	4	2	-	-	6
Aber Valley	-	-	-	-	-
Bedwas & Trethomas, Machen & Rudry	-	-	-	-	-
Llanbradach	-	-	-	-	-
Morgan Jones, Penyrheol, St Martins & Van	-	-	-	-	-
Total	142	7	5	-	154

Source: Caerphilly CB Social Landlords

3.2 Socio-Economic and Demographic Trends

This section provides an overview of socio-economic and demographic trends within Caerphilly county borough. The data has been accessed from the Office of National Statistics unless stated otherwise.

Households by tenure

Table 3.38 Below provides a breakdown of household by tenure and housing market area. It also provides a comparison of changes in the total number of households between the 2021 and 2011 Census. It shows that there has been an increase in the total number of households by 2.23%. The change in households range from -2.23% (New Tredegar) to 11.54% (Morgan Jones, Penyrheol, St Martins & Van). By tenure, there has been increases in the number of households living in the shared ownership, social rented and private rented sectors and decrease in homeownership and living rent free.

Table 3.38: Number of households by tenure and housing market area

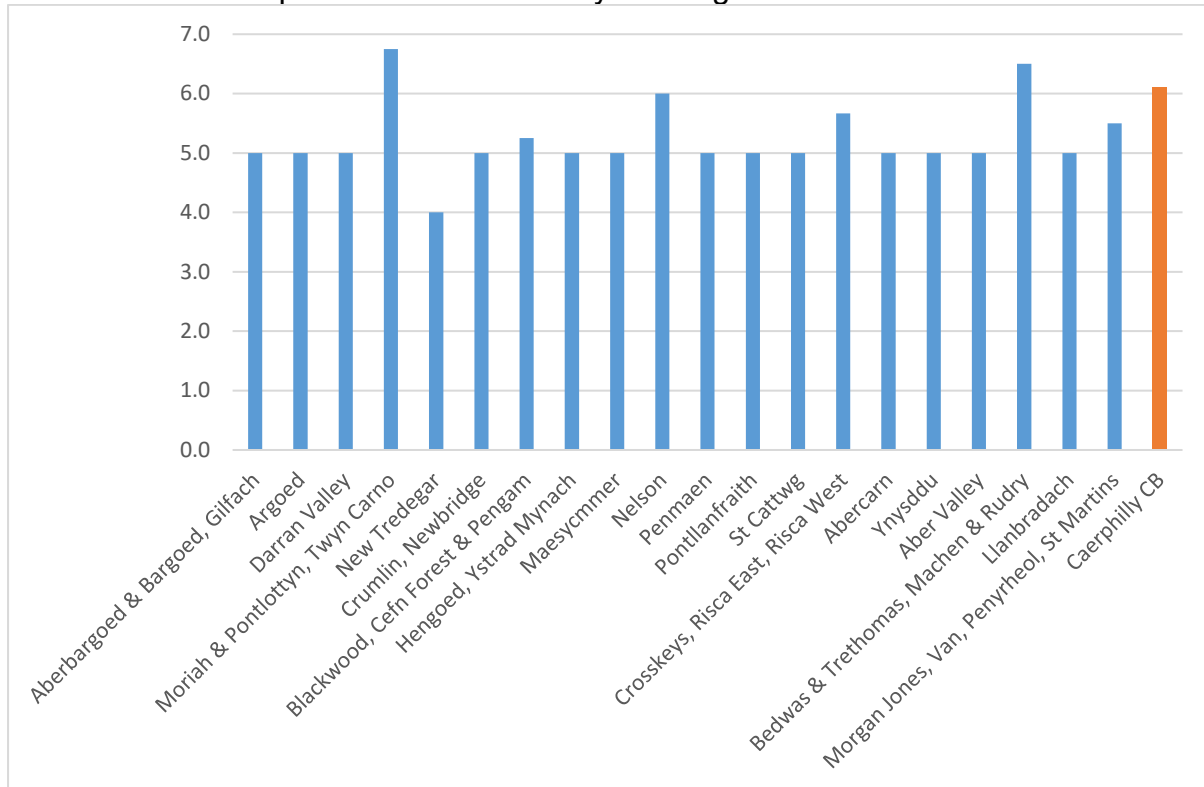
	Owned	Shared owners hip	Social rented	Private rented	Lives rent free	Total	Percent Change
Aberbargoed & Bargoed, Gilfach	3,140	10	1,154	884	1	5,189	2.21%
Argoed	729	3	258	135	-	1,125	1.44%
Darran Valley	736	2	179	131	-	1,048	0.67%
Moriah & Pontlloftyn, Twyn Carno	2,199	9	1,182	492	1	3,883	0.67%
New Tredegar	1,221	1	394	445	2	2,063	-2.23%
Crumlin, Newbridge	3,596	22	895	662	5	5,180	-0.17%
Blackwood, Cefn Forest & Pengam	4,536	20	1,364	790	9	6,719	0.99%
Hengoed, Ystrad Mynach	3,228	6	663	638	1	4,536	7.18%
Maesycwmmmer	817	1	139	99	-	1,056	11.98%
Nelson	1,462	3	327	195	2	1,989	0.56%
Penmaen	1,849	8	198	248	-	2,303	9.72%
Pontllanfraith	2,480	6	684	425	1	3,596	1.73%
St Cattwg	2,204	5	594	437	7	3,247	1.03%
Abercarn	1,619	14	383	380	3	2,399	7.00%
Crosskeys, Risca East, Risca West	4,420	23	1,226	906	1	6,576	-0.72%
Ynysddu	1,165	8	203	291	-	1,667	2.58%
Aber Valley	1,719	6	519	529	-	2,773	-0.18%
Bedwas & Trethomas, Machen & Rudry	3,445	8	966	510	1	4,930	11.54%
Llanbradach	1,274	10	301	279	1	1,865	1.69%
Morgan Jones, Penyrheol, St Martins & Van	9,660	59	2,698	1,677	9	14,103	1.32%
Total	51,499	224	14,327	10,153	44	76,247	2.37%
Percent Change	-0.26%	3.70%	2.61%	26.99%	-93.47%	2.37%	

Source: Office of National Statistics

Housing costs as a ratio of income

The affordability of housing is typically measured through a house price to income ration. Table 3.39 below provides an analysis of housing costs as a ratio of income by housing market area. Its shows that ration for Caerphilly county borough is 6.1:1, with a range of 4:1 (New Tredegar) to 6.8:1 (Moriah & Pontlloftyn, Twyn Carno). In terms of lower quartile housing the ratio for Caerphilly would increase to 6.5:1 showing that for many people on low incomes housing affordability will be a real issue.

Table 3.39: House price to income ratio by housing market area



Source: Hometrack

Household composition

Table 3.40 below provides a breakdown of household composition. It shows that 'One-person household: Other' as the most common group (16.33%). 60% of all household compositions require 1 bedroom accommodation, subject to the consideration of any specific requirements which would increase the bedroom requirement, e.g. due to a disability or an overnight carer.

Table 3.40: Household composition

	Count	Percent
One-person household: Aged 66 years and over	10,510	13.78%
One-person household: Other	12,456	16.33%
Single family household: All aged 66 years and over	7,422	9.73%
Single family household: Married or civil partnership couple: No children	8,302	10.89%
Single family household: Married or civil partnership couple: Dependent children	9,070	11.89%
Single family household: Married or civil partnership couple: All children non-dependent	5,197	6.82%
Single family household: Cohabiting couple family: No children	4,213	5.52%
Single family household: Cohabiting couple family: With dependent children	4,602	6.03%
Single family household: Cohabiting couple family: All children non-dependent	777	1.02%
Single family household: Lone parent family: With dependent children	6,513	8.54%
Single family household: Lone parent family: All children non-dependent	3,820	5.01%
Single family household: Other single family household: Other family composition	366	0.48%
Other household types: With dependent children	1,479	1.94%
Other household types: Other, including all full-time students and all aged 66 years and over	1,531	2.01%
Total	76,258	100%

Source: Office for National Statistics

Occupancy ratings by HMA (Housing Market Areas) (e.g. tables QS412EW or QS408EW)

Table 3.41 provides a breakdown of housing by occupancy rating for bedroom by housing market area. It shows that just 20.47% of households live in accommodation with the correct number of bedrooms. Just 2.12% of all households live in accommodation with an insufficient number of bedrooms, whereas 77.40% live in accommodation with more bedrooms than they require. 40.93% of households living in accommodation where with 2 or more bedrooms are required, while 0.24% live in accommodation lacking 2 bedrooms.

Table 3.41: Households by occupancy rating for bedroom

	Occupancy rating of bedrooms: +2 or more	Occupancy rating of bedrooms: +1	Occupancy rating of bedrooms: 0	Occupancy rating of bedrooms: -1	Occupancy rating of bedrooms: -2 or less
Aberbargoed & Bargoed, Gilfach	1,926	1,945	1,166	134	25
Argoed	439	414	246	24	1
Darran Valley	424	380	213	28	3
Moriah & Pontlottyn, Twyn Carno	1,332	1,521	948	71	11
New Tredegar	725	790	489	52	7
Crumlin, Newbridge	2,249	1,828	1,005	87	12
Blackwood, Cefn Forest & Pengam	2,948	2,257	1,374	125	16
Hengoed, Ystrad Mynach	2,003	1,606	818	93	11
Maesycwmmmer	513	369	162	8	6
Nelson	826	737	393	29	5
Penmaen	1,093	842	341	28	-
Pontllanfraith	1,641	1,198	692	60	6
St Cattwg	1,288	1,280	601	64	15
Abercarn	907	968	479	45	1
Crosskeys, Risca East, Risca West	2,505	2,481	1,438	131	24
Ynysddu	695	633	318	20	2
Aber Valley	1,039	989	659	80	9
Bedwas & Trethomas, Machen & Rudry	2,154	1,689	983	96	11
Llanbradach	748	703	385	32	1
Morgan Jones, Penyrheol, St Martins & Van	5,763	5,182	2,904	229	18
Total	31,218	27,812	15,614	1,436	184

Source: Office for National Statistics

Ethnicity

Table 3.42 Below provides a breakdown of ethnicity within Caerphilly county borough, comparing changes between the last two census. It shows that the population has grown by 3.80%. There have been increases in all the categories except 'White: Irish.' The largest changes have been in the minority ethnicities, with 'Black, Black British, Black Welsh, Caribbean or African: Other Black' increasing by nearly 2,000%. Please note that there has been a change in the categories used in for each census, so not all data is comparable.

Table 3.42: Ethnicity by Census

	Count 2011 Census	Count 2021 Census	Percent change
Asian, Asian British or Asian Welsh: Bangladeshi	22	38	72.73%
Asian, Asian British or Asian Welsh: Chinese	269	446	65.80%
Asian, Asian British or Asian Welsh: Indian	264	456	72.73%
Asian, Asian British or Asian Welsh: Pakistani	106	155	46.23%
Asian, Asian British or Asian Welsh: Other Asian	61	489	701.64%
Black, Black British, Black Welsh, Caribbean or African: African	62	129	108.06%
Black, Black British, Black Welsh, Caribbean or African: Caribbean	56	93	66.07%
Black, Black British, Black Welsh, Caribbean or African: Other Black	3	61	1933.33%
Mixed or Multiple ethnic groups: White and Asian	171	535	212.87%
Mixed or Multiple ethnic groups: White and Black African	69	247	257.97%
Mixed or Multiple ethnic groups: White and Black Caribbean	229	539	135.37%
Mixed or Multiple ethnic groups: Other Mixed or Multiple ethnic groups	151	433	186.75%
White: English, Welsh, Scottish, Northern Irish or British	165,882	169,356	2.09%
White: Irish	566	389	-31.27%
White: Gypsy or Irish Traveller	N/a	38	-
White: Roma	N/a	46	-
White: Other White	1,523	2,126	39.59%
Other ethnic group: Arab	N/a	87	-
Other ethnic group: Any other ethnic group	N/a	292	-
Chinese/Other: Other	84	N/a	-
Total	169,518	175,955	3.80%

Source: Office of National Statistics

Commuting patterns

Table 3.43 below provides a breakdown of people aged 16 years and over in employment by method used to travel to work. It shows that most people travel to work by car or van, (59.69%) with only a small percentage using public transport. 23.85% of people work mainly at or from home, which is significantly higher than the 2011 Census (4.08%) and is most likely to be artificially high due to after-effect of the Covid-19 pandemic, as the Census took place during a national lockdown.

Table 3.43: Method used to travel to work

	Count	Percent
Work mainly at or from home	18,473	23.85%
Underground, metro, light rail, tram	17	0.02%
Train	1,190	1.54%
Bus, minibus or coach	1,680	2.17%
Taxi	360	0.46%
Motorcycle, scooter or moped	288	0.37%
Driving a car or van	46,223	59.69%
Passenger in a car or van	4,229	5.46%
Bicycle	394	0.51%
On foot	4,038	5.21%
Other method of travel to work	547	0.71%
Total	77,439	100%

Source: Office for National Statistics

Table 3.44 below provides a breakdown of car or van availability. It shows that 79.66% of households had access to 1 or more car or van, with the remainder of households having no access.

Table 3.44: Car or van availability

	Count	Percent
No cars or vans in household	15,502	20.33%
1 car or van in household	31,897	41.83%
2 cars or vans in household	21,106	27.68%
3 or more cars or vans in household	7,752	10.17%
Total	76,257	100%

Source: Office for National Statistics

Table 3.45 below provides a breakdown of people aged 16 years and over who were in employment and stated that their main place of work was a workplace or a depot. It shows that 15.91% of people travelled what the Census terms a short distance to work (less than 10km).

Table 3.45: Distance travelled to work

	Count	Percent
Does not apply	98,513	55.99%
Less than 2km	7,881	4.48%
2km to less than 5km	8,955	5.09%
5km to less than 10km	11,158	6.34%
10km to less than 20km	13,894	7.90%
20km to less than 30km	3,622	2.06%
30km to less than 40km	854	0.49%
40km to less than 60km	777	0.44%
60km and over	890	0.51%
Works mainly from home	18,473	10.50%
Works mainly at an offshore installation, in no fixed place, or outside the UK	10,933	6.21%
Total	175,950	100%

Source: Office for National Statistics

Disability

Table 3.46 below provides a breakdown of usual residents by long-term health problems or disabilities. It shows that 29.94% of people have a long-term health problem or disability.

Table 3.46: Usual residents in Caerphilly by long-term health problems or disabilities

	Count	Percent
Disabled under the Equality Act: Day-to-day activities limited a lot	21,226	12.06%
Disabled under the Equality Act: Day-to-day activities limited a little	20,336	11.56%
Not disabled under the Equality Act: Has long-term physical or mental health condition but day-to-day activities are not limited	11,115	6.32%
Not disabled under the Equality Act: No long-term physical or mental health conditions	123,275	70.06%
Total	175,952	100%

Source: Office for National Statistics

3.3 Local Housing Survey

Introduction

In preparation for the production of the 2022 Local Housing Market Assessment, the Council undertook a housing survey of Caerphilly county borough residents in the summer of 2021. The purpose of the survey was to inform the Local Housing Market Assessment with qualitative data on people's housing circumstances and aspirations.

