



Torfaen Local Housing Market Assessment 2023



Signed off by Welsh Government – April
2025

An Executive Summary of this document is available in Welsh & English versions

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Preface

Every 5 years, a local authority is required to rewrite their Local Housing Market Assessment (LHMA) and refresh it once during the 5-year period. This report is a rewrite for Torfaen County Borough Council.

The report summarises the policy backgrounds that inform the LHMA, and policies that the LHMA help to develop. Consulting and collaborating with stakeholders refined the LHMA; details of the stakeholder list is included in the report, a broad representation ensures this report meets the demands of all service areas.

This report includes an overview of the assessment and methodology behind the development of the LHMA, focusing on the proposed changes in Housing Market Areas (HMAs). The HMAs were defined by Travel to Work Areas, distribution of schools, and other facilities like retail and health. House price sales, number of social rented properties and market housing sales also helped to inform this decision.

The report considers the overview of housing market and socio-economic and demographic trends. Using data from the 2021 Census, the report assesses resident's demographics and the current housing situation in the area, such as tenure, average house prices and number of rental and housing market sales in the borough.

As part of the LHMA, the local authority assessed the specific housing requirements of Torfaen. Some needs such as student accommodation were not apparent within the area, and this has been justified within the report. Local policies, strategies and data were used to detail the specific housing need against current provisions available in the area to identify any housing requirements.

Finally, the report includes results extracted from the LHMA tool which shows the affordable and total housing need in the area against 3 household projections: lower, higher, principal variant over a 15-year period.

Following a consultation with the stakeholder group, the local authority decided that the higher variant was the most appropriate household projection to deliver the housing need for Torfaen.

1. Introduction

1.1 National Policy Background

- 1.1.1 **Section 8 of the Housing Act 1985** - Section 8 of the Housing Act 1985¹ 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 (LHMA) 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 LHMA's every five years and refresh that LHMA once during that five-year period (between years two and three) utilising section 87 of the Local Government Act 2003².
- 1.1.2 **Independent Review of Affordable Housing Supply** - The importance of LHMA's 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 Supply³. The Review placed significant emphasis on understanding exactly how many homes are needed, in which geographical areas and in what tenures. A robust LHMA is the key means of identifying this evidence at the local level.
- 1.1.3 Welsh Government's highest tier development plan **Future Wales: The National Plan 2040**⁴ contains Policy 7 on 'Delivering Affordable Homes', which states:-
*"The Welsh Government will increase delivery of affordable homes by ensuring that funding for these homes is effectively allocated and utilised.
Through their Strategic and Local Development Plans planning authorities should develop strong evidence-based policy frameworks to deliver affordable housing, including setting development plan targets based on regional estimates of housing need and local assessments. In response to local and regional needs, planning authorities should identify sites for affordable housing led developments and explore all opportunities to increase the supply of affordable housing."*
- 1.1.4 Welsh Government's **Planning Policy Wales 12th Edition**⁵ (PPW12) (February 2024) and **Development Plans Manual: Edition 3**⁶ (March 2020) both stress that LHMA's form a fundamental part of the evidence base for development plans.
- 1.1.5 Similarly, Welsh Government's **Technical Advice Note 2⁷: Planning and Affordable Housing** (2006) (TAN2) advises:-
"Local authorities should undertake Local Housing Market Assessments (LHMA's) to establish the nature and level of housing requirements in their local housing

¹ 1985 Housing Act - <https://www.legislation.gov.uk/ukpga/1985/68/section/8>

² 2003 Local Government Act - <https://www.legislation.gov.uk/ukpga/2003/26/part/7>

³ Independent Review of Affordable Housing Supply - https://gov.wales/sites/default/files/publications/2019-04/independent-review-of-affordable-housing-supply-report_0.pdf

⁴ Future Wales: The National Plan 2040 - <https://gov.wales/sites/default/files/publications/2021-02/future-wales-the-national-plan-2040.pdf>

⁵ Planning Policy Wales - https://www.gov.wales/sites/default/files/publications/2024-02/planning-policy-wales-edition-12_1.pdf

⁶ Development Plans Manual - <https://gov.wales/sites/default/files/publications/2020-03/development-plans-manual-edition-3-march-2020.pdf>

⁷ Technical Advice Note 2 - <https://gov.wales/sites/default/files/publications/2018-09/tan2-planning-affordable-housing.pdf>

market(s). They provide the joint evidence base for local housing strategies and development plans.”; and

“For affordable housing, it is important that authorities have an appreciation of the demand for different dwelling sizes and types of housing (i.e. intermediate and social rented) in relation to supply so that they can negotiate appropriate mixes on new sites.”

- 1.1.6 In addition, TAN2 provide the following definition of a **“Housing market (area)”** - *geographical areas within which there are clear links between where people both live and work. These areas can be defined by the patterns of household movement. These patterns are influenced by factors such as proximity to family, friends, employment, education and other facilities, and are likely to operate across local planning authority boundaries.”*
- 1.1.7 **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 2014⁸. The LHMA 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.
- 1.1.8 **Equality Act 2010** - It is essential also for local authorities to consider their equality duties under the Equality Act 2010⁹ and the Welsh Public Sector Equality Duties.

1.2 Local Policy Background

- 1.2.1 The extant, adopted **‘Torfaen Local Development Plan 2006-2021’**¹⁰ (LDP) (December 2013), has the following “Vision Statement”:-
- “At the eastern edge of the South Wales valleys, Torfaen will be part of a Networked City Region supporting thriving communities and a diverse economy in an outstanding historical, cultural and natural environment.*
- To achieve this:*
- By 2021, through collaborative working, the development strategy for the Torfaen Local Development Plan will deliver planned, sustainable growth reflecting the specific role and function of settlements. It will provide a distinctive, vibrant and prosperous area where people have the skills, knowledge and opportunities to achieve a better quality of life in safe, healthy and thriving communities with accessible local facilities. It will promote the sustainable regeneration of our town centres ensuring they are a focus for social, commercial and community life, whilst also protecting and enhancing Torfaen’s unique natural heritage and cultural and historic identity.”*
- 1.2.2 Torfaen LDP **Policy H4** on **“Affordable Housing”** also states: -
- “In order to achieve a target of approximately 1,132 affordable homes within Torfaen over the period 2006-2021, the Council will, on all residential sites of 3 or more dwellings or over 0.1ha (including if it forms part of a more substantial site over this size), seek to negotiate the on-site provision of up to the following percentage of affordable housing and / or a payment in lieu of onsite provision, by Housing Sub-Market Area, as follows:-*

⁸ Housing (Wales) Act 2014 - <https://www.legislation.gov.uk/anaw/2014/7/contents/enacted>

⁹ Equality Act 2010 - <https://www.legislation.gov.uk/ukpga/2010/15/contents>

¹⁰ Torfaen Local Development Plan 2006-2021 - <https://www.torfaen.gov.uk/en/Related-Documents/Forward-Planning/Adopted-Torfaen-LDP-Written-Statement.pdf>

1. North Torfaen - 10%;
2. Pontypool - 25%;
3. Cwmbran West & North - 20%; and
4. Cwmbran East & South - 30%.

These percentages will change upwards if Social Housing Grant is to be used.

These percentages may change by 5% increments (increase or decrease), via Supplementary Planning Guidance, if house prices or construction costs change (up or down) as a result of annual monitoring and an update of the Affordable Housing Viability Study.

The dwelling size and tenure of the affordable housing should contribute to balanced & sustainable communities, reflect local need and normally be designed to the principles of the Welsh Government Development Quality Requirements.”

- 1.2.3 The Council has also adopted an associated **‘Revised Planning Obligations Supplementary Planning Guidance’**¹¹, February 2023 (S106 SPG); Annex 1 of which on ‘Affordable Housing’, based upon the evidence of the **Torfaen 2020 LHMA**¹², provides detailed information on the level, tenure and size of affordable housing it will seek. Furthermore, the latest Torfaen LHMA is used as robust evidence (as it uses a published Welsh Government methodology) to prove that there is a need for affordable housing under Policy H4 as part of a S106 planning obligation for a residential site; and to meet the Community Infrastructure Levy (CIL) Regulations (as amended) legal test of being “*necessary to make the development acceptable in planning terms*”. Therefore, the **Torfaen 2020 LHMA** will continue to be used for this purpose until this latest **Torfaen 2023 LHMA** is signed off by the Welsh Ministers; after which the ‘S106 SPG: Annex 1’ will be updated accordingly.
- 1.2.4 The Council is currently preparing a **Torfaen Replacement LDP (RLDP) 2022-2037**; which once adopted will supersede the current Torfaen LDP. The first stage of which will be the development and consideration (by a larger group of key stakeholders / Torfaen Members) of the RLDP ‘*key issues, vision and objective*’ and the ‘*growth and spatial strategy*’ in Summer 2023 and early 2024 respectively, which are expected to be informed by this latest **Torfaen 2023 LHMA**.
- 1.2.5 It is also noted that the South-East Wales Corporate Joint Committee (CJC), which came into being on 1st July 2022, is legally required to produce a **South-East Wales Strategic Development Plan (SDP)** in due course; the housing growth and spatial strategy of which will be informed by the **Torfaen 2023 LHMA** and the LHMAs of the other nine local authorities within the region.
- 1.2.6 Following a Housing Summit with key partners in 2022, the Torfaen Strategic Housing Partnership has been created with a number of sub-working groups who are looking to deliver key aims and objectives for the development of a new **Local Housing Strategy in 2025**. The **Torfaen 2023 LHMA** will be a key element of informing and shaping this strategy.
- 1.2.7 The Council finalised the **Torfaen Rapid Rehousing Plan (RRP)** to provide a clear and coherent approach to meeting the housing and support needs of the local community. The plan establishes a clear vision and direction that will inform the development, design and delivery of housing, support, advice and accommodation

¹¹ Revised Planning Obligations SPG - <https://www.torfaen.gov.uk/en/Related-Documents/Forward-Planning/SD84-AdoptedPlanningObligationsSupplementaryPlanningGuidance.pdf>

¹² Torfaen 2020 LHMA - <https://www.torfaen.gov.uk/en/Related-Documents/Forward-Planning/Local-Development-Plan-Review/Torfaen-Local-Housing-Market-Assessment-2020.pdf>

services for the future that aims to prevent and mitigate homelessness in Torfaen. The plan contains stats and figures brought together from numerous other policies and reports, including the **Draft Torfaen 2023 LHMA**.

1.3 Governance and Consultation

- 1.3.1 The development of this LHMA has been undertaken by Torfaen Housing and Planning departments, with support for Census & GIS Officers, in collaboration with several stakeholder bodies who are detailed in Table 1 below.
- 1.3.2 Consultation events (one to agree the Housing Market Areas to be used in the assessment (see paragraphs 2.2.10 - 2.2.11 below); and one to agree which of the three WG Household Projections should be used to inform the LHMA (see paragraphs 5.2 - 5.4 below)) were undertaken to allow representation from all stakeholders in ensuring the information contained within the document is as accurate as possible and meets the demands of all service areas.
- 1.3.3 Thus, the draft LHMA underwent several consultation / scrutiny activities and was formally signed off for submission to the Welsh Ministers by Torfaen's Executive Member for Adult Services & Housing on 28th March 2024.

Table 1: Torfaen LHMA Stakeholder Group

Function	Body	Function	Body
Local Planning Authority	Bannau Brycheiniog National Park	national housebuilders assoc.	Home Builders Federation (Cymru)
Local Authority	Blaenau Gwent	national housebuilder	Lovell
Local Authority	Cardiff	national housebuilder	Redrow
Local Authority	Caerphilly	national housebuilder	Bellway
Local Authority	Monmouthshire	national housebuilder	Taylor Wimpey
Local Authority	Newport	national housebuilder	Barratt
Registered Social Landlord	Bron Afon	local housebuilders assoc.	Federation of Master Builders (Cymru)
Registered Social Landlord	LINC	local housebuilder	Butler Wall
Registered Social Landlord	Melin	local housebuilder	Enzo Homes
Registered Social Landlord	Monmouthshire	local housebuilder	Lewis Homes
Registered Social Landlord	Pobl	local housebuilder	P&P Builders
Registered Social Landlord	United Welsh		
		Landlord / developer	D2 Pro Co
Melin Tenants Association	Voices Residents Group	Landlord / developer	Highmore Group
Bron Afon Tenants Assoc.	c/o Bron Afon	landlord	360 Property

BAME group	Diverse Cymru	estate agent	DJ&P Newland Rennie (Cwmbran)
BAME group	Race Council Cymru	estate agent	Haart (Pontypool)
		estate agent	Haart (Cwmbran)
Disabled persons forum	Torfaen Access Forum	estate agent	Peter Alan (Cwmbran)
		estate agent	Roberts (Pontypool)
Environmental Health	Torfaen CBC	estate agent	Roberts (Cwmbran)
Asset Management	Torfaen CBC		
Children's Social Care	Torfaen CBC	Executive Member for Adult Services & Housing (Chair)	Torfaen CBC
Adult Social Care	Torfaen CBC	Executive Member for Economy, Skills & Regeneration	Torfaen CBC

2. Overview of Assessment and Methodology

2.1 Methodology, inputs and assumptions

- 2.1.1 The additional housing needs estimates in this LHMA are determined using the Welsh Government's Excel based LHMA Tool. This Tool uses a formulaic approach to allocate the additional housing need, formed from the existing unmet need and the newly arising need (change in the household projections over the LHMA period), 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 LHMA period. The newly arising need is allocated between market and affordable housing using a formulaic approach.
- 2.1.2 By defining and using Housing Market Areas (HMAs), the LHMA Tool provides default data inputs for rent, house price paid and household projections (used to generate the newly arising need) with the Council inputting 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 LHMA 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 LHMA period. The LHMA Tool allows the Council to have up to 20 HMAs which are defined using either wards, middle-layer super output areas (MSOAs) or lower-layer super output areas (LSOAs). Each HMA can have up to 40 wards, MSOAs or LSOAs.
- 2.1.3 The input data together with several assumptions is used to generate an income level above which households would be considered able to meet their needs in the market and a lower income level below which households are considered to be in need of social rent. The intermediate households are those not allocated to market housing or social rent. The LHMA Tool also forecasts how the data inputs may change over the first five years of the LHMA period.
- 2.1.4 The output tables from the LHMA Tool are used as the starting point for development plans to provide the range of LHMA additional housing need estimates.
- 2.1.5 The income data provided by Paycheck was slightly inaccurate due to assumed rounding errors. For some MSOA's, the Paycheck directory 'total households' figures did not match the total households of the individual income brackets. As a result, the totals in each income bracket were manually calculated for each MSOA area, so there is a slight deviation from the totals provided by Paycheck to the totals used in the LHMA tool for some MSOA areas.

2.2 Housing Market Areas (HMAs)

- 2.2.1 Each local authority is responsible for determining the appropriate geography for HMAs in their area. The Welsh Government's '[Undertaking Local Housing Market Assessments \(LHMAs\) Guidance](#)' (March 2022) and Technical Advice Note 2 (TAN2) '[Planning and Affordable Housing](#)' (June 2006) provide definitions and advice on identifying Housing Market Areas which are considered in turn and include: -

2.2.2 WG LHMA Tool (which is used to analyse the LHMA data) is based on up to 20 HMAs using electoral wards, Lower layer Super Output Area (LSOA) or Middle layer Super Output Area (MSOA); which for Torfaen's HMAs are as follows: -

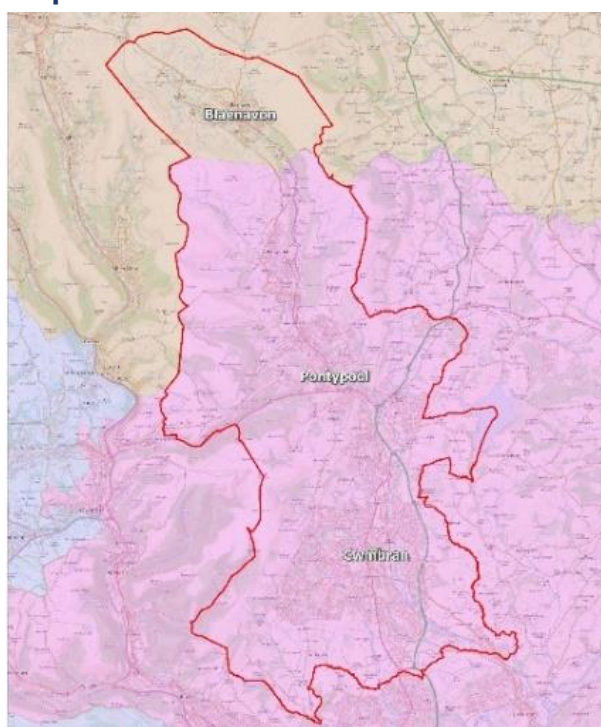
- from the May 2022 Local Government Elections, Torfaen has 18 electoral wards (down from 24) (1 in Blaenavon, 6 in Pontypool and 11 in Cwmbran);
- Torfaen has 60 LSOA's - which would be too many for the 'LHMA Tool' and would need combining in some way; and
- Torfaen has 13 MSOA's (1 in Blaenavon, 5 in Pontypool and 7 in Cwmbran).

