Arneil Johnston

Dundee City Housing Market Partnership

Housing Need & Demand Assessment Final Report

November 2022

Table of Contents

INVESTORS IN PEOPLE™
We invest in people Platinum

Donna Milton (MCIH)
Managing Director

Elaine Byrne (CPFA)
Director of Housing Consultancy

Appendix A: Core Output 2: Dundee Data book
Appendix B: May 2021 Dundee Stakeholder Engagement Workshop report

Arneil Johnston
50 Scott Street
Motherwell
ML1 1PN

DUNDEE CITY HOUSING NEED & DEMAND ASSESSMENT				
Key Findings Template: Estimate of Additional (New) Future Housing Units				
Total households with **existing need (net)**	2,250	Number of years to clear existing need	5	
Household Projection Period				
	2021-2041			
Total number of new households over the projection period	2,450	4,060		
HNDA Projection Period				
	2021-2041			

HOUSING ESTIMATES - YEARS 1 TO 5		
Total households over the projection period who may afford:	Scenario 1 - Principal Projection	Scenario 2 - High Migration
OWNER OCCUPATION	116	216
PRIVATE RENT	77	144
BELOW MARKET HOUSING	82	152
SOCIAL RENT	2,332	2,400
Total additional future housing units	**2,607**	**2,912**

HOUSING ESTIMATES - YEARS 5 TO 10		
Total households over the projection period who may afford:	Scenario 1 - Principal Projection	Scenario 2 - High Migration
OWNER OCCUPATION	181	322
PRIVATE RENT	120	215
BELOW MARKET HOUSING	117	210
SOCIAL RENT	106	190
Total additional future housing units	**524**	**937**

HOUSING ESTIMATES - YEARS 10 TO 15		
Total households over the projection period who may afford:	Scenario 1 - Principal Projection	Scenario 2 - High Migration
OWNER OCCUPATION	330	485
PRIVATE RENT	219	323
BELOW MARKET HOUSING	201	296
SOCIAL RENT	171	253
Total additional future housing units	**921**	**1,357**

HOUSING ESTIMATES - YEARS 15 TO 20		
Total households over the projection period who may afford:	Scenario 1 - Principal Projection	Scenario 2 - High Migration
OWNER OCCUPATION	242	413
PRIVATE RENT	162	275
FELOW MARKET RENT	135	230
SOCIAL RENT	109	186
Total additional future housing units	**648**	**1104**

CUMULATIVE TOTAL AT END OF PROJECTION		
Total households over the projection period who may afford:	Scenario 1 - Principal Projection	Scenario 2 - High Migration
OWNER OCCUPATION	869	1,436
PRIVATE RENT	578	957
BELOW MARKET HOUSING	535	888
SOCIAL RENT	2,718	3,029
Total additional future housing units	**4,700**	**6,310**

Tayside HNDA Glossary: Commonly Used Abbreviations

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

2021 Dundee City HNDA Housing Market Partnership Signatories

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

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

Authorised by	Local Authority	Signature
Name David Simpson Designation Head of Housing and Communities Email address david.simpson@dundeecity.gov.uk	Dundee City Council	
Name Gregor Hamilton Designation Head of Planning and Economic Development Email address gregor.hamilton@dundeecity.gov.uk		

1 Introduction

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

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

- **Housing Supply Target(s)** (HSTs): to inform the setting of a HST for use in the LHS and Local Development Plan. The HST sets out the extent and nature of housing to be delivered over the period of the plan(s)
- **Stock management**: to assist understanding of the current and future demand for housing by size, type, tenure and location in order to optimise the provision, management and use of housing stock. This in turn feeds into policy and planning decisions about future stock in the LHS
- **Housing investment**: to inform future housing investment decisions, for example through Strategic Housing Investment Plans (SHIPs)
- **Specialist Provision:** to inform the provision and use of specialist housing and housing related services to enable independent living for all, as expressed in policy in the LHS and to inform planning decisions e.g. land for Gypsy/Travellers
- **Geographic distribution of land:** to inform the spatial allocation of land through the Development Plan for new housing at both Housing Market Area level and local authority level.

1.1 Purpose of the HNDA

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

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

- future need for households yet to form or migrating into an area
- existing (or backlog) need experienced by households currently living in unsuitable housing which cannot be adapted or improved to meet the needs of the household.

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

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

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

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

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

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

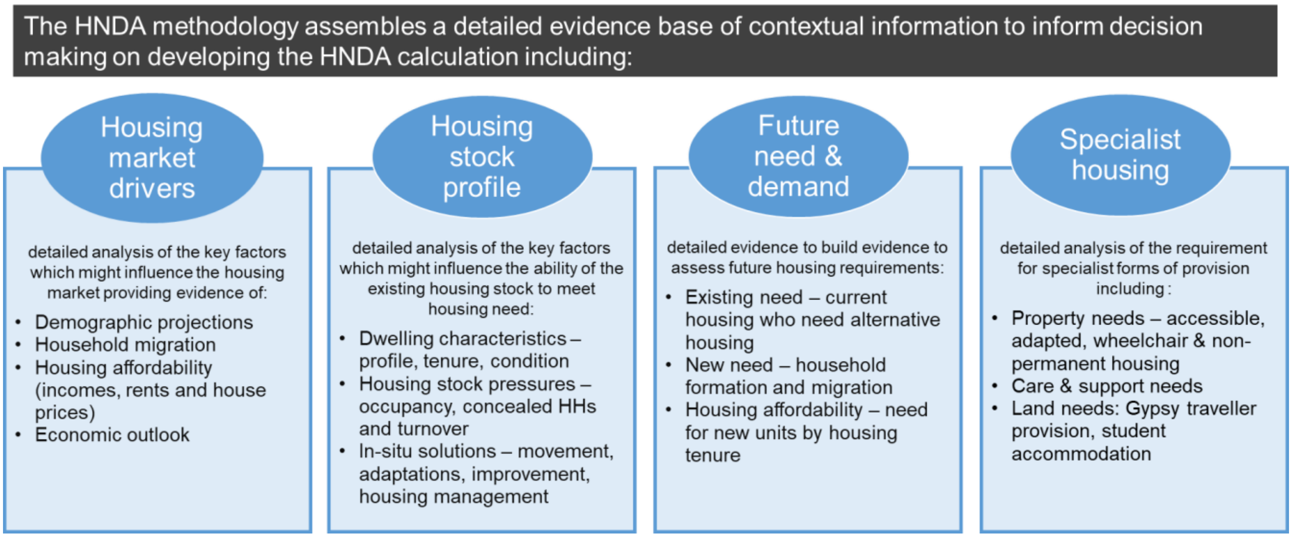
Angus Council | Dundee City Council | Fife Council (In relation to the North Fife area) | Perth & Kinross Council

1.2 Tayside HNDA Methodology

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

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

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



1.3 HNDA Final Report Structure

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

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

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

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

Table 1.1: Final Reporting Evidence of Dundee City HNDA Core Outputs

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

1.4 Quality Control

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

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

- project managing the overall programme for HNDA production
- coordinating and validating the production of Core Output materials including proofing interactive briefings, data-books and stakeholder engagement materials
- coordinating and validating primary research materials including the production of survey tools, final reporting materials, crosstabulations
- validating the accuracy and credibility of HNDA calculation inputs and assumptions and providing final sign off on HNDA calculation scenarios and housing estimates
- proofing and validating all final HNDA reporting outputs and digital materials.

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

- Arneil Johnston: Quality system based on requirement of BS EN ISO 9000, plus CIH and CIPFA professional practice standards
- Research Resource: MRS Code of Conduct and ISO20252:2012 – Market, Opinion and Social Research

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

2 Validating Housing Market Areas

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

The purpose of the validation exercise was to:

- determine whether any statistical evidence exists to justify a change to current housing market area boundaries (validated in 2012)
- evidence the extent and nature of any cross-boundary housing market areas including the Greater Dundee Housing Market Area and any other cross-boundary market areas within or crossing the Tayside regional boundary
- validate the functional market area boundaries operating across the Tayside region to provide a spatial basis for HNDA primary research and calculation purposes.

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

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

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

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

2.1 Dundee City Housing Market Area Validation Outcomes

Analysis of the origins of households purchasing residential properties in the Dundee City HMA reveals that:

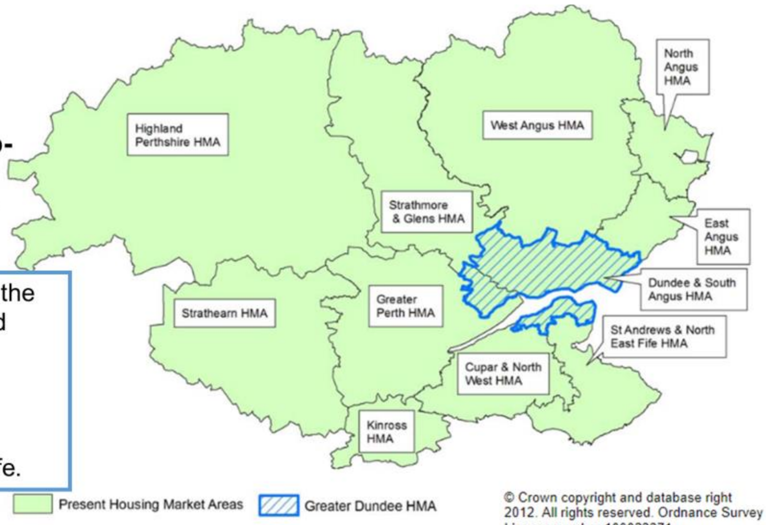
- 63% of property purchasers in Dundee come from within the City, therefore Dundee can be regarded as a relatively self-contained Housing Market Area
- 20% of transactions in Dundee City take place from purchasers originating from other Tayside partner areas, most notably Angus (10%), followed by Fife (6%) and Perth & Kinross (4%)
- This inward migration is instrumental in validating the cross boundary Greater Dundee functional market area.

The Greater Dundee HMA operates as a functional Housing Market Area centred on the City of Dundee

This area includes wider partner sub-market areas where significant house sales are made to purchasers from Dundee

The Greater Dundee HMA extends beyond the administrative boundary of Dundee City and includes areas in:

- the eastern Carse of Gowrie in Perth & Kinross,
- South Angus and
- Newport, Tayport and Wormit in North Fife.



Purchaser Origin	Dundee City
Dundee City	63%
Adjoining Councils	20%
Glasgow & Edinburgh	3%
Other Scotland/UK	15%
Dundee City	63%
2nd main origin	Angus

Table 2.1: HMA Self Containment/Migration Outcomes in Dundee City HMA

3 Housing Need & Demand Assessment Primary Research

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

- no credible information on the housing suitability or housing affordability drivers of Tayside households (including limited intelligence on household income and financial circumstances)
- no credible, recent information on household circumstances, housing intensions or aspirations
- no insights on the impact of the Covid-19 pandemic on the extent and nature of housing need across Tayside
- limited sample sizes in national secondary data sources offering poor statistical confidence in key measures of housing need
- inconsistencies in data collection, assembly and reporting across Tayside partners, leading to poor data reliability across several key measures of housing need (and particularly in relation to specialist housing requirements)
- very limited ability to disaggregate data to functional HMAs (or sub-areas) using many secondary datasets (which often report by local authority administrative boundaries only).

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

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

3.1 Sample Size and Data Confidence

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

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

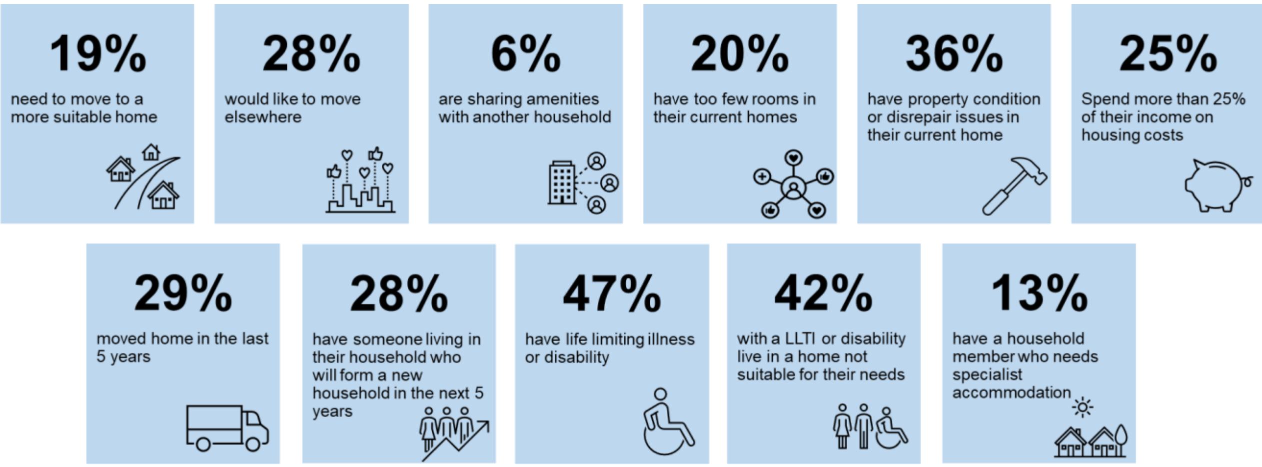
At a Dundee City level, a total of 480 interviews were achieved across both surveys, providing statistically robust data accurate to the level of +/-4.5% (based upon a 50% estimate at the 95% level of confidence).

3.2 2021 HNDA Household Survey: Dundee City Outcomes

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

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

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



4 Core Output 1: Housing Market Drivers

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

Core output 1 evidence:

'identifies the key factors driving the local housing market.

