

Strategic Housing Market Assessment: Pilot study for Dorset

Study Brief



HOUSING MARKET ASSESSMENT: PILOT STUDY FOR DORSET.

BRIEF FOR THE STUDY

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1.0 INTRODUCTION AND CONTEXT FOR THE ASSESSMENT

Relationship of the study with the regional agenda

1.1 This brief is for a Sub Regional Housing Market Assessment (HMA) of Dorset. The study area contains two market areas:

- the Bournemouth/Christchurch/Poole area and
- the Dorchester/Weymouth area.

1.2 This sub region has been identified by the South West Housing Body as part of a pilot programme of sub regional assessments in the South West, the others being the Swindon Area and West Cornwall.

1.3 Common features of all pilot assessments will be:

- A detailed sub regional market analysis of housing demand and supply
- Collection of evidence of the requirements for future levels of market and affordable housing throughout the area.

1.4 Particular features of the Dorset sub-market which are of interest to the SWHB and other partners include:

- The influence of the South East region on the sub market
- The impact of environmental constraints around south east Dorset on the market.
- The links between the economy and the housing market.
- The relationship between the rural hinterland and the market towns/conurbation.

1.5 An important condition for SWHB funding is that the partnership involved in the assessment should include key stakeholders including the private sector, (eg developers, letting and estate agents and private landlords) to ensure that a market perspective is fully included.

1.6 The SWHB is also concerned to disseminate information from the study and will support workshops or conference sessions at Regional Housing Forum meetings or other venues yet to be developed in which stakeholders should be encouraged to take part.

Relationship with Draft PPS3 and the Draft HMA practice guidance

1.7 The Office of the Deputy Prime Minister (ODPM) recently published a Consultation Draft Planning Policy Statement on Housing¹. This sets out the Government's key objective in planning for housing to ensure that everyone has the opportunity of living in a decent home, which they can afford, in a community where they want to live. To achieve this objective the Government is seeking to:

- Ensure that a wide choice of housing types is available, for both affordable and market housing to meet the needs of all members of the community;

¹ Consultation paper on PPS3 Housing, ODPM December 2005.

- Deliver a better balance between housing demand and supply in every housing market and to improve affordability where necessary;
- Create sustainable, inclusive, mixed communities in all areas.

1.8 In order better to inform housing policy at regional and lower levels the Government recognises the need for consistent evidence bases. To this end PPS3 sets out the basic key outputs required of a HMA as:

- An estimate of housing need and demand in terms of affordable and market housing;
- To determine how the distribution of need and demand varies across the study area (for instance between urban and rural areas) and
- To identify the particular accommodation needs and demands of specific groups, such as key workers, homeless households, Black and Minority Ethnic groups, first time buyers, students, disabled people, older people and Gypsies and Travellers.

1.9 The ODPM has also produced Draft Practice Guidance on Housing Market Assessments². The study must have regard to this and any other relevant guidance.

The Study Area.

1.10 The study area contains two HMAs. The Bournemouth/ Christchurch/ Poole area (BCP) includes the local authority areas of Bournemouth, Poole, Christchurch, Purbeck, North and East Dorset. The Dorchester/Weymouth (DW) area covers the local authority areas of Weymouth and Portland and West Dorset.

1.11 The BCP area covers the major conurbation of Bournemouth and Poole and its rural hinterland. To the far north of the area the influence of the conurbation is less pronounced and more localised factors appear to influence the housing markets of towns such as Shaftesbury and Gillingham. The study will need to examine the influence of the conurbation on its rural and coastal hinterland as well as the more local impact of market towns on their surrounding area. The study should also examine the relationship with adjacent areas just outside the County such as the New Forest.

1.12 The DW area covers the two main towns of Dorchester and Weymouth which provide a significant economic base in the west of the County. The study should also investigate the more local markets based on coastal towns such as Bridport and Lyme Regis and their links to settlements in East Devon as well as towns in the north (Sherborne) and its relationship with Yeovil in South Somerset.