2.2.3 Therefore, given that the statistical data used in this LHMA is more readily available for MSOAs and their good geographical spread across Torfaen's more 'sustainable' settlements of Blaenavon, Pontypool and Cwmbran (based upon their levels of 'sustainable transport & accessibility', 'local facilities & services', and 'employment opportunities' as defined by the Torfaen RLDP: Sustainable Settlement Assessment, March 2020', the 13 MSOAs should be used to define Torfaen's HMAs.

2.2.4 The **WG LHMA Guide & TAN2** state that *"HMAs are areas that have been defined geographically based on the functional areas where people currently live and would be willing to move home without changing jobs, recognising that housing markets are not constrained by administrative boundaries".* Key factors include the *"broad price of housing"* and *"major transport links"*; and should consider *"the costs and benefits of increasing supply (i.e. land availability, broad viability, dwelling vacancy rates and potential impact on housing need deficits)."* *"These areas can be defined by the patterns of household movement influenced by factors such as proximity to family & friends [no data available], employment, education and other facilities".* Therefore: -

A. As regards to employment, Torfaen lies within two large Travel to Work Areas: the 'Merthyr Tydfil TTWA' (the Blaenavon MSOA) and the 'Newport TTWA' (all other MSOAs in Pontypool & Cwmbran/Ponthir) see Map 1 below; where, by definition *'at least 67-75% of the area's resident workforce work in the area and at least 67-75% of the people who work in the area also live in the area.'*

Map 1: Torfaen Travel to Work Areas

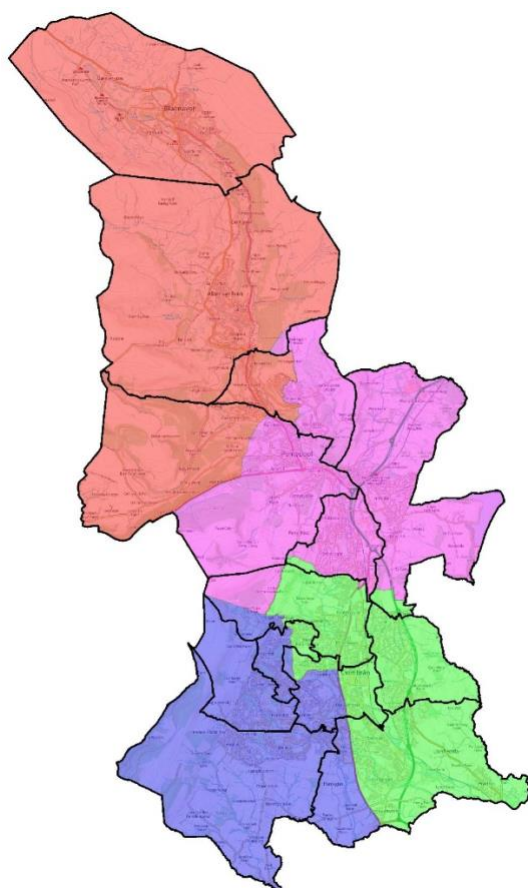


Cardiff
Merthyr Tydfil
Newport

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Source: 2011 based UK TTWAs can
be viewed on this [interactive map](#)

- B. As regards to education, aside from the countywide faith and Welsh medium schools and the sixth form college, generally serving the whole of Torfaen; the spatial distribution of the local English medium 4 secondary schools and 18 primary school catchment areas compared to the 13 Torfaen MSOAs are shown in Maps 2 & 3 respectively below: -

Map 2: Torfaen Secondary School Catchments by Middle Super Output Area (MSOA)

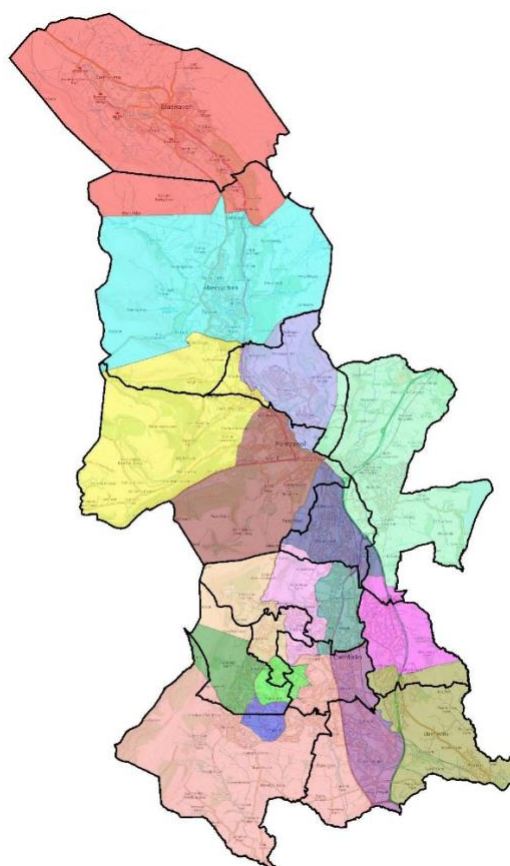


Middle Super Output Areas

Comprehensive School Catchments

- ABERSYCHAN COMP
- CROESYCEILIOG COMP
- CWMBRAN HIGH SCHOOL
- WEST MON COMP

Map 3: Torfaen Primary School Catchments by Middle Super Output Area (MSOA)



Middle Super Output Areas

Primary Schools Catchment

- Blaenavon Heritage VC Primary School
- Blenheim Road Community Primary
- Coedeva Primary
- Croesyceiliog Primary
- Cwmffrwdroer Primary
- Garnteg Primary
- George Street Primary
- Greenmeadow Primary
- Griffithstown Primary
- Llantarnam Community Primary
- Llanyravon Primary
- Maendy Primary
- Nant Celyn
- New Inn Community Primary
- Penygarn Community Primary
- Pontnewydd Primary
- Woodlands Community Primary

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- C. As regards relevant other facilities:-

- **Retail** - Cwmbran has a major 'sub-regional' town centre (with supermarkets and many national retailers); Pontypool has a large town centre mainly serving the settlement (with a supermarket and some national retailers); and Blaenavon has a small town centre (with local shops), but with a more diffuse hinterland for supermarkets / national retailers (i.e., Abergavenny, Brynmawr, Cwmbran, Merthyr Tydfil, Pontypool, etc.);
- **Leisure** - Pontypool and Cwmbran each have a large leisure centre generally serving their respective settlement; and Blaenavon and Cwmbran High School have smaller leisure centres; and
- **Health** - there are eighteen doctors' surgeries within Torfaen (1 in Blaenavon, 7 in Pontypool, 9 in Cwmbran and 1 in Ponthir); and an Aneurin Bevan University Health Board clinic in Cwmbran and the County Hospital in Griffithstown, Pontypool serving Torfaen (with other 'district' hospitals in Abergavenny (Nevill Hall) and Newport (Royal Gwent) also serving Torfaen), and a 'sub-regional' hospital (serving 'Gwent' and South Powys) at Llanfrechfa Grange, Cwmbran.

2.2.5 As noted in para 2.2.4 above, planning for additional housing provision needs to be conducted at a scale suitable to consider the costs and benefits of increasing supply (i.e., land availability, broad viability, dwelling vacancy rates and potential impact on housing need deficits) as follows:-

- A. Land availability analysis** - whilst the following 2006-2022 housing completions and April 2022 planning permissions / outstanding Torfaen LDP allocations Tables 2 & 3 below have been collated on the basis of the Torfaen Local Development Plan 'Housing Sub-Market Areas' (HSMAs - defined by post-codes), they do provide some useful indicators on housing land availability:-

Table 2: Actual 2006-22 Residential Completions in Torfaen

Torfaen LDP 'HSMA'	Total	%
North Torfaen	497	13%
Pontypool	1,153	31%
Cwmbran (combined)	2,100	56%
TOTAL	3,750	100%

Source: Torfaen CBC - Annual Monitoring of Torfaen LDP Housing Delivery (April 2022)

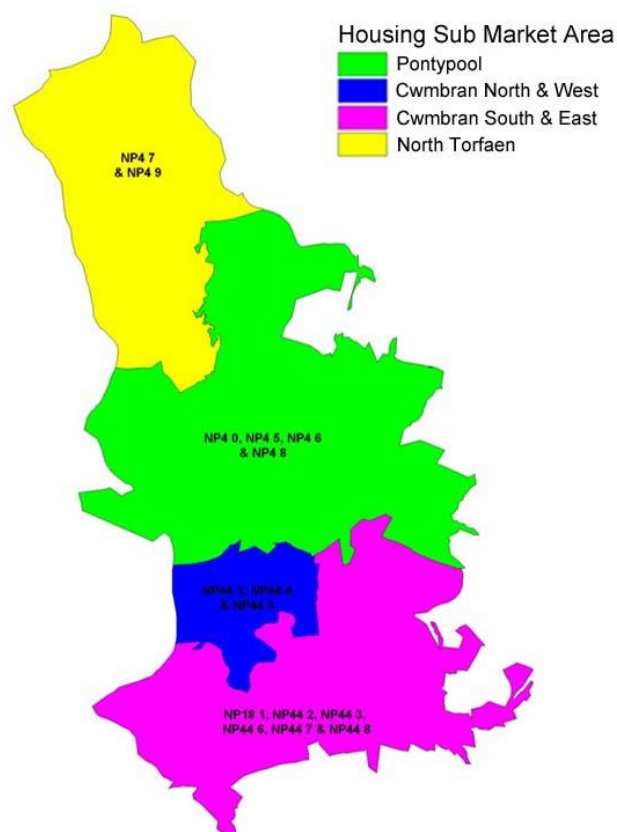
Table 3: Forecast 2022-33 Residential Completions in Torfaen

Torfaen LDP 'HSMA'	Total	%
North Torfaen	110	4%
Pontypool	1,407	47%
Cwmbran (combined)	1,452	49%
TOTAL	2,969	100%

Source: Torfaen CBC - Annual Monitoring of Torfaen LDP Housing Delivery (April 2022)

Note: this table does not include any new residential allocations in the Torfaen RLDP (2022- 2037) currently being prepared.

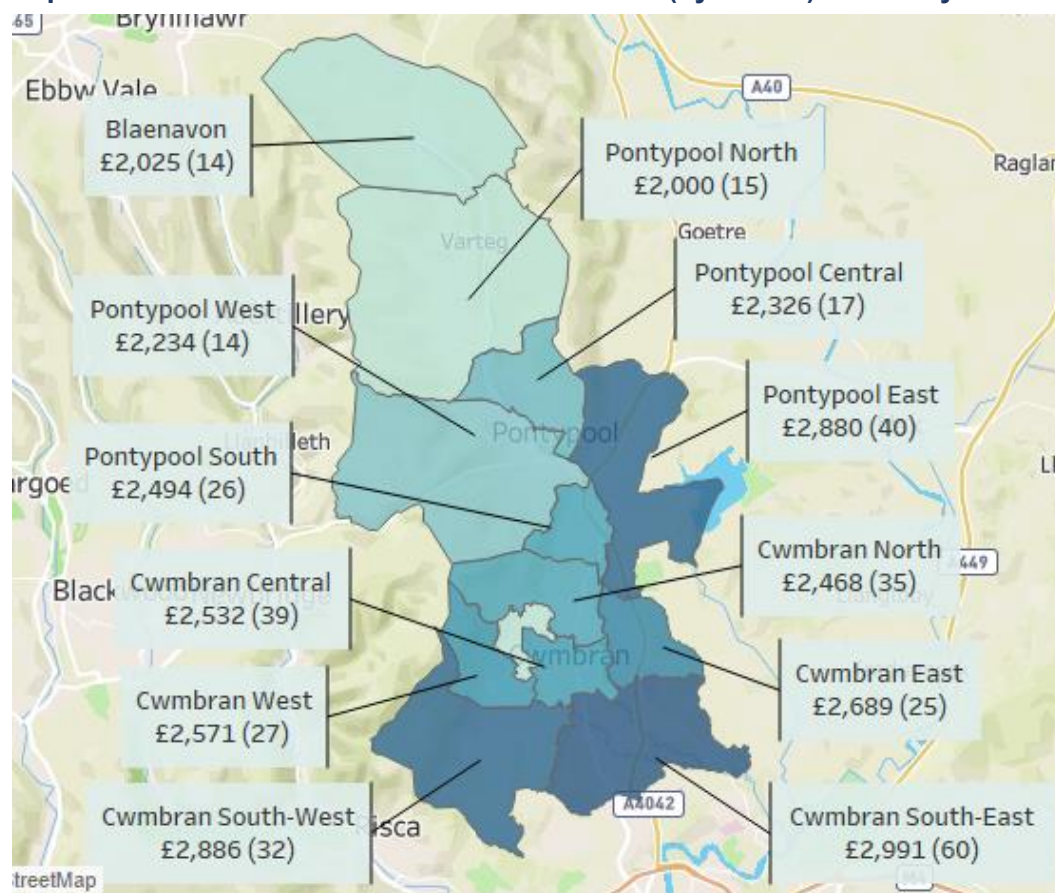
Map 4: Torfaen LDP HSMA's



B. Broad viability analysis - It is generally accepted that new house price sales values need to be above **£2,150m²** (£200ft²) to be viable for market housebuilders (at 20% developer profit). However, new build median house price paid m² data was only available for two Torfaen MSOAs (Jan 21 - Apr 22: Cwmbran North: £2,417m² and Cwmbran Central: £2,482m²). But as there is a high degree of correlation between median new house prices and 'detached' second-hand sales values, we can see from the following map of detached sales values, where within Torfaen new housing is currently generally viable for market housebuilders.

However, going forward, with regards to progressing towards zero carbon dwellings, it is also noted that the Welsh Government changes to Parts F, L & O of the Building Regulations (on 'Ventilation', 'Conservation of Fuel & Power' and 'Mitigation of Overheating') are estimated to add £74.41m² (£179,850 (BR2022 cost) - £171,144 (BR2014 cost) = +£8,706) / 117m² detached house - WG: Building Regulations - Final Impact Assessment, April 2022 to build costs from November 2022; and a further yet unknown increase to build costs from 2025 when the standard is expected to be increased again. Similarly, to potentially address the needs of an ageing population, the 'Council / RLDP Stakeholders' are going to consider applying the English Building Regulations Part M2 'Accessible and adaptable dwellings' Standard to new dwellings in the RLDP currently being prepared; which could add a further estimated £14m² (Q2: 2022 cost) from late 2024 if introduced. Therefore, making a total potential additional build cost of **£75-£89m² plus** per dwelling over the next 5-years.