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

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

4.1 Core Output 1: Key Issues – Dundee City Housing Market Area

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

- key demographic factors and how these are driving the Dundee City housing market
- key affordability factors and how these are driving the Dundee City housing market
- key economic factors and how these are driving the Dundee City housing market

Dundee HNDA: Core Output 1: Housing Market Drivers	
LHS & Development Plan	Key Issues identified in the HNDA
Demographic issues for the local housing market	• **Population change:** Dundee has experienced minimal population growth at 2% between 2000-2019. In terms of population projections, the population in Dundee is projected to change by less than 1% across the period 2018-43. • In 2018/19 Dundee City experienced the highest % of overseas in migration (113%) and within Scotland out migration (-38%). • Like all other Tayside areas, Dundee's younger and working age population is expected to decrease between 2018 and 2038 and the 65+ older people age group is expected to increase (17%) although this increase is the lowest amongst Tayside partners. • **Households:** There has been a 2.5% increase in the number of households between 2008-2018 in Dundee which is the smallest change in the Tayside area. Dundee is expected to have a 4% increase in the number of households between 2021 and 2043, which could stretch to 6% if there is high migration. The HNDA Survey revealed that Dundee had the highest percentage of people with a desire to move (47%) and the lowest percentage (77%) of respondents who wanted to move within Dundee.

Affordability issues for the local housing market	• **Household incomes:** According to Scottish Government income estimates for 2018, the median income in Dundee in 2018 was £24,440. It is the lowest median income within the Tayside partner area with the highest being in Perth & Kinross (£30,160). This profile reflects the median income benchmarks which populate the HNDA Tool v4.0 (sourced from CACI Paycheck data). • Between 2014-18, Dundee median household incomes increased by 2% from £23,920 in 2014 to £24,440 in 2018. • Analysis of data from the Scottish House Condition Survey (SHCS) 2017-19 reveals that the average income in Dundee was £23,500, which is significantly lower than both Scotland (£29,100) and all other Tayside partner areas. • CACI Paycheck data (2020) sets the median income in Dundee at £24,628 which is slightly higher than both Scottish Government 2018 estimates and SHCS estimates 2019. • ONS Annual Survey of Hours and Earnings (2020) suggests a median weekly pay for all employees in Dundee is £460. • **Access to Mortgage Finance:** Analysis from Bank of England data detailing residential loans provided via the FCA, shows that first time buyer mortgages accounted for 21-24% of all mortgage loans between 2015-22, with a rise of almost 3% taking place between 2019 and 2020. • The percentage of home-owners re-mortgaging accounted for 28% of all mortgages in Q4 2021 which is its highest rate since 2017. The Covid pandemic coupled with stricter bank lending requirements on large LTV mortgages have played a role with the figure for 2021 bouncing back to previously seen levels. • In Q4 2021, the mean Loan-to-Value (LTV) ratio on new mortgages to first-time buyers in Scotland stood at 82%, an annual increase of 4.8 percentage points. Meanwhile, the mean LTV ratio for home movers in Scotland stood at 71% in Q4 2021, up 1.4 percentage points on the previous year (Source: UK Finance). • Analysis of Bank of Income data on lending multiples reveals that for buyers on a single income, the most consistent lending multiple is 4.0 or over in 2021 (the highest in the 7 year period of data). For joint income borrowers, the most consistent LTV income multiple is 3 or over, representing 43% of all loans in Q4 of 2021. As the affordability calculation in the HNDA Toolkit uses a default LTI of 3.2 this analysis suggests there is no strong case to change this with 3.00 or over LTI (joint income) being the most recurring lending multiplier between 2015 and 2021. • **Home Ownership:** Dundee had the smallest increase in the volume of house sales between 2008 and 2020 at 7.4%. The median house sales value in Dundee (£145,942) was the lowest of all Tayside areas. In Dundee, 45% of households cannot afford a lower quartile market home. Households would need to spend 4.53 times the average local income to afford the average house price – a factor in excess of the typical 3.9 multiplier. • **Private Renting:** The Local Housing Allowance across Dundee (£571) averages at 30% less than the costs of market rents (£744) and as a result 6 in 10 households cannot afford to rent privately

	when applying a 25% income to rent ratio and 5 in 10 cannot afford to rent privately applying a 30% income rent ratio. • **Social Renting:** RSL rents are on average 24% higher than local authority rents with a monthly average of £420 compared to £339. 30% of households cannot afford an RSL rent without subsidy based on a 30% income to rent ratio. • **Diminishing affordability levels:** 2021 HNDA Survey data estimates that 17% of households in the Dundee area are spending more than 30% of their income on rent/mortgage costs. • The Covid-19 pandemic has seen housing affordability levels diminish across Dundee, with three times more people stating they are experiencing serious financial difficulties post pandemic. Housing solutions for lower income households need careful consideration as most options, even at entry level, are unaffordable.
Economic issues for the local housing market	• **Economic Growth**: Dundee's Gross Value Added (GVA) per head is consistently the lowest of each Tayside partner and at a level of £39,050 sits well below the Scottish average of £52,549. • **Employment**: Across Dundee, just under 67,000 people were employed in 2019, and whilst there has been a modest growth (1.7%) since 2009, growth is one of the lowest of Tayside partners and 15% lower than the growth experienced by Perth and Kinross. • Key industries in Dundee include (i) construction (ii) professional, scientific & technical sectors, (iii) accommodation and food services and (iv) retail which collectively account for half of all employment opportunities in the area. • Average Dundee weekly pay equals £498 which is the lowest of all Tayside partners and lower than the mean for Scotland (£558). • **Unemployment**: Dundee City has the highest levels of economic inactivity at 27.2% across Tayside in 2019 and also a higher claimant count rate (7.2%) than the Scottish average (6%) • **Travel to work:** Dundee City has 62% more people travelling into the area to work than outward travel to work. • **Deprivation:** In 2020, 59 of the 188 (31%) of Dundee data zones were in the top 15% most deprived areas, this was an increase of 4 from the 55 data zones in 2016. There are only three local authorities who have a higher percentage of data zones in the 15% most deprived category (Glasgow, Inverclyde and West Dunbartonshire).

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

5 Core Output 2: Estimating Future Housing Need and Demand

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

- Market housing (owner occupation)
- Market rents (the PRS)
- Below market housing (a range of subsidised intermediate housing tenures including mid-market rent, shared equity/ownership and other forms of low cost home ownership)
- Social housing rents.

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

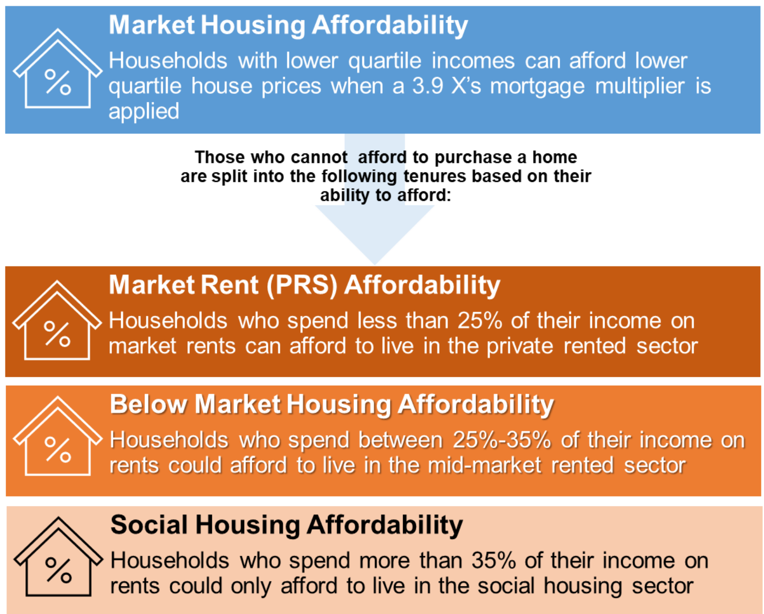
The Scottish Government's HNDA calculation tool is prepopulated with data to estimate the number of new homes needed in the area. The HNDA tool works by projecting the number of new households who will require housing in Dundee City by considering existing households who need new homes PLUS new households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

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

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

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

Scenarios on housing affordability can then be developed by varying economic, market and affordability assumptions, which affect the tenure split of housing estimates, but which do not have an impact on the overall estimates. These



assumptions include testing scenarios on income growth, income distribution, house prices and market rent inflation.

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

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

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

Table 5.1: 2021 Dundee City HNDA Calculation Baseline Assumptions

5.1 Dundee City HNDA Scenarios and Assumptions

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

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

Table 5.2: Dundee HNDA Tool Default Assumptions

HNDA Scenario 1: Dundee Principal Scenario		
Overview: This scenario represents the HNDA Toolkit default settings with all income and house price assumptions being based on the economic outlook for Scotland in 2020. Existing need is updated based on local authority generated existing need figures.		
HNDA Model Input	Assumption	Evidence/justification
Households	Tayside principal household growth = 4% Dundee principal = 3%	NRS principal household projections for the Tayside region project a growth in the number of households of 4% over the next 25 years, which is half of the projected growth rate in Scotland (8%). This projection is slightly higher than household growth rates across Dundee over the last decade (3%) and therefore likely to be a good baseline measure based on wider regional trends
Existing need	Tayside existing need = 5,624 Dundee existing need = 2,250	Detailed in Section 5.1: HNDA Backlog: Estimate of Households in Existing Need
Years to clear existing need	5 years	Based on recent social housing turnover rates (9%, c. 4,300 per annum) and capacity for new social housing delivery projected in future Strategic Housing Investment Plans (c. 4,100 units); meeting existing housing need fully over 5 years would require c. 20% of all affordable supply to address the current estimated backlog. This is considered a realistic and feasible assumption by the Tayside HMP. Furthermore, partners including Dundee City Council had no appetite to extend the period that households in Tayside would spend in unsuitable housing for longer than a 5 year term.
Income growth	Moderate real terms growth 2.5%	Moderate real term growth is selected by Tayside HMP given the economic uncertainty associated with recovery from Covid-19 (13% of households experiencing financial difficulty post Covid compared to 8% pre-Covid) and the UK's departure from the European Union. Whilst both factors may negatively impact on income growth, the Tay Cities Deal and implementation of a transformational economic development strategy should at a minimum balance these risks.
Income distribution	No change in income distribution. Point of income distribution set at 25th and 75th percentile	Income distribution stability selected despite evidence of a higher % of Tayside households experiencing financial hardship (13%) in a post Covid environment; given scale of ambition to grow the Tayside

		economy via the Tay Cities Deal and associated £400M of investment in jobs and infrastructure.
House prices	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside house prices over the last 10 years has equaled 1.3%
Affordability	Entry to home ownership set at the 25th percentile house price; 3.9x lower quartile income	Default assumptions selected – despite uncertainty in the economic context for Tayside in 2021, the scale of ambition in Tay Cities Deal should at a minimum hold any worsening of housing induced poverty
Rental threshold	If 35% of income spent on rent – household is suitable for social rent	
Rental growth	Trend growth 1.6% per annum	Default assumption selected – aggregate annual growth in Tayside BRMA rents (excluding St Andrews) over the last 10 years has equaled 2%

Table 5.3: Dundee HNDA Scenario1: Principal

HNDA Scenario 2: Dundee High Migration Scenario		
Overview: This scenario assumes limited impacts of the Covid-19 pandemic and Brexit, with economic risks mitigated by an ambitious Tay Cities Growth Deal which drives migration to the Tayside region as a result of committed investment in jobs and infrastructure. This scenario is characterised by moderate real terms income growth, static income distribution, real term trend house price and rental growth.		
HNDA Model Input	Assumption	Evidence/justification
Households	Tayside high migration = 6% Dundee high migration = 5%	NRS high migration household projections for the Dundee City area project a growth in the number of households over the next 25 years of 5%, just below the household growth rate projected for the Tayside region. Whilst this growth rate is higher than the rate of household growth in Dundee over the last decade (3%); it has been assumed this is a credible growth assumption in the context of the Tay Cites Deal investment framework.
Existing need	Tayside existing need = 5,624 Dundee existing need = 2,250	Detailed in Section 5.1: HNDA Backlog: Estimate of Households in Existing Need
Years to clear existing need	5 years	Based on recent social housing turnover rates (9%, c. 4,300 per annum) and capacity for new social housing delivery projected in future Strategic Housing Investment Plans (c. 4,100 units); meeting existing housing need fully over 5 years would require c. 20% of all affordable supply to address the current estimated backlog. This is considered a realistic and feasible assumption by the Tayside HMP. Furthermore, partners including Angus Council had no appetite to extend the period that households in Tayside would spend in unsuitable housing for longer than a 5 year term.
Income growth	Moderate real terms growth 2.5%	Moderate real term growth is selected by Tayside HMP given the economic uncertainty associated with recovery from Covid-19 (13% of households experiencing financial difficulty post Covid compared to 8% pre-Covid) and the UK's departure from the European Union. Whilst both factors may negatively impact on income growth, the Tay Cities Deal and implementation of a transformational economic development strategy should at a minimum balance these risks.

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

Table 5.4: Dundee HNDA Scenario 2: High Migration

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

The outcomes associated with each scenario are detailed below ranging from the HNDA toolkit default settings for Dundee City area (2,839) to an upper range of 6,310 (more than double the HNDA tool default settings.

