



Powys County Council
Local Housing Market Assessment
2022 - 2037
Draft
May 2024

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2. Preface

Every five years, a local authority is required to rewrite their Local Housing Market Assessment (LHMA). A refresh of their LHMA is required once during that five-year period, between years two and three. They can refresh their LHMA more frequently if required, but these would not be reviewed nor signed off by Welsh Government. This LHMA 2022-2037 is a rewrite for Powys. The previous LHMA covered the period 2018-2033.

The LHMA sets out the estimated housing need for Powys for the 15-year period 2022-2037. The LHMA forms part of the evidence base for both Powys and Bannau Brycheiniog (Brecon Beacons) planning authorities. The assessment is a key consideration in determining the amount of market and affordable housing required, and the location of housing growth in their development plans.

Welsh Government provides guidance on undertaking Local Housing Market Assessments and a LHMA Tool that need to be used to complete the assessment. Both the guidance and the tool are published on the Welsh Government website and can be accessed via this link <https://gov.wales/local-housing-market-assessment-lhma-guidance-local-authorities>.

If Census data is used the year when the Census took place is included. Data used in this assessment is published by the Office for National Statistics.¹

¹ These are links to the ONS Census data; Census 2021 <https://www.ons.gov.uk/census>;
Census 2011 <https://www.ons.gov.uk/census/2011census>;
Census 2001 <https://www.ons.gov.uk/census/2001censusandearlier>

3. Key findings and summary

Housing market areas

This assessment defines thirteen housing market areas. For each area, the estimated housing need has been calculated, using the Local Housing Market Assessment Tool (LHMA Tool) provided by Welsh Government. The areas are the same as the Locality Areas which are based around the main market towns (some are grouped together).

To understand more about the Powys geographical areas please visit our interactive report in our [Well-being Information Bank](#). Geography information is in the [Demographics theme](#), specifically the [Powys Geography report](#).

Household projections

Welsh Government household projections, together with existing unmet need for affordable housing, are essential to estimate additional need. Welsh Government has published six different household projections, based on different assumptions.² This LHMA uses the higher variant as the most likely variant to happen. Estimated additional need is also estimated for three other variants, to provide better understanding how a change to the selected household projections impacts the additional housing need estimates.

Table 1 - Welsh Government 2018-based household projections by variant for Powys 2022-2037. The estimated number of households in 2018 is 59,664 households for all variants.

Variant	Households in 2022	Households in 2037	Change in number of households
Zero migration variant	59,293	55,303	- 3,990
Lower variant	60,198	60,174	- 24
Ten year average migration variant	60,325	61,653	+ 1,328
Principal variant	60,323	61,840	+ 1,517
Higher variant (used in LHMA)	60,427	63,171	+ 2,744
Fifteen year average migration variant	60,906	63,917	+ 3,011

Powys has an ageing population. The number of deaths is larger than the number of births. Without inward migration from other parts of the UK, there would be a population decline in Powys. Census 2021 data shows 71 % of households in Powys consist of one or two persons. The average household size is slowly decreasing.

Existing need for affordable housing

The existing housing need is measured by the number of households registered on the Common Housing Register called "Homes in Powys". The register is used to allocate all social rented housing in Powys. Only households that are assessed as in housing need

² This is a link to the household projection

<https://statswales.gov.wales/Catalogue/Housing/Households/Projections/Local-Authority/2018-based>

and ready to move are counted. This accounts for social rented housing. For this assessment, the number of households in need of social rent is 2,378 (March 2023). This includes households who get support from the council because they are homeless.

In addition, the households registered on the Tai Teg register have been counted. This accounts for intermediate affordable housing, not being social rented housing. For this assessment, the number of households is 106 (March 2023). It is likely there is a hidden need for low-cost home ownership and other intermediate affordable tenures.

Reletting and committed supply of affordable housing

Based on previous years, the number of future reletting of social housing is estimated. For this assessment, the number is 559 per year. The committed supply of additional affordable dwellings is also used. For this assessment, the number that is used is 75 new social rent homes per year and 31 low-cost home ownership each year. The numbers are based on the Programme Delivery Plan using Social Housing Grant and figures provided by both planning authorities for private sector development that need to include affordable homes. Both reletting and additional supply have been deducted from the existing unmet need.

Calculating estimates

The used household projection estimates an average increase of 184 households per year between 2022 and 2037.

The LHMA Tool calculates housing need for the first five years, 2022 to 2027, on the basis that all unmet need is met within the first five years. The LHMA Tool does not consider existing unmet need and committed supply for market housing.

For the remaining ten years, 2027 to 2037, the LHMA Tool uses the household projections to estimate housing need.

Summary tables

Tables 2, 3 and 4 show the estimated newly arising need, existing unmet need, estimated reletting and committed additional supply.

Table 2 - LHMA Tool outcome for the 2018-based household projection higher variant: estimated average annual number of households who have a newly arising need, by tenure, 2022-2037.