Map 5: Median Price Paid for Detached Houses (by MSOA) - January 21 to April 22

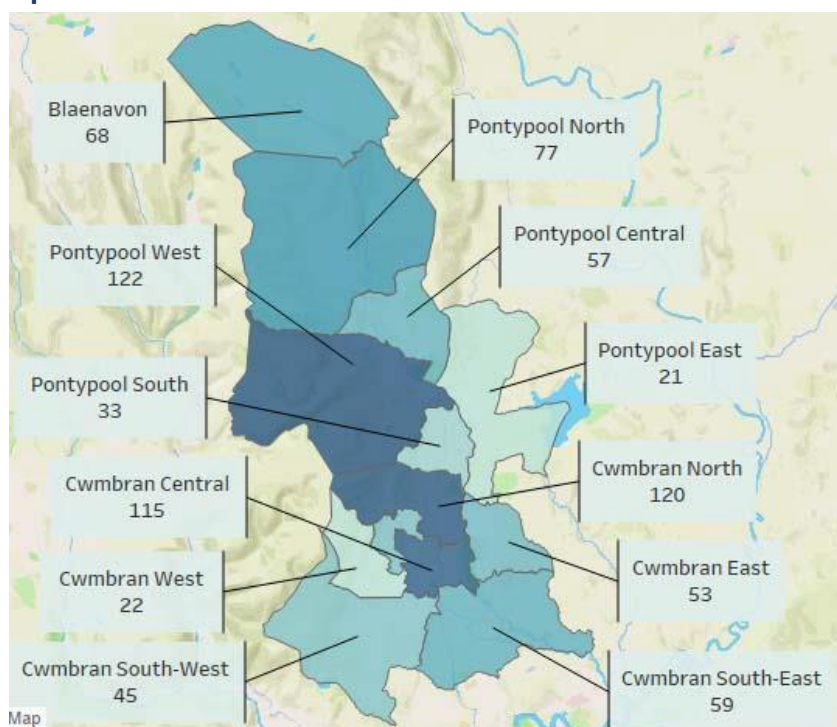


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Source: Analysis of Land Registry residential sales data for Torfaen.

- C. Dwelling vacancy rates - the following two Maps 6 & 7 show the dwelling vacancy rates for social and market dwellings in Torfaen between January 2021 and April 2022.

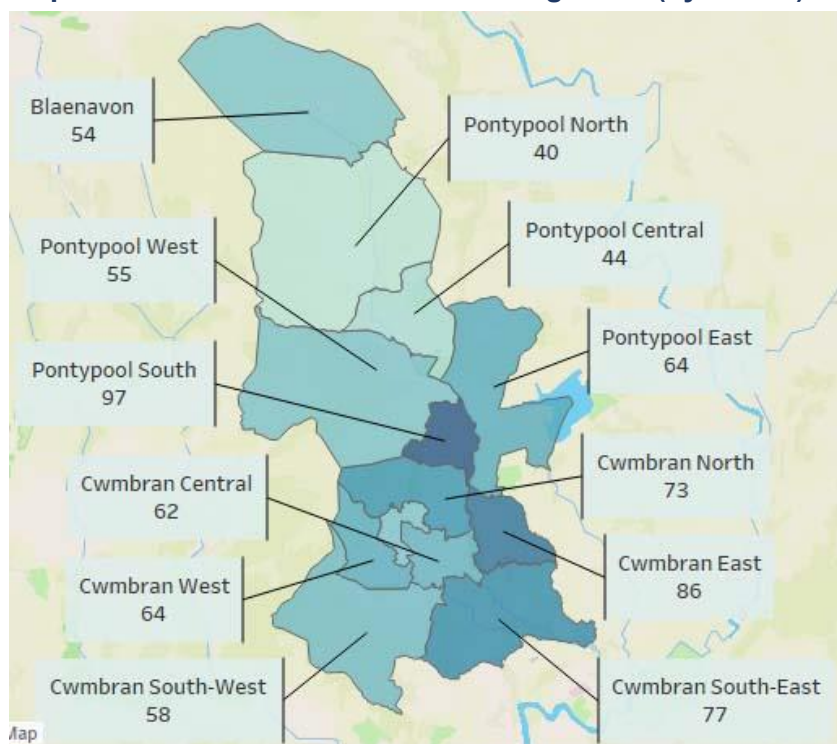
Map 6: Total Number of Social Rented Homes 'Allocated' (by MSOA) - Jan 21 to April 22



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Source: Analysis of TCBC social housing allocations data.

Map 7: Total Number of Market Housing Sales (by MSOA) - January 21 to April 22

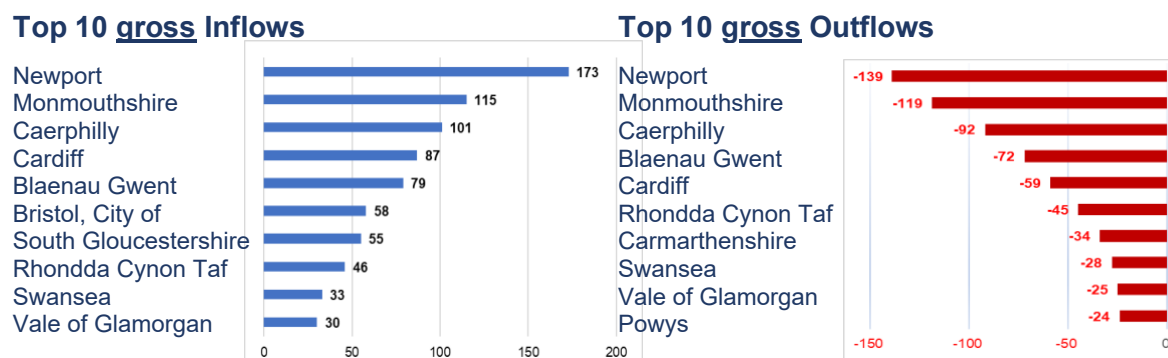


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Source: Analysis of Land Registry residential sales data for Torfaen.

In addition, Figure 1 below shows the 2019-20 ONS data for the top ten gross in / out migration flows for Torfaen shows the relationship to the neighbouring LAs; especially Newport, Monmouthshire, Caerphilly, Blaenau Gwent and Cardiff, with net flows almost in balance; and the levels of positive in-migration from the City of Bristol and South Gloucestershire:-

Figure 1: 2019-20 Local Authority based Internal In / Out Migration for Torfaen (people)



Source: ONS - 'Table IM2020-1a: Detailed estimates dataset - internal migration by origin and destination local authorities (2021 LA boundaries), sex and single year of age, year ending June 2020.'

- D. Housing need deficits** - the Council with its six RSL partners operate a single 'Homeseeker' common housing register for applicants seeking a social rented affordable home. As the register is a 'choice based letting scheme', applicants are required to 'bid' for properties that become available in Torfaen. When registering, for LHMA purposes only, each applicant is also asked to pick up to six of 45 Torfaen locations where they would like to live. This location-based preference data has been amalgamated to the 13 Torfaen MSOAs and presented in the 'origin / locational preference' Table 4 below (with only the 'highest' destination total, plus any figures over 50% of this total shown for each origin MSOA to aid in interpretation of the data).

Table 4: Social housing origin-destination areas of preference (by MSOA): Jan 21 - Apr 22

Origin Community (by MSOA)	'Highest' Destination Preference Community (by MSOA)												
	Blaenavon	Pontypool North	Pontypool Central	Pontypool West	Pontypool East	Pontypool South	Cwmbran North	Cwmbran East	Cwmbran North-West	Cwmbran Central	Cwmbran West	Cwmbran South-West	Cwmbran South-East
Blaenavon	98	172											
Pontypool North	369		178										
Pontypool Central		197	340										
Pontypool West			444			232							
Pontypool East			51	58	92		53						
Pontypool South					252								
Cwmbran North						288	300		209				
Cwmbran East							323						
Cwmbran North-West						216	190	232	201			162	
Cwmbran Central							243		370			243	
Cwmbran West							105		103			191	
Cwmbran South-West												216	
Cwmbran South-East							134		83				138
Torfaen Grand Total	196	884	421	1,355	522	1,097	1,106	1,819	881	1,506	358	1,282	1,002

Source: Torfaen 'Homeseeker' common housing register

In analysing this data, we can identify in Table 5 below the following four potential HMAs based upon amalgamating similar ‘social housing origin / destination area preferences’:-

Table 5: Social housing origin-destination areas of preference: Jan 21 - Apr 22

'HMA' Origin	'HMA' Destination			
	Blaenavon / Abersychan	Pontypool West	Pontypool East	Cwmbran
Blaenavon / Abersychan	639	178		
Pontypool West		981	232	
Pontypool East		51	402	53
Cwmbran				3,947
Torfaen Grand Total	1,042	1,776	1,619	7,934

Source: Torfaen ‘Homeseeker’ common housing register

Similarly, for the 2020 Torfaen LHMA, the Council amalgamated the 45 Torfaen ‘preference locations’ of the ‘Homeseeker’ register to reflect the three Torfaen LDP ‘Housing Sub-Marker Areas’ (HSMA’s) in Table 6 below; from which the spatial ‘affordable housing need deficits’ by tenure can clearly be seen: -

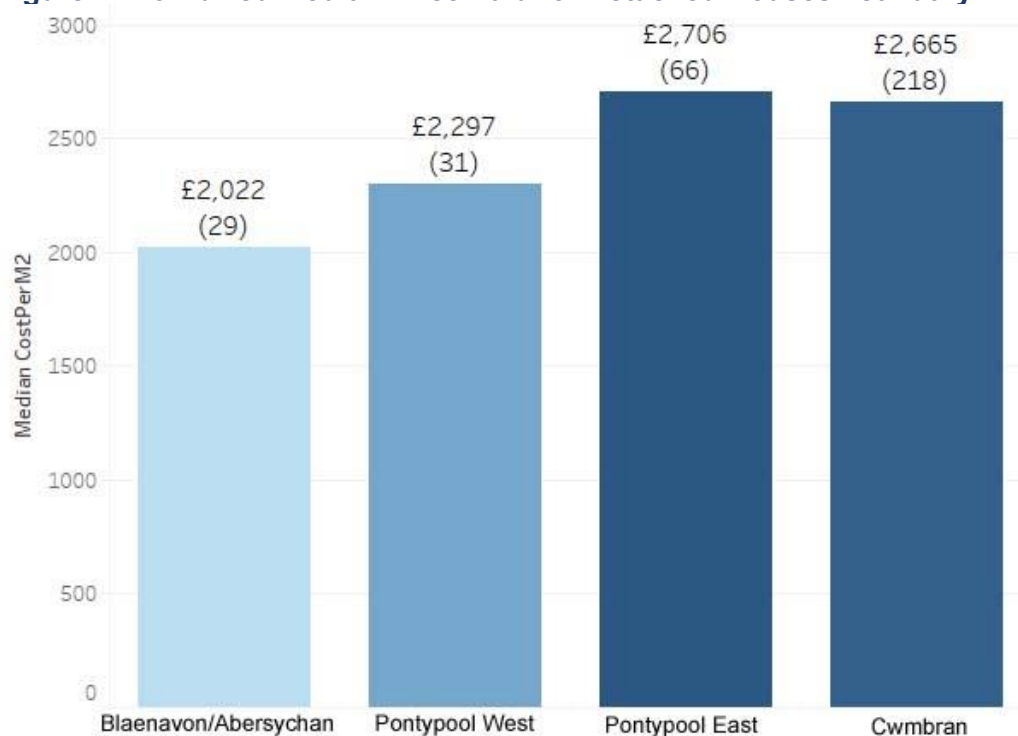
Table 6: Torfaen Affordable Housing Need per annum 2020-2025 (2020)

Area (HSMA)	Social	Low Cost Home Ownership	Intermediate Rent	Total
North Torfaen	21	6	0	27 (11%)
Pontypool	49	14	4	67 (28%)
Cwmbran	114	26	6	146 (61%)
Total	184 (77%)	46 (19%)	10 (4%)	240

Source: Torfaen 2020 LHMA background data analysis

- 2.2.6 **Broad price of housing** (“to consider ‘transferability’ within the market”) - from the ‘Median Price Paid for Detached Houses (by MSOA)’ Map 5 above, we can identify the following four potential HMAs based upon amalgamating similar ‘house prices’:-

Figure 2: Combined Median Price Paid for Detached Houses - January 21 to April 22

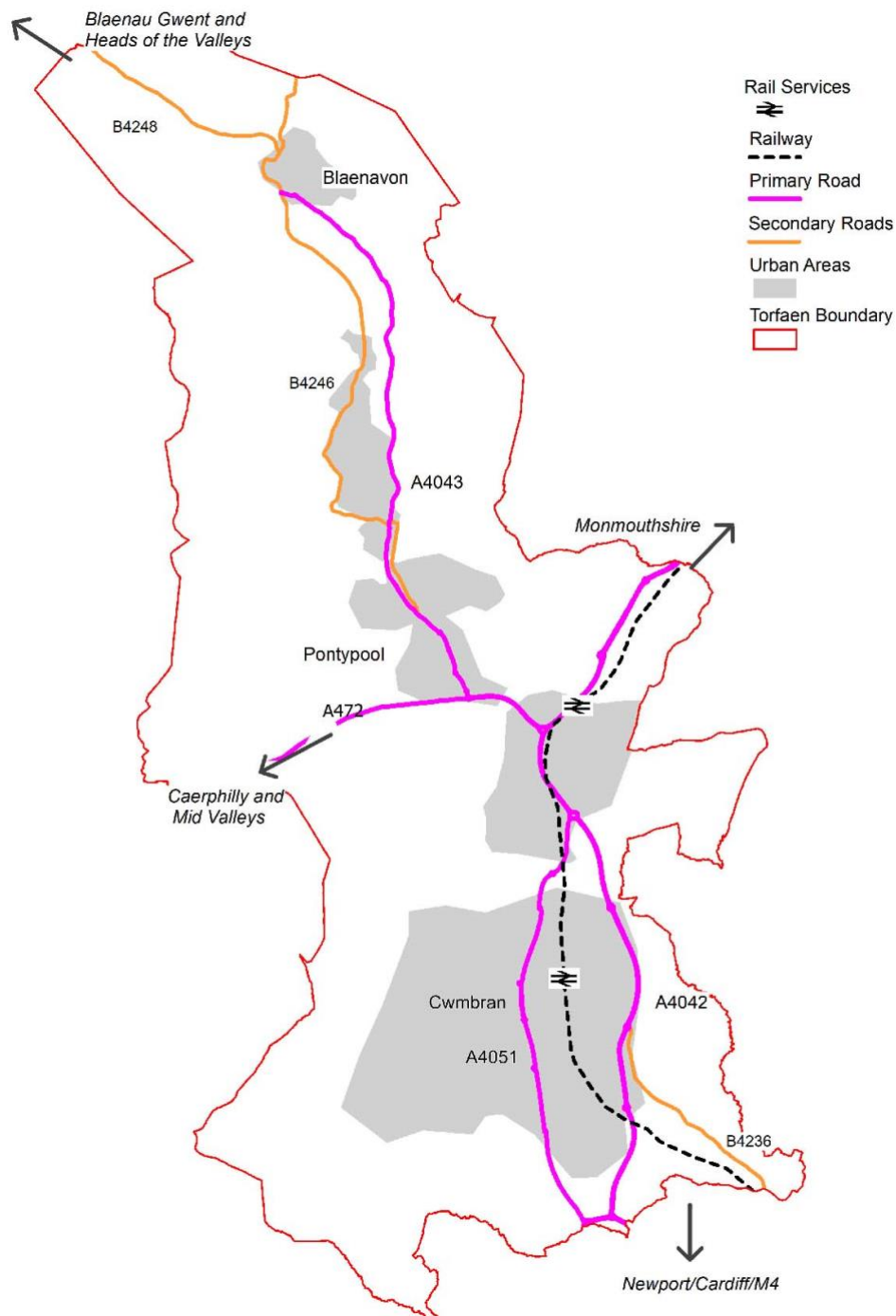


Source: Analysis of Land Registry residential sales data for Torfaen

Major transport links by road or rail (“to take account of commuting patterns”).

- E. Unfortunately, commuting data is only provided by a local authority level, and then only from the 2011 Census; so is of little use in defining HMAs within Torfaen; albeit the Travel To Work Area (TTWA) information above (paragraph 2.2.4/A above) is relevant to some degree.
- F. Map 8 below shows the major roads and railway line throughout Torfaen. However, given that the distances between the settlements by road are relatively short (Blaenavon to Pontypool = 6 miles, Blaenavon to Cwmbran = 12 miles; and Pontypool to Cwmbran = 6 miles) and along one ‘linear’ north / south main route (A4043, A472, A4042T & A4051) it is considered that the transport network does not have a major influence on defining Torfaen’s HMAs.