Cumulative need all tenures	2021-2025	2026-2030	2031-2035	2036-2040
Default	747	1,271	2,191	2,839
Scenario 1	2,607	3,131	4,051	4,699
Scenario 2	2,912	3,849	5,206	6,310

Table 5.5: 2021 Dundee City HNDA Calculation Scenarios

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

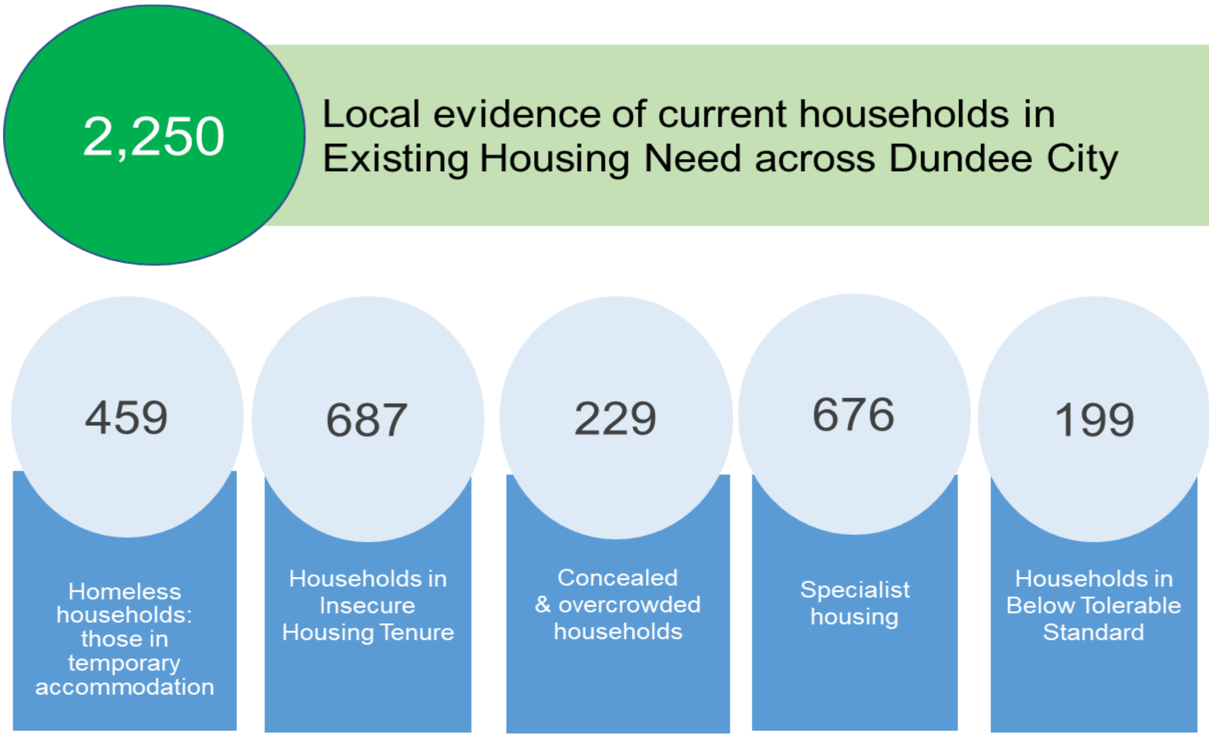
The evidence which underpins the major components of each scenario are detailed below.

5.2 HNDA Backlog: Estimate of Households in Existing Need

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

In some cases, existing need can be met using in-situ solutions as Core Output 2 of the HNDA e.g., through aids, adaptations or repairs to existing properties. However, a proportion of need must be met through additional housing where an in-situ solution cannot be found e.g., for homeless households in temporary accommodation.

The basis of the local estimate of existing housing need is as follows:



Each element of existing housing need is evidenced in detail in Appendix A: Core Output 2 Dundee City Databook, with the basis of each measure detailed below:

- Homeless households in temporary accommodation were established using an average of HL1 statistics for 2020/21 detailing the number of households in temporary accommodation on 31st March 2021 and a snapshot of households in temporary accommodation derived from partner temporary accommodation stock lists
- Households in secure tenure were established using an average of respondents to the 2021 Tayside HNDA survey who were ‘under immediate threat of eviction, repossession or loss of housing’ with 2020/21 HL1 statistics on households who have become homeless as a result of insecure tenure
- Households in the 2021 HNDA survey who identified themselves as overcrowded **OR** sharing amenities with another household with double counting eliminated from total respondent numbers
- Households who need to move due to medical needs or who require specialist housing established through analysis of local housing waiting lists
- Local estimates of poor housing quality using 2021 Tayside HNDA survey outcomes of households in poor quality housing.

Combining these requirements results in a local existing need estimate of 2,250 households across Dundee City who require moving to a new property.

	Dundee City
Homeless households & those in temporary accommodation	459
Households with insecure Tenure	687
Concealed households & Overcrowding	229
Specialist Housing and Housing Related Services	676
Poor Quality	199
Total Existing Housing Need	**2,250**

Table 5.6: Dundee City Local Estimate of Existing Housing Need

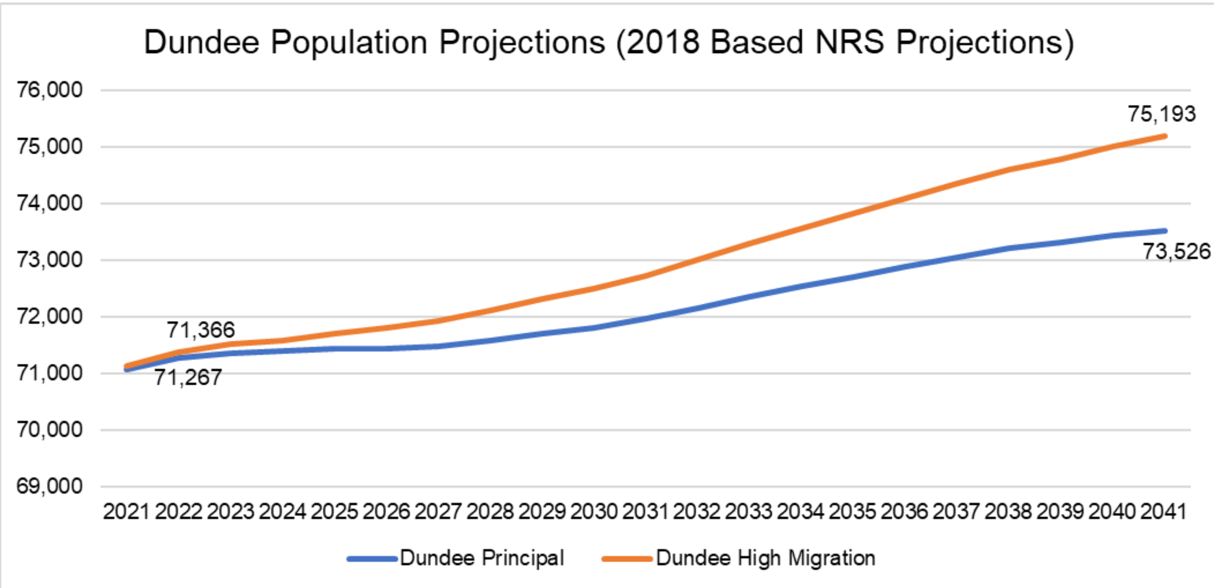
For the purposes of the HNDA calculation, Dundee City partners have assumed that the backlog of households in existing housing need will be addressed over a 5 year period and in the first 5 years of the 20-year projections.

5.3 New Need: Household Projection Scenarios

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

Informed by demographic analysis presented in Core Output 1 (Housing Market Drivers), the Dundee City area has shown positive household growth in the last decade, albeit at half the rate of the wider Tayside region (2.5% between 2008 and 2018). Given the highly ambitious economic growth strategy within the Tayside City region but in Dundee City specifically, partners felt that an ongoing growth projection could be justified as a reasonable scenario with the HNDA calculation.

On this basis, partners opted to create two scenarios: one using the NRS principal household projection for the Dundee City area and one using the NRS High Migration scenario.



The outcomes of household projection scenarios create an estimate of new households emerging in the Dundee region over the next 20 years of between 2,449 using the principal household projections and 4,060 using the high migration/growth scenario.

Dundee City HNDA Toolkit New Arising Need Estimate: Principal – High Migration

2,449

- NRS 2018-based Principal Projections
- Projected 3% growth across the Dundee City area

4,060

- NRS 2018-based High Migration Projections
- Projected 6% growth across across the Dundee City area

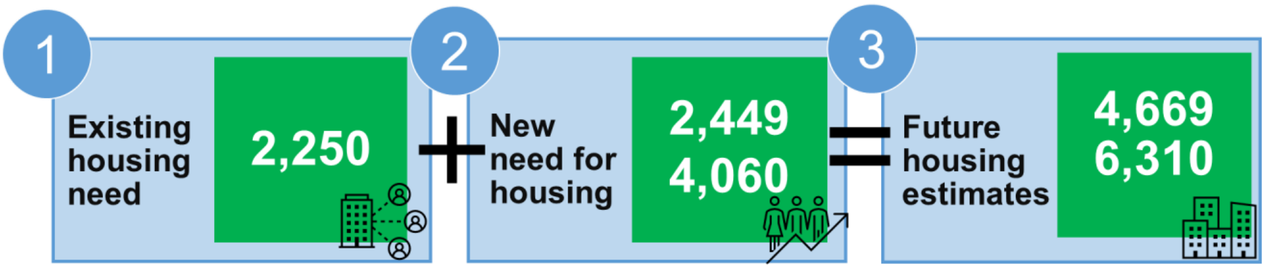
	2021	2040	20 Year Change	Avg Annual	% Change
2018 Principal	71,077	73,526	2,449	122	3%
2018 High Migration	71,133	75,193	4,060	203	6%

The principal household projections estimate an overall growth in households across the Dundee City region of 3%. These projections create an average annual increase of 122 households in Dundee.

The high migration/growth scenario estimates an overall growth in households across Dundee of 6%. These projections create an average annual increase of 203 households across the City.

5.4 Dundee City Housing Estimates

The Dundee HNDA calculation combines each component of housing need to create a 20-year range of housing estimates as follows:



Dundee HNDA housing estimates range from 4,699 to 6,310 over the next 20 years. The high migration/growth scenario projects a 40% increase in estimated need from the principal scenario. This results in an additional net housing requirement of 81 homes per annum. Table 5.4; sets out the 20 year HNDA projections for Dundee City in 5 year bandings

Dundee	Principal	High Migration
2021-2025	2607	2912
2026-2030	524	937
2031-2035	920	1357
2036-2040	648	1104
Total	**4699**	**6310**
Average per annum	**235**	**316**

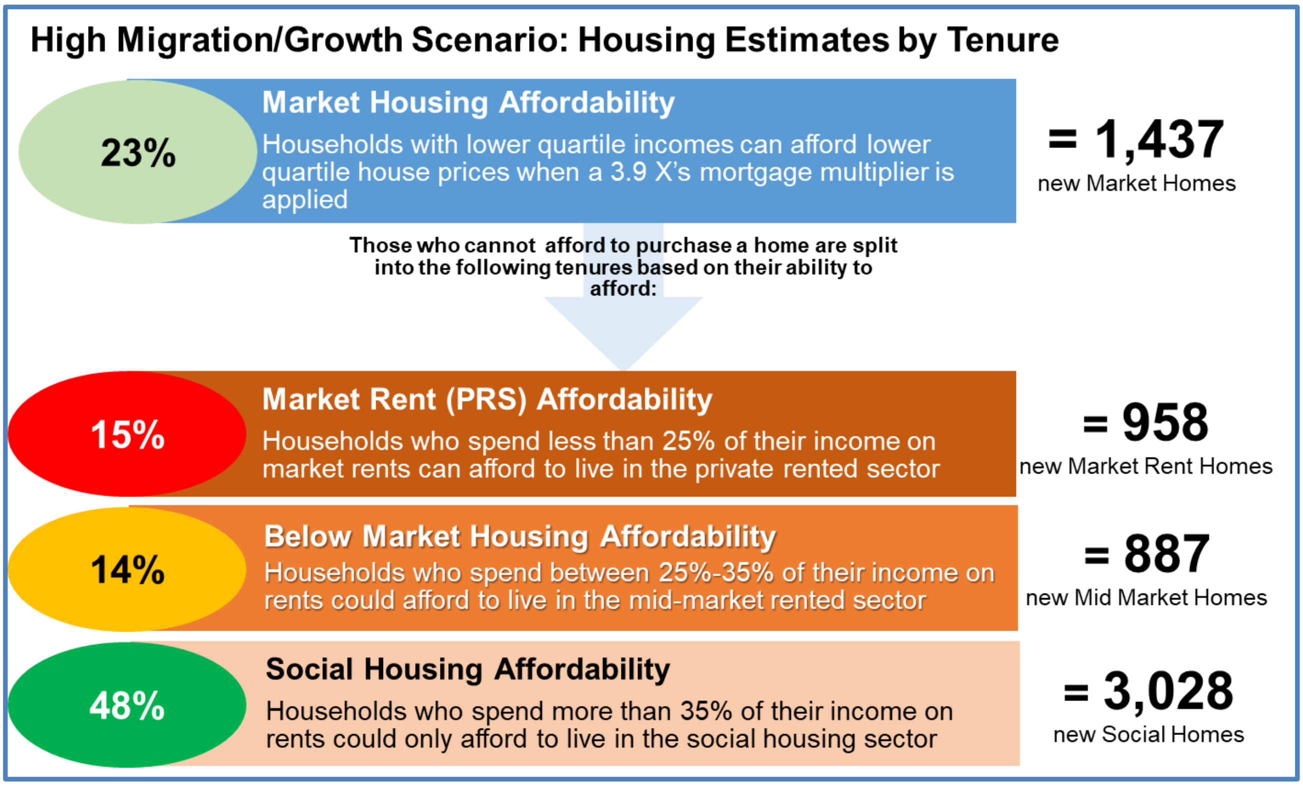
Table 5.7: Dundee City HNDA Housing Estimates 2021-2040 (Principal and High Migration/Growth Scenarios)

5.5 Housing Estimates by Housing Tenure

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

- Moderate, real term growth in incomes of 2.5% per annum is projected
- No change in income distribution from the baseline Scottish Government banded income dataset is projected
- House price growth reflects historic market trends at 1.6% per annum
- House price to income ratios will bench lower quartile house prices to lower quartile incomes as a benchmark for market housing affordability
- A loan to value mortgage multiplier of 3.9 times income is applied
- Rental growth reflects historic market trends at 1.6% per annum.