Total annual newly arising need	184	100%
Consisting of:		
Market rent	90	49%
Market owner occupier	29	16%
Affordable intermediate rent / LCHO*	21	11%
Affordable social rent	44	24%

* Low Cost Home Ownership

Table 3 - Number of households with an existing unmet need for affordable housing, average per year, 2022-2027. Unmet need as recorded on 1 March 2023 on Common Housing Register and Tai Teg register, divided by 5 years.

Total existing unmet need	497
Consisting of:	
Affordable intermediate rent	5
Affordable LCHO	16
Affordable social rent	476

Table 4 – Estimated average annual reletting and known committed supply for affordable housing, 2022-2027.

Total reletting and committed supply	665
Estimated reletting social rent	559
Committed supply social housing	75
Committed supply low cost home ownership	31

The overall number of estimated reletting cannot be deducted from the existing need, because the LHMA Tool takes into account the number of bedrooms required and reletting by housing market area.

The LHMA Tool requires key assumptions to be set. These assumptions can influence the estimates of needed tenure, but not the overall estimate of need. For this assessment, the default options have been used.

Table 5 shows a summary of the estimated number of households in housing need for Powys. The LHMA Tool has calculated an estimate of almost 3,000 households that need additional housing in the period 2022-2037. It is estimated that around 2,400 households are requiring housing in the Powys Local Planning Authority area and around 600 households in the Bannau Brycheiniog National Park Planning Authority (NPPA) area within Powys. This is a split of roughly 80% of the total estimated additional need in the Powys LPA and 20% in the Bannau Brycheiniog NPPA.

The estimated tenure split for the 15-year period 2022-2037 is 40% affordable and 60% market.

Table 5 - LHMA Tool outcome for the 2018-based household projection higher variant: estimated number of households in housing need by housing market area in Powys, 2022-2037. Figures may not sum due to rounding

HMA	Total affordable	Social rented	Inter-mediate	Total market	Owner occupier	Market rent	Total all need
Brecon	183	150	34	180	44	136	364
Builth and Llanwrtyd	64	54	10	103	21	82	167
Crickhowell	59	36	23	87	16	72	147
Hay and Talgarth	76	39	38	112	21	91	189
Knighton and Presteigne	89	66	23	137	26	111	226
Llandrindod and Rhayader	67	38	29	201	44	157	268
Llanfair Caereinion	61	46	15	76	20	56	136
Llanfyllin	79	48	30	118	26	92	197
Llanidloes	43	26	17	90	24	67	134
Machynlleth	56	37	19	85	20	65	141
Newtown	109	74	35	230	66	163	339
Welshpool and Montgomery	193	112	81	234	66	169	427
Ystradgynlais	114	93	20	132	49	83	245
Powys	1,193	820	374	1,785	441	1,344	2,978

Table 6 shows estimates of the number of bedrooms per dwelling that the households in need of social rented housing will require.

Table 6 - LHMA Tool outcome for the 2018-based household projection higher variant: estimated number of households in housing need for social rented housing by number of required bedrooms for social rent, 2022-2037, Powys County Council area. Figures do not sum

1 bedroom	2 bedrooms	3 bedrooms	4 or more bedrooms	total social rent
485	176	50	109	820
59%	21%	6%	13%	100%

4. Policy background

National Policy Background

Section 8 of the Housing Act 1985³ places a statutory duty on local authorities to periodically assess the level of housing need in their area. It is vital that authorities have a comprehensive understanding of their local housing market(s) and provide a robust evidence base for effective strategic housing and planning services. Production of a Local Housing Market Assessment (LHMA) falls under this duty, building upon the requirement to review housing needs through a more holistic review of the whole housing market. Local authorities are expected to rewrite LHMA's every five years and refresh that LHMA once during that five-year period (between years two and three) utilising section 87 of the Local Government Act 2003.

The **Independent Review of Affordable Housing Supply 2019**⁴ underlines the importance of LHMA's and using the best possible data on housing need and demand to inform housing policy and decisions regarding affordable housing supply. The Review placed significant emphasis on understanding exactly how many homes are needed, in which geographical areas and in what tenures. A robust LHMA is the key means of identifying this evidence at the local level.

Planning Policy Wales⁵ also stresses that LHMA's form a fundamental part of the evidence base for development plans.

Future Wales, The National Plan 2040⁶ also refers to LHMA's as part of the evidence base for Strategic and Local Development Plans.

Part 2 Chapter 1 of The Housing (Wales) Act 2014⁷ places a duty on local authorities to develop a homelessness strategy every four years under sections 50, 51 and 52. The LHMA plays a fundamental role in informing this strategy which must include a review of the resources available to the local authority and other bodies associated with supporting people who are or may become homeless.

The Equality Act 2010⁸ makes it essential for local authorities to consider their equality duties under the Act and the Welsh Public Sector Equality Duties described in **The Equality Act 2010 (Statutory Duties) (Wales) Regulations 2011**⁹.