Map 8: Torfaen Major Road / Rail Transport Network



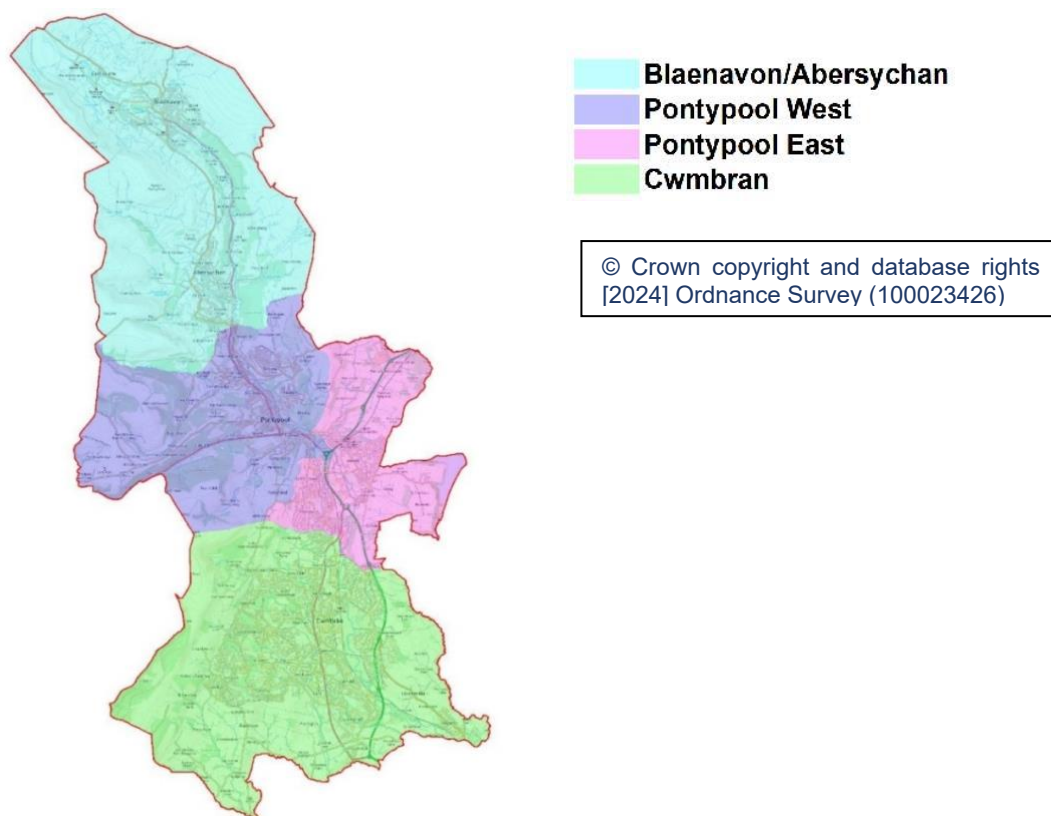
© Crown copyright and database rights [2024] Ordnance Survey (100023426)

2.2.8 **Overall Conclusion in Defining the Torfaen HMAs** - Therefore, in consideration of the above evidence, and given that the HMAs are primarily used for housing (in the Council's Prospectus for Social Housing Grant) and planning purposes (development viability / deliverability, development plan and S106 planning obligation requirements), the Council proposed the following four Middle layer Super Output Area (MSOA) based HMAs within Torfaen (see Map 9 below):-

- **Blaenavon / Abersychan HMA: (Blaenavon - T001 (Blaenavon) & Pontypool North - T002 (Abersychan, Cwmavon, Garndiffaith, Talywain & Varteg) MSOA's);**
- **Pontypool West HMA: (Pontypool Central - T003 (Penygarn, Snatchwood, St. Cadocs & Trevethin) & West - T004 (Brynwern, Cwm Fields, Cwmynyscoy, Pontnewynydd, Pontymoile, Pontypool town centre, Tranch, Trostant, Upper Race & Wainfelin) MSOA's);**
- **Pontypool East HMA: (Pontypool East - T005 (New Inn) & South - T006 (Griffithstown & Sebastopol) MSOA's); and**
- **Cwmbran HMA: (Cwmbran North - T007 (Lowlands, Northville, Pontnewydd, Pontrhydyrun & Upper Cwmbran), East - T008 (Croesyceiliog & Llanyraon North), North-West - T009 (Greenmeadow East, Pontnewydd & West Thornhill), Central - T010 (Old Cwmbran, Southville & St. Dials), West - T011 (Greenmeadow West & Fairwater), South-West - T012 (Coed Eva, Henllys, Two Locks & Ty Canol) & South-East - T013 (Cwmbran town centre, Llanfrechfa, Llantarnam, Llanyraon South, Oakfield & Ponthir) MSOA's).**

2.2.9 In arriving at this proposal, the Council has given more 'weight' to the above evidence / maps on the 'market housing sales value / viability' information (paragraphs 2.2.5/B and 2.2.6 above) and the 'affordable housing locational preferences' of those on the Torfaen 'Homeseeker' register (paragraph 2.2.5/D above), which coincide.

Map 9: Four Proposed Torfaen Housing Market Areas (HMAs)



2.2.10 The 41 plus Torfaen LHMA Stakeholder Group (listed in para 1.3.3 / Table 1 above) were consulted by email on paragraphs 2.2.1 - 2.2.9 above between Friday 8th July - Friday 29th July 2022; i.e. on the detailed assessments and four proposed HMAs; with an additional request for any relevant, and appropriate, evidence and data sources to inform the LHMA.

2.2.11 Table 7 below details the four stakeholder comments which were received during the above consultation. The main result of which was three consultees stating no HMA preference; and one housebuilder requesting that Cwmbran should be split into two HMAs East and West on viability grounds. As detailed in Table 7, noting that viability is one of several factors in defining an HMA, the Council has chosen to give more weight to the 'affordable housing locational preferences' of those on the Torfaen 'Homeseeker' register; and has thus decided to keep the 4 HMAs as proposed.

Table 7: Results of Stakeholder Consultation on 4 Proposed Housing Market Areas

Stakeholder	Comment	Response
Voices Residents Group (Melin)	No comment	Noted
Torfaen Access Forum (TAF)	I will explain to members we are currently looking at 'Housing Market Areas'. I'm sure members would appreciate the opportunity to be involved in a broader consultation on 'Specific Housing Needs'. We are currently working with Disability Wales and Welsh Government and housing needs are frequently mentioned.	Comments noted
Melin Homes	I have had a look through your consultation paper regarding the above and the proposed change to 4 x MSOA regions. There is a lot of supporting and helpful data with the report, and we can see the points you have made in terms of the number and extent of LSOA / MSOA present in the county. Only a few points to mention as follows. 1. It is evident that young couples / families setting up homes, move into Torfaen from higher value areas e.g., Monmouthshire to take advantage of better housing supply and generally lower priced homes. Conversely for leisure and hospitality especially in the warmer months, the movement seems to be in the opposite direction. 2. The Council has previously made the point that brownfield, commercial sites need to be retained in order to justify the promotion of new housing sites in the county, so jobs are available locally. Will the changeover to 4x regions change this thinking in any extent, plus does the fact that staff remain WFH also impact in any way? 3. We note with interest the recent focus on regeneration of town centres in the county. Will the changes in any way then help or	It is difficult to establish if this consultee supports the proposed HMAs or not, albeit there was no direct objection to them made. Other comments are considered policy matters which can be considered in the preparation of the Torfaen RLDP going forwards.

	influence say residential content or schemes in these areas separately? We would be interested in discussing the above further with you, plus the rationale for the changes proposed and how this fits in with the vision for Torfaen?	
Enzo Homes	We broadly agree with the proposed HMAs given that viability between each of the HMAs vary significantly between them with a few exceptions. In consideration to section '1.5 B', our build cost/m² has increased approximately £250/m² since 2020 based on increased pricing alone before taking into account Approved Documents F, L & O's increasing standards. After section 106 contributions and obligations, as well as highway developments and upgrades, a sales value of £2,150/m² results in a -2.27% profit for a prospective Torfaen development when tested with our appraisal formula. Taking Cwmbran Central's median price paid for detached houses for example, a sales value of £2,532/m² results in 12.2% developer profit compared to Cwmbran East £2,689/m² resulting in 22.24% developer profit. In terms of viability, contributions and obligations must be considered in more specific areas than the HMAs proposed. If similar obligations are considered on developments in Cwmbran West as Cwmbran South-East, many developments in Cwmbran West would not be viable due to the difference in sales values within the same HMA. In terms of viability, we believe Cwmbran could be split into two separate HMAs to ensure developments are viable in East and West Cwmbran with different levels of obligations for each to ensure developments are able to proceed. Without getting into the specifics of how planning views the HMAs and site-specific viability reports as usually requested in planning, we believe obligations for Cwmbran West would need to be fairly lower than East in order for more developments to proceed in Cwmbran West. Similarly, this may result in affordable housing needs being met in the current proposed Cwmbran HMA as a whole, whilst Cwmbran West potentially being neglected.	This consultee is suggesting due to viability, Cwmbran should be split into two East and West HMA's. Due to the lack of new house price data, the HMA viability analysis was based upon the general correlation between the values of detached dwelling as a proxy for new house values, it should not be relied on alone to define the HMAs. Furthermore, unlike the proposed Pontypool East & West HMAs where the level of housebuilder attractiveness is more noticeable, the same cannot be said for Cwmbran, where there is housebuilder demand throughout the whole Town. For example, the Taylor Wimpey former Police College site in a previous expected low value area achieved similar prices to their site in South Sebastopol in North Cwmbran, so location may not be as much a factor in this respect. Thus, given that viability is one of several factors (see paragraph 2.2.4 above) in defining an HMA, the Council has given more weight to the 'affordable housing locational preferences' of those on the Torfaen 'Homeseeker' register; and has thus decided to keep the 4 HMAs as proposed. The viability matters raised can be dealt with by submitting a 'viability appraisal' to make sites deliverable.

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

3.1 Housing Market Analysis by Tenure

- 3.1.1 Torfaen has a geographic area of 126km² and is the 3rd smallest borough in Wales; with a population of circa 92,300 (ONS Census 2021). The population is broken down into the age categories in Table 8 below: -

Table 8: Age Breakdown of Torfaen Population (2021 Census)

Age	Number of persons	%
14 and under	16,000	17%
15-24	9,600	10%
25-34	12,100	13%
35-44	11,000	12%
45-54	11,800	13%
55-64	12,700	14%
65-74	10,400	11%
75-89	7900	9%
90+	800	1%
Total	92,300	100%

Source: Office for National Statistics

- 3.1.2 The ethnicity of Torfaen residents is predominantly white at 97% of the population as shown by Table 9 below: -

Table 9: Ethnicity of Torfaen Population (2021 Census)

Ethnic Group	No.	%
Total: All usual residents	92,276	100%
Asian, Asian British or Asian Welsh	1,202	1%
Black, Black British, Black Welsh, Caribbean or African	228	0.2%
Mixed or Multiple ethnic groups	1,005	1%
White	89,596	97%
Other ethnic group	245	0.3%

Source: Office for National Statistics

- 3.1.3 According to the 2021 Census, a total of 21,501 residents are classed as disabled under the Equality Act 2010. 10,477 residents have a disability that limits their daily activities a lot, compared to 11,024 residents whose disability limits their daily activities a little, which equates to 23% of Torfaen residents.¹³
- 3.1.4 In 2021, Torfaen has a total number of 40,241 households, with a large proportion of residents owning their property outright at 35% compared to 11% of residents privately renting or living rent free and 24% in a social rented property as shown by Table 10 below: -

¹³ Torfaen Local Authority: 2021 Census Area Profile -

https://www.nomisweb.co.uk/sources/census_2021/report?compare=W06000020 [Accessed 24.04.2023].

Table 10: Tenure / Ownership Split of Torfaen Households (2021 Census)

Tenure	Total	%
Owns outright	13,952	35%
Owns with a mortgage / loan / shared ownership	12,186	30%
Social rented	9575	24%
Private rented	4528	11%
All households	40,241	100%

Source: Office for National Statistics

- 3.1.5 Demand for affordable housing remains an area of pressure in Torfaen, with house prices preventing many households from meeting their housing need via the open market. Despite prices dipping during 2008 and 2011, house prices have continued to rise steadily with an average property in 2022-2023 costing £196,261¹⁴, see Table 11 below for detail: -

Table 11: Breakdown of Average House Prices in Torfaen by Property Type (March 22 - February 23)

Date	All property types	Detached houses	Semi-detached houses	Terraced houses	Flats and maisonettes
Mar 2022	£186,875	£327,064	£189,229	£148,345	£91,775
Apr 2022	£186,444	£325,750	£188,568	£148,264	£91,373
May 2022	£187,351	£327,456	£189,439	£149,064	£91,036
Jun 2022	£191,348	£332,808	£193,260	£152,769	£92,896
Jul 2022	£195,370	£339,114	£197,380	£156,154	£94,656
Aug 2022	£197,188	£341,225	£199,083	£157,940	£95,480
Sep 2022	£200,557	£347,880	£202,547	£160,480	£96,428
Oct 2022	£198,795	£345,622	£200,792	£158,887	£95,310
Nov 2022	£202,102	£353,242	£203,964	£161,165	£96,561
Dec 2022	£200,050	£350,446	£201,955	£159,276	£95,776
Jan 2023	£200,293	£352,463	£202,362	£159,063	£95,353
Feb 2023	£202,470	£357,831	£204,679	£160,353	£96,517

Source: Land Registry, UK House Price Index

- 3.1.6 The largest property type in Torfaen is a terraced property with the average cost of £155,980 between March 2022 - February 2023. Flats and Maisonettes are a more affordable option, but they only account for 10% of the housing stock in Torfaen and a high proportion of them are in the social sector, so are not available to purchase.
- 3.1.7 Low-Cost Home Ownership (LCHO) assists households that are currently priced out of the open market and demand for this service has grown, with nearly 400 applicants currently on the register. However, this is not suitable for all households, which inevitably places greater pressure on the rental markets.
- 3.1.8 Torfaen has a relatively small private rented sector (circa 10%) and despite efforts to make it more accessible and develop intermediate rental products, it has not grown significantly and remains an expensive option for many households, especially those under 35 years old and in receipt of benefits.

¹⁴ UK House Price Index - <https://landregistry.data.gov.uk/app/ukhpi/browse?from=2022-03-01&location=http%3A%2F%2Flandregistry.data.gov.uk%2Fid%2Fregion%2Ftorfaen&to=2023-03-01&lang=en> [Accessed 26.04.2023].

Table 12: Rent Officers Wales Number of Rentals 2022 - Calendar Year

HMA	Number of Rentals (by bedrooms)				
	1 Bed	2 Bed	3 Bed	4 Bed	Total
Blaenavon / Abersychan	2	21	14	0	37
Cwmbran	18	69	71	6	164
Pontypool East	4	19	25	3	51
Pontypool West	5	35	22	2	64
Torfaen	29	144	132	11	316

Source: Rent Officers Wales

3.1.9 Table 12 captures the number of private rental units in Torfaen for 2022. Most private rented properties are in Cwmbran. 2 Bedroom properties are the most common form of private rental units in the borough at 46% of total stock, compared to 4 Bedroom properties at only 3%.

3.1.10 Tables 13 and 14 display rent at the 30th and 50th percentile position across each Housing Market Area in Torfaen. Where figures are missing, the property sample was too small for Rent Officers Wales to provide rent data.

Table 13: Rent Officers Wales - Rent at the 30th Percentile Position Data 2022-2023

HMA	Rent at the 30 th Percentile Position (by bedrooms)			
	1 Bed	2 Bed	3 Bed	4 Bed
Blaenavon / Abersychan		£435	£595.25	
Cwmbran	£501	£572	£650	£922.50
Pontypool East		£513	£655.70	
Pontypool West		£501	£529	
Torfaen	£475	£525	£628.81	£950

Source: Rent Officers Wales

Table 14: Rent Officers Wales – Rent at the 50th Percentile Position Data 2022-2023

HMA	Rent at the 50 th Percentile Position (by bedrooms)			
	1 Bed	2 Bed	3 Bed	4 Bed
Blaenavon / Abersychan		£500	£672.50	
Cwmbran	£545	£600	£725	£1225
Pontypool East		£550	£700	
Pontypool West		£575	£587.50	
Torfaen	£525	£575	£700	£1000

Source: Rent Officers Wales

3.1.10 Table 15 shows the total number of housing market sales by Housing Market Area in 2021 and 2022:

Table 15: Wales Land Registry Data 2021 & 2022

HMA	2021	2022	% change
Blaenavon / Abersychan	208	176	-15%
Pontypool West	226	193	-15%
Pontypool East	255	184	-28%
Cwmbran	852	626	-27%
Total	1541	1179	-23%

Source: Wales Land Registry Data 2021 & 2022

3.1.11 2022 saw a decline in housing market sales by 23%. In both 2021 and 2022, more houses were sold in Cwmbran than other housing market areas at over 50% of total sales. Properties at the north of the borough sold the least at under 15% of total housing market sales.