The Scope of the Study

1.13 As indicated above the housing market of any part of each area is influenced by factors at several different layers. While the main focus of the

² Housing market Assessments; draft Practice Guidance, ODPM December 2005.

study will be to identify the relationship between the local economy and the housing market in each area, the study should also investigate

- the influence of London and the South East Region on the whole area
- the influence of the South Hampshire conurbation on the BCP area and
- the local influence of individual market towns within and adjacent to the HMAs.
- The relationship between the two HMAs

1.14 The study should examine links with local economy, the influence of the investment market and identify the factors needed to create balanced housing markets and sustainable communities.

The Broad Aims of the Study

1.15 The assessment should:

- Analyse trends and survey data to produce a detailed understanding of the BCP and DW housing markets and the more local markets within the sub region.
- On the basis of the information gathered (making use of existing research used to inform the RSS process), enable the development of long-term strategic views on the need and demand for both market and affordable housing in these areas.
- Enable comparison of the trends identified from the analysis of data with the outcomes proposed in draft policy in order to further inform both the regional housing and planning policy debate.
- Provide evidence to inform policies in both the Regional Spatial Strategy and Local Development Frameworks on the different types and sizes of housing needed to enable the development of balanced communities within the market area (and any sub areas) and by local authority area.
- Inform decisions on the amount and mix of housing to be provided on urban extension, windfall and rural exception sites.
- Inform decisions on how housing need translates into different sizes and types of affordable housing (ie social rented and intermediate housing) to aid policy formulation.
- Identify the accommodation needs of particular groups (eg key workers, homeless households, black and minority ethnic groups.)
- Back up a variety of decisions on matters including social housing allocation priorities, private sector renewal options and the evaluation of new-build low cost home ownership. It should also inform the development of housing policies on the quality of housing including stock conversion, demolition and transfer in areas where the type and quality of housing is inadequate.
- Provide an understanding of the linkages between the housing market and the local economy and help to inform the provision of other services such as education and transport.

- Enable the development of local expertise and a toolkit or methodology to enable regular updates of information so that stakeholders can maintain the data base without recourse to new primary surveys.
- Provide the information in a format that will enable it to be shared and disseminated to a wide range of interested parties (eg Local community partnerships, Town and Parish Councils, estate agents, Housing Associations).

In addition it is expected that following the initial literature review and discussion with stakeholders, further objectives specific to the study areas will be defined.

Management of the Study

1.16 A HMA **Partnership** will have responsibility for commissioning and steering the project. It should comprise representatives of

- GOSW/RHB/SWRA/SWRDA (2)
- Housing Corporation (1)
- County Council (planning and research and intelligence functions) (2/3)
- Each Unitary or District Council (planning and/or housing functions) (8+)
- Registered social landlords (2)
- Housebuilders (1)
- Estate Agents (1)
- Private Landlords (1)

1.17 To function effectively the partnership should be of a manageable size and therefore a limit of about 20 members is considered appropriate.

1.18 Key stakeholders and community interests will be involved at relevant stages through specific consultation or involvement in the partnership. Other organisations (eg mortgage lenders, transport, education and health authorities) may be called on for advice at particular stages.

1.19 A small **project team** co-ordinated by the County Council will be responsible for co-ordinating production of the HMA and reporting back. The team will include officers of the Spatial Planning and Research and Information sections as well as Unitary and District Council representatives of Housing and Planning functions, specifically involving the Bournemouth, Poole, Dorchester and Weymouth authorities. The team should be limited to about six key personnel, but will call on others as needed.

1.20 **Member** endorsement will be through the Dorset and South Wiltshire Planning and Transport Liaison Committee. However it is recognised that each authority will also wish to consider the findings through its own political management system and that no decision of the DSWPTLC can be binding on any authority.