³ This is a link to Section 8 of the Housing Act 1985 <https://www.legislation.gov.uk/ukpga/1985/68/section/8>

⁴ This is a link to the Independent Review of Affordable Housing Supply https://gov.wales/sites/default/files/publications/2019-04/independent-review-of-affordable-housing-supply-report_0.pdf

⁵ This is a link to Planning Policy Wales <https://www.gov.wales/planning-policy-wales>

⁶ This is a link to Future Wales The National Plan 2040 <https://www.gov.wales/sites/default/files/publications/2021-02/future-wales-the-national-plan-2040.pdf>

⁷ This is a link to Part 2 Chapter 1 of The Housing (Wales) Act 2014 <https://www.legislation.gov.uk/anaw/2014/7/part/2/chapter/1>

⁸ This is a link to the Equality Act 2010 <https://www.legislation.gov.uk/ukpga/2010/15/contents>

⁹ This is a link to The Equality Act 2010 (Statutory Duties) (Wales) Regulations 2011 <https://www.legislation.gov.uk/wsi/2011/1064/contents>

Local Policy Background

This LHMA can be used as evidence to inform plans and strategies for the future of Powys. This includes:

- Powys Replacement Local Development Plan¹⁰
- Bannau Brycheiniog Local Development Plan 2¹¹
- Housing Strategy / Integrated Business Plan for the Housing Service
- Social Housing Grant Programme Delivery Plan (PDP)
- Regional Partnership Board Programme Plan and Objectives
- Mid Wales Strategic Growth Plan

The following plans and strategies are relevant.

- The **Homes in Powys Allocation Policy**¹² sets out how households can register for housing let by Registered Social Landlords and the Local Housing Authority. It also sets out how households are prioritised when a social rented home becomes available to let. The Register is the main source of evidence of social housing need.
- Adopted **Powys Local Development Plan (2011 – 2026)**¹³ and adopted **Brecon Beacons National Park Authority Local Development Plan 2007-2022**¹⁴ set out the current planning policies for housing development.
- **Powys Housing Support Programme (HSP) Strategy 2022-26**¹⁵ sets out the strategic priorities of Powys County Council and its partner agencies for homelessness prevention and housing related support services.
- The **Powys Well-being Assessment 2022**¹⁶ and **Powys Well-being Plan**¹⁷ describe the link between inadequate housing or homelessness and well-being and health.

¹⁰ This is a link to Powys Replacement Local Development Plan
[:https://en.powys.gov.uk/article/12866/replacement-local-development-plan-2022---2037](https://en.powys.gov.uk/article/12866/replacement-local-development-plan-2022---2037)

¹¹ This is a link to Bannau Brycheiniog Local Development Plan 2 <https://bannau.wales/planning/draft-strategy-and-policy/local-development-plan-review/>

¹² This is a link to the Social Housing Allocation Policy and register
[https://en.powys.gov.uk/media/9504/Homes-in-Powys-Allocations-Policy/pdf/Homes in Powys Common Allocation Scheme June 2022.pdf?m=1675855307043](https://en.powys.gov.uk/media/9504/Homes-in-Powys-Allocations-Policy/pdf/Homes%20in%20Powys%20Common%20Allocation%20Scheme%20June%202022.pdf?m=1675855307043)

¹³ This is a link to the Adopted Powys Local Development Plan (2011 – 2026)
<https://en.powys.gov.uk/article/4898/Adopted-LDP-2018>

¹⁴ This is a link to Adopted Brecon Beacons National Park Authority Local Development Plan 2007-2022
<https://www.beacons-npa.gov.uk/planning/draft-strategy-and-policy/brecon-beacons-national-park-local-development-plan/>

¹⁵ This is a link to the Powys Housing Support Programme (HSP) Strategy
https://en.powys.gov.uk/media/16238/Local-Housing-Strategy-for-Powys-2022-26/pdf/tkPowys_HSP_Strategy_2022-26.pdf?m=1708682315643

¹⁶ This is a link to the Powys Well-being Assessment 2022 <https://en.powys.gov.uk/article/5794/Full-Well-being-assessment-analysis>

¹⁷ This is a link to the Powys Well-being Plan <https://en.powys.gov.uk/article/5789/Towards-2040---the-Powys-Well-being-Plan>

- The **Market Position Statement for housing an ageing population**¹⁸ estimates the accommodation need for older people in Powys, including extra care and sheltered housing.
- The **Accommodation and Support – Live Well Delivery Plan 2022-26** for Powys estimates the housing and support need for people because of a learning disability, mental health needs, multiple and complex needs (including homelessness), physical disability or sensory loss.
- The **Powys Programme Delivery Plan (PDP)** includes all housing developments funded through social housing grant.
- **Regional Partnership Board Programme Plan and Objectives (PPO)** includes the accommodation needs of housing with care.
- The council's **Stronger, Fairer, Greener Corporate and Strategic Equality Plan 2023-2027**¹⁹ sets out the well-being priorities and objectives, including housing development, accessing housing services and meeting housing need.
- **A Vision for Growing Mid Wales**²⁰ sets out the importance of a housing strategy that seeks to ensure appropriate and conveniently located housing for working families and young people.
- **Y Bannau, The Future**, The Management Plan For Bannau Brycheiniog National Park 2023-2028²¹ highlights the issue of access to affordable housing and homelessness. The mission is that for those who cannot afford market prices, there will be low carbon community led housing options available.
- **Mid Wales Area Statement**²² by Natural Resources Wales, outlines the key challenges facing the area, what can be done to meet those challenges and how natural resources can be better managed for the benefit of future generations.