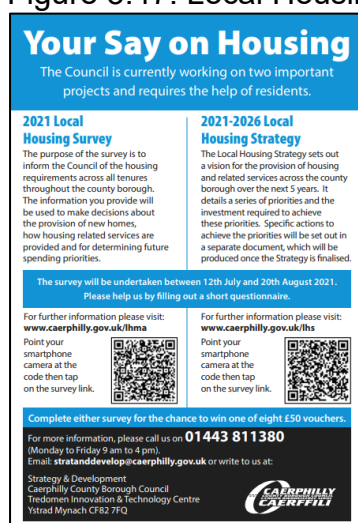
The survey was based on a previously survey that was undertaken in 2013 for the production of the 2014 Local Housing Market Assessment and updated to consider the impact of the Covid-19 pandemic. The survey was undertaken in accordance with previously Welsh Government guidance on undertaking Local Housing Market Assessments. The information collected from the survey is supplementary and contextual and has not been used to alter or replace any of the housing need calculations in the Local Housing Market Assessment tool.

Given that Welsh Government introduced new guidance to local authorities on preparing Local Housing Market Assessments, which included a new methodology and tool, work on the 2022 Local Housing Market Assessment was discontinued.

Methodology

The local housing survey was conducted between 12th July and 20th August 2021. The survey was hosted online using Snap Surveys software, with the Council's website providing links to the survey in both Welsh and English. To maximise response rates, the Council undertook an extensive marketing campaign and offered respondents the opportunity to win one of eight, £50 vouchers, in a prize draw. The image below shows a leaflet designed by the Council to promote the Local Housing Survey and another consultation. The leaflet was delivered to all residential households in the county borough.

Figure 3.47: Local Housing Survey Leaflet (2021)



Source: Caerphilly CBC

Summary of responses

In total, 317 responses were received, of which 316 were submitted in English and 1 was using Welsh. In 2013, 2,183 valid responses were submitted. The Council attributes the difference in the number of responses due to different methodologies employed for each survey. It is unclear whether the presence of the Covid-19 pandemic impacted on people's willingness to engage with the survey.

The following paragraphs summaries some of the key findings from the survey. The analysis was undertaken using the housing market areas determined for the 2022 Local Housing Market Assessment and not the new housing market areas identified for the 2024 Local Housing Market Assessment. A detailed analysis of survey responses can be found on the [Local Housing Market Assessment](#) webpage.

- The percentage of responses received in each housing market area was broadly representative of the proportion of households that lived within that area.
- 64.3% of respondents identified their gender as female, 34.2 as male and 1% as other, with the remainder preferring not to say.
- 97.4% of respondents described their ethnicity as white, 0.3% as mixed race and 2% preferred not to say.
- Only 1% of respondents were aged 25 and under. 38% of respondents were aged 25-44, 39% were aged 45-64 and 21% were aged 65 or over.
- The average household size of respondents was 2.66 persons per household.
- 6% of respondents lived in single person households.
- 39.2% of respondents lived in a semi-detached house, 27.7% in a terraced housing and 23.8% in a detached house.
- 73.3% of respondents owned their own homes (with or without a mortgage or loan), 13.3% rented from the Council and 12.4% rented either from a housing association or private landlord.
- 36.9% of respondents were registered for housing on the Council's common housing register.
- Most single person households are living in houses that have more bedrooms than they would require to satisfy their need. Single person households and two person households in the owner-occupied sector were found to live in larger dwellings than those who are renting, privately or in the social sector.
- A small number of respondents were living in overcrowded conditions.

- 74% of respondents had lived in their current address for 5 or more years, 13% have lived there for 2-5 years, 8% have lived between 1 and 2 years and a further 5% have moved within the last year.
- The main reasons given for moving included being closer to family and friends, the previous home being too small and moving to a better environment. Other reasons included anti-social behaviour, to move to a house with a garden, property tied to employment, no fault eviction, access to the countryside and had inherited house from family member.
- 55.5% of respondents did not expect to move within the next 5 years. 2.5% intended to move now and 5.4% in the next year. 20.8% did not know if they would move in the next 5 years.
- 15% of respondents who indicated that there were likely to move in the next 5 years indicated that the Covid-19 pandemic had changed their intentions.
- There is no clear pattern for desired size of housing, with some respondents wanting to move to larger houses and others wanting to move to smaller houses than they previously lived in.
- 13.8% of respondents had one or more person within their household that were likely to move into their own accommodation as an independent household within the next 5 years. 37.2% of respondents expected to buy their own home, with a further 27.8% expecting to privately rent.
- 51% of newly forming households, expected to move somewhere within Caerphilly county borough, 7% within South East Wales and 14% elsewhere in Wales or the UK. 28% indicated that they did not know where they expected to move to.
- The highest proportion of respondents on the lowest incomes lived in the Heads of the Valleys area and Lower Islwyn valley, and a greater proportion of respondents on the highest incomes lived in Caerphilly Basin.
- Housing costs per week were notably lower in the Heads of the Valleys than other areas and higher in Caerphilly Basin and the Northern Connections Corridor, reflecting higher house prices in these areas.
- 21% of respondent households contained one or more person who was an older person (aged over 65). Of which, 24% lived alone, 64% lived in a couple household and the remainder lived with one or more other relatives, predominately their children.
- 1.2% of respondents had the right number of bedrooms based on their household composition. 16.4% of households have 1 bedroom more than they required, 54.4% have 2 more bedrooms than required and a further 28% have 3 or more bedrooms than are required.

- 18% of older person households indicated that they were likely to move in the next 5 years.
- The most common reasons for older people wanting to move included being unable to manage in their current home, access problems (e.g. steps, stairs), the current home being too big, wanting to move closer to friends and family and a need to move to cheaper accommodation.
- 45% of older people expected to move to a bungalow, 27% to a flat/apartment and the remaining 27% to another house.
- 45% of older people wanted to live in general housing, with 55% wanting some type of purpose-built accommodation for elderly people.

3.4 Specific Housing Needs Requirements

Introduction

The section considers the housing need requirements of specific groups of people, as identified by Welsh government, to enable them to live safely, independently and with dignity. It is primarily a qualitative overview of the Council's policies, strategies and data sources, where applicable and/or available. It covers the following groups:

- | | |
|---------------------------------|--|
| Property needs | a. Accessible and adapted housing; |
| | b. Multi-generational and/or larger family households requiring larger properties; and |
| | c. Non-permanent housing. |
| Housing, care and support needs | d. Supported accommodation. |
| Locational needs | e. Locations for student accommodation close to a university; |
| | f. Properties in close proximity to shops, places of worship and services etc., to meet those with physical or cultural needs. |

a. Accessible and adapted housing provision

Local policies / strategies

- Corporate Plan Well-being Objectives (2023-2028)²¹:
 - Enabling our communities to thrive
- Local Housing Strategy (2021-2026):
 - Priority 1 – Creating Better Choices
 - Priority 3 – Creating Healthy Homes and Vibrant Communities
 - Priority 5 – Supporting Specialist Housing Needs
- Common Allocation Policy²²
- Private Sector Housing Renewal Policy (2024-28)²³
 - Priority 4 – Providing Adaptations for disabled persons
 - Priority 5 – Enabling vulnerable people to remain at home in safety and comfort

Property needs

Research shows that the provision of accessible housing and the adaption of existing homes can both have a positive impact on the health and wellbeing of disabled adults and children, and older people²⁴. Accessible housing and adaptations can also help to improve independence, reduce the requirement for support and reduce the risk accidents and hospital admissions.

Social housing landlords operating in Caerphilly county borough provide a range of accessible accommodation and carry out adaptations to their contract holders' homes where required. There are several measures that social landlords may undertake to increase the provision of accessible homes:

- Prior to the letting, all homes are categorised on their level of accessibility and a best match approach is followed to ensure that an applicant with an accessible housing requirement is allocated the right type of accommodation.
- The requirement for new build, accessible social housing is considered as part of the Programme Development Plan process.
- Follows guidance issued by Welsh Government (Welsh Housing Quality Standard and Welsh Design Quality Requirement) on accessibility of new and existing homes.
- Liaise with the Occupational Therapist Housing team to ensure any specific accessible housing requirements are appropriately met.

²¹ Corporate Plan Well-being Objectives (2023-2028) - <https://www.caerphilly.gov.uk/caerphillydocs/council-and-democracy/corporate-plan-2023-28.aspx>

²² Common Allocation Policy (Dec 2016) - <https://www.caerphilly.gov.uk/my-council/strategies,-plans-and-policies/housing/common-allocation-policy>

²³ Private Sector Housing Renewal Policy (2024-28) – [Insert hyperlink]

²⁴ Housing LIN: Adaptations without delay - [https://www.housinglin.org.uk/assets/Resources/Housing/Support materials/Other reports and guidance/Adaptations-Without-Delay.pdf](https://www.housinglin.org.uk/assets/Resources/Housing/Support%20materials/Other%20reports%20and%20guidance/Adaptations-Without-Delay.pdf)

- All new build, 1 bedroom, ground floor, social housing apartments in Caerphilly county borough are fitted with walk-in showers to increase the level of accessibility.

In the private sector the Council provides a range of advice and support to ensure people's homes are adapted to meet their needs.

Evidence

Table 3.13a, see section 3.2, provides a breakdown of the housing situation of people aged 16 to 64 by disability status. The data is only available at an all-Wales level. The table shows that there is a high level of people with a disability living in the social rented sector, when compared to the percentage of the total housing stock, and a lower level living in the owner-occupied sector.

Data from the Common Housing Register provides the Council with an indication of the level of need for accessible, social housing throughout the county borough. This information has been used to inform the outputs of the Local Housing Market Assessment tool.

All social housing in the county borough is categorised by landlords on the level of accessibility before being let. On shortlisting for a vacant property, applicants are matched to the correct housing based on their accessible housing requirement. Applicants requiring wheelchair accessible accommodation will typically be allocated highest level of accessible accommodation, whereas full ambient applicants will typically be allocated category 'D' accommodation. This process is named as the best match approach. Below are the property classification categories currently in use:

A1 - A highly adapted or purpose-built property, providing wheelchair access throughout. Access to alternative levels will need to be achieved by a stair lift or vertical lift and access to the property would need to be level or ramped to a maximum of 1:12 gradient. All doorways to be a minimum of 780mm clear opening.

A2 - A property allowing wheelchair access to main facilities, i.e. bathing, living and sleeping facilities. Access to alternative floors will need to be achieved by a stair lift or vertical lift. Access to the property will need to be level or ramped to a maximum gradient of 1:12.

B1 - A ground floor property, first floor property with lift access or a two-storied property allowing either a stair lift or vertical lift access to the first floor. Access to the property should be level or ramped to a maximum gradient of 1:12.

B2 - A ground floor property, first floor property with lift access or a two-storied property allowing stair lift access to the first floor. Access to the property should have a maximum of three steps.

C1 - A first floor property so facilities are on one level. Lift access to first floor not essential. Access to the property should have a maximum of six steps.

C2 - A two storied property with WC facilities on both levels. Lift access to first floor not essential. Access to the property should have a maximum of six steps.

C3 - Ground floor property with maximum 6 steps.

D - A property not suitable for adaptation.

Table 3.48 below provides a breakdown on applications on the Common Housing Register, in April 2023, by level of accessible housing required. It shows that that the highest requirement is for category 'D' accommodation, accommodation determined as the least accessible. 7.66% of applications, categorised as 'U' still require assessment. 1.33% of applications require the highest level of accessible accommodation (A1 and A2).

Table 3.48: CHR Applications by Accessibility Category

	Count	Percent
A1	35	0.49%
A2	59	0.83%
B1	620	8.75%
B2	1,026	14.47%
C1	7	0.10%
C2	23	0.32%
C3	90	1.27%
D	4,604	64.95%
Not categorised	82	1.16%
U	543	7.66%
Count	7,089	100%

Source: Caerphilly CBC

Table 3.49 below provides a breakdown of the total social housing stock for Caerphilly county borough by level of accessibility. It shows that 54.39% of the stock has been assessed, with the remainder still to be assessed. 7.42% of the stock is categorised as wheelchair accessible (A1 and A2).

Table 3.49: Total social housing stock by level of accessibility

	Count	Percent
A1	492	3.29%
A2	617	4.13%
B1	1,684	11.27%
B2	1,247	8.35%
C1	526	3.52%
C2	484	3.24%
C3	300	2.01%
D	2,775	18.58%
Missing	6,813	45.61%
Count	14,938	100%

Source: Caerphilly CBC

To make best use of the social housing stock, the common allocation policy provides preference for people to move who no longer require accessible accommodation, thereby freeing up accommodation for use by other people. A review of the data used to determine the level of unmet housing need for the Local Housing Market Assessment tool shows there is one application currently on the common housing register that is in receipt of this priority award.

Table 3.50 below provides a breakdown of applications currently on the Common Housing Register in receipt of a priority award for medical, excluding mental health, by housing market area. It shows that 25.71% of current Common Housing Register applications have a priority award.

Table 3.50: Count of medical priority award on Common Housing Register

	Count	Percent
Aberbargoed & Bargoed, Gilfach	87	5.45%
Argoed	33	2.06%
Darran Valley	12	0.77%
Moriah & Pontlottyn, Twyn Carno	19	1.19%
New Tredegar	32	2.02%
Crumlin, Newbridge	91	5.69%
Blackwood, Cefn Forest & Pengam	226	14.10%
Hengoed, Ystrad Mynach	94	5.90%
Maesycwmmmer	23	1.47%
Nelson	14	0.85%
Penmaen	70	4.38%
Pontllanfraith	109	6.80%
St Cattwg	93	5.84%
Crosskeys, Risca East, Risca West	89	5.54%
Abercarn	63	3.94%
Ynysddu	56	3.51%
Aber Valley	28	1.74%
Bedwas & Trethomas, Machen & Rudry	85	5.35%
Llanbradach	43	2.71%
Morgan Jones, Van, Penyrheol, St Martins	331	20.68%
Total	1,599	100%

Source: Caerphilly CBC

Table 3.51 below provides a breakdown on the number of Personal Independence Payment cases with entitlement in Caerphilly county borough by disability, in July 2023. It shows there are 17,775 cases, which is 10.11% of the total population of Caerphilly county borough. The number of cases in Caerphilly county borough accounts for 7.34% of the total number of cases in Wales (242,144). By disability, the highest number of cases is 'Psychiatric disorders.'

Table 3.51: Personal Independence Payment cases with entitlement by disability

	Count	Percent
Psychiatric disorders	6,090	34.26%
Musculoskeletal disease (general)	4,387	24.68%
Musculoskeletal disease (regional)	2,530	14.23%
Neurological disease	1,906	10.72%
Respiratory disease	730	4.11%
Cardiovascular disease	477	2.68%
Malignant disease	472	2.66%
Visual disease	241	1.36%
Endocrine disease	190	1.07%
Gastrointestinal disease	180	1.01%
Hearing disorders	155	0.87%
Skin disease	124	0.70%
Genitourinary disease	96	0.54%
Autoimmune disease (connective tissue disorders)	61	0.34%
Infectious disease	53	0.30%
Diseases of the liver, gallbladder, biliary tract	35	0.20%
Haematological disease	29	0.16%
Metabolic disease	26	0.15%
Diseases of the immune system	7	0.04%
Multisystem and extremes of age	-	0.00%
Unknown or missing	-	0.00%
Total	17,775	100%

Source: Department of Work & Pensions

The availability of accessible housing and adaptations can have a serious impact on hospital discharges. Data from the Nuffield Trust showed that patients in Wales stay in hospital, on average, 60% longer than those in England²⁵. A delay in hospital discharges can impact negatively on the patient, reduces the availability of hospital bed spaces and increase costs to the National Health Service.