The Format of the Study

1.21 The study will follow the following format:

1) Review. The project team will review existing planning and housing policies and practise together with other relevant literature in order to define specific aims and related research issues and the geography of any sub market areas that may need investigation. The findings should be discussed with the Partnership.

2) Refine Aims / issues. Following the review the partnership will refine the key aims and issues that the assessment should address, adding any specific matters relevant to the two sub areas.

3) The research. The project team will be responsible for compiling relevant information or commissioning surveys as necessary.

It is anticipated that a large amount of the information required can be obtained from secondary data sources accessible to either the County Council or constituent authorities. Research will largely be commissioned in-house. However, decisions will need to be made as to whether any new/updated Housing Needs surveys should be undertaken and if so, their scope and timing. (See below Paras 2.11 -2.12)

4) Consultation. A distinction should be made between consultation with stakeholders and consultation with wider groups of people with an interest in the Assessment.

Relevant stakeholders will be involved with different aspects of the study (eg local estate agents on house price information, Housing Associations on stock condition and tenants' preferences.)

Outside the stakeholder group other parties may need to be consulted. This could be part of the brief for a consultant (if used) or will need to be organised separately. Examples of the groups who may need to be involved include:

- The Racial Equality Council, Gypsy /Traveller liaison, Shelter.
- Tenant and residents groups
- Households with particular characteristics (eg due to race, disability, homeless status for instance.)
- Local employers
- Health authorities, Police, Education and transport providers.

Appropriate consultation methods should be employed including for instance questionnaires, focus groups, face to face interviews etc. However the extent of participation undertaken will need to be tempered by the time and resources available.

5) The Output . The output of the study will be a report with technical appendices that describes the features of the two defined HMAs and any sub areas within them. This should provide

- A consistent evidence base to influence all levels of housing, planning and economic policy and investment decisions.
- A finer grain appraisal of local housing markets and implications for LDF/RSS settlement hierarchies.
- A detailed analysis of housing demand, need and supply by local housing market area and any finer grained sub-areas and the key housing issues for policy development and trends in the future.
- An assessment of the current and future requirement for the size, type, mix and general location of new housing (including social rented, intermediate, supported/special needs and general market) by local housing market area and sub-areas.
- An assessment of the accommodation needs of particular groups such as key workers, minority ethnic groups etc by area.
- An agreed HMA toolkit (a workable methodology, to enable reviews to be undertaken easily and to a standard format by housing stakeholders).

An **interim progress report** should be made available in July to inform the Partnership of progress to date, to inform the RSS debate on housing numbers and to be used as a basis for consultation.

The **final report** should be available by December 2006. It should be made widely available to stakeholders, community interest groups and the public.

2.0 DETAILED REQUIREMENTS

Review of policy context and available data.

2.1 The County Council will work with each constituent Local Authority to:

- Examine past, current and future housing market trends and any gaps in the evidence base.
- Identify common housing themes from local initiatives and strategies in order to set further objectives for each study area.
- Provide an overview of the policy context from a housing need and demand perspective, identifying any key issues to be considered as well as opportunities and constraints.
- Consider how the assessment should inform the preparation of local strategies (including Local Development Frameworks, local Housing Statements, Community Strategies, Economic and Transport Strategies and Plans) as well as regional housing, planning and economic policy and investment decisions.
- Where possible make any necessary improvements to fill gaps in the data or identify what additional survey work may be required.

2.2 The review outlined above should help to identify the key aims and research issues that the Study will need to address and to clarify the geography of any sub areas within the two main HMAs. The outcome of the

review should be agreed by the Partnership before moving on to the next stage of detailed data collection and analysis.

Detailed Technical requirements

2.3 The general process that the study will follow will be as set out in the Guidance. (See Table 1 below.) Three other factors should be addressed.