3.1.12 There are approximately 10,000 social housing properties in Torfaen. This accounts for 24% of the overall housing stock in the county, compared to a Welsh average of only 10%. This is the highest proportion of social housing stock per local authority in Wales and has resulted in a greater dependency locally on social housing.

Table 16: Torfaen Affordable Housing Need Prospectus, 2022

Submarket Area	Stock (%)	Households (%)
Cwmbran South & East	26.72%	26.75%
Cwmbran West & North	28.39%	26.45%
Mid Torfaen	28.61%	32.30%
North Torfaen	16.28%	14.50%

Source: Torfaen Housing Service

3.1.13 The greatest proportion of social homes are located in the South of the borough (Cwmbran South & East and West & North), where the number of households is also highest. However, there is also a mismatch between the type and size of the current housing stock compared with the current demand for housing required by applicants on the housing register, especially for 1 bed properties. This mismatch of stock versus demand can be seen clearly in the infographic below:

Figure 3: Torfaen Social Housing Stock by Number of Bedrooms (February 2020)

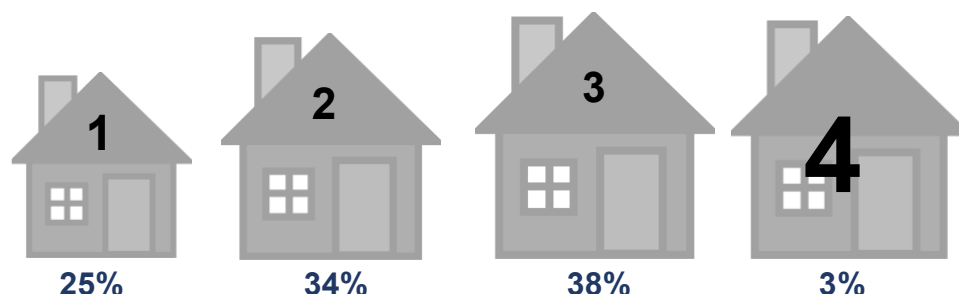
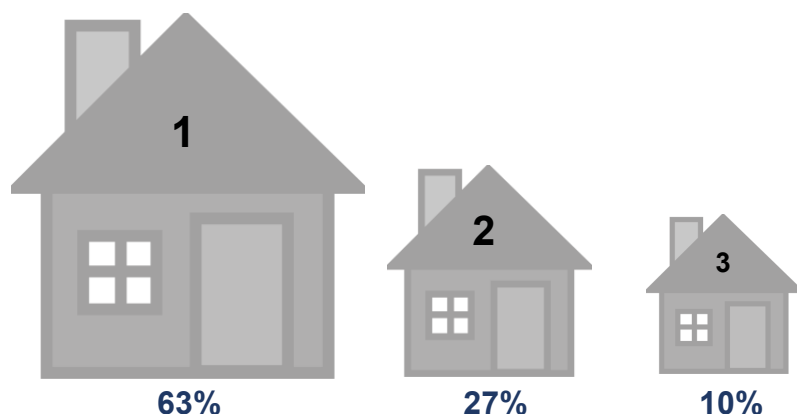


Figure 4: Torfaen Social Housing Need by Number of Bedrooms (from Torfaen Common Housing Register February 2020)



3.1.14 As regards to **second homes**, according to the Welsh Government '**Second homes: Developing new policies in Wales**'¹⁵ report (2021), from an analysis of Council tax records, there were 7 second/holiday homes in Torfaen in 2020/21; this represents 0.02% of all the total dwelling stock (the fourth lowest County total in Wales). This can be compared to 4,900 second homes (10.76%) in Gwynedd (39.8% in Llanengan), which has the highest total in Wales. Therefore, this negligible level of second homes in Torfaen is considered to have no implications for the Welsh language.

3.1.15 Torfaen has 440 empty properties as of 2023. 431 are private properties and 9 properties are owned by registered social landlords. This is divided into the Housing Market Area's in Table 17 below:

Table 17: Empty Properties in Torfaen 2023

HMA	Private Empty Homes	RSL Empty Homes
Blaenavon / Abersychan	101	1
Pontypool West	100	2
Pontypool East	67	1
Cwmbran	163	5

Source: Torfaen Housing Service

3.2 Socio-Economic and Demographic Trends

- 3.2.1 Looking at the whole of Torfaen, the most popular area of desire is Cwmbran which is in the south of the borough. This is felt by the majority of people who reside in temporary accommodation along with the majority of people who are registered on the social housing register.
- 3.2.2 Residing in the north of the borough is not as popular as the south of the borough. As a result, most new build properties are required in the south of the borough.
- 3.2.3 Creating huge pressures in households being able to afford private rental as an option, along with individuals being able to afford to take out a mortgage on a property.
- 3.2.4 There has also been significant development in Cwmbran in the past two years with a new A&E hospital opening. Creating a long list of jobs and career prospects in the local area, impacting the cost of house prices and private rentals. This has had an impact on the trends within the local authority.
- 3.2.5 The household composition of Torfaen shows that a single family household is the largest at 65%. This is by far the largest area of need we see in Torfaen overall, with our largest percentage of households in temporary accommodation and on the waiting list being that of single households. Therefore, this is our greatest area of need for future planning going forward. We have not seen the demand for single beds decrease in quite some time, whilst remaining our highest need bracket by far.

Table 18: Household Composition (2021 Census)

Household Composition	No.	%
Total: All households	40,241	100%
One-person household	12,316	31%

¹⁵ Second homes: Developing new policies in Wales - <https://gov.wales/sites/default/files/publications/2021-03/second-homes-developing-new-policies-in-wales.pdf>

Single family household	26,294	65%
Other household types	1,631	4%

Source: Office for National Statistics

Table 19: Occupancy Ratings by Torfaen HMA (2021 Census)

Occupancy Ratings	Total
Blaenavon	2,645
Pontypool East	829
Pontypool West	2, 632
Cwmbran	6, 661

Source: Office for National Statistics

Within Torfaen there are three main settlement areas: Blaenavon in the north, Pontypool in the centre and Cwmbran in the south. Despite the short distance between them, these three towns have their own unique character and needs.

- 3.2.6 Table 20 shows the commuting patterns of Torfaen residents between the ages of 16 - 74 years old. The average distance travelled to work is 13.4 km. Torfaen has a population of approximately 93,000 with a working age population of 57,100 residents. Which equates to 60.7 % of the population.

Table 20: (2021 Census)

All Categories - Distance travelled to work	Total
Less than 2km	7,471
2km to less than 5km	7,888
5km to less than 10km	7,864
10km to less than 20km	6,436
20km to less than 30km	2,762
30km to less than 40km	774
40km to less than 60km	536
60km and over	1,043
Work mainly from or at home	2,582
Other	2,905
Total Distance (Km)	467,654.4
Average Distance (Km)	13.4

Source: Office for National Statistics

3.3 Specific Housing Needs Requirements

3.3.1 This section looks at the specific housing needs requirements, citing policies, strategies and data sources to highlight the housing support needs in Torfaen. The report justifies the reasoning as to why a support need is limited in the area.

a) Accessible and adapted housing provision	
Local policies / strategies	The Gwent Population Needs Assessment aims to support disabled people to live independently in appropriate accommodation.
Property needs (key section)	Properties with existing adaptations (low-level appliances, stair rails, barriers free, wheelchair accessibility) in place will be advertised by partner landlords specifically giving preference to applicants with a need for that type of accommodation. For example, ground floor accommodation without adaptations would be advertised without this specific preference applied but applicants would still be able to bid for the property. Applicants with an assessed need for accessible/adapted accommodation are enabled to bid for retirement accommodation even where they fall short of the minimum age criteria.
Suitable for	People with limited mobility and/or dexterity, need for low level care, wheelchair users.
Evidence including data sources (key section)	1 A total of 21,501 Torfaen residents are classed as disabled under the Equality Act 2010. 10,477 residents have a disability that limits their daily activities a lot, compared to 11,024 residents whose disability limits their daily activities a little, which equates to 23% of Torfaen residents. 2 In Wales, 46% of disabled people live in rented properties, compared to 28% of non-disabled people.¹⁶ 3 Torfaen is expected to see an 11% increase in residents with a limiting long-term illness from 2021-2023.¹⁷ 4 In Torfaen, we currently have 304 households on the housing access register who require an adapted/accessible property. Out of these 304 households, these include a mixture of bedroom types along with level of adaptations required. The breakdown includes: ▪ One Bedroom = 217 ▪ Two Bedrooms = 72 ▪ Three Bedrooms = 10 ▪ Four Bedrooms plus = 5 • And we still have 34 households that have not been fully assessed yet. Breaking down the 304 households on the current register, the majority of these households sit within the category of requiring a property which is level access and the most in demand adapted property. • These 304 households can be broken down into age categories: ▪ 16-21 years old = 2 households ▪ 22-39 years old = 38 households ▪ 40-59 years old = 95 households ▪ 60+ years old = 169 households • In the last 12 months, 128 households were rehoused via the housing access register.
External stakeholder	The Housing Access manager was consulted. Data from the Common Housing Register.

¹⁶ Coronavirus (COVID-19) and the impact on disabled people (2021) <[Coronavirus \(COVID-19\) and the impact on disabled people | GOV.WALES](#)> [Accessed 22.11.2023].

¹⁷ Gwent Population Needs Assessment <[Health and Physical Disabled People - Gwentrbp](#)> [Accessed 22.11.2023].

consultation and engagement	The Gwent Population Needs Assessment 2022-2023.
Key Issues identified	No limitations on the data.

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

Multi-generational and larger families is not a significant housing need within the borough. According to 2021 Census data, 4.1% of households are classed as 'other households'; this is defined as 'the number of people, number of dependent children, whether the household consists only of students or only of people aged 66 and over' and more specifically, 5 households identified as a multi-generational household.

Additionally, the waiting lists for the affordable housing and social housing schemes indicate that 4-bed properties are less in demand than 1-3 bed properties, as only (74) 3% of social housing applicants require a 4-bed property which suggests that larger families are not a significant need in the area. This is further supported as only 7% of social housing applicants indicated they live in an overcrowded household. On average, 9 4-bed properties are allocated to residents on the social housing waiting list per year since 2022, which shows that the area lacks 4-bed properties.

These statistics show that multi-generational and larger families is not a significant housing need within the area. However, to help resolve this housing need, applicants who state overcrowding on their social housing application are awarded a priority band to help them access a suitable property faster.

c) Non-permanent housing

Local policies / strategies	Housing Wales Act 2014, s.68 Suitability of temporary accommodation Renting Homes (Wales) Act 2016 Torfaen County Borough Council Homelessness Strategy
Property needs (key section)	Good quality temporary accommodation to meet the levels of demand in Torfaen. Ensuring there is the right mix of single units of accommodation along with a range of couple and family units to cater for all household mixes. There are also a range of adapted properties which can be used again as interim accommodation units. All accommodation must meet health and safety standards along with the Renting Homes (Wales) Act 2016. This accommodation needs to be available to house clients until they can source appropriate long-term permanent housing. All units of accommodation are managed via Torfaen County Borough Council's housing department.
Suitable for	Permanent housing is the preferred choice, but temporary housing is considered where there is currently insufficient permanent housing to meet the needs. Torfaen cater for households in interim accommodation covering: ▪ Singles ▪ Couples ▪ Families of all sizes ▪ Households with adaptive needs Any household that finds themselves at threat or risk of becoming homeless or is homeless that day could qualify for interim accommodation under a section 68 duty.
Evidence including data sources	In Torfaen we have an abundance of non-permanent housing which is used for anyone who finds themselves homeless or at risk/threat of homelessness. At this present time, we currently hold: ▪ 79 Single Units which are in a variety of blocks and set ups.

(key section)	▪ 15 Two bed units/houses/flats ▪ Three bed units/houses/flats ▪ Adapted properties/Units ▪ 8 Single units which are used specifically for a CAS3 project (which is in place for anyone leaving prison or custody and meeting the criteria). ▪ 15 family units which are in a family block. The above number of units has almost tripled in size following the Covid-19 pandemic. Immediately post Covid-19, there was a massive influx of single household presentations. So, this was an in-demand type of accommodation; however since the implementation of the Renting Homes (Wales) Act, we are now seeing a much larger influx of families and larger units. In relation to gaps in provision, there is very little, larger family units if we had a large family present. Another gap or shortfall in provision is the requirement for any provision that can take pets or animals. Data was collated from the local authority's housing department. The temporary accommodation team and the boards showing which collate all the individuals and households actively in temporary accommodation. The aim is to have people in these temporary and non-permanent housing options for as little time as possible and get them moved into more long-term housing options.
External stakeholder consultation and engagement	Consultations were held with the Council's temporary accommodation officers. Housing Solutions team. One Drive Boards where anyone actively held in temporary accommodation is stored. Housing Benefit department Housing access register Environmental Health Agency Shelter Cymru
Key Issues identified	Note any limitations or gaps in data - N/A

d) Housing, care and support needs	
Local policies / strategies	The Housing Support Programme Strategy and Rapid Rehousing Plan aims to review and develop supported accommodation, with the aim of increasing single unit accommodation to support single people with high/complex needs. The Strategy plans to develop a network of dispersed emergency bed provision to assist with the supply and management of emergency accommodation to those presenting as homeless. Under the Regional Partnership Board, a Mental Health and Learning Disability strategic partnership meets. It remains a strategic priority to develop a range of accommodation options for people including those with learning disabilities. The focus remains on promoting independence, social inclusion and positive risk taking.
Property needs (key section)	The Housing Support Grant funds 6 supported housing accommodations; totalling to 60 units, including 2 emergency accommodation units: ▪ Llamau Ty Cyfle: 8 units of semi-supported accommodation for young people aged 16-24 with a housing need. ▪ Refuge: 10 units of accommodation for women fleeing domestic abuse. ▪ POBL Hales House: 20 units of generic supported accommodation. ▪ Platform Supported Housing: 16 units of semi-supported housing for people with a mental health need. ▪ The Wallich Pen Y Parc: 2 units ▪ The Wallich Fairwater: 2 units ▪ Emergency bed provisions: 2 unit.