Research by Care & Repair Cymru (2022) shows the impact of poor housing on older people²⁶:

- 18% of homes in Wales pose an unacceptable risk to health.
- 83% of older people live in their own home are amongst those at greatest risk from poor housing.
- Cold damp homes increase circulatory, respiratory and cardiovascular illnesses.

²⁵ Delayed Discharges from Hospital - <https://www.nuffieldtrust.org.uk/resource/delayed-discharges-from-hospital>

²⁶ Hospital to a Healthier Home - <https://careandrepair.org.uk/wp-content/uploads/2023/01/H2HH-Evaluation-Report-2022-Eng-1-1.pdf>

- Around 278,000 older people will fall in their own home.
- Around 139,000 older people will fall more than once in their home.
- Of these falls, around 8,100 will result in serious injury.
- Around 3,000 older people receiving a hip fracture each year.
- Around 1,500 older people not recovering to independence in 12 months following a fall.
- £96 million treatment cost per year following accident or illness related to poor housing.

The Council provides a cross-tenure adaptation service for all disabled people living in the county borough either through the provision of Disabled Facilities Grants or via a variety of discretionary works, dependent upon circumstances and eligibility. The requirement for adaptations is identified through an assessment undertaken by an occupational therapist.

The 2021 Tenant Satisfaction Survey, undertaken by the Council, provided an insight into the level of tenants' satisfaction with their homes. It showed that 15% of Caerphilly CBC tenants were dissatisfied with the quality of their home and 10% disagreed that their home was safe and secure. The data does not allow examination to determine how many respondents were dissatisfied because their home required adaptation or they need to move to accessible accommodation.

Table 3.52 below provides a breakdown of the number and costs of disabled facilities grants by the Council over the last 5 years. Due to the Coronavirus (COVID-19) pandemic in 2020, data on Disabled Facilities Grants in Wales for 2019-20 were not collected by Welsh Government. The table shows that the number and costs of grants completed in the last 2 years is significantly below pre-pandemic levels.

Table 3.52: Disabled facilities grants by year

	Number of dwellings improved	Number of valid grant applications	Number of grant applications approved	Number of grants completed: Total	Amount of grants completed (£)
2021/22	90	99	104	90	£390,758
2020/21	47	64	52	47	£274,092
2019/20	-	-	-	-	£ -
2018/19	143	122	113	143	£862,496
2017/18	208	196	187	208	£1,066,370

Source: Stats Wales

Welsh Government provides Enable funding to local authorities to provide small to large scale adaptations to enable disabled and older people to live safely and independently in their homes. However, there is insufficient funding available to meet all identified needs and, as a result, the Council packages multiple adaptations into one scheme to provide economy of scale. Therefore, the number of adaptations delivered, as shown in the table below, may appear low.

Table 3.53 below provides a breakdown of adaptations carried out in Caerphilly county borough over the last 5 financial years by provider and adaptation funding stream.

Table 3.53: Enable funded adaptations by funding stream

	Care & Repair Caerphilly & Blaenau Gwent Rapid Repair Adaptation Programme+	Independent Living Grant	Caerphilly CBC Enable
2018/19	369	5	12
2019/20	439	9	11
2020/21	180	2	15
2021/22	345	9	9
2022/23	225	10	86 ¹
Total	1,558	35	133

Source: Caerphilly CBC

¹79 of which were top up to the minor works programme due to significant increase in demand and exceeding the minor works budget.

Example of adaptations carried out in the last financial year (2022/23) under the Repair Adaptation Programme+ include stair rails (53), external handrails (52), grab rails (43), key safes (24), steps (19), shower seats (10), electrical works (8), drop down rails (5), ramping (4), moving furniture (4) and lever taps (3).

Minor works of adaptation and equipment are provided to enable people to live safely and independently. In the last financial year the Council noticed a significant increase in demand for minor works, which may be because of increased pressure on the health service. Budgets have been increased three times to meet this increased demand. Without additional funding from Welsh Government, the continuing financial pressures on local authorities in Wales means that the Council's ability to provide adaptations to all those in need in the future will become increasingly more difficult.

Table 3.54 below provides a breakdown of the number of minor works of adaptations by year. It shows that the number of adaptations carried out in 2020/21 was lower than in comparison to other years, due to the Covid-19 pandemic. In 2022/23, the Council spent £307,684 on the provision of 1,138 adaptations including key safes (109), grab rails (852), handrails (95), shower seats (223), ramps (13), external handrails (454), folding seats (46), shower seats (53), lever taps (9) and other adaptations such as flooring (222).

Table 3.54: Number of minor works of adaptations by year

	Count
2018/19	810
2019/20	747
2020/21	441
2021/22	876
2022/23	1,138
Total	4,012

Source: Caerphilly CBC

Disabled Facilities Grants help towards the costs of making changes to the home of a disabled person so they can continue to live there. Table 3.55 below provides a breakdown of the number of grants provided and the total funding. It shows that in the last 3 financial years there has been a reduction in the number of Disabled Facilities Grant delivered, due to restrictions imposed during the Covid-19 pandemic. This prevented projects from starting and as a result backlogs have increased. Of the 94 homes improved in 2022/23, works included shower adaptations (59), extensions (3), hoists (14), ramps (2), stairlifts (21) and clos-o-mats (1).

Table 3.55: Number of Disabled Facilities Grant by financial year

	Number of dwellings improved	Number of valid grant applications	Number of grant applications approved	Number of grants completed: Total	Amount of grants completed (£)
2022/23	94	103	92	94	£615,938
2021/22	90	99	104	90	£390,758
2020/21	47	64	52	47	£274,092
2019/20	-	-	-	-	£ -
2018/19	143	122	113	143	£862,496
2017/18	208	196	187	208	£1,066,370

Source: Caerphilly CBC

The Council also carries out to adaptations to homes it owns and manages – termed public sector works of adaptation. Table 3.55 below shows the number of public sector adaptations by financial year. It shows that since Covid-19 pandemic related restrictions have lifted there has been an increase in adaptations delivered. In the 2022/23 financial year, the types of adaption carried out included shower adaptations (84), kitchen adaptation (1), hoists (4), ramps (2), vertical lifts (2), stairlifts (28) and clos-o-mats (2).

Table 3.55: Public Sector Major Works of Adaptation

	Number of dwellings improve	Total expenditure for delivery (£)
2022/23	157	£845,164
2021/22	152	£780,590
2020/21	60	£250,325

Source: Caerphilly CBC

Funding available to the Council to carry out adaptations is under increasing pressure. Material costs have risen exponentially over the last 3 years, resulting in a lower capacity to carry out a similar number of adaptations as in previous years. There are less contractors available to carry out the work. Also, restrictions imposed on society due to the Covid-19 pandemic has resulted in increased backlogs of people requiring adaptations. Since the restrictions were removed the Housing Department has experienced a significant increase in the number of referrals from people requiring adaptations due to the pent-up demand. However, the resources available are insufficient and do not match the level of need, meaning people will be required to wait longer before the Council can provide their adaptation.

The Council is currently exploring ways to mitigate many of the external factors affecting the delivery of adaptations including the implementation of a new framework covering adaptations in private homes to mirror that for public sector homes, recruiting and retaining contractors, and increasing elements of the schedule of rates to counter inflationary pressure. E.g. low-level appliances, stair rails, barriers free, sheltered housing, housing with care, wheelchair accessibility.

Suitable for

All people irrespective of age:

- Where their existing accommodation no longer meets their needs due to the existence of a medical condition and/or physical disability; and
- With limited mobility / dexterity who are otherwise able to live independently, with or without care or support.

External stakeholder consultation and engagement

The Private Sector Housing team undertakes periodic satisfaction monitoring of the disabled adaptations grant process, with recipients being asked to complete questionnaires. These questionnaires are reviewed and any matters arising are identified and addressed.

The Council is in the process of preparing a new Private Sector Housing Renewal Policy and is undertaking a public consultation exercise to understand the views of a range of stakeholders.

Key Issues identified

1. A lack of suitable accessible accommodation to meet identified needs.
2. Budget constraints means there is a backlog of people waiting for an adaptation to their home.
3. The economic situation has made the cost of carrying out an adaptation more expensive.
4. There are an insufficient number of contractors available to carry out adaptations.

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

Local policies/ strategies

- Corporate Plan Well-being Objectives (2023-2028):
 - Enabling our communities to thrive
- Local Housing Strategy (2021-2026):
 - Priority 4 – Delivery new homes
- Common Allocation Policy

Property needs

Larger properties to accommodate cultural needs associated with multi-generational living.

Suitable for

Larger or multi-generational families.

Evidence

Information is captured via the common housing register application form on household size and rehousing circumstances. There is a specific award in the common allocation policy providing priority to those people living in accommodation assessed by the Council as being overcrowded.

The data shows the Council that there is a current mismatch between identified housing needs and the availability of accommodation. There is a shortage of family sized accommodation for larger households – 4 bedroom plus. Of the 11,247 homes, only 289 (2.56%) have four bedrooms and 2 (0.02%) have five bedrooms. There are currently, 190 households waiting for accommodation of four bed or greater (3.06%). 90 households have an award for overcrowding (0.14%), ranging from four to seven bed requirement.

External stakeholder consultation and engagement

Consultation with external stakeholders was carried out as part of the introduction of the common housing register and common allocation policy by the Council in December 2016. An equality impact assessment was carried out by the Council with the support of Tai Pawb, as organisation promoting social justice in housing.

No specific consultation with external stakeholders has been undertaken. The Council has undertaken regular monitoring of the operation of the common housing register since its implementation; the result of which have been shared and discussed with all housing association party to the common allocation policy.

The Council is currently working closely with housing association partners on a review of the existing common allocation policy. As part of this review the Council

proposes to undertake consultation with a wide range of stakeholders. This report will, therefore, be updated with the results of the consultation following completion on the common allocation policy review.

Key Issues identified

1. There is a lack of appropriately sized accommodation to house families requiring such accommodation.

c) Non-permanent housing

Local policies/ strategies

- Corporate Plan Well-being Objectives (2023-2028):
 - Enabling our communities to thrive
- Local Housing Strategy (2021-2026):
 - Priority 4 – Delivery new homes
 - Priority 5 – Supporting specialist housing needs
- Common Allocation Policy
- Caerphilly County Borough Council Rapid Rehousing Plan 2022-2027
- Supporting People Strategy

Property needs

The Council recognises that there is a need to ensure that they are meeting their statutory functions in providing good quality suitable emergency temporary accommodation within the county borough for those households who require emergency housing. Table 3.56 below provides a breakdown of the number of homeless people temporarily accommodated on 31st December by their type of accommodation at the end of December 2023. It shows that currently the Council is providing accommodation for 509 people, which is an increase of 16 on the previous month.

Table 3.56: The number of homeless people temporarily accommodated on 31st December by accommodation type

	Total	Of which: Aged under 16 (dependent children)
Bed and breakfast and Hotels	303	60
Caravan parks or similar holiday accommodation	0	0
Hostels (including reception centres and emergency units)	133	50
Women's refuge	21	5
Private sector accommodation	52	7
Within your own stock	0	0
RSL stock	0	0
Other (please specify)	0	0
Total	509	122

Source: Welsh Government Homelessness Data Collection (December 2023)

The Council recognises that whilst there is a good supply of supported housing within the county borough, there is a lack of suitable single person emergency housing, some specialist forms of supported housing and also the need to provide

more suitable family accommodation following the withdrawal of one of the Councils schemes, in 2023, that provided an emergency housing model for families and some single person households.

The Council's Rapid Rehousing Plan identifies how it plans to tackle these challenges in view of the fact that instances of homelessness should be rare, brief and non-recurrent. Also taking into account that local authorities should look to reduce their dependency on emergency temporary accommodation and that local authorities should be looking to prioritise the move into permanent housing and reduce the need for interim housing.

The Council has identified the following key areas for development and as priorities for non-permanent housing within the county borough:

- The need to have suitable self-contained single person emergency housing.
- Develop a provision for those with higher risks/ support needs.
- Look at female only provision.
- The removal of the use of hotels and bed and breakfast accommodation as the go to provision for temporary accommodation.
- Increase the provision for units where pets are allowed.
- Increase the family provision and where larger family households are concerned.
- Develop the local authorities first wet house style accommodation.
- Roll out the STAR model.
- Develop its Housing First provision.

The Council is actively considering the proposals outlined in Welsh Government's White Paper *Ending Homelessness in Wales* ²⁷ and will take forward the following priorities:

- Young Persons Emergency Provision with support.
- Young Persons Provision not with adult provision.
- Recommendations where space standards and no shared sleeping spaces etc are concerned.

Suitable for

The Council recognises that its provision for non-permanent housing needs to be suitable and meet the needs of the following groups.

- Single person households
- Families
- Young people
- Female only provision
- Those with higher risks and more complex needs
- Specialist provision for those with dependency on substances, i.e. wet house style accommodation.

²⁷ White Paper on ending homelessness in Wales - <https://www.gov.wales/ending-homelessness-white-paper>

Evidence including data sources

The local authority is currently reliant on a number of private landlord providers to provide its emergency housing provision and this includes hotels, bed and breakfast, HMO type accommodation, this accommodation is both costly and also does not always meet the needs of the client groups and priorities listed above. The local authority through its Welsh Government Data returns is managing significantly high levels of placements in temporary accommodation and the data attached highlights the type and numbers of those placed in its current provision. This is demonstrated through our current internal portfolio of provisions used to provide our current non-permanent housing.

The data highlighted in our WG returns is the data we are using to develop our need for suitable forms of non-permanent temporary accommodation along with our Rapid Rehousing Plans. Where our supported housing is concerned then we have identified through our delivery plan the need to develop a specialist accommodation unit that would replicate something of a wet house style unit.

Our data sources that we use to collate the household type and composition, age, gender, level of support, type of accommodation provided are undertaken through our Welsh Government data returns via Homelessness and Supporting People services.

There are a variety of reasons why people may be sleeping rough in the open air or in buildings, vehicles or other places not designed for habitation. Table 3.57 below provides a snapshot of individuals sleeping rough in Wales and Caerphilly on the last day of the month. It shows on average that 5 people will be sleeping rough at any given time in the county borough. This compares with the numbers of people sleeping rough in the county borough when the data was last collected (2019/20), using a different methodology to record instances.

Table 3.57: Number of rough sleepers in 2023 in Wales & Caerphilly

	Apr	May	Jun	Jul	Aug	Sep	Oct
Wales	126	154	173	174	167	144	169
Caerphilly	6	4	5	4	6	4	5
Percent	4.76%	2.60%	2.89%	2.30%	3.59%	2.78%	2.96%

Source: Welsh Government Homelessness Data Collection

Table 3.58 below provides a breakdown of homeless households temporarily accommodated by the Council at the end of the year, by length of time. It shows that the majority of people will be accommodation for under 6 months, although over 20% have been accommodation over 1 year. We know that the average length of time to accommodate people is increasing due to the increased number of homelessness presentations and the lack of suitable accommodation to rehouse them.