¹⁸ This is a link to the market position statement housing for an ageing population in Powys https://powys.moderngov.co.uk/documents/s28312/Market_Position_Statement_Older%20Peoples%20Accommodation.pdf

¹⁹ This is a link to the council's Stronger, Fairer, Greener Corporate and Strategic Equality Plan 2023-2027 <https://en.powys.gov.uk/article/14174/Our-Corporate-and-Strategic-Equality-Plan>

²⁰ This is a link to a Vision for Growing Mid Wales https://growingmidwales.co.uk/media/11185/A-vision-for-growing-mid-Wales/pdf/Vision_for_Growing_Mid_Wales_FINAL_ENGpdf.pdf?m=1612436327177

²¹ This is a link to Y Bannau The Future <https://future.bannau.wales/>

²² This is a link to the Mid Wales Area Statement <https://naturalresources.wales/about-us/what-we-do/strategies-and-plans/area-statements/mid-wales-area-statement/?lang=en>

5. Consultation

The Council's Housing Service produced this Local Housing Market Assessment (LHMA) report. Both Powys and Bannau Brycheiniog planning authorities have been informed and consulted throughout the process. Regular joint meetings, including officers from Ceredigion County Council have taken place.

Public consultation

A public consultation about the draft summary LHMA has been undertaken. The document was published on the Council's consultation "Have your Say" webpage.²³ Stakeholders were informed of the consultation. Stakeholders include community and town councils, county councillors, Powys Association of Voluntary Organisations, and affordable housing providers. The Local Development Plan housing stakeholder group for Powys Local Planning Authority was informed of the consultation by the Planning Authority. Rent Smart Wales did alert landlords and agents in Powys to the consultation.

The consultation focussed on four themes:

- Proposed housing market areas
- Household projection variants
- Specific housing needs
- Missing information

The total number of formal responses was 29. This included 17 individuals, 4 organisations and 8 responses of which it is unknown if they were an individual or an organisation. Below is a summary per question.

Housing market areas

The consultation asked if there was agreement or not to include 13 housing market areas within Powys.

Table 7 - Consultation responses about 13 housing market areas.

Response	Count
Yes, agree	14
No, disagree	3
Don't know	6
No answer	6
Total	29

No fundamental issues were identified with adopting the 13 housing market areas. There was feedback that it is not clear enough how the areas have been identified.

The LHMA will include the 13 housing market areas. More detailed information about the areas can be found in section 6 "Housing market areas".

²³ This is a link to the closed public consultation <https://www.haveyoursaypowys.wales/local-housing-market-assessment>

Household projection variants

The consultation asked which of four variants is most realistic in the opinion of the respondents.

Table 8 - Consultation responses about household projections variants.

Response	Count
Lower variant	4
Principal variant	7
Higher variant	7
15-year migration variant	5
Don't know	5
No answer	1
Total	29

Below is a list of comments made per variant.

Lower variant comments

- Powys always states that the demand is greater than it actually is.
- Many families are reducing in size due to cost-of-living crisis.
- Powys is a settled area.
- Young people, other than relatives of local businesses, move out, especially those 50% going to universities who do not return to settle in Powys.
- Increasing number of older folk living in family houses where their children have left to find work in cities, means that over the next five to ten years more family homes will be on the market as people die or move to be near their children in their more infirm years.
- The number of people living in Powys from the European area will fall further due to Brexit and immigration policies of central government.

Principal variant comments

- It does not consider there is strong evidence to the contrary.
- Following the pandemic and the increase in the number of people homeworking for part or all of their working week, which will be supported by the roll out of the super-fast broadband connections to the more rural areas of the county, that we will see an increase of the net migration of people moving into Powys and that this inward migration will be of a higher percentage of working age people.

Higher variant comments

- The market housing requirement is short on houses, they are sold before they are built.
- There is a definite trend up in migration into Powys. Even though there will be higher mortality rates due to ageing population - this will still mean an increase in population. Fertility rates will continue to decline for 'original' residents, but 'newcomers' are likely to have slightly higher fertility rates although those are set to go down again over time too.

15-year migration variant comments

- More people being able to work in the community, hopefully enabling more families to stay and live in the community.

- Net demand for the county as a whole is likely to be generally in line with or higher than the 15-year migration profile. This opinion is based on the assumption that the country will continue to prove increasingly attractive as a retirement or relocation base for non-Welsh residents, especially for those seeking a rural location and wishing to benefit from lower property prices. This is a very broad assumption and certainly would not apply in a uniform way across all housing market areas.
- There are numerous valid studies showing that within the next 10 years a significant increase (an order of magnitude greater than the current economic migrant numbers) is expected in climate migration.