	The Market Stability Report details the accommodation options for people including those with learning disabilities. The local authority continues to develop a broad range of accommodation with care and support to enable residents to remain independent, examples of these include: ▪ Ty Glas Y Dorlan is an intermediate care facility and Independent Living Accommodation that provides housing with care and support available to adults to experience independent living, respite breaks and extra care. It has 6 long stay and 13 short stay flats. ▪ Somerton House is a 16-unit Independent Living Accommodation. ▪ Ty Hen Ysgol is a 17-unit supported accommodation. ▪ Ty Cae Nant is a 41-unit extra-care accommodation. ▪ Ty Clos Y Fran is a 7 unit supported accommodation. The Enhanced Support Service delivers realistic, short, mid, and long term supported accommodation: ▪ Wern Road: 8 units supported housing. ▪ Brookside: 4 dispersed supported housing units.
Suitable for	▪ Ty Cyfle: young people aged 16-24 with high/intensive housing needs. ▪ Refuge: women fleeing domestic abuse. ▪ Hales House: individuals aged 16+ with a high/intensive level housing need. ▪ Mental Health Supported Housing: individuals aged 16+ with a housing and a mental health need. ▪ Emergency bed provisions: individuals aged 16+ who are immediately at risk of homelessness. ▪ Ty Glas Y Dorlan: 18+ Social Care assessment based on need. ▪ Somerton House: 18+ Social Care assessment based on need. ▪ Ty Hen Ysgol: 18+ Social Care assessment based on need. ▪ Ty Cae Nant: 55+ Social Care assessment based on need. ▪ Ty Clos Y Fran: 18+ Social Care assessment based on need. ▪ Enhanced Support Service (Wern Road/Brookside): Young people aged 16-21 who hold category one, two and three statuses as defined within the Social Services Well-Being Act 2014 and has a housing and care need.
Evidence including data sources (key section)	Housing ▪ Homeless presentations within Torfaen increased across the board since early 2020. There has been an approximate 30% increase in single males presenting along with figures doubling for single females, which shows a demand for single accommodation provision. ▪ In 2022-23, 210 referrals were received to the Housing Support Gateway for supported accommodation. More supported housing is required as there was an average waiting time of 108 days for an individual to access the provision in 2022-23. ▪ The local authority are renovating Pearl House as an accommodation and triage hub with 15 units of single person supported accommodation, estimated to open in 2024 with a focus on rapid rehousing. Care ▪ An ageing population is an area of concern; Torfaen is expecting a 50% increase of residents experiencing dementia from circa 1400 residents over 65, to around 2100 by 2035. ▪ Torfaen does not have in-house residential settings but relies on private sector placements. Torfaen has 2 private sector providers within our boundaries. The plan wants to engage with these providers and improve our use of local residential homes. ▪ The Placements commissioning Strategy Plan wants an increased choice of accommodation options for care leavers and will pilot an Enhanced Support Service (ESS) for our 16+ population.
External stakeholder	▪ The Housing Support Grant Team were consulted, and reports were produced from Civica where all referrals are processed.

consultation and engagement	▪ Consulted with Planning and Development Officers from the Commissioning department. ▪ Referred to the Housing Support Programme Strategy, Rapid Rehousing Plan, Gwent Population Needs Assessment, Gwent Market Stability Report, Torfaen County Borough Council Market Position Statement. ▪ From April 2020 to March 2025 and Placement Commissioning Strategy Action Plan 2022.
Key Issues identified	No limitations identified.

e) Locational needs for student accommodation

According to the 2021 Census data, 5.3% of residents are classed as a 'student'. Also, the nearest university to Torfaen is the University of South Wales which has multiple locations including Newport. As students from that university would stay in Newport and the surrounding areas, as well as the small number of residents classed as a student, show that this housing need does not apply to this area.

f) Locational needs for people with physical or cultural needs

According to the 2021 Census data, 23% of residents are classed as disabled, with 11% of residents' daily activities are limited a lot due to their disability. In 2024, 10% of applicants on the social housing register require an adapted/accessible property. Data from the social housing register, shows that applicants who require an adapted property prefer to live in the Cwmbran area, with the 2 most popular options based in the south of the borough. This area has efficient transport links, well established shopping and neighbourhood centres, allowing residents to access a variety of services within a small area to meet their needs. Additionally, the main hospital for the region, Llanfrechfa Grange, is located within Cwmbran.

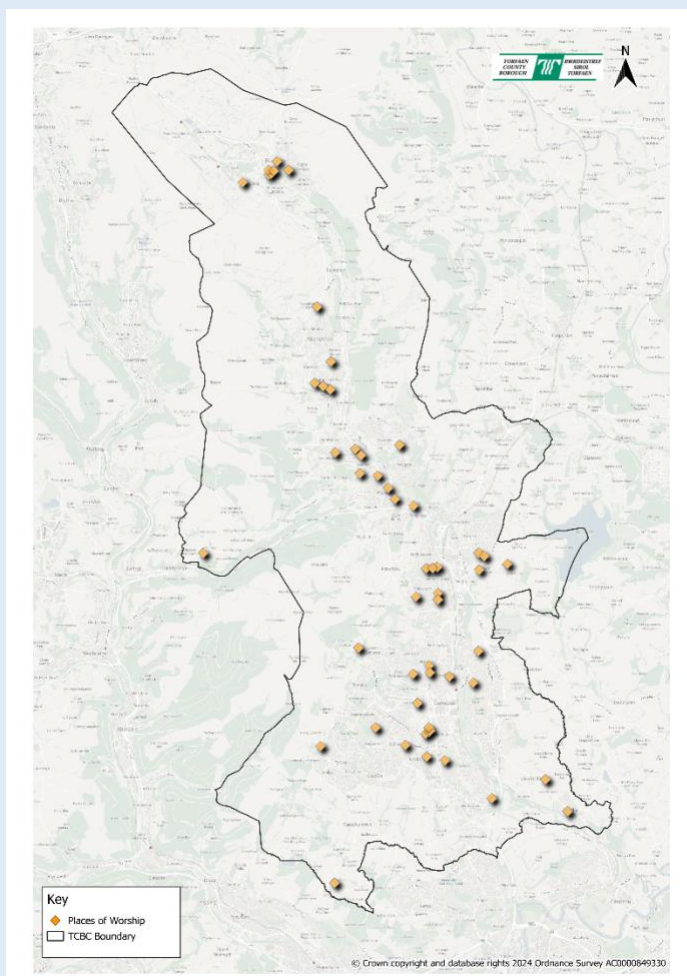
As Torfaen is a relatively small borough of 126km² and is the 3rd smallest borough in Wales. Distances between the settlements in Torfaen by road are relatively short (Blaenavon to Pontypool = 6 miles, Blaenavon to Cwmbran = 12 miles; and Pontypool to Cwmbran = 6 miles) and along one 'linear' north / south main route (A4043, A472, A4042T & A4051). The 2021 Census shows that the average distance travelled to work is 13.4 km. Most residents travel between 2km and 5km in average. Residents with known physical disabilities tend to remain within their existing areas due to their support network; therefore, Torfaen ensures there are adapted properties developed throughout the borough and these families have access to adaptation grants to assist. All new properties will be delivered to the Welsh Government DQR (lifetime home standards) to anticipate a growing number of residents with physical needs. Cwmbran and Pontypool are the 5th and 8th largest settlements in South-East Wales, as a result these areas have a variety of community facilities nearby.

In conclusion, the smaller size of the borough, as well as the efficient transport links suggests that there is a limited locational need for people with physical needs in Torfaen.

Torfaen has a small population of individuals with cultural needs reflected in the 2021 Census data with only 0.4% of residents identified as a member of the Gypsy & Traveller community. The Council has updated their Gypsy Traveller Accommodation Assessment which was approved by the minister in July 2024; this has planned the unmet need. This is further supported by data from GOV.UK on the number of immigration groups, specifically Homes for Ukraine scheme, Afghan Resettlement Programme and asylum seekers receiving support in Torfaen, which only account for 0.13% of the total population.¹⁸ The Council has taken steps to ensure individuals are considered but due to the limited number of individuals concerned this is not currently a significant and impactful area.

¹⁸ Regional and local authority data on immigration groups - <https://www.gov.uk/government/statistical-data-sets/immigration-system-statistics-regional-and-local-authority-data>

Additionally, Torfaen's religious population mainly consists of Christians at 42%, then other religions at 0.5% and Muslims at 0.4%. There are an estimated 70 places of worship located across the borough, as pictured in the map. Due to the small population of people with other religious beliefs, this has a limited impact on locational needs within the borough and as noted above, there are a number of places of worship throughout the borough.



4. Range of additional housing need estimates

- 4.1 Below are the completed summary tables extracted from the 'Summary tables for LHMA report' section of the LHMA tool. The tables are based on the Welsh Government's '2018 based' household projections (principal, higher and lower variants).

Table 1 - Additional Affordable Housing Need for Torfaen over a 5-year period (2023 - 2028) (statistical rounding may lead to totals not summing correctly)

Principal Projection	1 Bed	2 Bed	3 Bed	4 Bed	Social Rent	Intermediate Rent	LCHO	Affordable Housing
Blaenavon / Abersychan	11	0	0	1	12	7	5	23
Pontypool West	0	0	0	0	0	8	13	21
Pontypool East	33	1	11	2	47	10	13	70
Cwmbran	92	21	17	0	131	25	27	183
Torfaen Total	137	22	28	3	190	50	57	297

Higher Variant	1 Bed	2 Bed	3 Bed	4 Bed	Social Rent	Intermediate Rent	LCHO	Affordable Housing
Blaenavon / Abersychan	12	0	0	1	14	8	5	26
Pontypool West	0	0	0	0	0	9	13	22
Pontypool East	34	1	11	2	48	11	13	72
Cwmbran	97	24	18	0	139	29	27	195
Torfaen Total	144	25	29	3	201	56	57	315

Lower Variant	1 Bed	2 Bed	3 Bed	4 Bed	Social Rent	Intermediate Rent	LCHO	Affordable Housing
Blaenavon / Abersychan	9	0	0	1	10	5	5	20
Pontypool West	0	0	0	0	0	6	13	19
Pontypool East	32	0	10	2	45	10	13	67
Cwmbran	86	18	16	0	119	21	27	167
Torfaen Total	127	19	26	3	175	42	57	274

Table 2 - Additional Total Housing Need for Torfaen over a 5-year period (2023 - 2028)

(statistical rounding may lead to totals not summing correctly)

Principal Projection	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Owner Occupier	Private Rented	Market Housing	Additional Housing
Blaenavon/Abersychan	60	11	72	5	8	12	84
Pontypool West	78	26	104	6	11	17	121
Pontypool East	89	24	113	3	6	9	122
Cwmbran	398	57	455	14	29	43	498
Torfaen Total	626	118	743	28	53	82	825

Higher Variant	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Owner Occupier	Private Rented	Market Housing	Additional Housing
Blaenavon/Abersychan	63	12	75	7	11	18	92
Pontypool West	81	27	108	9	15	24	133
Pontypool East	91	24	115	4	9	13	128
Cwmbran	407	60	467	20	42	62	529
Torfaen Total	641	124	765	40	76	117	882

Lower Variant	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Owner Occupier	Private Rented	Market Housing	Additional Housing
Blaenavon/Abersychan	58	10	67	2	3	5	73
Pontypool West	74	24	98	3	5	7	105
Pontypool East	87	23	111	1	3	4	114
Cwmbran	387	52	439	6	12	18	457
Torfaen Total	605	109	715	12	23	35	749

Table 3: Additional total housing need over the remaining 10-year period (2028-2038)

(statistical rounding may lead to totals not summing correctly)

Principal Projection	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Owner Occupier	Private Rented	Market Housing	Additional Housing
Blaenavon/Abersychan	5	2	7	5	8	12	20
Pontypool West	7	3	11	6	11	17	28
Pontypool East	3	1	4	3	6	9	13
Cwmbran	20	8	28	14	29	43	71
Torfaen Total	35	15	50	28	53	82	132

Higher Variant	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Owner Occupier	Private Rented	Market Housing	Additional Housing
Blaenavon/Abersychan	7	3	11	7	11	18	28
Pontypool West	10	5	15	9	15	24	40
Pontypool East	4	2	6	4	9	13	19
Cwmbran	29	11	40	20	42	62	102
Torfaen Total	51	21	72	40	76	117	188

Lower Variant	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Owner Occupier	Private Rented	Market Housing	Additional Housing
Blaenavon/Abersychan	2	1	3	2	3	5	8
Pontypool West	3	1	5	3	5	7	12
Pontypool East	1	1	2	1	3	4	6
Cwmbran	9	3	12	6	12	18	30
Torfaen Total	15	6	21	12	23	35	56

Table 4: Annual and total additional affordable housing need over the 15-year period of the LHMA (2023-2038) (statistical rounding may lead to totals not summing correctly)

Principal Projection	Average Annual Estimates			15-year estimates		
	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Social Rent	Intermediate rent / LCHO	Affordable housing
Blaenavon / Abersychan	7	5	13	111	80	192
Pontypool West	5	9	14	76	136	212
Pontypool East	18	9	26	264	128	391
Cwmbran	57	23	80	855	339	1,194
Torfaen Total	87	46	133	1,305	683	1,988

Higher Variant	Average Annual Estimates			15-year estimates		
	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Social Rent	Intermediate Rent / LCHO	Affordable Housing
Blaenavon / Abersychan	9	6	16	139	96	235
Pontypool West	7	11	18	107	158	265
Pontypool East	19	9	28	283	135	419
Cwmbran	66	26	92	984	389	1,373
Torfaen Total	101	52	153	1,514	778	2,292

Lower Variant	Average Annual Estimates			15-year estimates		
	Social Rent	Intermediate Rent / LCHO	Affordable Housing	Social Rent	Intermediate Rent / LCHO	Affordable Housing
Blaenavon / Abersychan	5	4	9	74	59	133
Pontypool West	2	7	9	33	107	141
Pontypool East	16	8	24	237	118	355
Cwmbran	46	18	64	683	272	955
Torfaen Total	68	37	106	1,027	557	1,584

5. LHMA additional housing need estimates

- 5.1 In this section, the Welsh Government's LHMA Template Report requires the Council to: -

"State which of the household projection variants set out in Section 4 you propose to use to provide your LHMA additional housing need estimates.

Where the preferred projection is not one of the Welsh Government variants (for example where it is based on the Development Plan's Preferred Growth Strategy), this must be benchmarked against the Welsh Government projections and the degree of variation clearly evidenced and explained. If the LHMA is due to be reviewed in-between revisions to the Development Plan, it should be based primarily on the Welsh Government principal projection, with the alternative variants acting as upper and lower estimates.

... You should note stakeholder engagements and the action taken as a result of these discussions."

- 5.2 Therefore, from the 15th - 29th January 2024, the Council undertook a two week email consultation with the 41 plus Torfaen LHMA Stakeholder Group (listed in para 1.3.3 / Table 1 above) asking their views *"on which of the three projections we should use in the Torfaen 2023 LHMA, based upon which you consider more accurately reflects the number of new households likely to have been formed in Torfaen by 2038... This should be a factual rather than a policy choice!"*. To inform this choice, the 4 sets of LHMA Tool result tables (see Section 4 above) were provided, as well as the following table, produced by the Council's planning service, which forecast that at least **2,910 dwellings** are likely to be built over the Torfaen 2023 LHMA period 2023-2038, see Table 22 below for details.

Table 22: Forecast Housing Delivery in Torfaen 2023-2038

Permitted Sites	Dwellings
Manor Way, Abersychan	10
Lower Shepherds Hill G&T Site, Pontypool	21
Osborne Road & Michael Way Pontypool	9
Glanwern House, Pontypool (10 dwellings - 6 new)	6
Penywain Lane, Pontypool	33
Pearl House, Pontypool	16
South Sebastopol SAA	635
Malthouse Lane, Llantarnam	148
County Hall, Cwmbran	143
The Former New Bridge Inn, Greenhill Road, Cwmbran	9
Rifle Club Victoria St / Ventnor Rd, Cwmbran	13
Mamhilad SAA, Pontypool	850
Police College Phase 3, Cwmbran	70
Remaining Torfaen LDP Allocated Large Site	
H2/3 - Pontypool College	112
Large Windfall Sites Allowance @ 40 dwellings p.a. (2025-2038)	520
Small Windfall Sites Allowance @ 21 dwellings p.a. (15 years)	315
TOTAL Housing Delivery 2023-2038	2,910

Source: based upon Torfaen LDP Annual Monitoring Report 2023 (October 2023) and supporting information (using advice on how a 'Housing Trajectory' should be calculated from the Welsh Government's 'Development Plans Manual v3', March 2020 (Tables 19-20) and consultation with the Torfaen LDP Housing Stakeholder Group)

- 5.3 This consultation email also stated: “... given that the adopted Torfaen Local Development Plan (LDP) (2006-2021) does not cover the 2023-2038 Torfaen LHMA period to be of use, and the Torfaen Replacement LDP (2022-2037) Preferred Strategy is not expected to be published until the summer of 2024, the Council considers that it is neither appropriate or possible to produce a 4th ‘RLDP led’ LHMA assessment at this time. However, it is also noted that WG require the 2023 LHMA to be updated in 2-3 years’ time, at which point, the expected WG 2025 based household projections can be used, as well as the dwelling numbers from the Torfaen RLDP Growth Strategy (2022-2037) if adopted by then.”; and consultees were also asked for a view on this statement?
- 5.4 The Council received four responses to this consultation, details of which and the Council’s response are provided in Table 23 below. Of those who expressed an opinion, the higher variant projection was unanimously preferred, given the high correlation between the projected households and forecast dwellings. Similarly, there was also unanimous support for not producing a 4th RLDP led projection at this time. **Thus the Council concurs with these expressed stakeholder views, to use the higher variant household projection to assess additional housing need estimates in the Torfaen 2023 LHMA.**

Table 23: Results of the Stakeholder Consultation, on the household projection variant to be used in the Torfaen LHMA

Stakeholder	Comment	Response
Melin Homes	1. The Council’s planning service currently forecast (without prejudice) that at least 2,910 dwellings are likely to be built over the Torfaen 2023 LHMA period 2023-2038, from ‘deliverable’ Housing Sites already permitted, the remaining Torfaen LDP allocation likely to be permitted and delivered, plus an allowance for ‘windfall housing sites. It is noted that this is very close to your high variant projection of 2,948 new homes over the plan period. 2. The information provided includes details of permitted sites, of which Melin is currently on site constructing the following • Penywain Lane (33), • Pearl House (16), • The former New Bridgend Inn (9) • Also, we are advancing the acquisition of the former Pontypool College - LDP Allocated Large Site for residential redevelopment in the near future. • In addition, we are on site remodelling the bungalow at Greenhill Road, Cwmbran as a children’s home (4) • Our site at the former Greenway Road social club, Griffithstown is currently awaiting planning approval and we anticipate developing 12 new homes here. • We have secured the acquisition of a number of new affordable homes at Barclud Coch (15), Wren’s Nest phase 2 (24) and in the near future, a further 8 in the Village core plus shortly a further 25 at Abbey Wood, Llantarnam • Following release of Welsh Government’s , Transitional Accommodation Capital Programme we are also in negotiation to secure further homes at Barclud Coch and Abbey Woods • Our DIY Homebuy programme has secured a further 10 homes this financial year.	The support for the Higher Variant Projection, and for not producing a 4th RLDP based projection is noted.