Table 3.58: Homeless households temporarily accommodated by your authority at the end of the year, by length of time

Duration	Count	Percent
Under 6 months	148	54.21%
6 to 12 months	52	19.05%
Over 1 year	56	20.51%
Total	273	

Source: Welsh Government Homelessness Data Collection (April 2022 – March 2023)

Table 3.59 below provides a comparison of homelessness data between 2021/22 and 2022/23. It shows an increase against all measures. The total number of decisions has risen by 128%, total number of households eligible, unintentionally homeless and in priority need by 145%, the total number of homeless households temporarily accommodated by your authority at the end of the year by 111% and the total number of families with children temporarily accommodated in Bed and Breakfast by 600%.

Table 3.59: Comparison of Welsh Government Homelessness Data Collection, years 2021/22 – 2022/23

	April 2021 - March 2022	April 2022 - March 2023	Difference between the two years
Total decisions	1,482	1,891	409
Total number of households eligible, unintentionally homeless and in priority need	285	413	128
Total number of homeless households temporarily accommodated at the end of the year	245	273	28
Total number of families with children temporarily accommodated in Bed and Breakfast at the end of the year	4	24	20

Source: Welsh Government Homelessness Data Collection (April 2022 – March 2023)

Table 3.60 provides a breakdown of the households temporarily accommodated by the Council by family composition and type of accommodation (at 29/01/2024). It shows that the Council's uses bed and breakfast accommodation more so (60.95%) than the accommodation types combined. 71.11% of households are single with no dependents. 30.47% of households are single people residing in bed and breakfast accommodation.

Table 3.60: WHO12 Household Type

	Temporary accommodation (private)	Bed & Breakfast	Hostel	Refuge	Total
Couple with dependent child(ren)	1	11	5	-	17
Single parent household with dependent children - male applicant	-	3	1	-	4
Single parent household with dependent children - female applicant	2	29	7	6	44
Single person household - male applicant	29	96	25	-	150
Single person household - female applicant	7	33	24	10	74
All other household groups	3	20	3	-	26
Total	42	192	65	16	315

Source: Welsh Government Homelessness Data Collection (Jan 2024)

External stakeholder consultation and engagement

In 2021, the Council's Housing Solution Team commissioned Crisis to undertake a piece of work linked to service improvement. A number of interviews were undertaken with residents of non-permeant housing to discuss the nature and type of accommodation offered and the support that was available. These recommendations are also being used to develop our non-permanent housing model and helped in formulating the Council's Rapid Rehousing Plan.

In 2022/23, an audit carried out by Audit Wales looked at service delivery. Key stakeholder consultation was undertaken and the recommendations from this report have been included in the Rapid Rehousing Plan.

The Council's Internal Audit Team completed its own audit on our non-permanent provision of housing and these findings and recommendations are also being incorporated into consideration for our further needs following the consultation undertaken via this route.

Exit questionnaires and service user and service provider feedback is also taken into account in the planning and considering for our ongoing provision of non-permanent housing.

Key Issues identified

1. The availability of suitability existing property/ land to develop accommodation identified.
2. The current state of the housing market where affordability is concerned in acquiring suitable units.
3. Financial / budget constraints affecting delivery.
4. Political support to take forward the priorities.
5. Legislative reform and timelines associated with this.
6. The overall cost associated with the delivery of non-permanent housing.
7. The Planning and associated statutory requirements to bring forward suitable buildings or land to deliver such projects and the constraints and timescales associated with this.
8. Welsh Government Grant Funding

d) Housing, care & support needs

Local policies/ strategies

- Corporate Plan Well-being Objectives (2023-2028):
 - Enabling our communities to thrive
- Local Housing Strategy (2021-2026):
 - Priority 4 – Delivery new homes
 - Priority 5 – Supporting specialist housing needs
- Common Allocation Policy
- Caerphilly County Borough Council Rapid Rehousing Plan 2022-2027
- Supporting People Strategy

Property needs

A range of accommodation including extra care, contemporary sheltered housing, supported living for people with a learning disability and/or Autistic Spectrum Disorder and those people who are living in temporary supported housing.

Suitable for

- People aged 50 years plus who want to live in sheltered accommodation.
- People aged less than 50 years old who require sheltered accommodation by virtue of a medical condition and/or disability.
- Young people coming out of care, people with a learning disability and/or Autistic Spectrum Disorder to live independently.
- People requiring refuge provision.

Evidence

Sheltered Housing

The Council owns and manages 32 sheltered housing schemes situated throughout the county borough, providing independent living with housing related low-level, floating support from small number of sheltered housing officers. These schemes consisting of 890 homes for approximately 1,100 residents, typically aged 60 years plus unless there is no need or if there is a specific medical requirement which could be met through the provision of sheltered accommodation, subject to management discretion.

The Council is in the process of developing a new later living scheme at Ty Darran, Risca and is considering a second development in Oakdale, Penmaen. The proposal is for residents of existing schemes in these areas, earmarked for closure, to relocate to these new developments once they have been completed.

Table 3.61 below provides a breakdown of Council owned and managed sheltered housing schemes by housing market area. It shows that there are some areas in the county borough where there are no sheltered housing schemes. The highest

percentage of homes is in the 'Crosskeys, Risca East, Risca West' housing market area (14.27%).

Table 3.61: Council owned and managed sheltered housing schemes by housing market area

	Number	Count	Percent
Aberbargoed & Bargoed, Gilfach	2	52	5.84%
Argoed	-	-	0.00%
Darran Valley	1	24	2.70%
Moriah & Pontlottyn, Twyn Carno	1	32	3.60%
New Tredegar	2	62	6.97%
Crumlin, Newbridge	4	96	10.79%
Blackwood, Cefn Forest & Pengam	2	62	6.97%
Hengoed, Ystrad Mynach	-	-	0.00%
Maesycwmmmer	1	37	4.16%
Nelson	1	32	3.60%
Penmaen	1	33	3.71%
Pontllanfraith	2	41	4.61%
St Cattwg	1	31	3.48%
Crosskeys, Risca East, Risca West	5	127	14.27%
Abercarn	1	36	4.04%
Ynysddu	2	40	4.49%
Aber Valley	-	-	0.00%
Bedwas & Trethomas, Machen & Rudry	4	122	13.71%
Llanbradach	-	-	0.00%
Morgan Jones, Penyrheol, St Martins & Van	2	63	7.08%
Total	32	890	100%

Source: Caerphilly CBC

In response to the changing needs and aspirations of people seeking accommodation in later life the Council undertook a review of the sheltered housing service in 2014. This resulted in the staff no longer living on site and the introduction of a new floating support service for residents living at the sheltered schemes.

A further review of the Council's sheltered housing designated accommodation was undertaken in 2018 to establish the level of costs associated with improving homes to the Welsh Housing Quality Standard. Due to the high level of costs identified or structural difficulties associated in remodelling some schemes, the Council has made the following changes:

- Redesignated Castle Close, Crosskeys flats from sheltered to later living accommodation (15 homes);
- In preparation for a new later living scheme at Ty Darran, Risca, Castle Court, Crosskeys was now closed (41 homes), with the closure of Waunfawr House,

Crosskeys (22 homes) and St Mary's Court, Risca (33 homes) to follow once the residents have moved into Ty Darran;

- Redesignated Hafod Y Bryn, Risca from sheltered to later living accommodation (29 homes), with the communal lounge converted into another flat providing 30 homes in total;
- Remodelled Ynyswen, Pontllanfraith from 19 bedsits into 13 flats; and
- Ty Melin, Penmaen (33 homes) due for replacement by a new build scheme at the former Oakdale school site.

All other sheltered housing schemes were improved by the Council in line with WHQS (Welsh Housing Quality Standard) standards, however, there remains significant variation in the size of the available accommodation and access to community facilities, both within and between schemes. Some of the schemes are supported by separate communal blocks, which provide communal services enjoyed by the residents such as laundries, offices and communal lounges. These blocks were not included as part of the WHQS programme and consideration needs to be given by the Council to the significant improvements that are required to future proof them for ongoing use. All residents are service charged for any additional communal facilities provided within their scheme; however, some residents are not fully utilising these facilities.

The Council intends to undertake a further review of the schemes soon to establish how the needs and aspirations of current and future residents of the schemes can continue to be met.

Four housing associations provide 501 later living homes throughout the county borough, providing a mix of sheltered and non-sheltered accommodation. Table 3.62 provides a breakdown of accommodation type by bed count. It shows that the majority of properties are 1 bed (65.87%), with a fairly even split of sheltered (46.11%) and non-sheltered accommodation (53.89%).

Table 3.62: Housing association later living accommodation by type and bed count

	1	2	3	Total
Non-sheltered	159	109	2	270
Sheltered	171	59	1	231
Total	330	168	3	501

Source: Caerphilly CBC

Table 3.63 below provides a breakdown of housing association later living accommodation by area and bed count. It shows that the accommodation is situated in 14 out of the 20 housing market areas. The highest percentage of stock is in 'Morgan Jones, Penyrheol, Van & St Martins' (24.15%).

Table 3.63: Housing association later living accommodation by area and bed count

	1	2	3	Count
Aber Valley	18	-	-	18
Abercarn	10	27	-	37
Bedwas & Trethomas & Bedwas & Machen	21	4	-	25
Blackwood, Cefn Fforest & Pengam	38	-	-	38
Darran Valley	-	9	-	9
Hengoed & Ystrad Mynach	52	25	-	77
Llanbradach	29	-	1	30
Morgan Jones, Penyrheol, Van & St Martins	62	58	1	121
Moriah, Pontlottyn & Twyn Carno	33	12	1	46
Nelson	-	4	-	4
New Tredegar	33	7	-	40
Penmaen	-	6	-	6
Pontllanfraith	26	14	-	40
Ynysddu	8	2	-	10
Total	330	168	3	501

Source: Caerphilly CBC

All social landlords operating in the county borough are signed up to the Caerphilly common allocation policy and common housing register, which provides a single route of access to social housing in the county borough and a single means of assessment. Qualifying age criteria is applied by all landlords to their later living accommodation. Housing associations typically allocate all later living accommodation to people aged 55 years plus, unless a medical need is identified then this age will drop to 50 years plus. For the Council, it typically allocates this accommodation to people aged 60 years plus, unless a medical need is identified then this age will drop to 50 years plus. In exceptional medical circumstances the age criteria may be waived by all landlords.

An analysis of the age profile of people currently registered for housing on the Caerphilly common housing register, dated 01/01/2023 and shown in Table 3.64 below, showed that of the 5,513 active applications, 2,304 (41.79%) were aged 50 years plus, of which, 58.98% were assessed by the Council to be in housing need. By age group the highest percentage is 65 plus years – 49.78%, although, not all of these people will be in housing need.

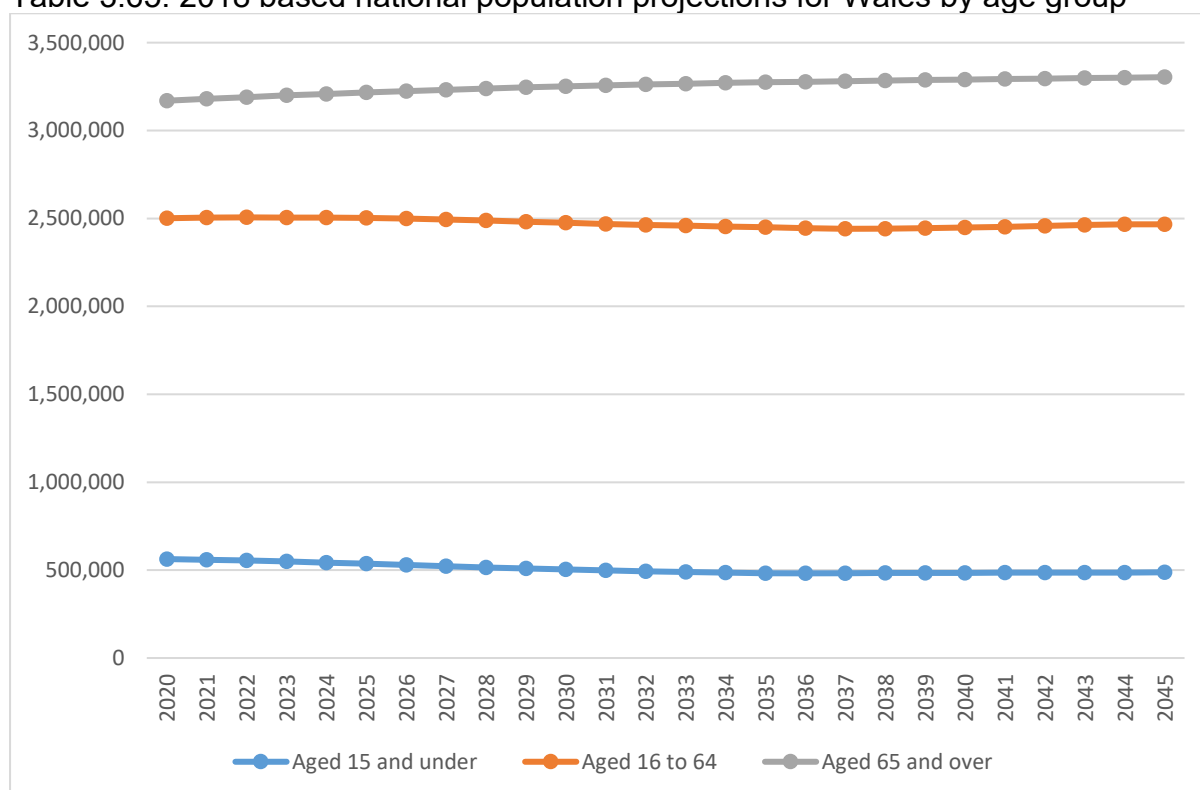
Table 3.64: Breakdown of CHR applicants aged 50 years plus by age group & band

	50-54	55-59	60-64	65+	Total	Percent
Band 1	40	28	20	50	138	5.99%
Band 2	139	165	210	707	1,221	52.99%
Band 3	194	197	164	390	945	41.02%
Total	373	390	394	1,147	2,304	100%
Percent	16.19%	16.93%	17.10%	49.78%	100%	

Source: Caerphilly CBC

Chart 3.65 below provides a breakdown of the national population projections for Wales by age group for each year from the base year of 2020, through the projection period to 2045. It shows that over the 25-year period the population is expected to grow by 133,802 people (4.22%). However, the population will not grow evenly by age group, with a reduction expected in people aged 15 and under (13.53%). The 65 year plus age group is expected to increase by 25.12%. It is important to note that the future provision of housing will need to reflect the changes in population, as projected.

Table 3.65: 2018 based national population projections for Wales by age group



Source: Stats Wales

In 2019, the Gwent Regional Health, Social Care and Housing Strategic Partnership undertook some research²⁸ into the reasons why older people living in the region do

²⁸ The APPROPRIATE Accommodation Provision for People of Retirement Age or Older, Predicated on Research and Investigation using Approved Techniques and Evidence and RIGHTSIZING Study (2019) - <https://www.housinglin.org.uk/assets/Resources/Housing/OtherOrganisation/Summary-Document-APPROPRIATE.pdf>

not want to move to age-appropriate housing in later life and how this issue could be addressed. The research showed there was insufficient accommodation to house an aging population, which was expected to grow and made a series of recommendations to promote safe, healthy and independent living in later life. It is intended that the findings from the research will help inform future housing provision in the region.

The Council is in the process of commissioning consultants to undertake a piece research into the barriers which prevent people in later life right-sizing into age-appropriate accommodation. The field work is expected to commence in January 2024 and take about 3 months. This report will be updated following the conclusion of this piece of research.