- The time period of the study. Neither Draft PPS3 nor the Guidance are specific about this. The difficulty of projecting housing need/demand into the future with any certainty would suggest a maximum time frame of 10 years. It should be acknowledged that projections beyond five years are likely to be less robust. It would seem advisable to tie the time period into that of the RSS (ie 2006 – 2011 and 2016) with possibly just a broad overview beyond this period.
- The study will need to give a definition of “need” which is locally driven and “demand” that encompasses the broader desires of people wishing to move into the area, so that the distinction between the two is clearly understood.
- The study will need to examine the HMAs at a finer grain than local authority level in order to enable sub area analysis and cross boundary issues. Data sources should enable analysis at ward level / Output area wherever possible so that information may be analysed across Local Authority boundaries.

Chapter	Stage	Output
<i>The Current Housing Market</i>	<i>1 The socio economic context</i>	<i>Description of past trends and the current housing markets, including key drivers that underpin the market and influence levels of housing need and demand.</i>
	<i>2 The current housing stock</i>	<i>Estimates by tenure of current stock of dwellings of different sizes, types and conditions.</i>
	<i>3 The active market</i>	<i>Description of demand pressures for particular sizes and types of dwelling and extent of problems such as long term vacancy and abandonment, second / holiday homes.</i>

	<i>4 Bringing it all together</i>	<i>Estimate of the current balance between housing supply and demand in different housing sectors. Description of key drivers underpinning the market.</i>
<i>The Future Housing Market</i>	<i>Projecting key drivers of demand</i>	<i>Estimate of future household demand based upon household projections or forecasts. Could be a number or range. Should investigate implications for demand of changes in key drivers (eg demography, economic performance, employment and affordability) and implications for future households.</i>
<i>Assessing Housing need</i>	<i>Current unmet need</i>	<i>Estimate of current number of households in unmet need.</i>
	<i>Future need</i>	<i>Estimate of newly arising households who are unlikely to afford suitable housing in the market.</i>
	<i>Required amount of affordable housing</i>	<i>Estimate of annual requirement of affordable housing to reduce levels of current unmet and future housing need.</i>
	<i>The profile of affordable housing needed.</i>	<i>Estimate of the profile of affordable housing units required.</i>
	<i>The locations where affordable housing is needed.</i>	<i>Level of need for affordable housing in different locations.</i>
<i>Assessing Housing requirements of different household types.</i>	<i>1 Minority, special needs and hard to reach groups</i>	<i>Qualitative assessment of housing need and demand in respect of particular groups of people and an appreciation of different methods that can be employed to better understand and meet their needs.</i>
	<i>2 The intermediate market.</i>	<i>An estimate of the potential role of intermediate housing in meeting need and the requirement for affordable housing from other groups in the housing market area.</i>

2.4 The Guidance also gives a more detailed breakdown of the principal data sources and outputs achievable at each stage of the process. Appendix 1 includes this information and identifies the level at which data may be available and whether it may be sought from primary or secondary data sources.

Stage 1 The Current Housing market.

2.5 There is a vast amount of data that can be collected. The partnership will need to decide how best to examine the data and draw out significant issues. Where possible GIS should be used to illustrate particular hotspots or areas with similarities.

2.6 A key stage will be 1.4 – “Bringing the evidence together”. At this point the partnership should be able to examine past trends, estimate the current balance between housing supply and demand in different housing sectors and describe the key drivers underpinning the housing markets (and sub markets).

2.7 Linkages between the data should be examined to identify for instance

- to what extent socio-economic change is related to house price change?
- whether there are particular hotspots for turnover of property and what the reasons behind this may be?
- which are the most/least desirable housing locations and why? and
- what is the level of suppressed demand (ie people looking elsewhere as they believe they will be unable to purchase/rent a property in their preferred location.)

Stage 2 The Future Housing market

2.8 The next stage is to build on the understanding of how the market is currently working to estimate likely need and demand for housing in the future. Four key drivers will be examined – future household numbers in the area, anticipated economic performance, employment levels and house prices.