	3. Given the above activity and our low void rates in the county, it is noticeable that demand for affordable homes and our associated development activities to resource this remains very high, especially in the south in and around Cwmbran and we aren't anticipating this to change. 4. Therefore we support the Council's projection figures but our experience of demand to date would suggest that the higher projection is reasonable. 5. Also, it is recognised that given the expected WG 2025 household projections, plus Torfaen's RLDP Growth strategy will all being well, be in place soon, then the production of a 4th LHMA is unnecessary at the moment, as the projection and strategy will provide a sufficient basis to support an update in the near future.	
The Torfaen Accessibility Forum (TAF)	As an "LHMA Stakeholder", The Torfaen Accessibility Forum (TAF) has been asked for its comments relating to the consultation on the Preferred Additional Housing Needs Estimate for the 2023 Local Housing Market Assessment. In particular it has recently been asked to comment on the following statement recently issued by Torfaen's Planning Department. "Therefore, given that the adopted Torfaen Local Development Plan (LDP) (2006-2021) does not cover the 2023-2038 Torfaen LHMA period to be of use and the Torfaen Replacement LDP (2022-2037) Preferred Strategy is not expected to be published until the summer of 2024, the Council considers that it is neither appropriate or possible to produce a 4th 'RLDP led' LHMA assessment at this time. However, it is also noted that WG require the 2023 LHMA to be updated in 2-3 years' time, at which point, the expected WG 2025 based household projections can be used, as well as the dwelling numbers from the Torfaen RLDP Growth Strategy (2022-2037) if adopted by then." We note that it is the Council's view that 2,910 dwellings are likely to be built in the period 2023-2038. This figure is the sum total of • Already permitted deliverable housing sites • Sites likely to be permitted and delivered • 'Windfall housing sites We note that the total of dwellings from "Permitted Sites" totals 1,963. Given that the sites listed are likely to take many years to deliver, we consider that the additional 947 dwellings may be difficult to procure. We would value your comment on this point. However, your e-mail also mentioned guidance and an estimating tool both produced by the Welsh Government that should be used by Councils. For some time now, TAF has been critical of 2 aspects of housing delivery within Torfaen. These are • The failure of Torfaen to meet the required ratio of affordable to private housing (Welsh Government requirements are 45% to 55% respectively) • The oversupply of 4 bedroomed properties compared to the supply level of 2 bedroomed properties. Both of these issues affect the supply of properties suitable for • Disabled people	It is noted that this consultee did not express an opinion of which WG Projection to use in the LHMA, or if a 4th RLDP based Projection should be produced. In answer to the question on the deliverability of the 947 dwellings without planning permission; Melin Homes have stated above that they will be acquiring and progressing the Pontypool College housing site in the near future (112 dwellings); and the 61 windfall dwelling p.a. (835 dwellings) was not challenged by any of the housebuilders

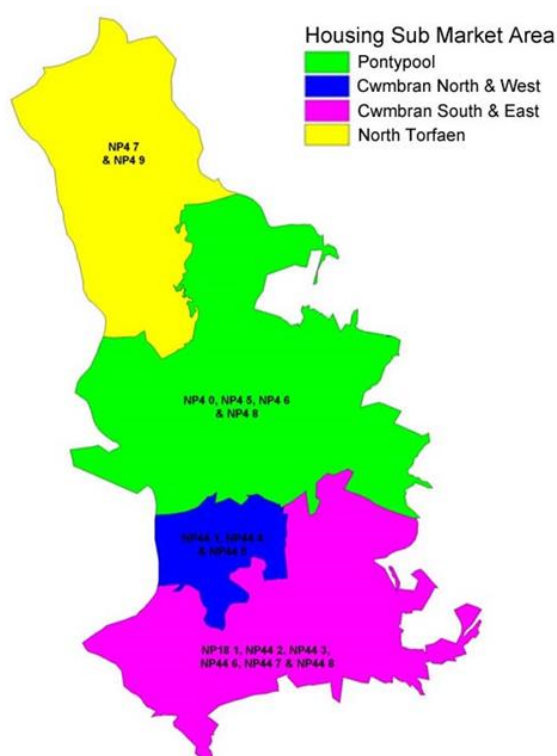
	- Downsizing by older people The 2 publications from the Welsh Government highlight the needs of both disabled and older people. TAF would be interested in seeing how the requirements of these 2 documents are being used by Torfaen's Planners when producing figures for Welsh Government and also when considering plans from house builders. In particular we would like to understand how - LHMAs are being used to plan for the diverse needs of different people and communities including ... disabled people ... to ensure homes meet their needs (p3 of the guidance) - Torfaen is providing an overview of the local housing market by considering the protected characteristic of 'disability' (clause 1.47) - Torfaen is providing an overview of socio-economic and demographic trends including disability (clause 1.48) - Torfaen is establishing the unmet need relating to minority households containing disabled people (Table 1) - The housing, care and support needs of disabled people are being considered by Torfaen's Planners (clause 4.3) We also note that Annexe 4, when giving recommendations from the Independent Review of Affordable Housing Supply states that 'There is a need to enhance the granularity of the LHMA process to better capture the range of needs which might otherwise be ignored. More attention should (for instance) be given to the requirements of older ... people and disabled people. TAF would be interested in knowing how information is being obtained to inform compliance with these requirements. We also note that Tai Pawb and the Access Design Solutions UK Ltd have developed a toolkit (Housing and disabled people) which we would hope Torfaen use. TAF hopes that these comments can be considered as a positive way of contributing to the issues of the provision of suitable dwellings for disabled people and older people in the future.	consulted; indeed, the Torfaen RSL's have recently agreed these figures in the 'Torfaen Urban Capacity Study' to be published in the summer of 2024. Finally, the remaining comments on addressing the needs of both disabled and older people have been considered, in Section 3.3 of this LHMA; and can be made by TAF as a key stakeholder in the production of the Torfaen RLDP going forward, which will also take account of this LHMA.
Bron Afon	Following internal discussion, we would agree that the higher variant projection should be considered.	The support for the Higher Variant Projection is noted.
Pobl	We have reviewed your LHMA data and have today met with our internal housing colleagues to run through the three variants of growth. Based on our data, we would support the higher growth option, for a household change of 2,824 (2,948 dwellings) across the plan period. We continue to see high levels of demand in the south of the borough for a variety of tenures including general needs social rent, intermediate rent, support housing needs and shared ownership.	The support for the Higher Variant Projection is noted.

5.5 The Welsh Government's LHMA Template Report also requires the Council to: -
"Provide an analysis of these estimates against your previous LHMA additional housing need estimates using the tables in Appendix C." and

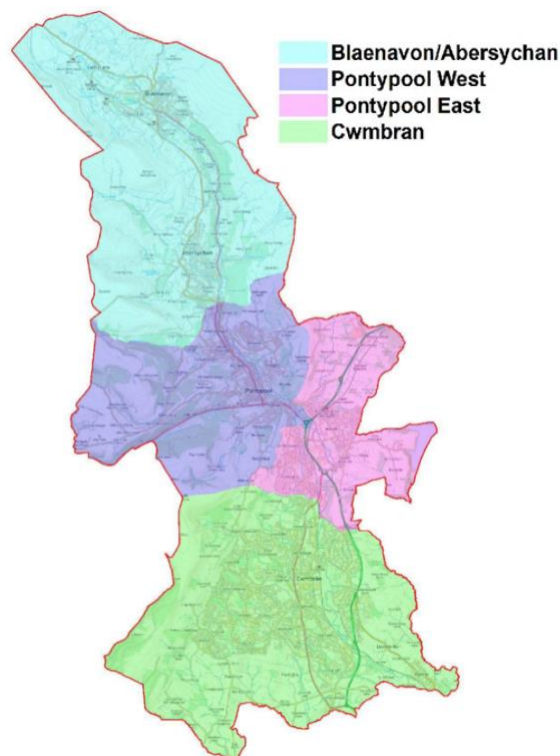
“As each LHMA is based on a snapshot at a point in time it is recognised that it would be inappropriate to directly compare one set of outputs with another due to different underlying data and assumptions. You should include any limitations or risks of simple comparisons of your first LHMA using the new process with the LHMA undertaken using the previous process.”

- 5.6 Therefore, in terms of comparing this latest 2023 and the previous 2020 LHMA's, from Maps 10 & 11 below, the housing 'market area' geographies have changed. The 2020 LHMA 'housing sub-market areas' were defined by viability, using a postcode based sales data geography, mainly to inform the Torfaen LDP, 2013 affordable housing policies. Whereas the 2023 LHMA has, following the more 'scientific' WG LHMA and other Guidance, and after stakeholder consultation, used the 13 Torfaen 2021 Census Middle layer Super Output Areas (MSOAs). Thus the 2023 HMAs are now based on functional areas where people currently live and would be willing to move home without changing jobs. Key factors included proximity to family & friends, employment, education and other facilities; the broad price of housing; major transport links; land availability broad viability; dwelling vacancy rates; and potential impact on housing need deficits.
- 5.7 The main 'market area' changes are Pontypool is now split East / West (mainly due to viability differences) and Cwmbran is now one combined area. The new 'Blaenavon / Abersychan HMA', whilst larger than the previous 'North Torfaen HSMA' has not had a significant change in population / households, as the additional area to the south-east is mainly open countryside, with relatively few dwellings. Thus the risk of this change in geography between the market areas in the two LHMA's is considered low; and the results for both Cwmbran and Pontypool can be reliably combined for comparison.

Map 10: Previous 2020 Torfaen LHMA Housing Sub-Market Areas (HSMAs)



Map 11: New 2023 Torfaen LHMA Housing Market Areas (HMAs)



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- 5.7 As can be seen from Appendix C, another major difference between the 2020 and 2023 LHMA, is that the former made no estimate of the need for market housing; so no comparison can be made until the next LHMA in this respect.
- 5.8 Also, due to the way the 2020 LHMA was reported, the Council has been unable to ascertain the comparative data for the 'social housing need split by number of bedrooms'.
- 5.9 As recognised in paragraph 5.5 above, notwithstanding the risks of a simple comparison between the previous and latest LHMA's which used different processes (albeit many of the input sources are the same, e.g. use of PayCheck data, Land Registry house price data, etc), from Appendix C we can compare the affordable housing need results for the first five years from the 2020 and 2023 LHMA's, as summarised in Tables 24 & 25 below: -

Table 24: Torfaen 2023 LHMA - Net Annual Affordable Housing Need (2023/28)

Housing Market Area	Social Rent	LCHO	Intermediate Rent	Total
Blaenavon / Abersychan	14	5	8	26 (8%)
Pontypool 'Combined'	48	26	20	94 (30%)
Cwmbran	139	27	29	195 (62%)
Torfaen	201 (64%)	57 (18%)	56 (18%)	315

(statistical rounding may lead to totals not summing correctly)

Table 25: Torfaen 2020 LHMA - Net Annual Affordable Housing Need (2020/25)

Housing Sub-Market Area	Social Rent	LCHO	Intermediate Rent	Total
North Torfaen	21	6	0	27 (11%)
Pontypool	49	14	4	67 (28%)
Cwmbran 'Combined'	114	26	6	146 (61%)
Total	184 (77%)	46 (19%)	10 (4%)	240

(statistical rounding may lead to totals not summing correctly)

- 5.10 From these tables, the Torfaen 2020 LHMA showed a total net need for 240 affordable dwellings pa; compared to 315 dwellings pa in the latest 2023 LHMA. The increase is mainly attributed to a reduction of the turnover of existing social rented stock (down from 750 units pa to around 450 units pa), the current housing (mortgage) / cost of living crisis, higher private rented sector (PRS) rents and a reducing PRS stock due to government legislation & taxation policies; there is also a forecast reduction in new affordable housing stock going forward, especially from S106 Planning Obligations on market sites, as the Torfaen LDP sites have nearly all been built out, and windfall sites within the urban areas are finite.
- 5.11 In addition, a minor difference between the two LHMA's is that the 2020 LHMA used the Principal WG Projection (and identified a need for 240 affordable dwelling pa), whereas the 2023 LHMA has used the Higher Variant WG Projection (and identified a need for 315 affordable dwellings pa). In comparison, the Principal Projection for the 2023 LHMA resulted a calculated need for 297 affordable dwellings; so at only 18 (6%) dwellings p.a. more, the effect of using the Higher Variant Projection in comparing the two LHMA's is considered marginal.

- 5.12 It is also noted that generally the % split of affordable housing need across the County Borough has remained about the same, with a slight reduction of need in North Torfaen and a slight increase in Pontypool.
- 5.13 However, the tenure split in the 2020 LHMA was Social Rented = 77%, LCHO = 19%, and Intermediate Rent = 4%, which has changed to 64%, 19% and 18% respectively in the 2023 LHMA. Therefore, whilst the % of LCHO need has remained about the same, there has been a notable reduction in social rented need and a roughly corresponding increase in intermediate rented need. This can be attributed to the matters highlighted in paragraph 5.10 above and increases in market house prices / private rents not being matched by income growth, and thus those tenures becoming less affordable, which results in more people on the affordable housing waiting lists, as people's tenure choices often drop to the next rung on the 'affordability ladder'.

6. Quality assurance statement

- 6.1 In terms of quality assurance the LHMA production tasks were split between the Council's housing and planning officers involved and then checked by the other party. For example, the LHMA Tool was populated by housing officers, and the inputs and results were checked by a planning officer in terms of data used, accuracy of data transfer, and correct use of the Tool. The Council also made the effort, several times, to update the LHMA Tool every time a new version was released.
- 6.2 Again the LHMA Template Report was mainly populated by the housing officers and in accordance with this WG 'quality assurance' requirement, a planning officer then checked that the figures in the narrative matched those in the tables, were arithmetically correct, and rounded consistently. This check also ensured that all data was fully sourced and up to date; and tables, figures and maps were dated and labelled in full and consistently - including any footnotes, caveats or warnings (including where statistical rounding led to totals in tables not summing correctly). Paragraph numbers were also added. A check was also made that the Council had provided all the narratives / details required in the LHMA Report.
- 6.3 A check was also made to ensure that the requirement of the Welsh Government in producing the LHMA Report in terms of consulting a wide-ranging Stakeholder Group where choices were to be made. For example, on the definition of the Housing Market Areas and the choice of which WG Projection to use to provide the Council's LHMA additional housing need estimates.
- 6.4 The Council also made use of the Welsh Government offer to check the completed LHMA tool, which resulted in one minor input choice being corrected. Similarly, the Welsh Government were asked to advise on the completion of the 'Appendix C - Analysis of change in the additional housing need estimates' tables, which were difficult to populate as the sources of the information required were sometimes unclear. This help was much appreciated.