Given the economic uncertainty associated with the Covid-19 pandemic, partners opted to used standard default economic measures within the HNDA toolkit, until firmer evidence of economic impact is established. In Dundee City, the tenure split of future estimates arising from the high migration/growth scenario is detailed below:



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

Dundee	Principal	High Migration	Principal	High Migration
Social Rent	2,718	3,028	58%	48%
Below Market Housing	535	887	11%	14%
PRS	579	958	12%	15%
Buyers	868	1,437	18%	23%
Total	**4,699**	**6,310**	100%	100%

Table 5.5: 2021 HNDA Dundee City Housing Estimates by Housing Tenure

The 2021 HNDA calculation shows that between 48% - 58% of households in Dundee City will require social housing to meet future housing need, in the region of 2,700 – 3,000 new homes. A further 11% - 14% of households could benefit from below market housing solutions or through the enhanced delivery of market rents (12% - 15%).

The requirement for market housing ranges from 18% - 23% over the next 20 years, in the region of 900 – 1,400 new homes.

5.6 Estimating Housing Need & Demand: Key Issues

LHS & Local Development Plan	Key Issues identified in the HNDA
Future need for additional housing broken down by household who are likely to be able to afford: • owner-occupation • private rent • below market housing • social rent	The Local Housing Strategy and Local Development Plan for Dundee City should set achievable and deliverable Housing Supply Targets based on the housing estimates produced by the 2021 Tayside HNDA calculation, considering deliverability within a regional Tayside context, as well as the local strategic landscape. Between 2021 – 2040 the housing estimates for the Dundee City area, range from: • 4,669 using the principal projection • 6,310 using the high migration projection In the next 5 years (2021-26), the housing estimates for the Tayside area range from: • 2,607 using the principal projection • 2,912 using the high migration projection By tenure, across the Tayside region, it is estimated that: • 48% - 58% of housing estimates will be met by social housing • 11% - 14% of housing estimates will be met by below housing • 12% - 15% will be met by market rented housing • 18% - 23% will be met by market housing The LHS and LDP should consider the need for housing supply targets that extend beyond the duration of the 5-year LHS period by reviewing historic new build completion rates, considering the wider policy and economic context at a regional and local level. Strategic drivers to inform longer term and short term housing and development planning policy decisions using HNDA housing estimates as a starting point, are set out in more detail in Chapter 8, based on the views and perspectives of Dundee City partners and stakeholders.

6 Core Output 3: Specialist Provision

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

Core output 3 evidence:

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

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

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

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

- estimated number of new accessible houses required in future
- estimated number of wheelchair accessible homes required in future
- estimated need for future residential/care homeplaces

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

6.1 Core Output 3: Key Issues – Dundee City Housing Market Area

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

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

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

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

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

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

6.2 Accessible, Adapted and Wheelchair Evidence

Accessible, adapted and wheelchair housing	
National policies	• **National Planning Framework (NPF4 Position Statement)** • **Scottish Homes (1998) Housing for Varying Needs, A Design Guide** • **Housing to 2040** - Scottish Accessible Homes Standard 2025-26 • **Accessible housing standards** including Scottish Building Standards • **Relevant Adjustments to Common Parts (Disabled Persons) (Scotland) Regulations 2020** • **A Fairer Scotland for Disabled People Progress Report** • **Local Housing Strategy Guidance** requirement for an all-tenure wheelchair accessible housing target. • **Still Minding the Step:** Recommends three-tier approach 1) design and supply 2) adaptations 3) effective allocation of wheelchair accessible and adapted homes.
Local policies/strategies	**<u>Strategic Housing Investment Plans:</u>** **Dundee (2019-2024)** Within Dundee City there is a large demand for wheelchair adapted housing, the requirements are considered in every new build social rented development. The size of housing required varies from 1 bed units to 5 bed units, with c.100 people currently on waiting list as at August 2018. Since 2015 there has been 45 new build social rented wheelchair units either completed or currently under construction in the City, there are also a further 137 proposed wheelchair units for future developments identified in this New SHIP 2019 - 24. SHIP Commissioning Targets 2019-2023 equal 10 units per annum.
Property needs	**<u>Accessible Housing</u>** An accessible home is one where the design and layout of the property is free from physical barriers that might limit its suitability for households with disability, mobility or health conditions. It is sufficiently flexible and convenient to meet the existing and changing requirements of most households with an interior fabric that can be adapted to accommodate aids, adaptations or equipment. Across Tayside there are a range of property types that are commonly defined as accessible housing. These include amenity accommodation; ambulant disabled; medium dependency; and other specially adapted properties. Some ground floor

	accessible mainstream housing may also be considered within this category and generally new build homes in the social rented sector will be designed to accessible standards. **Adapted Housing** An adapted property is usually described as one that was not originally designed with accessibility features for households with disability, mobility or health conditions but has since been altered to accommodate these requirements. An adaptation is defined in housing legislation as an alteration or addition to the home to support the accommodation, welfare or employment of a disabled person or older person and their independent living. Adaptations to properties can include both large and small-scale provision; ranging from minor modifications such as grab rails, up to major property extensions or remodelling work. Common adaptations can include low level appliances, stair lifts, wet rooms, door widening, suitable external surfaces, ramps, grab rails as well as a range of equipment to enable independent living. Delivering the right adaptations can reduce the need for personal care services, as well as the need for admission to a hospital/care home, or the move to a purpose-designed property. Currently, the funding streams for adaptations remain tenure-specific and there are variations in the processes for delivering adaptations to local authority, RSL and private sector properties. Tayside local authorities provide both mandatory and discretionary grant assistance for adaptations in the private sector, with RSL adaptations funded via a separate, central, Scottish Government budget. **Wheelchair Housing** The Scottish Government define wheelchair housing as homes suitable for wheelchair users to live in, as set out in Section 3 of the guidance on the ‘Housing for Varying Needs Standard’ (HfVN). Over and above this, developers are encouraged to meet ‘desirable’ wheelchair design criteria. HfVN states that wheelchair accessible housing “is for people who use a wheelchair most or all of the time. The home will be level access throughout, have space for a wheelchair to circulate and access all rooms, and offer a kitchen and bathroom that suits the occupant’s particular needs and fittings and services that are within reach and easy to use.
Suitable for	People with disabilities and limiting health conditions People with limited mobility and/or dexterity People who need for low level car Wheelchair users People with complex care needs including learning disability, sensory impairment, dementia, learning disabilities and autism.
Evidence	The key findings from the evidence on accessible, adapted and wheelchair housing are summarised as follows: **Health and Disability Profile** 47% of households in Dundee have someone who is long term sick or disabled (2021 HNDA Survey). The most common long-term sickness or disability is Physical Health Problems (24.7%), Mental Ill Health (22.5%) and Learning Disabilities (7%). This benchmark is lower than the Scottish House Condition Survey (2017-19) which estimates that 54% of

	households in Dundee have a household member with a long term illness or disability. The SHCS also estimates that 46% of households in owner-occupation contain one or more long-term sick or disabled person in comparison to 73% of those living in social housing. 9% of households with long term illness of disability in Dundee are limited by their current property, which is the highest of all Tayside partners. The concentration of flatted accommodation in Dundee aligned to a poorer health and mobility profile are likely to be driving factors in this statistic. Furthermore, 16% of older households contain an individual with a long-term sickness or disability restricted by the property, which is 6% points greater than found across Scotland as a whole. **Specialist Housing** It is estimated that there are 7,085 units of specialist housing provided by social landlords in Tayside, with 15% of all homes offering specialist forms of housing provision. Dundee accounts for a significant 56% of provision across Tayside, with 3,969 specialist homes in the social housing sector. In Dundee, 63% of specialist homes provide housing for older people including sheltered accommodation and 41% of specialist homes provide accessible housing for people with mobility needs. Across all Tayside partner areas, there has been a 8% turnover in specialist housing stock over the last three years. Dundee had 10% turnover over the same period. **Accessible Housing** Dundee has 666 units of accessible housing, which accounts for 3% of the total housing stock in Dundee. Across Tayside partners, Dundee accounts for 42% of all accessible housing provision. 5% of lets within the year 2019-20 were for accessible housing with around 108 accessible homes becoming available to let each year. Households in Dundee reported the most significant percentage of unmet need for accessible housing at 13%, significantly higher than the average for Tayside at 8.1%. Unmet need for accessible housing in Dundee is expressed by over 9,000 households (2021 HNDA Survey). **Adapted Housing** Projecting future adaptation requirements is challenging due to the changing demographics across Dundee. It is likely the current requirement will increase given there is an ageing population. This means targets in relation to specialist housing and adaptations will require continuous review to understand requirements as population demographics change. Dundee Council will undertake this as part of their Local Housing Strategy development work. In some instances where adaptation is not possible there may be need to identify alternative suitable housing options for such households. SHCS data suggests that 33% of the housing stock in Dundee has been adapted, approximately 71,000 homes. The Scottish House Condition Survey also provides estimates of properties requiring adaptations by local authority area. The majority of adaptations have been in social rented stock (48%). Scottish Government Housing Statistics also show that 48 properties have benefited from Grants since 2014 through Dundee City Council Scheme of Assistance.

	2021 Tayside Housing Need and Demand Survey indicates 30% of households across the Tayside partner areas have property adaptations. This figure is likely to be more representative of the current requirement for adapted housing given the level of statistical confidence achieved in each housing tenure. Unmet need for housing adaptations is expressed by 25% of households across the City, significantly higher than the proportion across Tayside at 16%. **Wheelchair Housing** There are 271 units of wheelchair housing in Dundee. The proportion of wheelchair accessible housing in Dundee makes up 1% of all social housing in the City. This is equal to the proportion of wheelchair homes across Tayside (1%). Dundee has the most significant proportion of wheelchair housing in the Tayside area at 66% of all wheelchair homes. The main provider of wheelchair housing is Dundee City Council (55.7%) followed by Hillcrest (15.5%) and Blackwood (13.3%) Housing Associations. Whilst there are currently 271 wheelchair properties available across the Dundee area, there is a waiting list of 32 people. With around 8 wheelchair properties being let per annum this indicates a pressure of 4.17 applicants per available let. 2.2% of survey respondents who said they had a specialist housing need indicated that they had an unmet need for wheelchair accessible accommodation in Dundee. This is slightly higher than the rate for Tayside at 1.7%. Key findings supporting the evidence on accessible, adapted and wheelchair housing is provided in Appendix L Specialist Provision Databook.
Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, health and social care partners has been instrumental in building the evidence required on the need for accessible, adapted and wheelchair housing across Dundee. This work is taken forward by the Housing Market Partnership in the Dundee area, to support the development and implementation of the Housing Contribution Statement. This work includes consultation, engagement and data-sharing to assess the needs of those who require accessible, adapted and wheelchair housing

Table 6.1: Accessible, Adapted and Wheelchair Housing Requirements

6.3 Non-Permanent Housing Evidence

Non-permanent housing	
National policies	**Homelessness: Code of Guidance (2019)** states homeless people should not be placed in temporary accommodation unnecessarily and time there should be as short as possible with care taken to avoid moves. **Homeless etc (Scotland) Act 2003 (Commencement No.4) Order 2019** removed local connection enabling presentation by homeless households at any Scottish local authority area of their choice. **Homeless Persons (Unsuitable Accommodation) (Scotland) Order 2020** amendment extends the Unsuitable Accommodation Order to all homeless households meaning that anyone staying in accommodation deemed as

	'unsuitable' for more than 7 days will constitute a breach of the Order. At present, this only applies to children and pregnant women in bed and breakfast accommodation. **The Homelessness & Rough Sleeping Action Group (HARSAG)** was set up by the Scottish Government to produce solutions to end homelessness and rough sleeping with a move towards a Rapid Rehousing approach. A requirement was placed on local authorities to produce 'Rapid Rehousing Transition Plans' (RRTP) with significant implications on the management and availability of non-permanent housing. **Ending Homelessness Together Action Plan** **Migrant Workers -** Non-EEA nationals may apply to work or train in the UK under a number of different schemes and categories. Some categories require the worker to obtain an Immigration Employment Document (IED), for example the Work Permits and Sectors Based Schemes, while others such as Fresh Talent Working In Scotland do not. Where an IED is required, this does not entitle the holder to enter or remain in the UK; they must also apply for leave separately, either as an Entry Clearance if outside the UK or Leave to Remain if already in the UK. **Armed Forces -** Taking the Strategy Forward (Jan 2020) outlines how Scottish Government will move this agenda forward and achieve the best possible outcomes for veterans now and in the future. A refreshed action plan was launched in August 2022 along with commitments to provide annual progress reports. The 'Welcome to Scotland' Guide published in 2022 provides advice for service personnel and their families in relation to housing, education, and healthcare in Scotland. Legislation in relation to armed forces personnel can be found in Armed Forces Act 2021 and Housing legislation. **Housing to 2040 reflects the 2020-21 Programme for Government which states that the Scottish Government will undertake a review of purpose-built student accommodation** which will help inform changes in the sector alongside the wider Rented Sector Strategy.
Local policies/ strategies	**Local Housing Strategies and Rapid Rehousing Transition Plans** **RRTPs** Rapid Rehousing Transition Plans outline how each local authority approaches providing a settled, mainstream housing outcome as quickly as possible through minimising the time spent in any form of temporary accommodation, with fewer transitions and how local authorities will move to use of mainstream furnished temporary accommodation within a local community. **Dundee City RRTP** Rapid Rehousing is about taking a housing-led approach for rehousing people who have experienced homelessness ensuring that they reach a settled housing option as quickly as possible rather than staying too long in temporary accommodation. To achieve these objectives, the Plan aims to reduce current temporary accommodation places by around 150 units over the plan, create 100 Housing First tenancies over the first two years and create over 50 units of supported accommodation. These figures are continuously reviewed and monitored as the RRTP changes are implemented. As with many local authorities the Covid-19 pandemic has

	had a major impact on the demand for and provision of temporary accommodation during the lockdown period and this is reflected within the update submitted to Scottish Government. In Dundee, the vision for rapid rehousing is to prevent homelessness wherever it is possible to do so, eradicate the need for bed and breakfast accommodation, reduce the number of temporary accommodation units in use, minimise the length of time homeless households spend in temporary accommodation, reshape temporary accommodation to offer less congregate options and more community based dispersed accommodation, and increase the range of supported accommodation options including the delivery of Housing First tenancies. Original RRTP assumptions projected that by 2024 the following outcomes would be achieved: • a reduction in homelessness by at least 10% as a result of prevention • a reduction in mainstream temporary accommodation in the region of 100 units • a reduction in the length of stay in temporary accommodation to an average target of 90 days. Whilst Dundee City Council remains fully committed to the delivery of RRTP targets the impact of the Covid-19 pandemic, cost of living pressures and the Ukraine resettlement programme has undoubtedly had a material impact on progress. However, a reduction in homelessness of 5% between 2018/19 and 2021/22 has been achieved in Dundee, higher than the Scottish reduction over the same period (4%). The target on the length of stay in temporary accommodation has not yet been achieved across Dundee. Dundee City Council continues to progress with the delivery of the RRTP vision for the region and achievement of the goal to provide a settled, mainstream housing outcome as quickly as possible through minimising the time spent in any form of temporary accommodation.
Property needs	As well as assessing the need for permanent housing, it is important the HNDA assesses the requirement for transitional accommodation, including temporary accommodation, houses in multiple occupation, refuges, hostels, tied/key worker housing, serviced accommodation or student accommodation. Non-permanent housing plays an important role in meeting a range of housing needs, including for transient populations such as seasonal/temporary workers and students; and those experiencing housing crisis who require temporary housing until a settled housing outcome can be achieved. Those living in non-permanent housing include homeless people, asylum seekers/refugees, people leaving care settings or institutions and students. This is usually delivered via the acquisition or reconfiguration of existing stock; however, the development of new build units can also be an also option, particularly for specific client or economic groups e.g. key workers or students. Provision can include temporary accommodation, specialist provision for homeless households, serviced accommodation, key/seasonal worker housing, student accommodation and housing for armed forces personnel.
Suitable for	Care leavers Homeless households