Variants comments summary

There are no comments that suggest that mortality or birth rates justify a different variant than the principal. However, several respondents refer to migration, with the majority expecting an increase of households moving into Powys for a variety of reasons. It is also noted that some respondents point out that the situation is not identical in every housing market area.

This Local Housing Market Assessment looks in more detail at the different variants in section 8 “Household projection variants”.

Specific housing needs

Most respondents indicate that they do see a housing need in the area where they live and/or work. From the comments, it seems that there is a need for almost every type of general needs housing: smaller homes, homes for large and small families, and executive homes.

Several state that due to a lack of affordable housing, younger people are forced to move away from Powys. Others note the lack of suitable housing for key workers and other people in employment.

Several respondents share personal experience about the impacts of a shortage of suitable housing.

The aim of the question was to gather additional evidence about specific housing needs. There is reference to the need of housing for large families, community housing, accessible housing for older people and people with a disability, and multigenerational housing. No evidence or estimates have been provided to indicate the size of the specific needs.

Missing information

The consultations asked if there is anything that people would like particularly to be included in the LHMA. There were many issues raised, including where to build, issues private rented landlords face to continue, lack of services, lack of employment opportunities, energy efficiency, climate change, the impact of new development on Welsh speaking communities, flats above shops and use of empty properties.

The aim of this LHMA is to estimate future housing need. All issues raised are important to individuals and to communities, but most fall outside the scope of this assessment. There is a suggestion to assess the need for bungalows for people with a disability. Accessible housing need is assessed in section 12 “Specific housing needs requirements”.

Queries about assumptions

The following queries have been raised regarding assumptions used.

- There is data on which the survey methodology is based which shows, for instance, population (the 0-14 and 16-64 populations are both shrinking, whilst the 65 and over population is growing) and housing tenure type (owner-occupied is relatively static over the last 20 years whilst social rents have dropped and private rentals have increased - not something which we believe is reflected on the ground in real life). The assumptions these are based on is unclear. For example, does "private rented" tenure include Airbnb and holiday lets? If so, this is a very unstable methodology for assessing housing need for local populations.
- Empty Dwellings are currently shown as at nearly 10% of housing stock. This is a bizarrely high figure and we find it hard to see how it is correct. Does it include, for instance, only derelict properties, or also second homes and/or holiday lets? This needs to be much clearer to allow accurate comments on housing requirements.
- We wish to emphasise the need to take cross-border migration and demand into account. We have seen significant growth in housing development which has been directed by English-based demand (Oswestry, Shrewsbury, and the wider West Midlands), rather than in-county demographics. Any realistic housing need assessment cannot afford to be Shropshire-blind.

The comments about an ageing population and migration are taken into consideration in Section 8 “Household projection variants”.

Details about vacant dwellings and holiday lets are included in section 10 “Factors to consider outside the LHMA Tool”. There is a specific subsection about vacant dwellings.