2.9 The study will need to assess a number of scenarios based on different policy approaches. For instance the effect of increasing the supply of housing in the strategically significant centres and reducing it in rural areas as proposed in the RSS could be compared with a continuation of current growth rates. The implications of building at higher densities or with different mixes of dwelling types could also be examined.

2.10 The issues that may need to be examined in these different scenarios are for instance -

- whether current pressure points are likely to improve or worsen?
- How might levels of affordability for different sizes and types of dwellings change?
- Are there any new issues that are likely to arise over the next 5-10 years?

Stage 3 Assessing Current and Future Housing Need

2.11 This is the stage when detailed analysis is required to assess actual numbers in need of affordable housing. Complex cross matching of household characteristics (income levels, household size, tenure being sought etc) and housing availability is needed. Although the Guidance advocates using secondary sources to estimate need, it is acknowledged that many of the sources cited are unavailable or unreliable below Local Authority level. Where the information source is individual LA housing registers, a check will need to be made of the data held to understand whether these are comparable and at what level the information can be analysed. Use of secondary data will also require considerable input of LA Housing resources at this stage.

2.12 The information could be provided by commissioning a local survey by external consultants. Funding offered by the SW Housing Board (£20,000) could be used to assist in the cost. If this approach is followed the partnership would need to agree the detailed requirements of the survey. In view of the tight time frame for completing the study an early decision should be made on this issue. If consultants are appointed they will be expected to support their work at any EIP into the RSS or LDF inquiry.

Stage 4 Assessing the Housing requirements of Different Household Groups.

2.13 The study will also need to assess the specific needs of particular household groups. This may require specific research to ascertain the needs of minority or “hard to reach” groups, those with special needs or groups such as students or key workers. This could be combined with a general needs survey (if one is commissioned) or undertaken separately through interviews with specific groups or use of Focus groups for instance.

2.14 The role of intermediate housing in the market should also be examined and estimates made of the need and demand for this type of housing. Demand for the intermediate market products (such as shared equity and sub-market rented housing) can change rapidly depending on economic circumstances and allowance should be made for this in predicting future demand.

2.15 The needs of key workers should also be considered. In addition to those eligible under the Housing Corporation definition³, other categories may be considered (eg people who serve the community or have a commitment to a particular area.) Evidence of recruitment or retention issues will be needed to support the assessment.

2.16 Time and resources should also be made available for quality control checks at various stages during the assessment process. This will require external consultants to examine the robustness of the data and report on their

³ See the Housing Corporation Key Worker Living Programme in the HCs Capital funding Guide.

findings and any necessary adjustments to be made before the study is completed.

3. OTHER MATTERS

Timetable/milestones

3.1 The following timetable is proposed but *may be subject to variation dependant on the decision on how/when to employ consultants:*

- Brief agreed and project commissioned **10th February 2006**
- Decision on whether to employ consultants for the analysis of housing need by **end of February**.
- If consultants to be used, tenders to be in by mid March appointment by **end of March**.
- Review of existing policy and literature and definition of finer grain local housing markets and any further objectives agreed by Partnership by **end of March 2006**.
- Assessment of current housing market and demand by **May 2006** to feed into Local Needs assessment.
- Local needs assessment undertaken by **July** (top level figures can then inform RSS debate on housing numbers and affordable quotas)
- Interim report to Partnership by **end of July**.
- Consultation on interim findings **August- September**.
- Partnership consider results of consultation and steer Final Report **early October**.
- Final Report completed by **December 2006**.

Funding

3.2 The following sources of funding are proposed:

- £20k contribution from GOSW
- Funding for baseline local needs assessment (or desktop review) will need to be found (cost pro rata per LA.)
- Funding for consultation (if not part of local needs assessment,) (cost pro rata per LA.)

Availability/Copyrights

3.3 The study will be owned by the Partnership.

3.4 The final report, toolkit and (updated) information sources will be made publicly available (housed on Dorset internet). Local needs information, aggregated to agreed level (ward/finer market area) also to be made available, but access to individual surveys to be protected to LAs only.