External stakeholder consultation and engagement

Consultation with external stakeholders was carried out as part of the introduction of the common housing register and common allocation policy by the Council in December 2016. An equality impact assessment was carried out by the Council with the support of Tai Pawb, as organisation promoting social justice in housing.

No specific consultation with external stakeholders has been undertaken. The Council has undertaken regular monitoring of the operation of the common housing register since its implementation; the result of which have been shared and discussed with all housing association party to the common allocation policy.

The Council is currently working closely with housing association partners on a review of the existing common allocation policy. As part of this review the Council proposes to undertake consultation with a wide range of stakeholders. This report will, therefore, be updated with the results of the consultation following completion on the common allocation policy review.

The right-sizing research will include consultation and engagements with older people.

Key Issues identified

1. The Council has commissioned research to into the barriers to people right-sizing to age-appropriate accommodation in later life. This research will help inform future service provision and the development of new homes.
2. The Council has not carried out a tenant profiling exercise and does not have comprehensive and up to date information about these tenants.

e. Locational needs for student accommodation

Local policies / strategies

- Corporate Plan Well-being Objectives (2023-2028):
 - Enabling our Children to Succeed in Education
 - Enabling our communities to thrive

Land needs

There are no university establishments or campuses located in the county borough. As things currently stand it has been identified that there is no specific requirement for formal student accommodation, such as a halls of residence, to be located in the county borough.

Evidence

There are no universities situated in Caerphilly county borough, although, there are 3 universities situated in neighbouring local authority areas:

- The University of South Wales – has campuses in Cardiff, Newport, and Pontypridd;
- Cardiff Metropolitan University – has two campuses in Cardiff;
- Cardiff University – the biggest university in Wales and the 10th largest in the UK.

None of the universities listed above have halls of residence situated in Caerphilly county borough. In addition, Council Tax records shows that there are no privately owned halls of residence in Caerphilly county borough.

There are 2 further education facilities situated in Caerphilly county borough:

- Coleg Gwent – has a campus in Crosskeys;
- Coleg y Cymoedd – has a campus in Ystrad Mynach.

Neither establishment provides accommodation but Coleg y Cymoedd runs a family hosting scheme for those students that require accommodation whilst studying.

Properties that are occupied solely by full-time university or college students are exempt from paying Council Tax. The Council's records show that there 121 properties in the county borough that are currently exempt. Typically, these properties are privately rented.

Table 3.66 below provides a breakdown of fulltime students, aged 18+ yrs., who are resident in the county borough, by their current living situation. It shows that most students are living with their parents. Being that there are no universities situated in the county borough, zero students are living in a communal establishment, such as a hall of residence.

Table 3.66: Student accommodation by type

	Count	Percent
Living with parents	2,973	71.09%
Living in a communal establishment: University	-	0.00%
Living in a communal establishment: Other	-	0.00%
Living in an all student household	204	4.88%
Living alone	144	3.44%
Living in another household type	861	20.59%
Total	4,182	100%

Source: Office of National Statistics

Table 3.67 Below provides a breakdown of student enrolment in higher education establishments in Wales in 2020/21. It shows that 16.28% of people had a known disability. Specific learning difficulty was the highest recorded disability (5.72%). The data is not available at local authority level.

Table 3.67: Student enrolments in Wales by disability (2020/21)

	Count	Percent
No known disability	121,535	83.72%
Known disability	23,640	16.28%
Specific Learning Difficulty	8,300	5.72%
Blind/ Partially sighted	190	0.13%
Deaf/ Hearing impairment	510	0.35%
Physical impairment / mobility issues	670	0.46%
Mental health condition	6,245	4.30%
Social/communication impairment	1,220	0.84%
A long standing illness / health condition	2,100	1.45%
Multiple disabilities	2,740	1.89%
Other disability not listed	1,660	1.14%
Total	145,175	100%

Source: Stats Wales

When considering the provision of student accommodation, it is important to take into consideration any specific requirements that students may have which may impact on the type and accessibility of accommodation they would require, e.g. disability, gender, cultural beliefs etc.

The requirement for student accommodation to be situated in Caerphilly county borough to meet existing or future needs was discussed with the Local Education Authority. Given there are no universities situated in Caerphilly county borough and that the local colleges do not have a requirement for student accommodation now or in the future, the Council has determined there to be no demonstrable need for the provision of student accommodation now or in the future. The situation will be monitored by the Council as part of the production of future Local Housing Market Assessments to determine any change to the current situation.

External stakeholder consultation and engagement

Discussions were held with the Local Education Authority to understand the provision of education establishments in Caerphilly county borough and the southeast Wales region and the requirement for specific accommodation located in the county borough.

Key issues identified

1. Higher Education data on Stats Wales is not available at a local authority level.
2. The data on student enrolments in Wales by disability (Stats Wales) has not been updated in line with published details.

f. Locational needs for people with physical or cultural needs

Local policies/ strategies

- Corporate Plan Well-being Objectives (2023-2028):
 - Enabling our communities to thrive
- Local Housing Strategy (2021-2026):
 - Priority 1 – Creating Better Choices
 - Priority 3 – Creating Healthy Homes and Vibrant Communities
 - Priority 5 – Supporting Specialist Housing Needs
- Common Allocation Policy
- Private Sector Housing Renewal Policy (2024-28)
 - Priority 4 – Providing Adaptations for disabled persons
 - Priority 5 – Enabling vulnerable people to remain at home in safety and comfort

Property needs

The Council recognises the importance to people in providing access to housing which is situated near shops, places of worship and support services in promoting wellbeing and independence, whilst tackling social isolation, reducing pressures on social care and preventing unnecessary hospital admissions. Given the pattern of past provision, not all homes in the county borough will be situated near shops, places of worship and support services. The Council attempts to minimise the impact of this by providing preference in the common allocation policy to those people who may need to move due a physical or cultural requirement.

Suitable for

1. People who need to move home to be closer to shops, places of worship or services due to a physical requirement.
2. People who need to move home due to be closer to shops, places of worship or services due to a cultural need.

Evidence

Research shows that people with a protected characteristic may experience inequality when accessing housing and related services.²⁹ Examples include delays in adaptations for disabled people, a high prevalence of black, Asian and ethnic minority people living in overcrowded accommodation, the impact of social isolation on mental health, gender based domestic violence and rising youth homelessness. Individual needs are currently addressed through a criteria-based approach, as set out in the common allocation policy or through the provision of supported accommodation (see sections 3.a, 3.b and 3d above). There is currently little specific provision in general needs accommodation except for age and disability.

²⁹ Inequality, Housing, Covid-19 - <https://www.gov.wales/sites/default/files/publications/2020-10/housing-information-group-24-september-2020-housing-and-inequality.pdf>

The current system for allocating social housing in the county borough is not choice based. However, the Council's common allocation policy provides an element of choice by allowing people seeking housing to specify where in the borough they would like to live. The range of choice may be restricted due to the availability, type, size and location in certain parts of the county borough. The policy also affords preference to people assessed by the Council to have a defined need to move. These preferences are in line with the current Welsh Government code of guidance.³⁰

Unless specified otherwise, data in this section has been taken from the Council's common housing register (July 2023). The information is collected from applicants at point of application and upon review. All equalities data is non-mandatory and, consequently, there are gaps in this data where people have declined to answer.

Physical needs

Providing adaptations to disabled people is a key priority for the Council.³¹ People with a physical need may be able to access an adaptation to enable them to remain in their existing home. Adaptations for people living in Council housing or private sector housing are funded via Disabled Facilities Grants or discretionary means. Adaptations to contract holders of housing associations are funded via Physical Adaptations Grants. Priority will be given where the adaptation is carried out within the existing property layout. Extensions to the property will only be considered where no alternative solutions can be identified, subject to a value for money test.

The physical needs of social housing applicants are typically met through the provision of accessible housing, whether that be ground floor flats, bungalows or housing with through floor lifts. Need can be met through the adaptation of the existing home, the turnover of the existing social housing stock or through the provision of new build homes. In terms of new build, bungalows can often be problematic to provide as they can be land hungry, which often impacts on scheme viability. The Council continues to work with partners to find suitable solutions for people seeking housing with a physical need.

To increase the amount of accommodation available to people with a physical need the common allocation policy provides applicants wanting to move from an adapted property a band 1 preference. Data shows that there is currently one applicant on the common housing register that has applied to move from an adapted property.

New build affordable housing in the county borough is funded primarily through social housing grant or the intermediate care fund. The Council works closely with partners to meet any specific needs identified by the Council's occupational therapist team, which is situated in the Housing department. Further information on the role of this team can be found at section 4a.

³⁰ Allocation of accommodation and homelessness: guidance for local authorities - [Allocation of accommodation and homelessness: guidance for local authorities | GOV.WALES](#)

Cultural needs

Research shows there a clear link between ethnicity and housing overcrowding, with certain ethnic groups being disproportionately affected.³² Table 3.68 below provides a breakdown of ethnicity of active lead applicants on the common housing register. It shows that most applicants identify as 'White Welsh/English/Scottish/Northern Irish/British.' 4.60% of applicants either preferred not to answer this question or left it blank. The breakdown of ethnicity of common housing register applicants is like the ethnicity profile from the 2021 Census – see table 3.41.

Table 3.68: A breakdown of ethnicity of active lead applicants on the common housing register

	Count	Percent
Any other ethnic group	9	0.13%
Arab	5	0.07%
Asian Any Other	6	0.09%
Asian Bangladeshi	3	0.04%
Asian Chinese	1	0.01%
Asian Indian	4	0.06%
Asian Pakistani	9	0.13%
Black African	11	0.16%
Black Any Other	2	0.03%
Black Caribbean	6	0.09%
Gypsy / Traveller	1	0.01%
Mixed Other	6	0.09%
Mixed W & B African	6	0.09%
Mixed W & B Asian	11	0.16%
Mixed W & B Caribbean	16	0.24%
NULL	204	3.04%
Prefer not to say	105	1.56%
White Any Other	73	1.09%
White Irish	13	0.19%
White Welsh/English/Scottish/Northern Irish/British	6,219	92.68%
Total	6,710	100%

Source: Caerphilly CBC

The provision of culturally appropriate information is critical in the provision of accessible services and housing. Table 3.69 below provides a breakdown of the preferred language of active lead applicants on the common housing register. It shows that most people prefer to use English (51.12%). When the 'no responses' are not counted this percentage rises to 99.43%. Half of all applicants did not provide a response. Welsh and other languages account for less than 1%.

³² Housing Overcrowding and Ethnicity: A Literature Review - <https://www.gov.wales/sites/default/files/statistics-and-research/2022-09/housing-overcrowding-and-ethnicity-a-literature-review.pdf>

Table 3.69: The preferred language of active lead applicants on the common housing register

	Count	Percent
No response	3,260	48.58%
British Sign Language	5	0.08%
English	3,430	51.12%
Other language	7	0.10%
Welsh	8	0.12%
Total	6,710	100%

Source: Caerphilly CBC

Research shows the level and types of gender inequality in housing provision and access to services, with women more disproportionately impacted than men.³³ Table 3.70 below provides a breakdown of the gender of the active lead applicant on the common housing register. It shows that two thirds of applicants identified as female. Less than 1% of applicants identified as non-binary.

Table 3.70: The gender of the active lead applicant on the common housing register

	Count	Percent
Female	4,201	62.61%
Male	2,492	37.14%
Non-binary	17	0.25%
Total	6,710	100%

Source: Caerphilly CBC

There are 18 units of refuge provision in the county borough, with a further 4 properties for dispersed refuge and support. Llamau, a Welsh homelessness charity providing support to vulnerable young people and women, are the sole provider of Violence Against Women, Domestic Abuse and Sexual Violence provision across the county borough. All refuge provision is staffed through the day with one project having additional staff funded across Gwent for people with complex needs. There are also specific services for males and children effected by living in a refuge and a floating support service, dedicated referral/waiting list and outreach service.

The 2021 Census showed that religion can be a determinant of housing conditions, with four times more likely to live in overcrowded homes than the overall population in the United Kingdom.³⁴ Table 3.71 below provides a breakdown of active lead applicants on the common housing register by religion. It shows that the highest percentage of applicants provided no response. Of those that did respond, 37.96% said that they were not religious. The highest identified religion was Christin –

³³ 2018 WBG Briefing: Housing and Gender - <https://wbg.org.uk/analysis/2018-wbg-briefing-housing-and-gender/>

³⁴ Religion by housing, health, employment, and education, England and Wales: Census 2021 - <https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/religion/articles/religionbyhousinghealthemploymentandeducationenglandandwales/census2021>

13.13%. Percentages for the other religions are low, similarly to the ethnic profile of the county borough.

Table 3.71: Active lead applicants on the common housing register by religion

	Count	Percent
Any other religion or belief	71	1.06%
Buddhist	16	0.24%
Christian	881	13.13%
Hindu	6	0.09%
Jewish	3	0.04%
Muslim	14	0.21%
No religion	2,547	37.96%
No response	2,672	39.82%
Prefer not to say	495	7.38%
Sikh	5	0.07%
Total	6,710	100%

Source: Caerphilly CBC

There is a specific award in the common allocation policy providing priority to those people living in accommodation assessed by the Council as being overcrowded. However, there is a current mismatch between identified housing needs and the availability of accommodation. There is a shortage of family sized accommodation for larger households. Of the 11,247 homes, only 289 (2.56%) have three bedrooms and 2 (0.02%) have five bedrooms. There are currently, 190 households waiting for accommodation of four bed or greater (3.06%). 90 households have an award for overcrowding (0.14%), ranging from four to seven bed requirement.

Research shows that someone's sexual orientation can exacerbate their housing circumstances, e.g. homelessness, domestic abuse and in later living.³⁵ Table 3.72 below provides a breakdown of the sexual orientation of active lead applicants on the common housing register. It shows 45.32% either did not respond or answered, 'prefer not to say.' Of the remaining applicants, 90.94% described their sexual orientation as heterosexual, which is not dissimilar from the Census 2021 which showed that 89.42% of people described their sexual orientation as heterosexual.³⁶

³⁵ Left out: Why many LGBTQ+ people aren't accessing their right to housing in the UK -

<https://thinkhouse.org.uk/site/assets/files/1578/world.pdf>

³⁶ Sexual orientation, England and Wales: Census 2021 -

<https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualorientationenglandandwales/census2021>

Table 3.72: Sexual orientation of active lead applicants on the common housing register

	Count	Percent
Bisexual	101	1.51%
Gay Man	31	0.46%
Heterosexual	3,342	49.81%
Lesbian / Gay Woman	43	0.64%
No response	2,490	37.11%
Other	158	2.35%
Prefer not to say	545	8.12%
Total	6,710	100%

Source: Caerphilly CBC

There are numerous examples throughout the UK of housing organisations providing accommodation to specifically meet the diverse needs of their population, whether that be the first purpose-built extra care scheme for lesbian, gay, bisexual and trans people in the UK in Manchester or culturally appropriate accommodation for Asian elders in Nottingham. Although the above analysis demonstrates that there are a diverse group of peoples registered for social housing in the county borough there is no demonstrable need for purpose-built accommodation to meet these needs other than by age and disability, which the Council and its housing association partners have been providing for many years. An individual's needs will continue to be met through the criteria set out in the common allocation policy.

External stakeholder consultation and engagement

Consultation with external stakeholders was carried out as part of the introduction of the common housing register and common allocation policy by the Council in December 2016. An equality impact assessment was carried out by the Council with the support of Tai Pawb, an organisation promoting social justice in housing.