6. Overview of Powys

Introduction

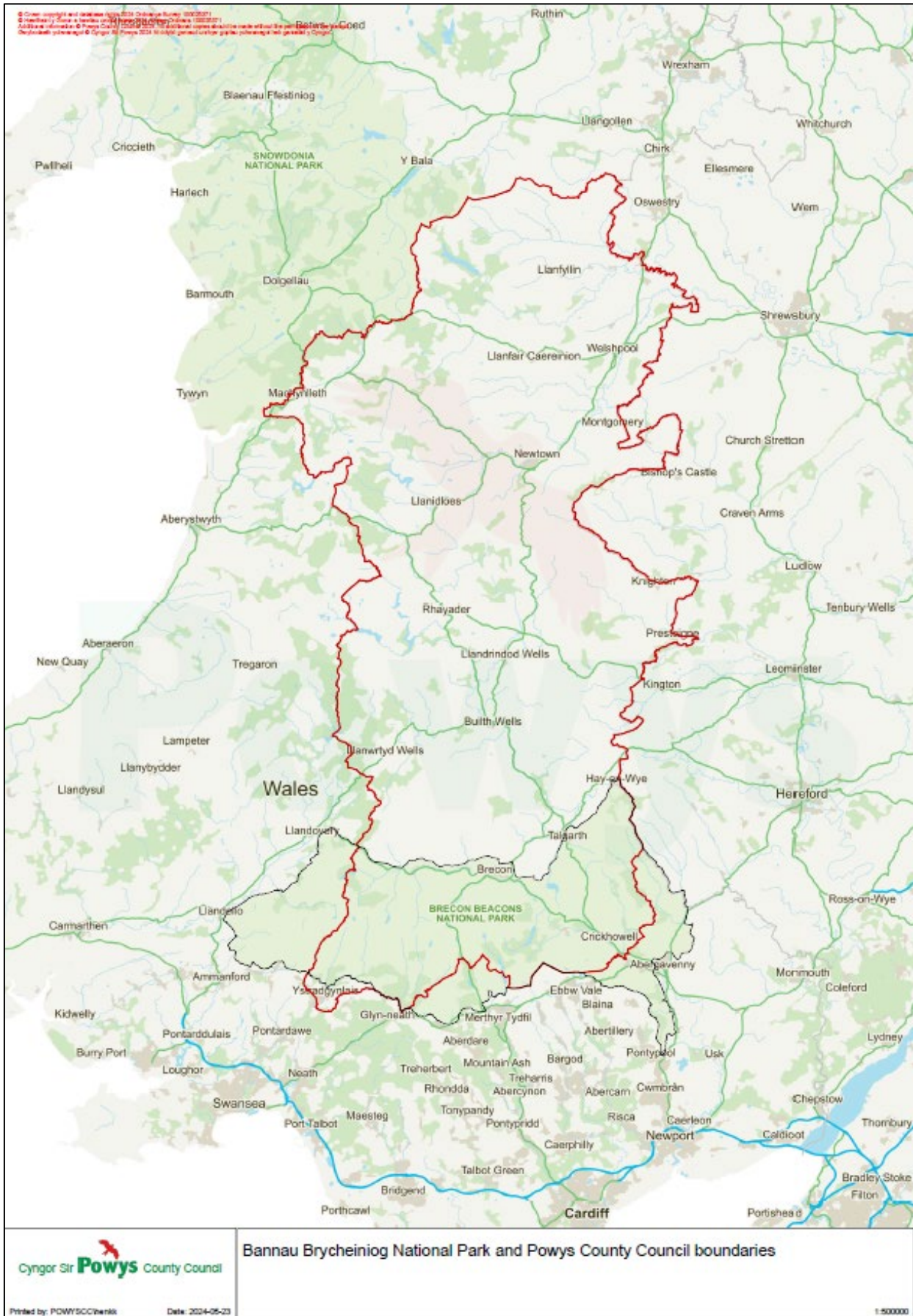
Powys is a large, rural county, with market towns and many dispersed smaller settlements. Farming plays a significant role, with the Census 2021 showing that there are almost 5,000 people occupied in agricultural and related trades, making it the top occupation.²⁴

The Bannau Brycheiniog (Brecon Beacons) National Park covers the south of the county except the southwest including Ystradgynlais town. In this assessment any figures for the Bannau Brycheiniog Planning Authority are for the Park's area inside Powys.

The area in Powys that is not covered by Bannau Brycheiniog Planning Authority, is covered by Powys Local Planning Authority.

²⁴ This is a link to the ONS website relating to occupations at Census Day 2021:
<https://www.ons.gov.uk/datasets/TS064/editions/2021/versions/1>

Map 1 - Bannau Brycheiniog National Park and Powys County Council boundaries. Black line is the Bannau Brycheiniog National Park boundary. Red line is the Powys County Council boundary.



Census data show that in Powys, the population size has increased slightly, from around 133,000 in 2011 to 133,200 in 2021. This is lower than the overall increase for Wales.

Due to the large geographical coverage of Powys and relatively small population, Powys is one of the most sparsely populated places in the UK.

Using Census 2021 figures, compared with Wales, it shows that in Powys there are relatively

- more older people than younger people
- higher percentage of one and two person households than larger households
- more homes owned outright, more private rented and less social rented homes
- more houses and bungalows than flats
- less overcrowded homes
- more people born in the UK than outside the UK
- more people that identify as white than as other ethnicity
- longer travel distances to work, but also more homeworkers
- more small employers, self-employed and own account workers
- less Welsh language skills and ability

The Welsh Index of Multiple Deprivation 2019 shows relatively less households in deprivation in Powys than in Wales.²⁵

Powys trends

Below is a summary of key statistics from the 2021 Census data.

- Increasing number of people living in Powys, but little growth in total population between 2011 and 2021.
- Number of households keeps increasing and household size decreasing.
- The population is ageing and there is a decrease of the working age population and young people.
- Powys has limited ethnic diversity, but is slowly increasing.
- The percentage of people that are limited in day-to-day activities remains the same around 1 in 5.
- There is a decline in the percentage of people speaking Welsh.
- The number of dwellings has increased, and the percentage of empty dwellings has also increased.
- Home ownership percentage declined, private rent increased, and social rent stabilised.

²⁵ This is a link to the WIMD 2019 figures <https://statswales.gov.wales/Catalogue/Community-Safety-and-Social-Inclusion/Welsh-Index-of-Multiple-Deprivation/WIMD-2019/localauthorityanalysis>

Figure 1 - Resident population, household and dwelling numbers for Powys County Council area, Census 2001 / 2011 / 2021.