Risks

3.5 The following risks have been identified:

- The timetable is very tight, particularly to interim report stage.
- Availability of LA staff time at critical stages to source data (particularly if consultants not used).
- Consistent and reliable local needs information will be essential (wider than just affordable needs).
- If consultants are used to provide Housing Need information their ability to fit into this tight timescale will be critical.
- Consistency and reliability of all secondary data sources.
- Robustness of data when projecting into future.

APPENDIX 1: OUTPUTS FROM THE HOUSING MARKET ASSESSMENT, POTENTIAL DATA SOURCES AND LEVEL OF INFORMATION AVAILABLE

SECTION OF STUDY	STAGE	GENERAL OUTPUT	POTENTIAL DATA SOURCES	LEVEL OF INFORMATION AVAILABILITY	PRIMARY/ SECONDARY SOURCE	DETAILED OUTPUTS
1 The current housing market	1.1The socio-economic context	Description of past trends and the current housing markets, including key drivers that underpin the market and influence levels of housing need and demand	a) National/Regional economic policy: LA econ dev teams, SWRDA, Regional Observatory, Joseph Rowntree Foundation.	Ward?/ District/ Unitary/ County	Secondary	Interest rate trends, levels of housing benefit, Gov funding for regeneration etc.
			b) Demography and household types: Census data, ONS mid year estimates, Patient Register data	Census Output area/ Postcode/ Ward/ District/ Unitary/ County	Secondary	Pop by ethnicity, age and no of households by type (couple/lone parent), age/gender of head, economic status.
			c) Labour force: Annual population survey, Annual Business Inquiry	Ward/ District / Unitary/ County	Secondary	No of employees in each SIC and by occ classification
			d) Incomes and earnings: Inland revenue personal incomes, CACI paycheck, Experian, CORE, Annual Survey of Hours and earnings, Local surveys	Postcode/ District/ Unitary/ County	Primary / Secondary	No of individuals and households in each income band. Distribution of income by age.
			e) cost of buying or renting land: Land Registry, Estate and letting agents, Rent service, Housing Strategy Statistical Appendix. (HSSA), Various websites	Postcode/ Local area/ District/ County.	Primary/Secondary	Average and lower quartile prices and rents by tenure, sizes and types in locations across the sub region. Weekly costs from the above

1.2 Current stock of housing	Estimates by tenure of current stock of dwellings of different sizes, types and conditions.	a) Total no of dwellings: HSSA, Census, Council Tax register	Census Output area/ Ward/District/Unitary/ County	Secondary	Total no of dwellings in the area incl second homes.
		b) Tenure: HSSA, Census, Council Tax Register	Census Output area/ Ward/District/Unitary/ County	Secondary	Total no of dwellings in each tenure.
		c) House size/Type: HSSA, Census, Local Housing Survey	Census Output area/ Ward/District/Unitary/ County	Primary / Secondary	no of dwellings by size/type (no of beds/ det, semi, terr, flat.)
		d) Condition of stock: HSSA, Stock condition survey, Decent homes information, Census data on amenities.	Census Output area/ Ward/District/Unitary/ County	Primary / Secondary	Condition of stock (unfit, in need of major/minor repair) by tenure and location.
		e) Shared housing and communal establishments: Census, Student accommodation services, Voluntary sector and key informants, Local Surveys.	Census Output area/ Ward/ District/ Unitary/ County	Primary / Secondary	Est no of households in shared houses and communal establishments.
1.3 The active market	Description of demand pressures for particular sizes and types of dwellings and extent of problems such as long term vacancy and abandonment.	a) Relative house prices and rents by size, type and location: As 1.1e above	District/ Postcode? Local area	Primary / Secondary	House prices and rents by size, type and location within the area.
		b) Affordability of housing: As 1.1 d and 1.1e above	Postcode/ District/ Unitary/ County	Primary / Secondary	Mapping of which areas and property types are most and least affordable.
		c) Overcrowding and under-occupation: Census and Local Housing Survey	Census Output area / Ward/ District/ Unitary/ County	Primary / Secondary	Dwelling size and household size. Degree of over crowding/ under-occupancy. Concealed households.