	Individuals leaving prison or institutional settings such as hospital Those with experience of criminal justice system Households experiencing domestic abuse Migrant/seasonal workers Refugee and asylum seekers Young People Students Armed Forces Veterans
Evidence	**Temporary Accommodation for Homeless Households** Dundee City has 309 units of temporary accommodation comprising 35% of the Tayside Total. Around 30% of households in temporary accommodation stay in self-contained accommodation within the community, which is a much lower proportion than the Tayside average (58%). Greater use of hostels (31%) and supported accommodation (32%) is evident than elsewhere in the region. Dundee city has the highest proportion of homeless assessment decisions where contact has been lost prior to assessment decision of all Tayside partner areas at 9%. The rate of households in temporary accommodation in Dundee City as of 31/03/2021 is 3.6 per 1000 population, the highest of all Tayside partner areas. Dundee City has an average total time in days spent in temporary accommodation in 2020/21 at 161 days. This is lower than the Scottish average at 199 days. **Student Accommodation** The Scottish Household Survey 2020 indicates that there were 5,013 full-time students aged 18-74 in employment in Dundee, with 1,710 unemployed. There are a higher proportions of full-time students living in the private rented sector than any other housing tenure. The adopted Dundee Local Development Plan 2019 sets out (in Policy 15: Student Accommodation) that over the past ten years there was comprehensive development of new and replacement purpose-built student accommodation within the City and that it is considered unlikely that there will be the need over the short to medium term for any significant additions to the supply of purpose-built accommodation for students. In the last 3 years since the adoption of the Local Development Plan 2019 there has been an increase in developer interest for purpose-built student accommodation and this has resulted in the approval of a number of planning applications within the city centre and circa 1,000 student flats have been approved. None of the larger scale applications approved in the last few years have commenced development yet and so the market demand for the purpose-built student accommodation hasn't been evidenced. **Migrant Worker Accommodation** Whilst the Seasonal Agricultural Workers Scheme (SAWS) registration totals in Tayside are traditionally one of the highest of all regions in Scotland. There is no evidence of a notable migrant population in the Dundee City area. **Armed Forces**

	Analysis of Dundee City Council HL1/CHR datasets indicates there was 1 housing application in 2020/21 from ex-service personnel with no allocations made to ex-service personnel in the same year. Furthermore, there were no homeless applications from ex-service personnel within Dundee City in 2020/21. Key findings supporting the evidence on non-permanent accommodation is provided in Appendix L Specialist Provision Databook.
Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, homelessness, health and social care partners has been instrumental in building the evidence required on the need for non-permanent housing across Dundee. This work is taken forward by the Housing Market Partnership in the Dundee area, to support the development and implementation of the Housing Contribution Statement, Rapid Rehousing Transition Plan and Strategic Commissioning Plan. This work includes consultation, engagement and data-sharing to assess the needs of those who non-permanent housing.

Table 6.2: Non-Permanent Housing Requirements

6.4 Supported Provision Evidence

Supported Provision	
National policies	**Shared Spaces was commissioned by Homeless Network Scotland** to explore permanent and non-permanent provision for individuals experiencing homelessness with multiple and complex needs. There is recognition that some individuals may benefit from shared and supportive provision. **Building Better Care Homes for Adults Guidance by the Care Inspectorate** illustrates what good building design looks like for care homes for adults post-Covid. It promotes self-contained small group living settings. **Independent Review of Adult Social Care offers** recommended improvements to the adult social care system in Scotland and recommends that the safety and quality of homes must improve with more joint working between services to ensure support is provided to enable people to stay in their homes and communities.
Local policies/ strategies	**Housing Contribution Statements:** Housing Contribution Statements (HCS) were introduced in 2013 and provided an initial link between the strategic planning process in housing at a local level and that of health & social care. At that time the HCS had a specific focus on older people and most Local Authorities based their initial HCS on their existing Local Housing Strategy. With the establishment of Integration Authorities and localities, Housing Contribution Statements **now become an integral part of the Strategic Commissioning Plan** and have been expanded and strengthened to consider the role of supported housing provision in enabling key client groups to live well in the community they choose. **Dundee:** The Dundee HSCP Housing Contribution Statement sets out how the local housing sector will actively work with the Partnership to support delivery of the outcomes within the Strategic Commissioning Plan. This will include achievement of the following outcomes: • Communities, families and individuals, including carers, will thrive in the areas they live in. • People, including carers, will be happier living in rejuvenated localities with better quality, safer and more energy efficient housing. • More people with health conditions or disabilities will receive care and/or supports in their own home or homely setting and their accommodation will provide the best possible environment to support their care from carers and the Health and Social Care workforce. • Fewer people will spend time in temporary accommodation and when this is necessary only for short periods. • Housing and homeless advice/ information will be easily accessible in localities and available closer to home
Property needs	In assessing the need for supported accommodation, as well as considering the future requirements associated with housing for older people, the HNDA guidance should also consider the provision of care homes and residential homes for this client group. Future requirements for accommodation based support services for key client groups including those with metal health

	conditions, physical disabilities, learning disabilities, developmental disorders and other complex need; should also be considered. Supported accommodation provision is often commissioned by health and social care partnerships to meet the requirements of households with complex care needs providing accommodation and on-site support to enable people to live well and with as much independence as possible. Supported accommodation covers a wide range of commissioned housing models. The common factor is that properties are typically built, designed, or adapted for the needs of the client group. Generally, there is a national shift away from large-scale congregate developments for all client groups with support needs, to housing based within a community setting which provide flexible care and support to meet individual needs. **Care homes** Care homes are designed to care for adults (aged over 18+) with high levels of dependency, who need a complete package of 24-hour care. As well as accommodation care homes offer nursing, personal and/or personal support to vulnerable adults who are unable to live independently. Residential Care is open to people with a range of care needs when a vulnerable person cannot return home safely so resides in a hospital/care setting for a prolonged period. These can include up to 24-hour supervision/monitoring. **Housing for Older People** Housing for older people takes many forms across the Tayside region but includes sheltered housing, extra care provision, retirement housing and other types of provision which offer accessible homes and neighbourhoods with some form of warden or on site supervision for households aged 60+. **Supported accommodation for key client groups** Types of supported housing provision could include: • Core and cluster developments: smaller scale, community based housing provision where care and support services are available to increase independence • Specialist support housing projects: open to client groups with a range of care needs. Typically, 24 hour support is available as well as self-contained accommodation spaces and communal living spaces. Depending on the client group, personal care, medical support and wellbeing activities are also provided on site • Group homes: small scale shared housing projects, where individuals live in a group setting typically with no more than 4 others. This is often in singled shared property with communal cooking facilities and living space. Support and/or care is provided typically 24/7.
Care & support needs	The housing care and support needs of households across the Tayside region will include: • Housing support services • Tenancy sustainment support • HSCP and NHS commissioned services for key client groups including those listed below • Third Sector support and advocacy services

	• Nursing staff • Social work support staff • Care/Home care workers offering personal care • Warden, kitchen and cleaning staff
Suitable for	Households with high support and care needs, including • Frailty • Dementia • Long-term illness, disease or condition • Mental health conditions • Physical disability • Learning disabilities • Neurological disorder • Developmental disorder • Drug/alcohol dependency • Multiple complex needs
Evidence	**Care Homes** In 2017, Dundee City had 44 registered places in care homes for older people per 1000 population, which represents an increase of 2.5 places per 1000 population since 2007. Furthermore, there were 34 care homes in Dundee City in 2017 which represents a 3% reduction between 2007 and 2017. Dundee City had 1,098 residents in care homes in 2017, representing an 8% increase from 2007. At this time care home occupancy rates were 87%. **Housing for Older People** There are 2,953 units of housing for older people in Dundee, 15% of the total social housing stock and 74% of all specialist housing in the Tayside area. In Dundee, there are 885 waiting list applications for housing for older people amounting to 12% of all applications. This equates to 3.19 applications for every available tenancy. **Supported accommodation for key client groups** There are 79 supported tenancies provided by social housing providers across Dundee, which account for 0.4% of the total housing stock in the area. There are 296 waiting list applications for supported housing. Over and above this, there are 211 units of supported housing in Dundee City (HSCP commissioned tenancies) all of which are for households with learning disabilities. In the absence of data on future need for accommodation with support, Dundee City Council estimate there is a further requirement for 211 HSCP commissioned tenancies. Defining supported accommodation needs for all client groups in Dundee is a priority for the HSCP. **Supported accommodation for homeless households** Dundee City RRTP indicates that 2% of homeless households 2018 and 2019 had a requirement for residential/supported accommodation with future requirements estimated to remain around this rate. There were 757 homeless households who had at least one support need identified with the majority of

	those requiring support having mental health problems or the need for housing management/independent living assistance. Of those homeless households that require support 16% have medium support needs, 17% require intense wrap around support and 2% require supported accommodation. Dundee has the greatest proportion of homeless households with SMD/Complex support needs across Tayside area. Key findings supporting the evidence on supported housing is provided in Appendix L Specialist Provision Databook.
Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, health and social care partners has been instrumental in building the evidence required on the need for supported housing across Dundee. This work is taken forward by the Housing Market Partnership in the Dundee area, to support the development and implementation of the Housing Contribution Statement and Strategic Commissioning Plan. This work includes consultation, engagement and data-sharing to assess the needs of those who require supported housing.

Table 6.3: Supported Provision Requirements

6.5 Care & Support for Independent Living at Home Evidence

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

	authority staff are already providing housing support and advice to applicants through homelessness prevention activity. **Care and Repair Scotland, Good Practice Guide** highlights the standards expected during the management and delivery of Care and Repairs services throughout Scotland.
Local policies/strategies	**Dundee** Dundee's Strategic Commissioning Plan focuses on moving resources from hospitals to community-based care. It aims to achieve this by delivering four strategic priorities which include: Health Inequalities, Early Intervention and Prevention, Locality Working and Engaging Communities and Models of Support (Pathways of Care). There are some areas within each priority where housing's contribution will assist in delivering improved outcomes, such as enabling people to live more independently at home for longer and improving digital technology. The HSCP feel success will look like communities and individuals who thrive in the areas they live in.

Property needs
Care & support needs
	The delivery of preventative housing solutions which enable households to live independently in the communities they prefer, reflects the policy shift away from institutional settings and congregate environments in Scotland, towards the delivery of practical care, support and assistance personalised to each individual. Individuals may require care and support at different points in their life, or not at all.
	
	There are a wide range of relevant care and support services available across Tayside to enable residents to live independently in their own housing setting. These are services generally unconnected with the forms of specialist housing outlined in previous templates. These services will include:
	
	• Property related interventions or assistance such as:
	    o Mobility aids and equipment
	    o Property adaptations
	    o Small repairs services including handypersons
	    o Care & Repair services including support to manage repair, maintenance or improvement works
	    o Telecare/Telehealth and community alarms
	
	• Care and support interventions or services such as:
	    o Self-directed support
	    o Home care workers
	    o Specialist support workers
	    o Carers
	    o Social workers
	    o Welfare Rights Advisors
	    o Housing/tenancy support workers

Suitable for	Households who require some form of support or care service to enable independent living at home could include: • Frailty • Dementia

	• Long-term illness, disease or condition • Mental health conditions • Physical disability • Learning disabilities • Neurological disorder • Developmental disorder • Drug/alcohol dependency • Multiple complex needs
Evidence	**Care at home services** Dundee City has the highest proportion of households where one or more member of the household are receiving care services at 15% of the City population. This is more than double the rate for Scotland at 7% In 2017, 33% of all care home clients in Tayside were located in Dundee (1,910 households) each receiving around 11 hours of care per client. This equates to roughly 12.9 clients per 1000 population, the highest level in the Tayside area. The top 3 services used to deliver independent living in Dundee are Social worker (34%), Community Alarm/Telecare (24%) and Self-Directed Support (21%). There were 13,070 unpaid carers in Dundee recorded by the 2011 Census, 8.9% of the population. This is equal to the proportion across Tayside (9.15%) and Scotland (9.3%). **Aids & adaptations** The Scottish House Condition Survey 2019 indicates 23,374 dwellings require adaptations in Dundee with a total of 71,000 properties already being adapted (33% of all homes in the Dundee area). The highest proportion of adapted properties is within social rented sector (48%). Furthermore, the HNDA survey confirms that 40% of households in Dundee have adaptations installed in their homes. The most popular housing adaptations currently fitted in homes in Dundee are Handrails (28%), level access showers (14%) and adapted bath/shower seats (16%). The Scottish Housing Regulator ARC shows that Dundee had 876 approved adaptation applications at the start of 2019/20 with 742 completions. The total cost of these adaptations was £1.3M. The Scottish Government Scheme of Assistance Grants provided 48 adaptations to households in private sector housing from 2014 to 2021 at a cost of £175,353. 25% of household in Dundee report an unmet need for housing adaptations, over 20,000 households. This is a significantly higher rate of unmet need for adaptation than the wider Tayside area (16.4%). **Telecare & Personal Care** The Social Care Survey 2017 indicates that there were 5,940 households in Dundee City receiving telecare services, the majority being age 75-84. This is well in excess of the number of households in Dundee receiving homecare services (1,570 households). **Self-directed support**

	Public Health Scotland, Social Care Insights Dashboard indicates that in 2018/19 there were 7,495 households opting for Option 3 Self-Directed Support in Dundee. The number of people choosing SDS has been increasing year on year since 2007. Key findings supporting the evidence on care and support for independent living is provided in Appendix L Specialist Provision Databook
Stakeholder consultation & engagement	Research and evidence building (including stakeholder engagement and consultation) across housing, health and social care partners has been instrumental in building the evidence required on the need for support to enable independent living across Dundee. This work is taken forward by the Housing Market Partnership in the Dundee area, to support the development and implementation of the Housing Contribution Statement. This work includes consultation, engagement and data-sharing to assess the needs of those who require independent living support. Key findings supporting the evidence on support for independent living is provided in Appendix L Specialist Provision Databook.