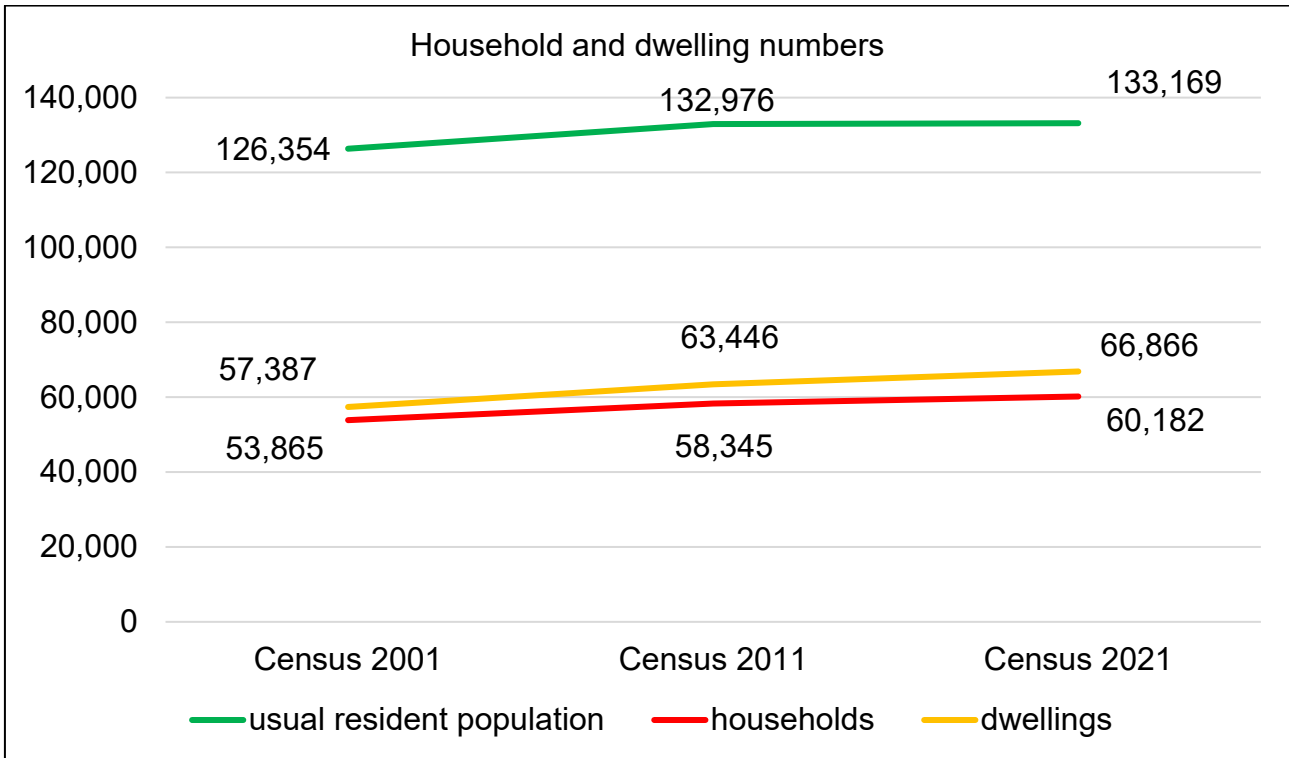


Figure 2 – Resident population, average household size for Powys County Council area, Census 2001 / 2011 / 2021.