No specific consultation with external stakeholders has been undertaken. Regular monitoring of the common housing register has been undertaken by the Council since its implementation, the results of which have been shared and discussed with all housing association partners to the common allocation policy.

The Council is currently working closely with housing association partners on a review of the existing common allocation policy. As part of this review the Council proposes to undertake consultation with a wide range of stakeholders. This report will, therefore, be updated with the results of the consultation following completion of the common allocation policy review.

Key issues identified

1. Census 2021 data does not allow the breakdown of accommodation type to show the number of bungalows (all tenures).

2. Equality monitoring questions on the housing register application form are non-mandatory, and gaps in data exist where people have not answered this question or chosen to answer with 'preferred not to say.'

4. Range of additional housing need estimates

This section considers the completed summary tables, as shown at section 4 of the Local Housing Market Assessment tool. For each household projection shown below there are four tables:

- Table 1: Estimated annual additional affordable housing need by HMA and tenure, net of planned supply and turnover of existing stock, over the first five years of the Local Housing Market Assessment period.
- Table 2: Estimated annual additional total housing need by HMA and tenure, gross need before any allowance for planned supply and turnover of existing stock, over the first five years of the Local Housing Market Assessment period.
- Table 3: Estimated annual additional total housing need by HMA and tenure over the remaining 10 years of the Local Housing Market Assessment period. No allowance has been made for any planned supply and turnover of existing stock beyond year five as it becomes less accurate to predict.
- Table 4: Estimated annual and total additional affordable housing need by HMA and tenure over the 15-year period of the Local Housing Market Assessment. These estimates are a combination of those estimates from the first and third tables.

The data inputs and key assumptions generating each of the above estimates are shown in the table below. The same inputs and assumptions apply across all of the household projections shown below. No deviation from the default data or assumptions provided in the tool by Welsh Government has occurred.

Table 4.1: Data Inputs & Key Assumptions

Data items / Key assumptions						
	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%
Number of years to clear existing unmet need	5 years					
Market housing affordability criteria	30%					
Social rent affordability criteria	35%					
Data item	Data Sources	Basis of the data				
Income data by HMA	Hometrack	2022				
House price paid data by HMA	Land Registry Data	Calendar year				
Rent prices	Rent Officer Wales & Hometrack	Calendar year				
Household projection basis	User Projections 1					
Percentage of households considered for owner occupier tenure that go on to buy	40%					
HMA assumptions						
HMA	FTB property price value	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent		
Aberbargoed & Bargoed, Giffach	£ 92,456	4.2	£ 17,302	£ 20,185		
Argoed	£ 101,850	4.2	£ 22,049	£ 25,724		
Darran Valley	£ 74,904	4.2	£ 19,028	£ 22,200		
Moriah & Pontllotyn, Twyn Carno	£ 75,646	4.2	£ 14,884	£ 17,365		
New Tredegar	£ 64,274	4.2	£ 18,573	£ 21,669		
Crumlin, Newbridge	£ 108,771	4.2	£ 18,444	£ 21,518		
Blackwood, Cefn Forest & Pengam	£ 123,604	4.2	£ 20,052	£ 23,394		
Hengoed, Ystrad Mynach	£ 123,604	4.2	£ 18,675	£ 21,788		
Maesycwimmer	£ 133,492	4.2	£ 22,148	£ 25,839		
Nelson	£ 126,570	4.2	£ 20,461	£ 23,871		
Penmaen	£ 148,325	4.2	£ 27,213	£ 31,748		
Pontllanfraith	£ 128,548	4.2	£ 19,403	£ 22,637		
St Cattwg	£ 120,143	4.2	£ 18,044	£ 21,052		
Abercam	£ 98,883	4.2	£ 17,079	£ 19,926		
Crosskeys, Risca East, Risca West	£ 122,615	4.2	£ 19,294	£ 22,510		
Ynysddu	£ 108,771	4.2	£ 22,814	£ 26,616		
Aber Valley	£ 103,827	4.2	£ 19,298	£ 22,515		
Bedwas & Trethomas, Machen & Rudry	£ 148,325	4.2	£ 22,284	£ 25,998		
Llanbradach	£ 122,615	4.2	£ 18,802	£ 21,935		
Morgan Jones, Penyrheol, St Martins, Van	£ 154,258	4.2	£ 23,439	£ 27,345		

Source: 2024-2029 Local Housing Market Assessment

Average annual additional housing need estimates using user defined household projections

A range of scenarios were considered by the Council to determine the total population, households, dwellings, and the working age population to inform the housing requirements in the 2nd Replacement Local Development Plan. Planning Policy Wales³⁷ is clear that the latest Welsh Government projections will form a fundamental part of the evidence base for the plan, but that planning authorities need to consider whether the various elements of the projections are appropriate for their area, and if not, undertake modelling, based on robust evidence, to identify alternative options.

Caerphilly county borough has an ageing population, with a significant increase in the number of people older than state pension age projected over the Local Development Plan period. In recent years there has been a decline in the number of births and an increase in the number of deaths, and for the first time in 2019-20, the number of deaths exceeded the number of births, resulting in negative natural change, with this trend projected to continue. Whilst in the past, population growth

³⁷ Planning Policy Wales - <https://www.gov.wales/planning-policy-wales>

has been driven by both natural change and migration, it is now the case that migration is the key driver of population growth.

Consideration has been given to the latest Welsh Government Population and Household Projections – 2018-based. These projections identify a low level of population growth over the plan period, driven by migration. However, in terms of the population structure, the projections identify a significant increase in older people and a decline in the working age and school age populations. This will result in an unbalanced population structure, which will have significant implications for the sustainability of schools and the Council's ability to support economic growth and service and infrastructure provision.

As Welsh Government projections are not considered to represent a desirable option from a policy perspective, the Council has tested ten other scenarios. Scenario J – Cardiff City Region working age population growth option – was considered the most appropriate to inform the Preferred Strategy, as the level of growth was considered to reflect the county borough's position within a National Growth Area in Future Wales³⁸ by being ambitious but still realistic, as well as supporting the regional level of job creation identified as part of the Cardiff Capital Region City Deal.

As a result of objections from Welsh Government planning officers to the emerging 2nd Replacement Local Development Plan, a regional assessment of future growth and migration has been commissioned. The purpose of the commission is to identify an appropriate level of growth for the Cardiff Capital Region area, for the period up to 2040, and to consider the spatial distribution of this growth at the local authority level to inform emerging Replacement Local Development Plans. The final report is expected at the end of April 2024.

Table 4.2 below shows a total housing requirement of 1,011, consisting of 765 affordable homes and 246 market homes. The need for affordable homes is made up of 189 homes emanating from newly arising need and 576 from existing unmet need. When planned supply and the turnover of existing stock is taken into account the need reduces to 218, consisting of 58 intermediate homes and 160 social housing rented homes.

³⁸ Future Wales: the national plan 2040 - <https://www.gov.wales/future-wales-national-plan-2040>

Table 4.2: Estimated annual affordable housing need by housing market area and tenure (net)

FIRST 5 YEARS OF THE LHMA PERIOD

Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)

Affordable housing

765

Market housing (newly arising need only)

246

Total

1011

+

Newly arising need

189

Existing unmet need

576

Less planned supply and turnover of existing stock

Net affordable housing

218

of which

Intermediate rent and LCHO

58

+

Social rent

160

Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock

Basis of the household projections

User Projections 1

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

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

The first table provides the additional affordable housing need estimates on the following basis:

- *at HMA level
- *by tenure (LCHO, intermediate rent and social rent)
- *annual estimate for the first 5 years of the LHMA period
- *the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	138	8	3	11	160	33	26	218
Aberbargoed & Bargoed, Giffach	8	-	-	1	9	2	3	14
Argoed	10	-	-	1	10	1	1	12
Darran Valley	3	-	-	0	3	-	1	3
Moriah & Pontlottyn, Twyn Carno	-	-	-	-	-	-	1	1
New Tredegar	-	-	-	-	-	-	1	1
Crumlin, Newbridge	14	-	-	1	15	0	2	17
Blackwood, Cefn Forest & Pengam	27	-	-	2	29	3	4	36
Hengoed, Ystrad Mynach	9	-	-	-	9	0	0	9
Maesycwmmr	5	6	3	0	14	4	1	19
Nelson	-	-	-	-	-	2	-	2
Penmaen	7	-	-	1	7	1	-	9
Pontllanfraith	13	-	-	1	14	2	-	16
St Cattwg	16	-	-	1	16	-	2	19
Abercam	9	-	-	-	9	-	2	10
Crosskeys, Risca East, Risca West	5	-	-	0	5	0	1	7
Ynysddu	10	2	-	1	13	0	2	15
Aber Valley	-	-	-	-	-	3	-	3
Bedwas & Trethomas, Machen & Rudry	-	-	-	1	1	1	2	4
Llanbradach	-	-	-	-	-	0	0	1
Morgan Jones, Penyrheol, St Martins, Van	3	-	-	1	4	12	4	20

Table 4.3: Estimated annual additional total housing need estimates by housing market area and tenure (gross)

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)							
The second table provides the additional total housing need estimates on the following basis:							
*includes market and affordable housing							
*at HMA level							
*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)							
*annual estimate for the first 5 years of the LHMA period							
HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	678	87	765	93	153	246	1,011
Aberbargoed & Bargoed, Gilfach	37	5	42	6	8	15	57
Argoed	17	2	18	2	3	5	23
Darran Valley	6	1	6	-	-	-	6
Moriah & Pontllotyn, Twyn Carno	9	1	9	-	-	-	9
New Tredegar	15	1	16	-	-	-	16
Crumlin, Newbridge	33	2	35	0	0	0	36
Blackwood, Cefn Forest & Pengam	82	9	91	9	16	25	117
Hengoed, Ystrad Mynach	30	2	32	0	0	1	33
Maesycwmmwr	25	5	31	13	23	36	66
Nelson	15	4	19	8	15	23	42
Penmaen	27	4	31	3	4	8	39
Pontllanfraith	43	8	51	7	11	18	68
St Cattwg	30	2	32	-	-	-	32
Abercam	23	2	25	-	-	-	25
Crosskeys, Risca East, Risca West	32	3	35	1	2	3	38
Ynysddu	22	2	24	1	1	1	26
Aber Valley	23	5	28	9	13	22	50
Bedwas & Trethomas, Machen & Rudry	36	5	41	4	7	12	53
Llanbradach	16	2	18	1	2	4	21
Morgan Jones, Penyrheol, St Martins, Van	157	23	180	26	47	73	253

Source: 2024-2029 Local Housing Market Assessment

Table 4.4: Estimated annual additional total housing need estimates over the remaining 10 years of the Local Housing Market Assessment period

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period							
LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period							
The third table provides the additional housing need estimates on the following basis:							
*at HMA level							
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)							
*annual estimate for the remaining 10 years of the LHMA period							
*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)							
*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.							
No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.							
HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing	(d) Owner occupier	(e) Private rented sector	(f) Market Housing	(g) Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c)+ (f)
Additional housing need estimates by tenure	140	49	189	93	153	246	434
Aberbargoed & Bargoed, Gilfach	7	3	10	6	8	15	25
Argoed	3	1	4	2	3	5	9
Darran Valley	-	-	-				
Moriah & Pontllotyn, Twyn Camo	-	-	-				
New Tredegar	-	-	-				
Crumlin, Newbridge	0	0	0	0	0	0	1
Blackwood, Cefn Forest & Pengam	13	5	17	9	16	25	42
Hengoed, Ystrad Mynach	0	0	0	0	0	1	1
Maesycwmmwr	18	5	23	13	23	36	59
Nelson	11	3	14	8	15	23	37
Penmaen	5	2	8	3	4	8	16
Pontllanfraith	9	5	14	7	11	18	32
St Cattwg	-	-	-				
Abercam	-	-	-				
Crosskeys, Risca East, Risca West	2	1	2	1	2	3	6
Ynysddu	1	0	1	1	1	1	3
Aber Valley	12	5	17	9	13	22	39
Bedwas & Trethomas, Machen & Rudry	7	2	9	4	7	12	21
Llanbradach	2	1	2	1	2	4	6
Morgan Jones, Penyrheol, St Martins, Van	50	16	66	26	47	73	139

Source: 2024-2029 Local Housing Market Assessment

Table 4.5: Estimated annual additional total housing need by housing market area over the 15 years of the Local Housing Market Assessment

Headline 15-year Affordable Housing Need Estimate						
Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA						
Table 4 provides the additional affordable housing need estimates on the following basis:						
*at HMA level						
*by tenure (intermediate housing and social rent)						
*annual estimate for the 15 years of the LHMA period						
*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.						
(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)						
	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	146	52	198	2,194	781	2,975
Aberbargoed & Bargoed, Gilfach	8	3	11	120	51	170
Argoed	6	1	7	85	16	100
Darran Valley	1	0	1	14	3	17
Moriah & Pontlloftyn, Twyn Carno	-	0	0	-	3	3
New Tredegar	-	0	0	-	5	5
Crumlin, Newbridge	5	1	6	76	11	87
Blackwood, Cefn Forest & Pengam	18	5	23	273	79	352
Hengoed, Ystrad Mynach	3	0	3	46	3	50
Maesycwmmwr	17	5	21	251	71	322
Nelson	7	3	10	105	45	150
Penmaen	6	2	8	89	31	120
Pontllanfraith	11	4	15	159	64	223
St Cattwg	5	1	6	82	11	93
Abercarn	3	1	3	44	8	52
Crosskeys, Risca East, Risca West	3	1	4	44	13	57
Ynysddu	5	1	6	73	11	85
Aber Valley	8	4	12	124	61	185
Bedwas & Trethomas, Machen & Rudry	5	3	8	76	41	117
Llanbradach	1	1	2	15	11	27
Morgan Jones, Penyrheol, St Martins, Van	34	16	51	517	244	761

Source: 2024-2029 Local Housing Market Assessment

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

Table 4.6 below shows a total housing requirement of 723, consisting of 640 affordable homes and 83 market homes. The need for affordable homes is made up of 64 homes emanating from newly arising need and 576 from existing unmet need. When planned supply and the turnover of existing stock is taken into account the need reduces to 167, consisting of 30 intermediate homes and 137 social housing rented homes.