			d) Vacancy and turnover rates: Census, HSSA returns, Council tax register, LA /HA records, land Registry transactions, Estate Agents, Survey of Mortgage lenders.	Census output area/ District/ Unitary/ County	Primary / Secondary	Vacancy rates by tenure and size/type/location if possible. Transactions data, turnover and churn relating to different types of property and area.
			e) Available housing supply by tenure: Estate and letting agents LA and HA re-lets.	Local area?/ District/ Unitary.	Primary / Secondary	An indication of available supply by tenure and house type/size/location.
2 The Future Housing market	2.1 Projecting key drivers of demand	Estimate of future household demand based upon household projections or forecasts	a) Projecting changes in future numbers of households: ONS projections or DCC model, varied according to changes in policy direction / issues arising from analysis of current housing market	County / Unitary/ District?	Secondary	Could be a number or range. Should investigate implications for demand of changes in key drivers (eg demography, economic performance, employment and affordability) and implications for future households.
			b) Future economic performance: Analysis of long term trends in local and national economy: National/ Regional economic forecasts, Cambridge econometrics model, Treasury forecasts.	County??	Secondary	Could be varied according to changes in policy direction / issues arising from analysis of current economy in 1.1.a.
			c) Future employment structure: Analysis of local employment structure, labour market accounts.	County/ Unitary/ District?	Secondary	Could be varied according to changes in policy direction / issues arising from analysis of current economy in 1.1.c above.

			d) Future Affordability: Analysis of likely future house prices and rents based on evidence from 1.1 and 1.3 above.	County/ Unitary/ District?	Secondary	Develop alternative based on different housing demand / need /supply scenarios.
3. Housing Need	3.1 Current unmet need	Estimate of current number of households in unmet need.	Local Housing Need Survey or Housing register, LA and RSL transfer lists, Priority homeless in temp accom, hostel and B/B move on needs, homeless agencies data, over crowding data.	Ward/ District/ Unitary/ County/ HMA	Primary / Secondary	As general output
	3.2 Future Need	Estimate of newly arising households who are unlikely to afford suitable housing in the market.	New household formation rates (from 2a above); household income and entry level rents/prices (from local survey or 1 above); Nos joining housing register from own occ or priv rented accomm.	Ward/ District/ Unitary/ County	Secondary	As general output
	3.3 Required amount of affordable housing.	Estimate of annual requirement of affordable housing to reduce levels of current unmet and future housing need.	Calculated by detracting future annual supply from total annual need.	Ward? District/ Unitary/ County		As general output
	3.4 The profile of affordable housing needed.	Estimate of the profile of affordable housing units required.	Calculated by analysis of income levels of those in need.	Ward? District/ Unitary/ County		As general output
	3.5 The need for affordable housing in different locations	Level of need for affordable housing in different locations.	Calculated from analysis of preferences identified on Housing Register or from Local Needs Survey.	Ward? District/ Unitary/ County		As general output

4. Housing requirements of different household types.	4.1 Minority, special needs and hard to reach groups	Qualitative assessment of housing need and demand in respect of particular groups of people and an appreciation of different methods that can be employed to better understand and meet their needs.	Calculated from analysis of HNS or Housing Register, survey of gypsy/traveller needs, Interviews with relevant minority groups. etc	Ward?? District / Unitary/County	Primary/secondary	As general output
	4.2 The intermediate market.	An estimate of the potential role of intermediate housing in meeting need and the requirement for affordable housing from other groups in the housing market area.	Calculated from analysis of household incomes and tenure preferences from HNS or data from 3 above.	Ward ?? District/ Unitary/County	Primary/secondary	As general output