Table 6.4: Care & Support for Independent Living Requirements

6.6 Specialist/Site Provision Evidence

Site Provision	
National policies/strategies	**Gypsy/Travellers and Care** published in 2021 by the Equal Opportunities Committee (EOC) sets out that Gypsy/Travellers do not enjoy the benefits of universal health care. **Scottish Government (2020) Gypsy/Traveller accommodation needs: evidence review** **Improving Gypsy/Traveller Sites: Guidance on minimum site standards and site tenants' core rights** Thematic Report on Gypsy/Traveller Sites commissioned by the Scottish Housing Regulator **'Improving the Lives of Scotland's Gypsy/Travellers'** (2019) **The Planning Act (Scotland) 2019** sets out the need for planning authorities to embed stronger engagement with Gypsy/Travellers in local development planning as a statutory requirement. **Equality and Human Right's Commission's report Developing Successful Site Provision for Scotland's Gypsy/Traveller Communities** **Scottish Government (2019) Improving the Lives of Gypsy Traveller: 2019-21** **Scottish Government (2019) Gypsy/Traveller Sites in Scotland** **Scottish Government (2020) Gypsy/Travellers-accommodation needs: evidence review** **Housing to 2040** made a commitment to make available up to £20 million over five years for more and better Gypsy/Traveller accommodation from 2021-22
Local policies/strategies	**LHS Commitments to Gypsy/Travellers** The Dundee City Local Housing Strategy 2019-2024 sets out a number of ongoing improvement actions associated with Gypsy Traveller site provision in Balmuirwood site. The LHS notes there is no resident community of

	Travelling Showpeople with research carried out in 2016 indicating there was no evidence this group would consider relocation to Dundee.
Land needs	The HNDA should set out current need and demand for the provision of sites and pitches for both Gypsy/Travellers and Travelling Showpeople. Gypsy/Travellers are recognised as a distinct ethnic group by the Scottish Government. There is a large body of evidence, both in Scotland and in the UK, which shows a lack of access to culturally appropriate housing which is a major contributory factor in poor health, education and societal outcomes experienced by Gypsy/Travellers. As defined in the Scottish Government's Local Housing Strategy Guidance, the term Gypsy/Traveller refers to a range of distinct groups including Romanies, Scottish, Irish, English and Welsh Travellers, who regard the travelling lifestyle as part of their cultural and ethnic identity. Travelling Showpeople are not an ethnic minority and do not seek this status, however they do have a distinctive cultural and historic identity and are explicitly identified as a key client group in their own right, distinct from Gypsy/Travellers. **Land needs** Land need for both communities will include either permanent or temporary (transit) sites and pitches for caravans and mobile homes, with offer communal facilities and which are made available to meet the accommodation needs of Gypsy/Travellers and/or Travelling Showpeople. This will include sites suited for residential and yard storage/ maintenance areas, as well as ensuring appropriate access to the sites. Primary sites are likely to be public sector/local authority provision but could also include private sites and parks. The Scottish Government has published formal guidance on site and pitch standards, in terms of space, amenities and so on, and all landlords are required to ensure these are met in full. It should be noted that Gypsy/Travellers across Tayside do seek, or are required by circumstances to consider, permanent housing in mainstream homes which are delivered and accessed through allocation procedures. **Care and support needs** Gypsy/Travellers require the same access to a range of public services as the rest of the resident population, including health care and education. They may also require additional care and support to enable independent living in their community.
Suitable for	Gypsy/Travellers Travelling Showpeople
Evidence	**Dundee City Site Provision for Gypsy/Travellers:** In 2016, Angus had 125 Gypsy/Travellers and Travelling Showpeople with 50% living in settled housing. In 2021/22, there were 3 roadside encampments in Dundee. At present, there is no waiting list for the site at Balmuir Wood which has capacity for 14 pitches, 6 of which are double and 8 single. Occupancy over the past year has been approximately 25%. The most recent roadside encampment had 13 caravans and was sited at Balmuir Wood. The encampment included approx. 20 adults and 16 children. Prior to this there were two encampments in July at Riverside with

	around 7 caravans at each and an estimate of 15 adults and 10 children at each encampment. Only 47% of council sites for Gypsy/Travellers and Travelling Showpeople in Dundee were occupied in 2016, with 17 households leaving on average annually. Dundee has the highest rate of turnover on Gypsy/Traveller sites of all Tayplan areas with an average of 89% of households living on the site vacating each year. Weekly Pitch Rent in Dundee is approximately £10 cheaper than the average rent on a 2 bed council property at £62.53. The 2016 Tayplan study included a Housing Need & Demand Calculation specifically for the Gypsy/Traveller population. It concluded that over a 5 year period (taking into account existing and newly emerging need) in Dundee, there is anticipated to be a 55 to 65 surplus in Gypsy/Traveller site pitches across the next 5 years. **Travelling Showpeople** The 2019-24 LHS notes there is no resident community of Travelling Showpeople with research carried out in 2016 indicating there was no evidence this group would consider relocation to Dundee. Key findings supporting the evidence on site provision is provided in Appendix L Specialist Provision Databook.
Stakeholder consultation & engagement	In 2016, Tayside partners commissioned a research study into the 'Accommodation Needs of Gypsy/Travellers and Travelling Showpeople in the Tayplan area'. This study offers the most recent estimates of accommodation/site requirements for Gypsy/Travellers across the Tayside region. Tayside housing market partners await the publication of Supplementary Scottish Government guidance on Gypsy/Traveller Needs Assessment (scheduled under the 'More and Better Accommodation' element of the Gypsy/Traveller Action Plan in 2022) to guide the approach to updating this analysis.

Table 6.5: Tayside Site Provision Requirements

6.7 Core Output 3: Key Issues – Dundee City

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

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

Dundee HNDA: Core Output 3: Specialist Housing Provision	
LHS & Development Plan	Key Issues identified in the HNDA
Property needs	• **Accessible and adapted housing:** It is estimated that there are 3,969 units of specialist housing provided by

	social landlords in Dundee, representing 21% of all social tenancies. There are 666 units of accessible housing in Dundee accounting for 17% of all specialist provision in Dundee. 21.4% of waiting list applications across Dundee are for accessible housing. 39% of households currently have a special form of adaptation in their home, with handrails being most common. 26% (20,019) of households surveyed have an unmet need for adaptations, the highest of any Tayside partner. • **Wheelchair housing:** 7% of specialist homes in Dundee are fully wheelchair accessible. 1,555 of households surveyed have an unmet need for wheelchair accessible housing in Dundee. There are 32 applicants on the waiting list for Wheelchair accommodation in Dundee. Based on the last three years, the average annual turnover of wheelchair properties in the social housing sector in Dundee was 4.17. • **Non-permanent housing:** There are 309 temporary accommodation units in the Dundee area to meet the needs of homeless households. Most households live in hostel accommodation (32%), in supported housing (31%) or in dispersed accommodation (28%) with the remainder living in refuge/sanctuary accommodation (5%) or other (4%). There were 455 households in temporary accommodation across Dundee on 31st March 2021. The average total time spend in temporary accommodation in Dundee was 161 days in 2020/21, lower than the Scottish average (199 days). Dundee city has the highest proportion of homeless assessment decisions where they lost contact prior to assessment decision of all Tayside partner areas at 9%.
Care and support needs	• **Supported provision:** There were 1,098 total residents in care homes inclusive of long, short stay and respite patients in 2017 across Dundee, with the occupancy rate in care homes of 87%. • 2,953 of specialist homes provide housing for older people including sheltered housing. There were 34 care homes for adults across Dundee in 2017. • While there was no data supplied to evidence the unmet need for commissioned tenancies/spaces across Dundee, a prudent estimate is 211 to equal the current commissioned places (this assumption mirrors the future requirements relative to current provision estimates of all other Tayside partner areas). • **Care/support services for independent living:** In Dundee the proportion of households receiving care services is double the Scottish figure (7%) at 15%. In Dundee, those households residing in social housing (27%) are more likely to be in receipt of care services than any other tenure (owner occupied 11%). The total number of homecare clients in Dundee is 1,910 with a total of 20,200 hours of care provided, which amounts to around 11 hours of care per client on average. The top 3 social care services received by clients in Dundee are social worker (34%),

	Community Alarm/Telecare (24%) and Self-Directed Support (21%). • Almost 6,000 households across Dundee are supported to live independently as a result of using assistive technology (Telecare). 74% of telecare clients across Dundee are not currently receiving a homecare service.
Locational or land needs	• In 2016, Tayside partners commissioned a research study into the 'Accommodation Needs of Gypsy/Travellers and Travelling Showpeople in the Tayplan area'. This study offers the most recent estimates of accommodation/site requirements for Gypsy/Travellers across the Dundee City area. Tayside housing market partners await the publication of Supplementary Scottish Government guidance on Gypsy/Traveller Needs Assessment (scheduled under the 'More and Better Accommodation' element of the Gypsy/Traveller Action Plan in 2022) to guide the approach to updating this analysis. Key findings from the 2016-21 study for the Dundee City area are as follows: • **Site provision:** In 2016, 60% (125) of the Gypsy/Travellers and Travelling Showpeople in Dundee were residing in settled accommodation. Dundee has one Council site with a capacity of 19 pitches. In 2016, only 47% of council sites for Gypsy/Travellers and Travelling Showpeople in Dundee were occupied with 17 households leaving on average annually. • Dundee has the highest rate of turnover in site pitches of all Tayside areas with an average of 89% of households living on the site vacating each year. Weekly Pitch Rents in Dundee are approximately £10 cheaper than the average rent on a 2 bed council property at £62.53. • In Dundee, there was projected to be a 55 to 65 **surplus** in Gypsy/Traveller site pitches across the next 5 years as identified in the 2016 Gypsy/Traveller HNDA study

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

7 Core Output 4: Housing Stock Profile and Pressures

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

Core output 4 evidence should:

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

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

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

7.1 Core Output 4: Key Issues – Dundee City Housing Market Area

The assembly of Core Output 4 of the HNDA has provided Dundee City Housing Market Partners with a clear, evidence-based understanding of:

- key stock condition issues influencing the operation of the Dundee City housing system
- key housing stock pressures influencing the operation of the Dundee City housing system
- key stock profile issues influencing the operation of the Dundee City housing system.

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

Specialist Housing Requirements: Future Provision		
Accessible, adapted and wheelchair housing	• It is estimated that up to 7,500 households across Tayside may require a more accessible form housing such as accommodation without stairs • It is estimated that 1,500 may require wheelchair housing • It is estimated that 20,000 households across Dundee may require adaptations to their current home	2021 Tayside HNDA survey
Non-permanent housing	• There is no estimated requirement for student accommodation in Dundee • There is no estimated requirement for provision to meet current or former MOD personnel in Dundee	Local evidence
Supported housing	• It is estimated that roughly 4,000 households across Dundee may require housing for older people	• 2021 Tayside HNDA survey

	• 17% of the annual homeless population in Dundee (1,400) have complex support needs and may benefit from Housing First tenancies (240 Housing First tenancies) • 2% of the annual homeless population in Dundee (1,400) is estimated to require housing with support (28 supported tenancies) • There is a need for 210 commissioned tenancies/spaces for key care groups.	• Local evidence

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

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

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

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

Dundee HNDA: Core Output 4: Housing Stock Profile & Pressures	
LHS & Development Plan	Key Issues identified in the HNDA
Housing (condition) quality	• **Occupation profile**: In Dundee, 4% of dwellings are vacant as of September 2019, which is greater than the national picture (3%). In addition, Dundee makes up the largest proportion, (30%) of the vacant dwellings in the Tayside region. 71% of the dwellings with occupied exemptions across Tayside are found in Dundee. 8% of dwellings in Dundee have occupied exemptions, higher than any other Tayside area. In Dundee the proportion of dwellings with a single adult discount is greater than all other partner areas at 44%. • **Tenure profile**: According to the HNDA Survey outcomes, 50% of households owned their property in the Dundee area, the lowest proportion of all Tayside partners. This is broadly in line with other data sources such as 2011 census (50%), 2019 Scottish Government Housing Statistics (45%) and 2017-19 Scottish House Condition survey (46%). Dundee has a higher percentage of private renting (survey - 15%) than the Scottish average (c12% depending on data source). The survey also indicates that Dundee has the highest proportion of householders renting social housing than any other partner area at 33%.