Table 4.6: Estimated annual affordable housing need by housing market area and tenure (net)

tenure (net)

FIRST 5 YEARS OF THE LHMA PERIOD

Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)

Affordable housing

640

+

Market housing (newly arising need only)

83

=

Total

723

Less planned supply and turnover of existing stock

Newly arising need

64

Existing unmet need

576

Net affordable housing

167

of which

Intermediate rent and LCHO

30

+

Social rent

137

Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock

167

of which

30

+

137

Basis of the household projections

Principal

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

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

The first table provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
HMA	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	Social rent (a) + (b) + (c) + (d) = (e)	Intermediate rent	LCHO	Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	124	2	-	10	137	11	19	167
Aberbargoed & Bargoed, Gilfach	7	-	-	1	8	1	2	11
Argoed	9	-	-	1	10	0	1	11
Darran Valley	3	-	-	0	3	-	1	3
Moriah & Pontlottyn, Twyn Carno	-	-	-	-	-	-	1	1
New Tredegar	-	-	-	-	-	-	1	1
Crumlin, Newbridge	14	-	-	1	15	0	2	17
Blackwood, Cefn Forest & Pengam	25	-	-	2	27	1	3	30
Hengoed, Ystrad Mynach	9	-	-	-	9	0	0	9
Maesycwimmer	2	0	-	0	2	1	1	4
Nelson	-	-	-	-	-	1	-	1
Penmaen	6	-	-	1	6	0	-	7
Pontllanfraith	11	-	-	1	12	1	-	13
St Cattwg	16	-	-	1	16	-	2	19
Abercam	9	-	-	-	9	-	2	10
Crosskeys, Risca East, Risca West	5	-	-	0	5	0	1	6
Ynysddu	10	2	-	1	12	0	2	14
Aber Valley	-	-	-	-	-	1	-	1
Bedwas & Trethomas, Machen & Rudry	-	-	-	1	1	0	1	3
Llanbradach	-	-	-	-	-	0	0	0
Morgan Jones, Penyrheol, St Martins, Van	-	-	-	1	1	4	1	6

Source: 2024-2029 Local Housing Market Assessment

Table 4.7: Estimated annual additional total housing need estimates by housing market area and tenure (gross)

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) The second table provides the additional total housing need estimates on the following basis: *includes market and affordable housing *at HMA level *by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent) *annual estimate for the first 5 years of the LHMA period							
HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	586	54	640	31	52	83	723
Aberbargoed & Bargoed, Giffach	32	3	35	2	3	5	40
Argoed	14	1	16	1	1	2	17
Darran Valley	6	1	6	-	-	-	6
Moriah & Pontlotyn, Twyn Carno	9	1	9	-	-	-	9
New Tredegar	15	1	16	-	-	-	16
Crumlin, Newbridge	33	2	35	0	0	0	35
Blackwood, Cefn Forest & Pengam	74	6	80	3	5	8	89
Hengoed, Ystrad Mynach	30	2	32	0	0	0	33
Maesycwmmwr	13	2	16	4	8	12	28
Nelson	8	1	10	3	5	8	18
Penmaen	24	2	26	1	1	3	29
Pontllanfraith	37	4	41	2	4	6	47
St Cattwg	30	2	32	-	-	-	32
Abercarn	23	2	25	-	-	-	25
Crosskeys, Risca East, Risca West	31	3	33	0	1	1	34
Ynysddu	22	2	23	0	0	0	24
Aber Valley	14	2	17	3	4	8	24
Bedwas & Trethomas, Machen & Rudry	32	3	35	1	3	4	39
Llanbradach	15	1	16	0	1	1	17
Morgan Jones, Penyrheol, St Martins, Van	124	12	136	9	16	25	161

Source: 2024-2029 Local Housing Market Assessment

Table 4.8: Estimated annual additional total housing need estimates over the remaining 10 years of the Local Housing Market Assessment period

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period							
LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period							
The third table provides the additional housing need estimates on the following basis:							
*at HMA level							
*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)							
*annual estimate for the remaining 10 years of the LHMA period							
*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)							
*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing. No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.							
HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing	(d) Owner occupier	(e) Private rented sector	(f) Market Housing	(g) Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	47	17	64	31	52	83	146
Aberbargoed & Bargoed, Giffach	2	1	3	2	3	5	8
Argoed	1	0	1	1	1	2	3
Darran Valley	-	-	-				
Moriah & Pontllytyn, Twyn Carno	-	-	-				
New Tredegar	-	-	-				
Crumlin, Newbridge	0	0	0	0	0	0	0
Blackwood, Cefn Forest & Pengam	4	2	6	3	5	8	14
Hengoed, Ystrad Myrnach	0	0	0	0	0	0	0
Maesycwmmwr	6	2	8	4	8	12	20
Nelson	4	1	5	3	5	8	12
Penmaen	2	1	3	1	1	3	5
Pontllanfraith	3	2	5	2	4	6	11
St Cattwg	-	-	-				
Abercam	-	-	-				
Crosskeys, Risca East, Risca West	1	0	1	0	1	1	2
Ynysddu	0	0	0	0	0	0	1
Aber Valley	4	2	6	3	4	8	13
Bedwas & Trethomas, Machen & Rudry	2	1	3	1	3	4	7
Llanbradach	1	0	1	0	1	1	2
Morgan Jones, Penyrheol, St Martins, Van	17	5	22	9	16	25	47

Source: 2024-2029 Local Housing Market Assessment

Table 4.9: Estimated annual additional total housing need by housing market area over the 15 years of the Local Housing Market Assessment

Headline 15-year Affordable Housing Need Estimate						
Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA						
Table 4 provides the additional affordable housing need estimates on the following basis:						
*at HMA level						
*by tenure (intermediate housing and social rent)						
*annual estimate for the 15 years of the LHMA period						
*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.						
(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)						
	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	77	21	98	1,153	317	1,471
Aberbargoed & Bargoed, Giffach	4	2	6	65	23	87
Argoed	4	1	5	60	8	68
Darran Valley	1	0	1	14	3	17
Moriah & Pontlloftyn, Twyn Carno	-	0	0	-	3	3
New Tredegar	-	0	0	-	5	5
Crumlin, Newbridge	5	1	6	75	11	85
Blackwood, Cefn Forest & Pengam	12	2	14	177	33	211
Hengoed, Ystrad Mynach	3	0	3	45	2	47
Maesycwmmwr	5	2	6	72	25	97
Nelson	2	1	3	35	15	51
Penmaen	3	1	4	50	10	60
Pontllanfraith	6	1	8	92	22	114
St Cattwg	5	1	6	82	11	93
Abercam	3	1	3	44	8	52
Crosskeys, Risca East, Risca West	2	0	2	32	6	37
Ynysddu	4	1	5	65	9	74
Aber Valley	3	1	4	42	20	62
Bedwas & Trethomas, Machen & Rudry	2	1	3	29	17	46
Llanbradach	0	0	1	5	4	9
Morgan Jones, Penyrheol, St Martins, Van	11	5	17	170	82	253

Source: 2024-2029 Local Housing Market Assessment

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

Table 4.6 below shows a total housing requirement of 828, consisting of 685 affordable homes and 142 market homes. The need for affordable homes is made up of 109 homes emanating from newly arising need and 576 from existing unmet need. When planned supply and the turnover of existing stock is taken into account the need reduces to 184, consisting of 40 intermediate homes and 144 social housing rented homes.

Table 4.10: Estimated annual affordable housing need by housing market area and tenure (net)

tenure (net)								
FIRST 5 YEARS OF THE LHMA PERIOD								
Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)		Affordable housing		Market housing (newly arising need only)		Total		
		685		142		828		
		Newly arising need		Existing unmet need				
		109		576				
Less planned supply and turnover of existing stock		Net affordable housing		Intermediate rent and LCHO		Social rent		
Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock		184		40		144		
		of which						
Basis of the household projections		Higher Variant						
Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period								
LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)								
The first table provides the additional affordable housing need estimates on the following basis:								
*at HMA level								
*by tenure (LCHO, intermediate rent and social rent)								
*annual estimate for the first 5 years of the LHMA period								
*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.								
HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	128	4	1	11	144	19	22	184
Aberbargoed & Bargoed, Giffach	8	-	-	1	8	1	2	12
Argoed	9	-	-	1	10	0	1	11
Darran Valley	3	-	-	0	3	-	1	3
Moriah & Pontllytyn, Twyn Camo	-	-	-	-	-	-	1	1
New Tredegar	-	-	-	-	-	-	1	1
Crumlin, Newbridge	14	-	-	1	15	0	2	17
Blackwood, Cefn Forest & Pengam	25	-	-	2	28	2	3	32
Hengoed, Ystrad Mynach	9	-	-	-	9	0	0	9
Maesycwmmmer	3	2	1	0	6	2	1	9
Nelson	-	-	-	-	-	1	-	1
Penmaen	6	-	-	1	7	1	-	7
Pontllanfraith	12	-	-	1	13	1	-	14
St Cattwg	16	-	-	1	16	-	2	19
Abercam	9	-	-	-	9	-	2	10
Crosskeys, Risca East, Risca West	5	-	-	0	5	0	1	6
Ynysddu	10	2	-	1	13	0	2	14
Aber Valley	-	-	-	-	-	2	-	2
Bedwas & Trethomas, Machen & Rudry	-	-	-	1	1	1	1	3
Llanbradach	-	-	-	-	-	0	0	1
Morgan Jones, Penyrheol, St Martins, Van	-	-	-	1	1	7	2	10

Source: 2024-2029 Local Housing Market Assessment

Table 4.11: Estimated annual additional total housing need estimates by housing market area and tenure (gross)

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) The second table provides the additional total housing need estimates on the following basis: *includes market and affordable housing *at HMA level *by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent) *annual estimate for the first 5 years of the LHMA period							
HMA	(a) Social rent	(b) Intermediat e rent and LCHO	(c) Affordable Housing (c)= (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	619	66	685	53	89	142	828
Aberbargoed & Bargoed, Gilfach	34	4	38	4	5	8	46
Argoed	15	1	16	1	2	3	19
Darran Valley	6	1	6	-	-	-	6
Moriah & Pontlloftyn, Twyn Carno	9	1	9	-	-	-	9
New Tredegar	15	1	16	-	-	-	16
Crumlin, Newbridge	33	2	35	0	0	0	35
Blackwood, Cefn Forest & Pengam	77	7	84	5	9	15	99
Hengoed, Ystrad Mynach	30	2	32	0	0	0	33
Maesycwmmr	18	3	21	8	13	21	42
Nelson	11	2	13	5	9	13	26
Penmaen	25	3	28	2	2	4	32
Pontllanfraith	39	5	45	4	6	10	55
St Cattwg	30	2	32	-	-	-	32
Abercam	23	2	25	-	-	-	25
Crosskeys, Risca East, Risca West	31	3	34	1	1	2	36
Ynysddu	22	2	24	0	0	1	25
Aber Valley	17	3	21	5	7	13	34
Bedwas & Trethomas, Machen & Rudry	34	4	37	2	4	7	44
Llanbradach	15	1	17	1	1	2	19
Morgan Jones, Penyrheol, St Martins, Van	136	16	152	15	27	42	194

Source: 2024-2029 Local Housing Market Assessment

Table 4.12: Estimated annual additional total housing need estimates over the remaining 10 years of the Local Housing Market Assessment period

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period							
LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period							
The third table provides the additional housing need estimates on the following basis:							
*at HMA level							
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)							
*annual estimate for the remaining 10 years of the LHMA period							
*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)							
*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.							
No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.							
HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing	(g) Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	81	28	109	53	89	142	251
Aberbargoed & Bargoed, Gilfach	4	2	6	4	5	8	14
Argoed	2	0	2	1	2	3	5
Darran Valley	-	-	-				
Moriah & Pontllytyn, Twyn Carno	-	-	-				
New Tredegar	-	-	-				
Crumlin, Newbridge	0	0	0	0	0	0	0
Blackwood, Cefn Forest & Pengam	7	3	10	5	9	15	25
Hengoed, Ystrad Mynach	0	0	0	0	0	0	1
Maesycwmmmer	10	3	13	8	13	21	34
Nelson	6	2	8	5	9	13	21
Penmaen	3	1	4	2	2	4	9
Pontllanfraith	5	3	8	4	6	10	18
St Cattwg	-	-	-				
Abercam	-	-	-				
Crosskeys, Risca East, Risca West	1	0	1	1	1	2	3
Ynysddu	1	0	1	0	0	1	1
Aber Valley	7	3	10	5	7	13	23
Bedwas & Trethomas, Machen & Rudry	4	1	5	2	4	7	12
Llanbradach	1	0	1	1	1	2	3
Morgan Jones, Penyrheol, St Martins, Van	29	9	38	15	27	42	81

Source: 2024-2029 Local Housing Market Assessment

Table 4.13: Estimated annual additional total housing need by housing market area over the 15 years of the Local Housing Market Assessment

Headline 15-year Affordable Housing Need Estimate						
Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of						
Table 4 provides the additional affordable housing need estimates on the following basis:						
*at HMA level						
*by tenure (intermediate housing and social rent)						
*annual estimate for the 15 years of the LHMA period						
*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.						
(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)						
	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	102	32	134	1,526	486	2,011
Aberbargoed & Bargoed, Gilfach	6	2	8	85	33	117
Argoed	5	1	5	69	11	80
Darran Valley	1	0	1	14	3	17
Moriah & Pontlloftyn, Twyn Carno	-	0	0	-	3	3
New Tredegar	-	0	0	-	5	5
Crumlin, Newbridge	5	1	6	75	11	86
Blackwood, Cefn Forest & Pengam	14	3	17	212	50	262
Hengoed, Ystrad Mynach	3	0	3	45	3	48
Maesycwmmwr	9	3	12	136	42	178
Nelson	4	2	6	61	26	87
Penmaen	4	1	5	64	18	82
Pontllanfraith	8	2	10	116	37	153
St Cattwg	5	1	6	82	11	93
Abercarn	3	1	3	44	8	52
Crosskeys, Risca East, Risca West	2	1	3	36	8	45
Ynysddu	5	1	5	68	10	78
Aber Valley	5	2	7	72	35	107
Bedwas & Trethomas, Machen & Rudry	3	2	5	46	26	72
Llanbradach	1	0	1	9	7	16
Morgan Jones, Penyrheol, St Martins, Van	19	9	29	291	141	432

Source: 2024-2029 Local Housing Market Assessment

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

Table 4.14 below shows a total housing requirement of 583, consisting of 579 affordable homes and 4 market homes. The need for affordable homes is made up of 3 homes emanating from newly arising need and 576 from existing unmet need. When planned supply and the turnover of existing stock is taken into account the need reduces to 148, consisting of 17 intermediate homes and 131 social housing rented homes.