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)	No issues
2. Household data	No issues
3. Rent data	Rent Smart Wales did not provide the 1 or 4 bed rent figures for Blaenavon/Abersychan, Pontypool East and West, so we used the average figures from the whole local authority area to input the data on the Rent Data tab.
4. Income data	1. For some MSOA's, the PayCheck directory 'total households' figures did not match the total households of the individual income brackets due to rounding errors.
5. House price paid data	No issues
6. Existing unmet need	No issues
7. Existing stock and planned supply	No issues

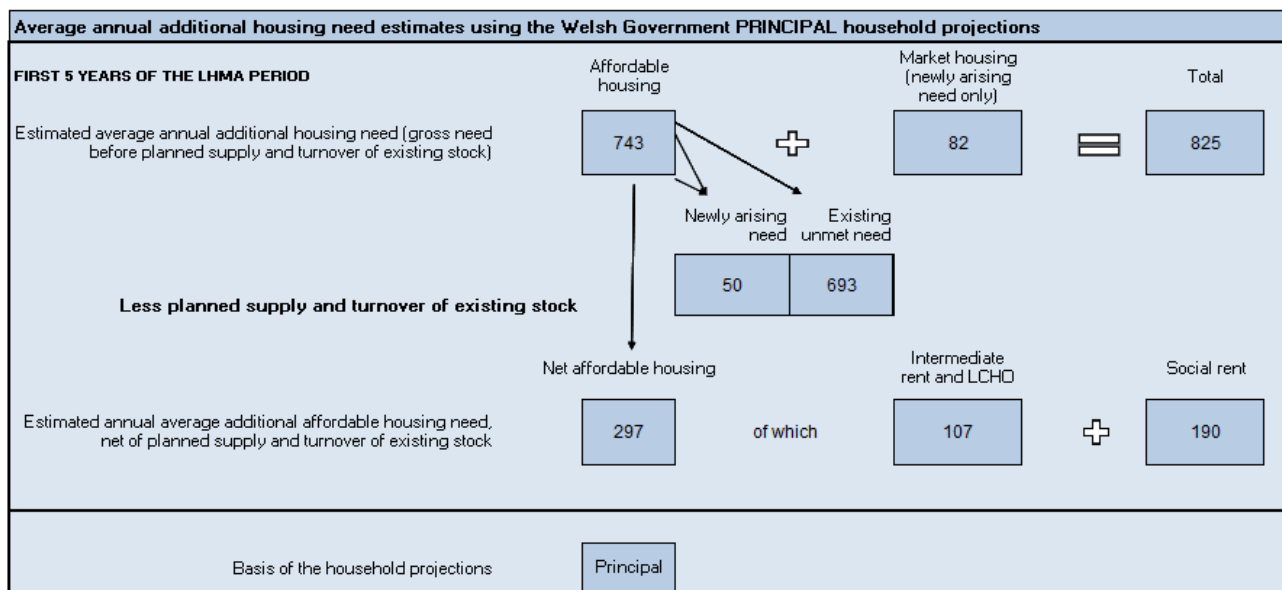
Key Issues Table 2 - Input assumptions

Key input assumptions	Key issues identified with the input assumptions
1. Affordability criteria	No issues
2. First time buyer (FTB) assumptions	No issues
3. Percentage of households eligible for owner occupier tenure that decide to go on and buy	No issues
4. Five-year financial forecast for key variables - income, rent and house prices	No issues
5. Calculation of intermediate housing (IR and LCHO)	No issues

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	No issues
2. Affordable housing need covering social rent and immediate housing	No issues
3. Scenario testing tables	No issues
4. Five-year outputs / 10-year outputs	No issues

Appendix B - Example of the output summary tables from the LHMA Tool



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 bedroom s	(c) three bedroom s	(d) four+ bedroom s	(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	137	22	28	3	190	50	57	297
Blaenavon/Abersychan	11	-	-	1	12	7	5	23
Pontypool West	-	-	-	0	0	8	13	21
Pontypool East	33	1	11	2	47	10	13	70
Cwmbran	92	21	17	-	131	25	27	183

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) Intermedi ate 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	626	118	743	28	53	82	825
Blaenavon/Abersychan	60	11	72	5	8	12	84
Pontypool West	78	26	104	6	11	17	121
Pontypool East	89	24	113	3	6	9	122
Cwmbran	398	57	455	14	29	43	498

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) +			(f) = (d) +	(g) = (c) +
Additional housing need estimates by tenure	35	15	50	28	53	82	132
Blaenavon/Abersychan	5	2	7	5	8	12	20
Pontypool West	7	3	11	6	11	17	28
Pontypool East	3	1	4	3	6	9	13
Cwmbran	20	8	28	14	29	43	71

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) +			(c) = (a) +
Additional housing need estimates by tenure	87	46	133	1,305	683	1,988
Blaenavon/Abersychan	7	5	13	111	80	192
Pontypool West	5	9	14	76	136	212
Pontypool East	18	9	26	264	128	391
Cwmbran	57	23	80	855	339	1,194

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%

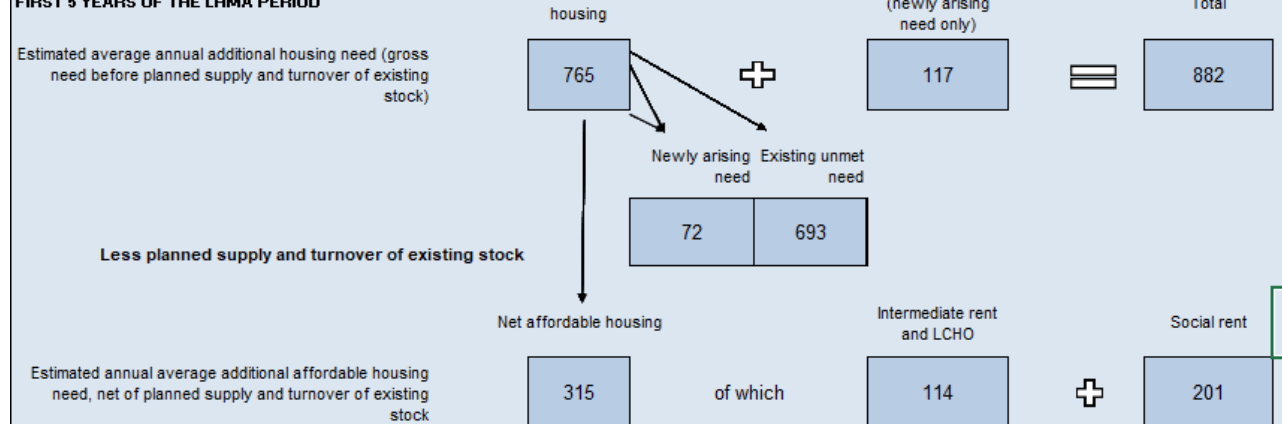
Data item	Data Sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	Principal	
Percentage of households considered for owner occupier tenure that go on to buy	40%	

HMA assumptions

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
Blaenavon/Abersychan	£116,682	4.4	£ 17,924	£ 23,815
Pontypool West	£123,604	4.4	£ 18,821	£ 24,740
Pontypool East	£168,101	4.4	£ 21,817	£ 27,227
Cwmbran	£163,157	4.4	£ 21,997	£ 28,190
5		4.4		

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

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	144	25	29	3	201	56	57	315
Blaenavon/Abersychan	12	-	-	1	14	8	5	26
Pontypool West	-	-	-	0	0	9	13	22
Pontypool East	34	1	11	2	48	11	13	72
Cwmbran	97	24	18	-	139	29	27	195

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

	(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	641	124	765	40	76	117	882
Blaenavon/Abersychan	63	12	75	7	11	18	92
Pontypool West	81	27	108	9	15	24	133
Pontypool East	91	24	115	4	9	13	128
Cwmbran	407	60	467	20	42	62	529

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	51	21	72	40	76	117	188
Blaenavon/Abersychan	7	3	11	7	11	18	28
Pontypool West	10	5	15	9	15	24	40
Pontypool East	4	2	6	4	9	13	19
Cwmbran	29	11	40	20	42	62	102

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.

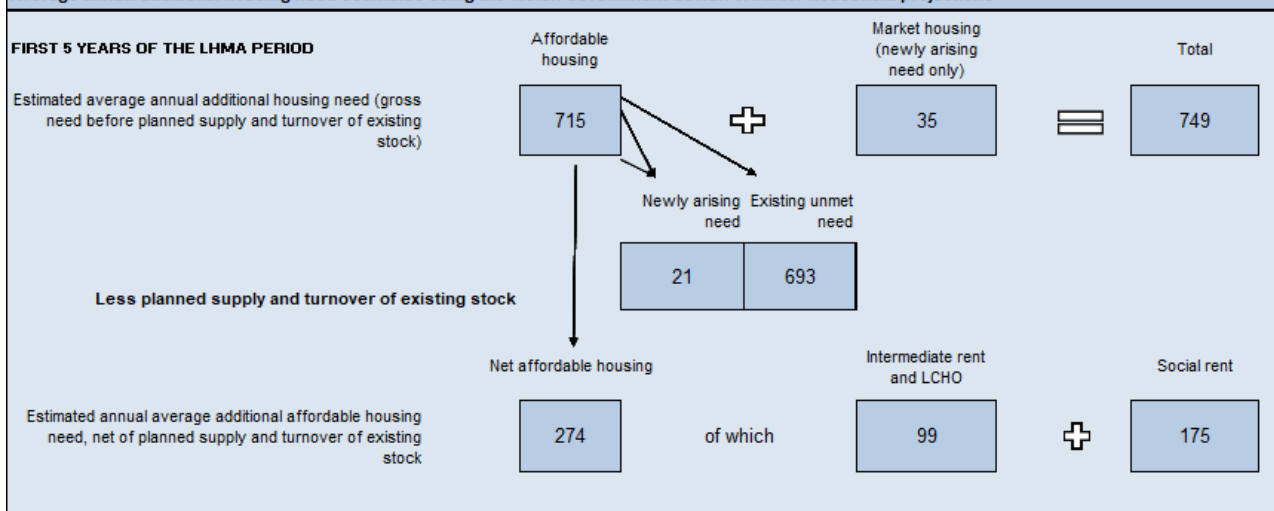
(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

	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	101	52	153	1,514	778	2,292
Blaenavon/Abersychan	9	6	16	139	96	235
Pontypool West	7	11	18	107	158	265
Pontypool East	19	9	28	283	135	419
Cwmbran	66	26	92	984	389	1,373

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	Paycheck	2022				
House price paid data by HMA	Land Registry Data	Calendar year				
Rent prices	Rent Officers Wales	Calendar year				
Household projection basis	Higher Variant					
Percentage of households considered for owner occupier tenure that go on to buy	40%					

HMA assumptions				
HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
Blaenavon/Abersychan	£ 116,682	4.4	£ 17,924	£ 23,815
Pontypool West	£ 123,604	4.4	£ 18,821	£ 24,740
Pontypool East	£ 168,101	4.4	£ 21,817	£ 27,227
Cwmbran	£ 163,157	4.4	£ 21,997	£ 28,190
5		4.4		

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



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	127	19	26	3	175	42	57	274
Blaenavon/Abersychan	9	-	-	1	10	5	5	20
Pontypool West	-	-	-	0	0	6	13	19
Pontypool East	32	0	10	2	45	10	13	67
Cwmbran	86	18	16	-	119	21	27	167

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

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermedia te rent and LCHO	Affordable Housing (c)= (a) + (b)	Owner occupier	Private rented sector	Market Housing (f) = (d) + (e)	Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	605	109	715	12	23	35	749
Blaenavon/Abersychan	58	10	67	2	3	5	73
Pontypool West	74	24	98	3	5	7	105
Pontypool East	87	23	111	1	3	4	114
Cwmbran	387	52	439	6	12	18	457

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	Intermedia te 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	15	6	21	12	23	35	56
Blaenavon/Abersychan	2	1	3	2	3	5	8
Pontypool West	3	1	5	3	5	7	12
Pontypool East	1	1	2	1	3	4	6
Cwmbran	9	3	12	6	12	18	30

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)

HMA	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)
Additional housing need estimates by tenure	68	37	106	1,027	557	1,584
Blaenavon/Abersychan	5	4	9	74	59	133
Pontypool West	2	7	9	33	107	141
Pontypool East	16	8	24	237	118	355
Cwmbran	46	18	64	683	272	955

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	Paycheck	2022
House price paid data by HMA	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	Lower Variant	

Percentage of households considered for owner occupier tenure that go on to buy	40%
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HMA assumptions				
HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
Blaenavon/Abersychan	£ 116,682	4.4	£ 17,924	£ 23,815
Pontypool West	£ 123,604	4.4	£ 18,821	£ 24,740
Pontypool East	£ 168,101	4.4	£ 21,817	£ 27,227
Cwmbran	£ 163,157	4.4	£ 21,997	£ 28,190
5		4.4		

Appendix C - Analysis of change in the additional housing need estimates

Annual additional housing need estimates	Column index	Current LHMA	Previous LHMA
		Over the first five years of the LHMA period	
Total housing need estimate	(a)	882	Not produced
Market housing	(b)	117	Not produced
Affordable housing	(c)	765	Not produced
Percentage split of additional housing need by market and affordable housing	(b)/(a): (c)/(a)	13% 87%	Not produced
Annual planned supply and turnover of existing stock for affordable housing	(e)	534	Not produced
Affordable housing need - net of planned supply and turnover of existing stock	(f) = (c) - (e)	231	240
Annual additional housing need estimate split by tenure:			
Owner occupier	(g)	40	Not produced
Private rented sector	(h)	76	Not produced
LCHO - net basis	(i)	57	46
Intermediate rent - net basis	(j)	67	10
Social rent - net basis	(k)	201	184
One bedroom social rent	(l)	144	Not produced
Two bedrooms social rent	(m)	25	Not produced
Three bedrooms social rent	(n)	29	Not produced
Four+ bedrooms social rent	(o)	3	Not produced
Market housing percentage split: Owner occupier estimate Private rented sector estimate	(g)/(b) (h)/(b)	34% 66%	Not produced
Affordable housing need percentage split: LCHO Intermediate rent Social rent	(i)/(f) (j)/(f) (k)/(f)	25% 29% 87%	19% 4% 77%
Social housing need percentage split by number of bedrooms			
1 bed	(l)/(k)	72%	Not produced
2 beds	(m)/(k)	12%	Not produced
3 beds	(n)/(k)	14%	Not produced
4+ beds	(o)/(k)	1%	Not produced

Notes:

1. statistical rounding has led to some figure in tables not summing correctly;
2. due to the way the 2020 LHMA was reported, the Council has been unable to ascertain many of the field required in this table for the previous LHMA.

Data Input and Key assumptions	Current LHMA	Previous LHMA
	Over the first five years of the LHMA period	
Number of HMAs and basis of defining HMAs (ward, MSOA, LSOA)	4 HMAs defined by MSOA	4 HMAs defined by postcode viability
Selected household projection basis	Welsh Government 2018 based Higher Variant projection	Welsh Government 2018 based Principal projection
Annual newly arising need	188	110 per annum This is calculated by looking at population projections, the number of first time buyers who are unable to buy on the open market and existing households who have fallen into need through homelessness.
Rent data - state default or source used	Rent Officers Wales	Hometrack / Commercial house price and market rent websites
House price paid data - state default or source used	Land registry data	Hometrack based upon Land Registry data
Income data - state source used	Paycheck	Paycheck
Annual existing unmet housing need	693	Not produced
Market housing affordability criteria	30%	Not applicable
Social rent affordability criteria	35%	Not applicable
Percentage of those considered appropriate for owner occupier that go onto buy	Based on the assumptions of the technical working group, we ran the tool multiple times using percentages between 40%-60% and the chosen percentage of 40% was the most suitable.	Not applicable
Average FTB property price for the LA	£142,886	Not applicable
FTB property value to income ratio for the LA	4.36	Not applicable
Five-year financial forecast - OBR or alternative source	Default - OBR financial forecast	Not applicable
Split of intermediate housing need - method 1, 2 or 3	Option 1	Not applicable