	• **Dwelling type and size:** The HNDA survey outcomes suggest 46% of dwellings in Dundee are flats/tenements, the highest proportion of all Tayside partners, with houses/bungalows accounting for just over half (53%) of dwelling types. The survey also highlights that across Dundee, 2 and 3 bedroom properties account for 75% of all dwellings (44%). • Dundee has approximately 17,000 social housing properties, with 55% being flats and 23% being houses and 80% of social housing properties in the Dundee area have 2 bedrooms or fewer. Dundee City has almost half (45%) of the number of registered PRS properties across the Tayside partner areas at 15,531 from a total of 34,331. Dundee has the most registered HMO's relative to other Tayside partner areas at 1,434, with 60% having between 3 and 4 occupants • Dundee City is the most densely populated Tayside partner area with 25.84 dwellings per hectare.
Size, type, tenure and location of future social housing supply	• **Dwelling type and size**: According to Scottish Government Statistics, in 2017, 55% dwellings in Dundee had up to 3 rooms, with (45%) offering 4+ rooms per dwelling. This dwelling size profile has remained static since 2007 and echoes with Census outcomes in 2001 • The 2021 survey results indicate that across Dundee, 54% of homes offer 1-2 bedrooms, with 44% offering 3-4 bedrooms • The 2021 survey results indicate that this bedroom size profile varies significantly by housing tenure with the owner occupied sector offering a greater proportion of larger homes. In the owner occupied sector, 47% offer 1-2 bedrooms, with the majority (53%) offering 3+ bedrooms. • In contrast in the social housing sector, a significantly higher proportion of homes have 1-2 bedrooms (82%) with fewer 4+ bedroom dwellings (3%). • Whilst 45% of homes across Dundee offer 4+ bedrooms, the house size profile in the social housing sector will restrict the available housing options of larger household types. The growing population of smaller and single person households across Dundee also raises questions over a growing mismatch of households to homes by property size • According to the 2021 HNDA survey, 53% of all dwellings are houses across Dundee, with 46% flats. • The Scottish Household Survey 2019 indicates that there is a much higher proportion of houses in the owner occupied sector (80%) than flats (20%). • There are more flats (68%) than houses (32%) in the social housing sector which is similar to PRS where there are 87% flats and 13% houses • There are 1,434 registered HMOs in Dundee, the majority (464) have 3 occupants • **Property condition:** 1% of dwellings in Dundee are considered to be Below the Tolerable Standard (BTS). Over one third (35% of dwellings in Dundee are in urgent disrepair and almost half (48%) of pre 1945 dwellings have evidence of urgent disrepair, the highest proportion of all Tayside partners. Almost 9 in 10 (88%) of Dundee's dwelling have evidence of

	disrepair, the highest of all Tayside partners and 17% higher than the Scottish average (71%). Dwellings with evidence of condensation in Dundee (16%) is double the rate of the Scottish average (8%). • 31% of properties within Dundee experience some form of fuel poverty, the highest of all Tayside partners and greater than the Scottish average (24%). Tenants in social (41%) or private rented accommodation (42%) and twice as likely to be fuel poor than owner occupied properties (20%). • Across Dundee social rented stock, 97% of properties met SHQS and 89% of properties met EESSH as of March 2021.
Housing stock pressures	• **Stock pressures**: As per CHMA estimates 2% of Dundee households are overcrowded but there are no concealed households in Dundee. The majority of respondents to the HNDA Survey stated that they do not share household amenities with anyone (94%) or have overcrowding issues (80%). However around 12,200 said they had one or two fewer bedrooms than needed compared to around 6,800 who had one or two too many bedrooms. • On average 10% of social rented properties with Dundee have turned over in the last three years. Across Dundee there are 7,499 waiting list applicants, which equates to 3.68 applicants to every available property. The main reason for housing applications in Dundee is applicants with a medical condition who require alternative housing. • **Future Supply:** The projected SHIP completions between 2021 and 2026 are estimated at 1,295 across Dundee. The 5 year effective land supply per the Dundee LDP equates to 3,392 units. The total historic house completions over 2010-19 varies depending on source with MATLHR data estimating 2,377 for Dundee and local data estimating a higher figure at 3,003. • 128 demolitions are programmed in the Dundee area. • **In-situ solutions**: Dundee has the highest level of older households living in dwellings with adaptations across Tayside at 39%. Of the HNDA survey respondents, Dundee had the highest proportion of homes with property adaptations at 39%. In Dundee, the most common adaptation fitted is handrails at 28.3%. Dundee's average landlord time to complete adaptations is 15 days, the highest of all Tayside partners. Dundee City Council fund 100% of adaptations through their own provisions whereas RSLs in the area fund 7% of their total adaptations spend with the remainder being grant funded. • 25% of survey respondents from Dundee reported unmet need in relation to housing adaptations, the highest proportion of Tayside partners. • Analysis of Dundee's housing stock profile and pressures identifies a range of factors contributing to housing needs. Across Dundee, there is potential for stock management approaches to be implemented to address housing need which maximise the use of existing housing assets. These 'in-situ' solutions offer a variety of approaches and opportunities

	which could be considered by partners across Dundee, including: • **Adaptations:** The Scottish Housing Condition Survey 2019 indicates that 33% of all properties have been adapted with 48% social housing tenants having adaptations in their home. Of those surveyed in 2021, 39% have special forms of adaptation. 25% of survey respondents confirmed that they had unmet demand for housing adaptations amounting to 20,019 households. Most people reporting unmet need for adaptations in Dundee City are level access shower (6%) followed by bath/shower sear 4% and then handrails. The most common singular adaptation is level access showers. In 2019/20 £1.3m was spent by social landlords on adaptations with £803k being funded by landlords and the remainder from grants or other funding sources. • **Technology Enabled Care:** Over 5,900 households across Dundee are supported to live independently as a result of using assistive technology (Telecare). Increasing investment in technology enabled care as well as other support for independent living will enable households to live well in the community they choose (detailed in Core Output 3, Chapter 6). This approach could enable Dundee to meet the needs of a growing population of older people, as well as young people with complex needs without the need for new specialist housing provision • **Housing allocations:** 15.9% of households currently registered on social housing waiting lists across Dundee (1,193) are overcrowded. Housing allocations policies across each partner area are designed to make best use of existing stock by awarding points to applicants who are overcrowded, under-occupying, or sharing facilities with another household; as well as those with a range of other defined needs. Incentives to encourage movement across the housing stock including encouraging under-occupiers to downsize could make a meaningful contribution to addressing housing need • **Housing condition and repair:** 35% of all homes across Dundee show evidence of urgent disrepair. Mechanisms to support property maintenance and improvement, including funding and support to private homeowners via the Scheme of Assistance, are likely to have a major role in maximising the effectiveness of existing stock and helping to alleviate some aspects of housing need including fuel poverty • **Empty Homes:** 4.0% of all dwellings across Dundee are currently classified as empty (3,031 properties). 1.6% of all dwellings are long-term empty homes. Investing in long term empty properties not only increases the supply of local housing but improves condition of housing stock and helps to regenerate communities. Continued investment in bringing empty homes back into use could make a positive contribution to meeting housing across Dundee. • **Second homes and holidays lets:** Options for future policy around the 365 second homes in Dundee could also be considered by partners aligned to new powers to license

	regulate and control short terms lets in areas of identified housing pressure
Sustaining Communities	• **Support for Private Owners:** The Council promotes and encourages best use of existing private sector stock via a range of empty home initiatives (including advice and assistance; loan and grant funding) to bring these homes back into use. Properties in poor condition also remain a focus, ensuring owners are assisted to help their properties meet the tolerable standard and are in a habitable condition contributing to the supply of effective housing stock. • **Strategic Investment:** The Council will consider the purchase of suitable, open-market properties to meet the City's general social housing needs, which includes the housing requirements of extended families, and people with particular needs. This option will also be considered in the delivery of Dundee's Rapid Rehousing Transition Plan. • **Utilising existing stock differently:** The Council actively contributes to sustaining local communities via improving and increasing local stock, whether this be wholesale regeneration, stock restructuring or building acquisition and repurposing. • **Tenure Diversification (including demand for intermediate housing):** The Council actively seeks to improve the structure of local housing markets through the (assisted) provision of intermediate housing products, e.g. mid-market rent; shared equity; & low cost home ownership options. • **Regeneration Proposals Deal:** Dundee City Council is accelerating the preparation of a long-term City Centre Strategic Investment Plan (CCSIP). This plan will identify opportunities for housing development within the City Centre. As such, we will prioritise development opportunities for the Affordable Housing Investment Plan in future years.

Table 7.1: 2021 Dundee City HNDA Key Issues - Core Output 2 Housing Stock Profile and Pressures

8 Stakeholder Engagement & Consultation

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

To ensure external stakeholders have had meaningful opportunities to engage in the HNDA process, two major stakeholder engagement events were held on 25th May 2021 and 10th December 2021. As a result of Government Guidance on Covid19, both events were held in a virtual environment using interactive consultation techniques to encourage stakeholder participation and engagement.

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

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

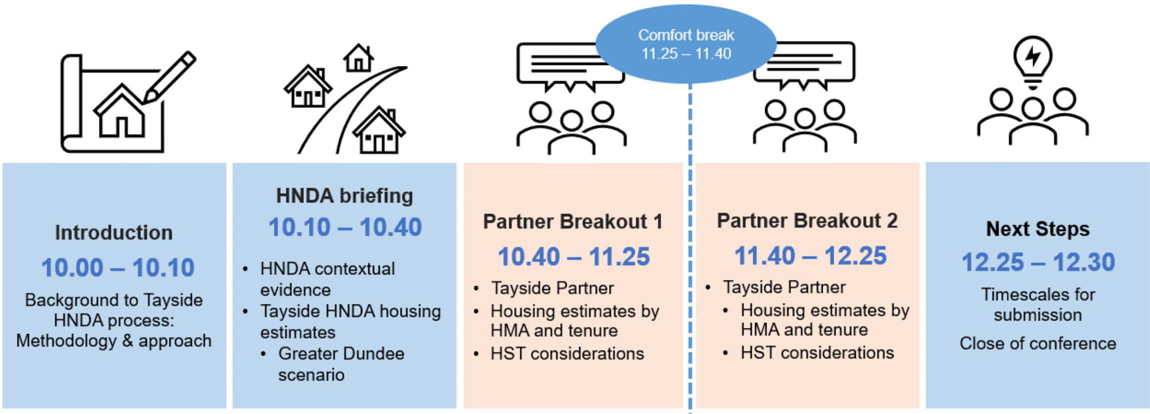
The second stakeholder engagement conference was held on the 10th December 2021 providing external stakeholders with a meaningful opportunity to scrutinse HNDA evidence and validate final HNDA housing estimates by sub-area and tenure. A total of 54 partners and stakeholders attended the event.

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

8.1 Dundee City HNDA Stakeholder Engagement Workshops

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

[1] Minimum All Tenure Housing Land Requirement



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

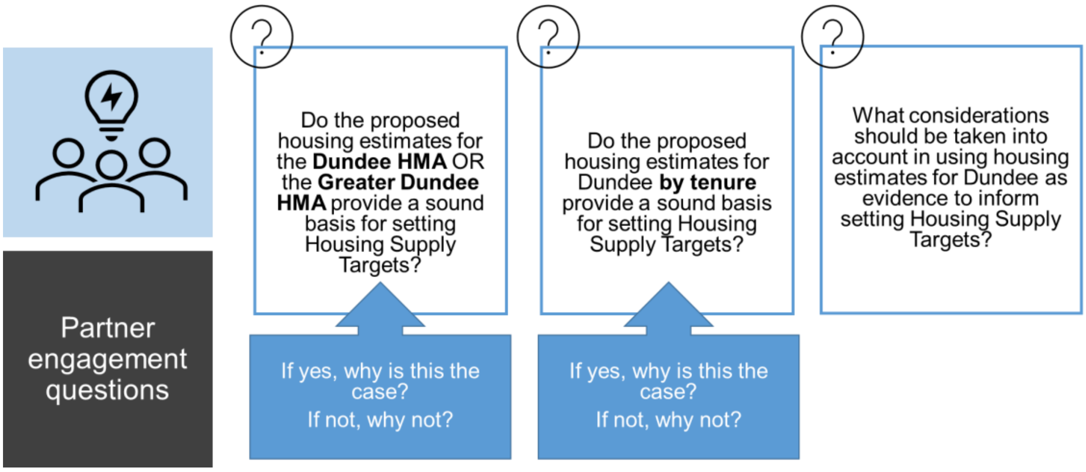
A total of 24 partners from 12 stakeholder organisations attended the Dundee City Council sessions, including representatives from the following organisations:

- Abertay HA
- Angus HA
- Angus Council
- Campion Homes
- DJ Laing Homes Limited
- Dundee City Council
- Fife Council
- Frontline Fife
- Hillcrest Homes
- Homes for Scotland
- Ogilvie Homes
- Persimmon Homes
- Perth & Kinross Council
- Sanctuary Housing
- Stewart Milne.

The objectives for the breakout session were to:

- share and discuss housing estimates for Dundee by sub market area
- share and discuss housing estimates for Dundee by tenure
- discuss further considerations that should be taken into account when using housing estimates to inform housing supply targets in Dundee.

During the interactive breakout session, delegates were asked to give their views on the following three questions:



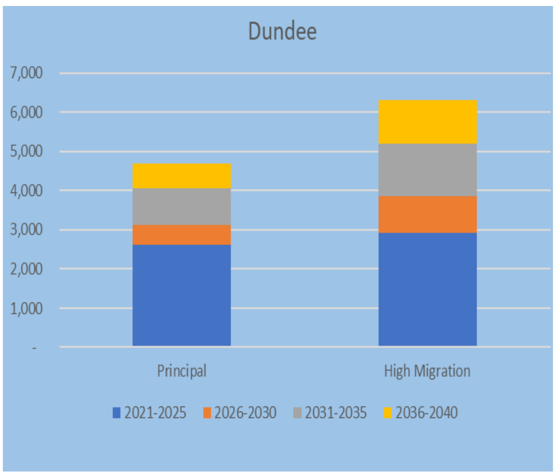
An interactive whiteboard was used at each of the sessions to record the views and opinions of stakeholders.