Table 4.14: Estimated annual affordable housing need by housing market area and tenure (net)

tenure (net)

5 YEARS OF THE LHMA PERIOD

Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)

Affordable housing

579

+

Market housing (newly arising need only)

4

=

Total

583

Less planned supply and turnover of existing stock

Newly arising need

3

Existing unmet need

576

Net affordable housing

148

of which

Intermediate rent and LCHO

17

+

Social rent

131

Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock

148

of which

17

+

131

Basis of the household projections

Lower Variant

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

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

The first table provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	119	2	-	10	131	0	16	148
Aberbargoed & Bargoed, Giffach	7	-	-	1	7	0	2	9
Argoed	9	-	-	1	9	0	1	10
Darran Valley	3	-	-	0	3	-	1	3
Moriah & Pontllytyn, Twyn Carno	-	-	-	-	-	-	1	1
New Tredegar	-	-	-	-	-	-	1	1
Crumlin, Newbridge	14	-	-	1	15	0	2	17
Blackwood, Cefn Forest & Pengam	24	-	-	2	26	0	2	28
Hengoed, Ystrad Mynach	9	-	-	-	9	0	0	9
Maesycwmmmer	0	-	-	0	0	0	0	1
Nelson	-	-	-	-	-	0	-	0
Penmaen	5	-	-	0	6	0	-	6
Pontllanfraith	11	-	-	1	12	0	-	12
St Cattwg	16	-	-	1	16	-	2	19
Abercam	9	-	-	-	9	-	2	10
Crosskeys, Risca East, Risca West	5	-	-	0	5	0	1	6
Ynysddu	9	2	-	1	12	0	2	14
Aber Valley	-	-	-	-	-	0	-	0
Bedwas & Trethomas, Machen & Rudry	-	-	-	1	1	0	1	2
Llanbradach	-	-	-	-	-	0	0	0
Morgan Jones, Penyrheol, St Martins, Van	-	-	-	0	0	0	0	1

Source: 2024-2029 Local Housing Market Assessment

Table 4.15: Estimated annual additional total housing need estimates by housing market area and tenure (gross)

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) The second table provides the additional total housing need estimates on the following basis: *includes market and affordable housing *at HMA level *by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent) *annual estimate for the first 5 years of the LHMA period							
HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c)= (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	541	38	579	1	2	4	583
Aberbargoed & Bargoed, Giffach	30	2	32	0	0	0	32
Argoed	13	1	14	0	0	0	14
Darran Valley	6	1	6	-	-	-	6
Moriah & Pontlloftyn, Twyn Carno	9	1	9	-	-	-	9
New Tredegar	15	1	16	-	-	-	16
Crumlin, Newbridge	33	2	35	0	0	0	35
Blackwood, Cefn Forest & Pengam	70	5	74	0	0	0	75
Hengoed, Ystrad Mynach	30	2	32	0	0	0	32
Maesycwmmwr	8	1	8	0	0	1	9
Nelson	5	0	5	0	0	0	6
Penmaen	22	2	24	0	0	0	24
Pontllanfraith	34	2	37	0	0	0	37
St Cattwg	30	2	32	-	-	-	32
Abercam	23	2	25	-	-	-	25
Crosskeys, Risca East, Risca West	30	2	33	0	0	0	33
Ynysddu	22	2	23	0	0	0	23
Aber Valley	10	1	11	0	0	0	12
Bedwas & Trethomas, Machen & Rudry	30	2	32	0	0	0	32
Llanbradach	15	1	15	0	0	0	16
Morgan Jones, Penyrheol, St Martins, Van	108	7	115	0	1	1	116

Source: 2024-2029 Local Housing Market Assessment

Table 4.16: Estimated annual additional total housing need estimates over the remaining 10 years of the Local Housing Market Assessment period

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period							
LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period							
The third table provides the additional housing need estimates on the following basis:							
*at HMA level							
*by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent)							
*annual estimate for the remaining 10 years of the LHMA period							
*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)							
*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.							
No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.							
	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	2	1	3	1	2	4	6
Aberbargoed & Bargoed, Gilfach	0	0	0	0	0	0	0
Argoed	0	0	0	0	0	0	0
Darran Valley	-	-	-				
Moriah & Pontllytyn, Twyn Carno	-	-	-				
New Tredegar	-	-	-				
Crumlin, Newbridge	0	0	0	0	0	0	0
Blackwood, Cefn Forest & Pengam	0	0	0	0	0	0	1
Hengoed, Ystrad Mynach	0	0	0	0	0	0	0
Maesycwmmmer	0	0	0	0	0	1	1
Nelson	0	0	0	0	0	0	1
Penmaen	0	0	0	0	0	0	0
Pontllanfraith	0	0	0	0	0	0	0
St Cattwg	-	-	-				
Abercarn	-	-	-				
Crosskeys, Risca East, Risca West	0	0	0	0	0	0	0
Ynysddu	0	0	0	0	0	0	0
Aber Valley	0	0	0	0	0	0	1
Bedwas & Trethomas, Machen & Rudry	0	0	0	0	0	0	0
Llanbradach	0	0	0	0	0	0	0
Morgan Jones, Penyrheol, St Martins, Van	1	0	1	0	1	1	2

Source: 2024-2029 Local Housing Market Assessment

Table 4.17: Estimated annual additional total housing need by housing market area over the 15 years of the Local Housing Market Assessment

Headline 15-year Affordable Housing Need Estimate						
Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of						
Table 4 provides the additional affordable housing need estimates on the following basis:						
*at HMA level						
*by tenure (intermediate housing and social rent)						
*annual estimate for the 15 years of the LHMA period						
*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.						
(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)						
HMA	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	45	6	51	673	92	765
Aberbargoed & Bargoed, Gilfach	3	1	3	38	9	47
Argoed	3	0	4	48	5	53
Darran Valley	1	0	1	14	3	17
Moriah & Pontllytyn, Twyn Carno	-	0	0	-	3	3
New Tredegar	-	0	0	-	5	5
Crumlin, Newbridge	5	1	6	74	10	84
Blackwood, Cefn Forest & Pengam	9	1	9	131	11	142
Hengoed, Ystrad Mynach	3	0	3	44	2	46
Maesycwmmwr	0	0	0	4	2	6
Nelson	0	0	0	2	1	2
Penmaen	2	0	2	30	0	31
Pontllanfraith	4	0	4	59	1	60
St Cattwg	5	1	6	82	11	93
Abercarn	3	1	3	44	8	52
Crosskeys, Risca East, Risca West	2	0	2	25	3	28
Ynysddu	4	1	5	61	8	69
Aber Valley	0	0	0	2	1	3
Bedwas & Trethomas, Machen & Rudry	0	0	1	6	5	11
Llanbradach	0	0	0	0	1	1
Morgan Jones, Penyrheol, St Martins, Van	1	0	1	9	4	13

Source: 2024-2029 Local Housing Market Assessment

5. Local Housing Market Assessment additional housing need estimates

Section 4 of this report considered the summary tables produced by the Local Housing Market Assessment tool. Each table was based on a different household projection variant, which were used by the tool to estimate newly arising need over the 15 year period of the Local Housing Market Assessment. The Council has chosen to use its own defined household projections based on work undertaken in preparation for the 2nd Replacement Local Development Plan. The justification for this approach is set out in section 4.

It is important to note that during the drafting of the Local Housing Market Assessment report a regional assessment has been commissioned, by local authorities making up the Cardiff Capital Region, following Welsh Government objections to their future growth strategies. The assessment is expected to be completed by April 2024, after which the Council will consider the findings and determine whether the Local Housing Market Assessment will need to be updated.

Based on user defined household projections the Local Housing Market Assessment tool shows a total housing requirement of 1,011, consisting of 765 affordable homes (75.67%) and 246 market homes (24.33%). The need for affordable homes is made up of 189 homes emanating from newly arising need (24.71%) and 576 from existing unmet need (75.29%). When planned supply and the turnover of existing stock is taken into account the need reduces to 218, consisting of 58 intermediate homes (26.61%) and 160 social housing rented homes (73.39%).

Table 5.1 below provides analysis of the various Welsh Government household projection variant types against the Council's user defined projections. It shows that the Council's projections are markedly higher than any of the Welsh Government variants, which range from 42.33%-18.20% lower.

Table 5.1: Comparison of household projection variant types

Variant type	Affordable housing	Market housing	Total	% Difference
User defined	765	246	1,011	-
Principal	640	83	723	-28.49%
Higher	685	142	827	-18.20%
Lower	579	4	583	-42.33%

Source: 2024-2029 Local Housing Market Assessment

Appendix B provides an analysis of the additional housing need estimates against those used in the previous Local Housing Market Assessment (2018). It is important to note, however, that each Local Housing Market Assessment is a snapshot at a point in time and have been undertaken using different methodologies, using

different guidance, and, therefore, it is not possible to directly compare one set of outputs with the other.

6. Quality Assurance Statement

Local authorities are required to submit Local Housing Market Assessments to Welsh Government for review and sign-off. This section outlines the process adopted by Caerphilly County Borough Council to ensure that the 2024 Local Housing Market Assessment was undertaken in accordance with Welsh Government guidance.

This Local Housing Market Assessment report has been undertaken by the Council in accordance with guidance issued by Welsh Government. The assessment has been undertaken by officers from the Housing and Planning & Regeneration departments. The data has been analysed using version three of Welsh Government 2003 tool and this report has been compiled using the report template issued Welsh Government.

The Council's preferred methodology for undertaking the assessment was discussed and agreed with the Caerphilly Affordable Homes Partnership. Verbal updates on progress have been reported to the partnership at its bimonthly meetings. Progress meetings were undertaken, at various stages of the project, between officers from the Housing and Planning & Regeneration departments.

The undertaking of the assessment has involved the collation and analysis of a wide range of primary and secondary datasets, from both internal and external sources. Sources include the Common Housing Register, Council Tax database, housing association partners, Hometrack, Welsh Government and the Office of National Statistics. All data sources have been clearly identified in the main body and appendices of this report.

Consultation with stakeholders has taken place during the various stages of the assessment. The results of these consultations are outlined in the assessment report.

Completion of the tool has required the Council to manipulate the data and make a series of assumptions. All assumptions have been reviewed and are clearly outlined in section 4 of this report.

Following the completion of data inputting stage and subsequent verification of the tool outputs, a scenario testing exercise was undertaken. This allowed the Council to vary key assumptions used within the tool and to assess their impact on the original outputs.

Consultation on the new Local Housing Market Assessment took place between 26th April 2024 and 20th May 2024. A wide range of stakeholders were contacted by the Council including neighbouring councils, housing associations partners, lettings agents, estate agents, House Builders Federation Cymru, local colleagues, the Aneurin Bevan University Health Board, Shelter Cymru and a number of housing support agencies funded by Supporting People.

A questionnaire was designed, using Microsoft Forms, to gain the views of stakeholders on the appropriateness and robustness of the data inputs and key assumptions used by the Council in the Local Housing Market Assessment tool. The questionnaire covered the following areas:

- Local authority household projections
- Rent data
- Income data
- House price paid data
- Existing unmet needs
- Key assumptions
- Existing stock and planned supply
- Specific housing needs requirements

At the end of the questionnaire, respondents were provided with the opportunity to provide other related comments.

Two consultation responses were received, one via Microsoft Forms and the other via email. The points raised were:

- Local authority household projections
 - there is a mismatch in available development opportunities against need, questions ability to meet expected need.
 - LDP currently not finalised so overall deliverability of sites is still undetermined. Planned supply of new homes is undisclosed.
 - Newly formed PPW12 Net biodiversity gains could remove total number of planned supply. No consideration for cross region population growth and overspill from other neighbouring authorities.
- Existing unmet needs
 - Concern was expressed that the data inputs excluded 60% of applications on the Common Housing Register and, therefore, significantly reduced the number of people that should be considered for housing.

After consideration of these comments, it has been determined by the Council that no changes were required to the Local Housing Market Assessment report or tool.

Prior to submission to Welsh Government for review and sign-off this report was considered by the Housing & Environment scrutiny committee (18th June 2024) and Cabinet (26th June 2024). Following formal approval by Cabinet this report was submitted to Welsh Government in July 2024.

Appendix A – Key Issues Tables

Key Issues Table 1 – Key data inputs

Key data inputs	Key issues identified with the data inputs
1. Housing Market Areas (HMAs)	None.
2. Household data	None.
3. Rent data	1. The Rent Officer for Wales data contained some gaps which were closed using Hometrack data and officer opinion.
4. Income data	1. CACI Paycheck data was accessed through Hometrack.
5. House price paid data	1. Land Registry data preloaded into the tool by Welsh Government.
6. Existing unmet need	1. The data needed to be manipulated before being inserted into the tool due to the way people are allowed to express multiple preferences on the housing application form. 2. The Council is in the process of reviewing the common allocation policy, which will likely result in an increased number of people being included in the overcrowding category and potentially the other categories. 3. The financial information held by the Council on those seeking intermediate housing does not allow for the disaggregation into intermediate rent and LCHO. The entire backlog need for intermediate housing was placed in the LCHO category.
7. Existing stock and planned supply	1. The Council's data shows that 20% of social rented lets per annum are to people in band 3 (no housing need). These people currently make up 60% of the common housing register and are prevented by the guidance from being included in the existing unmet

Key data inputs	Key issues identified with the data inputs
	need count. No allowance has been made to the stock turnover data to reflect this.

Key Issues Table 2 – Input assumptions

Key input assumptions	Key issues identified with the input assumptions
1. Affordability criteria	None.
2. First time buyer (FTB) assumptions	None.
3. Percentage of households eligible for owner occupier tenure that decide to go on and buy	1. There is no local data available to verify the accuracy of this assumption.
4. Five-year financial forecast for key variables – income, rent and house prices	1. There is no local data available to verify the accuracy of this assumption.
5. Calculation of intermediate housing (IR and LCHO)	1. The data is based on an assessment of affordability and not what happens in practice, due to the absence of this data.

Key Issues Table 3: Calculations and outputs

Calculations / outputs	Key issues identified with the calculations / outputs
1. Market housing need covering owner occupier and private rented sector	None.
2. Affordable housing need covering social rent and immediate housing	None.
3. Scenario testing tables	None.
4. Five-year outputs / 10-year outputs	None.

Appendix B – Analysis of change in the additional housing need estimates

Annual additional housing need estimates	Column index	Current LHMA	Previous LHMA * *Old methodology
		Over the first 5 years of the LHMA period	Over the first 5 years of the LHMA period
Total housing need estimate	(a)	1,011	1,909
Market Housing	(b)	264	262
Affordable Housing	(c)	765	1,647
Percentage split of additional housing need by market housing	(b)/(a)	26.11%	13.73%
Percentage split of additional housing need by affordable housing	(c)/(a)	75.67%	86.27%
Annual planned supply and turnover of existing stock for affordable housing	(e)	1,009	1,425
Affordable housing need – net of planned supply and turnover of existing stock	(f)	218	282
Annual additional housing need estimate split by tenure:			
Owner occupier	(g)	93	N/a
Private rented sector	(h)	153	N/a
LCHO - net basis	(i)	26	27
Intermediate rent - net basis	(j)	33	26
Social rent - net basis	(k)	160	169

One bedroom social rent	(l)	138	360
Two bedrooms social rent	(m)	8	-47
Three bedrooms social rent	(n)	3	-169
Four+ bedrooms social rent	(o)	11	25
Market housing percentage split:			
Owner occupier estimate	(g)/(b)	35.23%	N/a
Private rented sector estimate	(h)/(b)	57.95%	N/a
Affordable housing need percentage split:			
LCHO	(i)/(f)	11.87%	12.16%
Intermediate rent	(j)/(f)	15.07%	11.71%
Social rent	(k)/(f)	73.06%	76.13%
Social housing need percentage split by number of bedrooms			
1 bed	(l)/(k)	86.25%	213.02%
2 beds	(m)/(k)	5.00%	-27.81
3 beds	(n)/(k)	1.88%	-100.00%
4+ beds	(o)/(k)	6.88%	14.79%

Data Input and Key assumptions	Current LHMA	Previous LHMA * *Old methodology
	Over the first five years of the LHMA period	Over the first five years of the LHMA period
Number of housing Market areas (HMAs) and basis of defining HMAs	20 HMAs based on an aggregation of 1 to 4 wards	33 wards – analysed individual and collectively in 4 HMAs
Selected household projection basis	User defined	User defined
Annual newly arising need	434	163
Rent data – state default or source used	Rent Officer for Wales & Hometrack	Hometrack
House price paid data – state default or source used	Land Registry (default data)	Hometrack (Land Registry)
Income data – state source used	Hometrack (CACI)	Hometrack (CACI)
Annual existing unmet housing need	Common Housing Register	Common Housing Register
Market housing affordability criteria	30%	3.5 times multiplier was used to calculate the proportion of households who could afford a mortgage for an entry-level property (two bedroom terraced)
Social rent affordability criteria	35%	=>30%
Percentage of those considered appropriate for owner occupier that go onto buy	40%	N/a
Average FTB property price for the LA	£114,074	£103,006
FTB property value to income ratio for the LA	4.2	3.5

Five-year financial forecast – OBR or alternative source	OBR	N/a
Split of intermediate housing need	Option 2	N/a