8.2 Housing Estimates by Submarket Area: Consultation Feedback

The following information in relation to Dundee housing estimates (including the Greater Dundee HMA calculation) was shared with stakeholders:

Tayside Housing Need & Demand Assessment Calculation

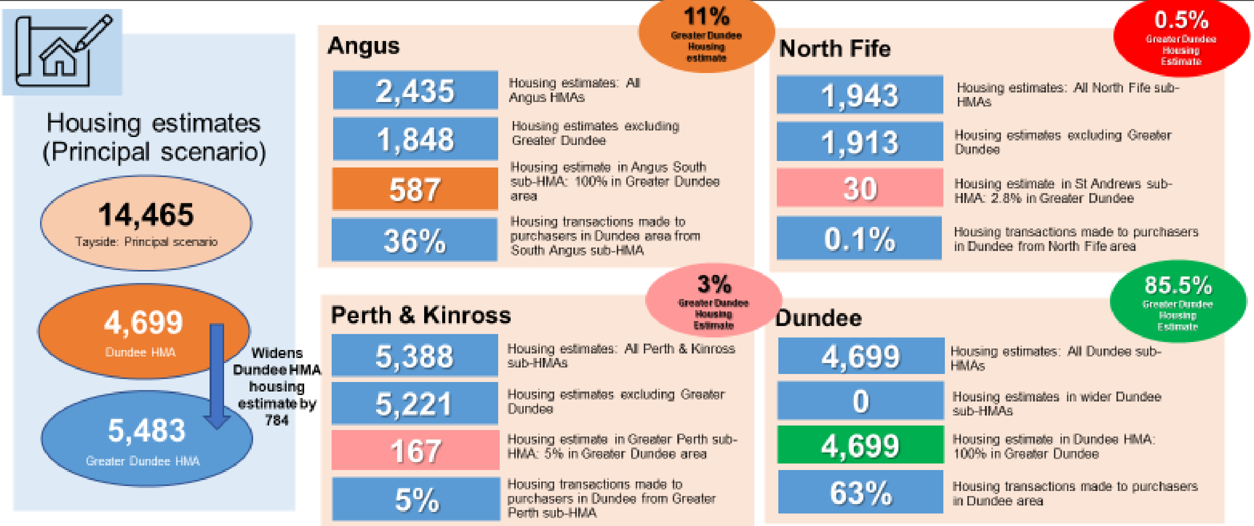
Dundee City/Greater Dundee Housing Estimates



Dundee	Principal	High Migration
2021-2025	2,607	2,912
2026-2030	524	937
2031-2035	920	1,357
2036-2040	648	1,104
Total	**4,699**	**6,310**
Average per annum	**235**	**316**

Housing Need & Demand Assessment Calculation

HNDA Housing Estimates: Greater Dundee (Principal Scenario)



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

Do the proposed housing estimates for the **Dundee HMA** OR the **Greater Dundee HMA** provide a sound basis for setting Housing Supply Targets?

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

Given that the Dundee Housing Market is not split into a series of sub-areas, stakeholders firstly reflected on whether the overall housing estimates for the City offered a reasonable starting point for housing and land use policy.

Generally, stakeholders were satisfied that housing estimates in the range of 4,700 – 6,300 offered a good starting point for setting future Housing Supply Targets. The estimates benchmark well to the equivalent 10-year MATHLR estimates set for NPF4 (5,200) and also compare well to historic completion rates (between 3,000 – 4,000 per decade). It was suggested however, that housing estimates should focus on future vision and NOT on historic delivery, particularly when housing completions in Dundee have been constrained by the volume of brownfield sites in the land supply.

"The estimates are comparable to previous completions but we need to think about future NOT historic delivery. We need to address the infrastructure constraints on available sites as this is restricting current delivery and will be distorting historic figures".

Stakeholders also agreed that a breakdown of housing estimates into sub-areas of the City would be helpful in guiding delivery planning, ensuring that planners and developers create the capacity to build the profile of housing most capable of meeting current and future need. Because of the focus on brownfield development in the City, it has encouraged a delivery profile which is denser and more flatted than elsewhere. As result, stakeholders agreed there was a need to disaggregate the extent and nature of housing need across different parts of the City to ensure that developers build homes and create places that are diverse and sustainable by tenure, house type and property size.

"We really need to understand the dynamics of what's needed in different parts of the City".

Stakeholders also responded to the question of whether housing and land-use policy should focus on the Dundee City boundary or on the functional market area associated with the Greater Dundee HMA.

It was noted that the Greater Dundee HMA has been the historic basis for development planning and in particular, the South Angus HMA has been aligned and integrated into the City's delivery plans. Planning policy through the decades has encouraged this connectedness and stakeholders were unanimously of the opinion of the need to continue on this basis, creating a coherent spatial policy across a wider area, both as a mechanism to address development constraints but as the basis to tackle new planning, housing system and infrastructure challenges:

"Planning policy at a regional level is essential to manage the scale of constraints and challenges we are facing. Huge challenges like developing a coherent approach to climate change necessitates collaboration at a regional level"

"In the past we had TAYplan to coordinate our planning process to ensure that all partners made a contribution to meeting need from Dundee. We need to find the right mechanisms to plan for the changes in our housing system and meet ambitions in NPF4 on infrastructure first. We can't do this on a partner by partner basis - we need to take a collective approach"

"We definitely do have land constraints in terms of the City boundary and an overreliance on brownfield development sites (we don't really have green belt sites). This makes infrastructure constraints more of a challenge and also means collaboration with wider partners to meet housing need across boundaries is essential".

As well as the need for coherent and collaborative approaches to planning and housing delivery, stakeholders agreed that focus on the Greater Dundee HMA boundary reflects consumer behaviours and the changing nature of the housing system resulting from the Covid-19 pandemic. It was agreed that local authority boundaries are administrative and political and don't reflect household behaviours, needs or preferences. It's therefore important that functional housing market areas are considered as the basis of delivery planning.

"Behavioural boundaries matter not administrative. But behaviour is changing and we need we be proactive in tracking this. Collaborative working to meet housing need is key, responding to shifts in household behaviours"

It was suggested that wider, peripheral boundaries around transport links should be used as the basis of planning to better reflect where people live, work or would consider moving. In a post Covid context, both housing and planning processes will need to be more agile and collaborative and wider partnerships will be key to achieving this. Furthermore, the scale of future challenges such as tackling climate change or achieving 20-minute communities will necessitate a consistent regional approach.

"Whilst households in market housing are moving out of the City, the mobility of households in social housing is very limited. It's simply not possible to move from one area to another because you want to change the way you live your life. We can only change that by working together and having joint policies on meeting housing need"

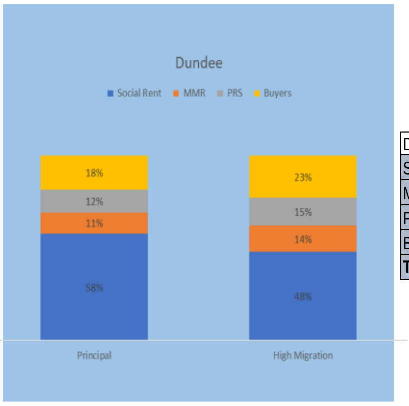
"Our collaboration should not be too dominated with reacting to the impacts of Covid. This needs to be overridden by tackling huge issues like creating homes and places which address climate change"

8.3 Housing Estimates by Tenure: Consultation Feedback

The following HNDA calculation outcomes detailing housing estimates by tenure were shared with stakeholders:

Tayside Housing Need & Demand Assessment Calculation

Dundee City Housing Estimates by Tenure



Dundee	Principal	High Migration	Principal	High Migration
Social Rent	2,718	3,028	**58%**	**48%**
MMR	535	887	**11%**	**14%**
PRS	579	958	**12%**	**15%**
Buyers	868	1,437	**18%**	**23%**
Total	**4,699**	**6,310**	100%	100%

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

Do the proposed housing estimates for Dundee City **by tenure** provide a sound basis for setting Housing Supply Targets?

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

Stakeholders considered the tenure profile associated with housing estimates and agreed that the disproportionally high requirement for social housing feels accurate[2].

"I'm not surprised at these figures - this is the nature of the Dundee. The City has been trying to redress the tenure balance for a long time"

Stakeholders also agreed that improving housing quality and affordability was central to the City's ambition to tackle poverty and continue the pace of economic regeneration activity achieved in recent years. Housing-led regeneration driven by investment in social housing offers a delivery framework for ongoing change.

Whilst stakeholders were satisfied that the HNDA methodology has been applied accurately and that tenure estimates were credible based on the Scottish Government's toolkit, questions over the deliverability of the outcomes by tenure dominated the debate.

"You have to question whether delivering these housing estimates by tenure offers a realistic starting point for future policy? Will we have the funding available to deliver the scale of social housing estimated? Does the PRS in Dundee really have the capacity to grow and absorb the need for market rent housing? Delivery factors need to be carefully considered in making policy judgements around housing supply and land allocation".

Stakeholders also questioned the deliverability of these tenure estimates given the significant number of brownfield sites in the Dundee land supply. Ensuring that sites are effective and

[2] (Dundee requires 50-60% of future homes to deliver social housing sector whilst in Tayside 40-50% is required)

economic to develop will inevitably have an impact on whether affordable housing tenures are financially deliverable.

It's also essential that sites for housing can deliver the right tenure blend in areas where people want to live. Brownfield development often encourages the delivery of developments which are denser than on green belt land. Whilst increasing density is an ambition of the new national planning framework, consumer preferences are shifting with many households looking to leave city centre environments following experiences of lockdown. Planning policy needs to be agile enough to consider changing consumer drivers, particularly in the context of rethinking city centres.

"The nature of the Dundee land supply is a big factor in tenure delivery decisions. The density of social housing is essential in delivering sustainable communities and places. We need to avoid the over development of dense flatted developments on brownfield sites to avoid creating future ghettos. We need to make sure we can deliver sustainable places".

"Moving forward - the approach to city centre planning is changing, bringing with it both challenges and opportunities. We need to rethink city centres and certainly more residential dwellings should be a part of that. But we need to think about infrastructure, access to jobs and green spaces as part of a wider master planning approach".

Reflecting on these points, again stakeholders agreed that it is essential that the dynamics of housing need by area, property size and property type is fully understood to ensure we deliver effective tenure solutions. It was agreed that housing and land use planning decisions need to consider national policy ambitions but balance them with an understanding of consumer drivers so that developers can tailor delivery solutions to what people want and need. To achieve this, ongoing analysis of the housing system is essential so that planners and developers can focus on the right tenure solutions.

"NPF4 sets out high ambitions in term of delivery planning and realistically, we need to transition towards new planning priorities at the right pace. We're also undoubtedly in a period of change and uncertainty. We need to find new solutions to new challenges".

8.4 Further considerations: Consultation Feedback

For the final question stakeholders were asked:

What considerations should be taken into account in using housing estimates for Dundee as evidence to inform setting Housing Supply Targets and Housing Land Requirements?

Stakeholders were asked to identify their preferred starting point for housing estimates in Dundee based on the two scenarios presented (principal and high migration). Almost unanimously, stakeholders would opt to use the high migration scenario as the starting point for housing and land-use policy. Whilst one stakeholders supported a more cautious approach, it was agreed an ambitious approach to finalising HNDA housing estimates should be pursued.

"Whilst the MATHLR calculation used the principal principle, our longer term planning figures should be more ambitious - maybe somewhere between principal and high migration?"

Stakeholders agreed that the scale of ambition for the Dundee economy needs to be matched by similar ambition for housing delivery. Whilst this ambition needs to be a continued driver in policy decisions, it needs to reflect the uncertainty of the current economic outlook and the changing nature of the housing system.

"Are we being ambitious? If John Alexander was speaking in this group he would say no! We're in the midst of a very ambitious programme for change in Dundee and we need a housing delivery

strategy that is equally ambitious – one that looks forward not plans for what we've achieved in the past".

"We're in the midst of a programme of change in Dundee - as a starting point we need to remember this ambition in our policy decisions".

"Yes, we need to reflect the wider ambition for Dundee BUT we also need to be realistic, we need to make sure our policy decision are informed by a good understanding of the housing market drivers in a post Covid housing system and in the changing delivery context that NPF4 sets".

There was strong stakeholder consensus that Dundee is in the midst of a programme of change and in using housing estimates as a starting point for LHS and LDP policy decisions, we need to remember that target ambition for the City. However, stakeholders agreed that within this ambition, policies must prioritise building the right profile of housing to meet local need by sub-area, property type and by tenure. To achieve this, it's crucial the plan-led system aligns housing delivery to investment in economic and social infrastructure.

"Having ambition is important as the City is changing. We need a clear housing focus within a mixed use city centre strategy. To do this, we think about investment in both social and economic infrastructure"

"Yes, we should aim to be ambitious and this is a good point to take stock when there's been such structural change in the housing system. But ambitions need to be balanced with deliverability concerns and we need the right social and economic infrastructure to really make this work. As well as housing we need to think about schools, green spaces etc".

Finally, it was suggested that given the constraints associated with the Dundee land supply, we should aim for housing estimates which apply an uplift to give developers more flexibility in bringing forward sites. This approach would ensure that deliverability is not compromised by the constraints of brownfield land.

Whilst opting for a high migration scenario will offer housing estimates which help to address deliverability challenges, an ongoing focus on investing in site infrastructure cannot be forgotten. It was agreed that developing an infrastructure investment plan will need coordination at a regional level and that Tayside partners should work together to engage utility providers and infrastructure planners.

"Deliverability is key - we now need to look at deliverability and infrastructure. The City can't do this on its own. We need to have a wider, regional focus".