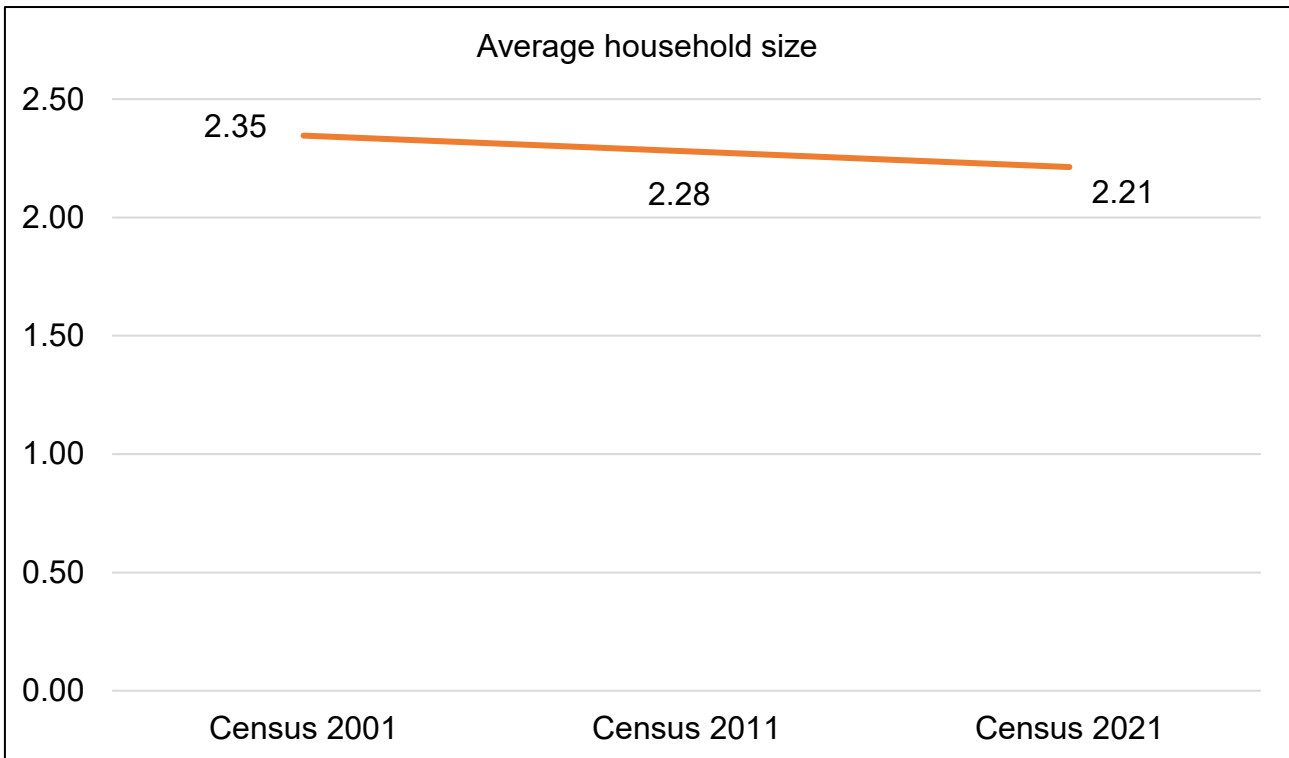


Figure 3 - Resident population, by age groups as a percentage for Powys County Council area, Census 2001 / 2011 / 2021.

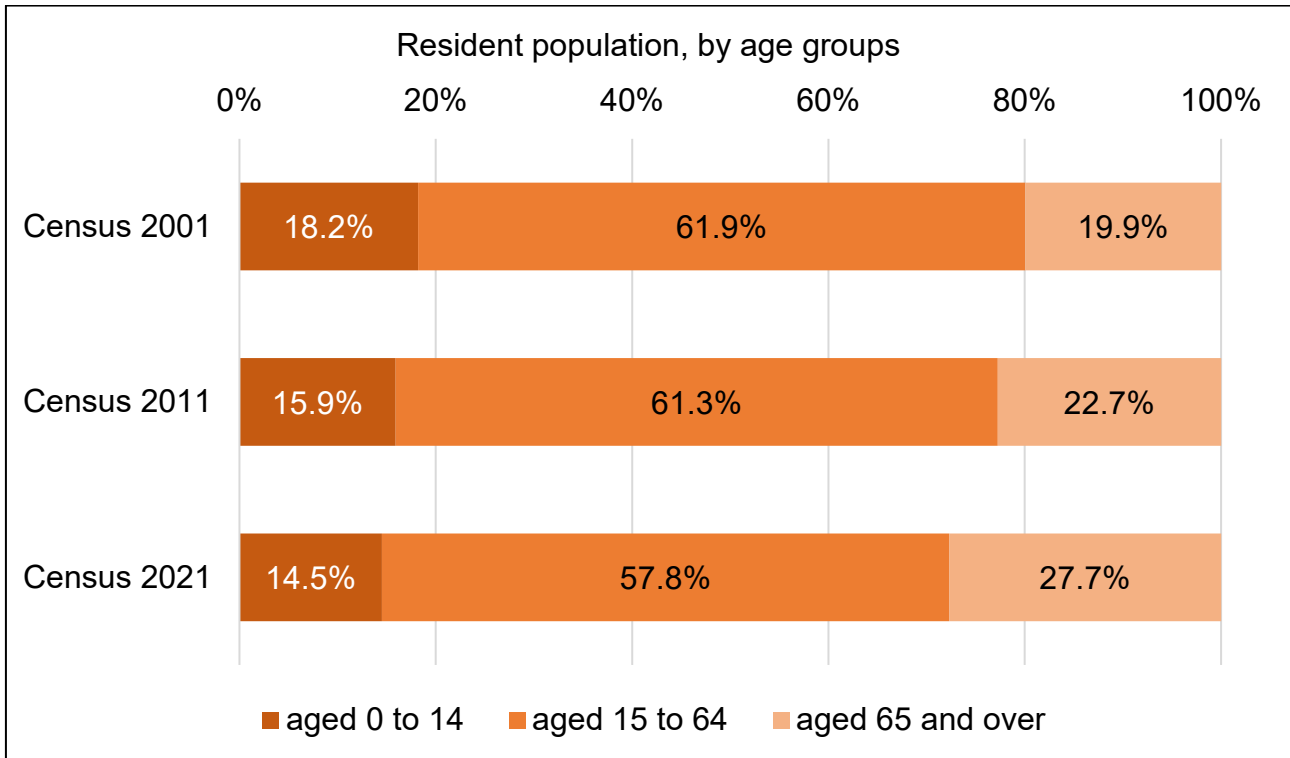


Figure 4 - Resident population, country of birth and ethnic group as a percentage for Powys County Council area, Census 2001 / 2011 / 2021

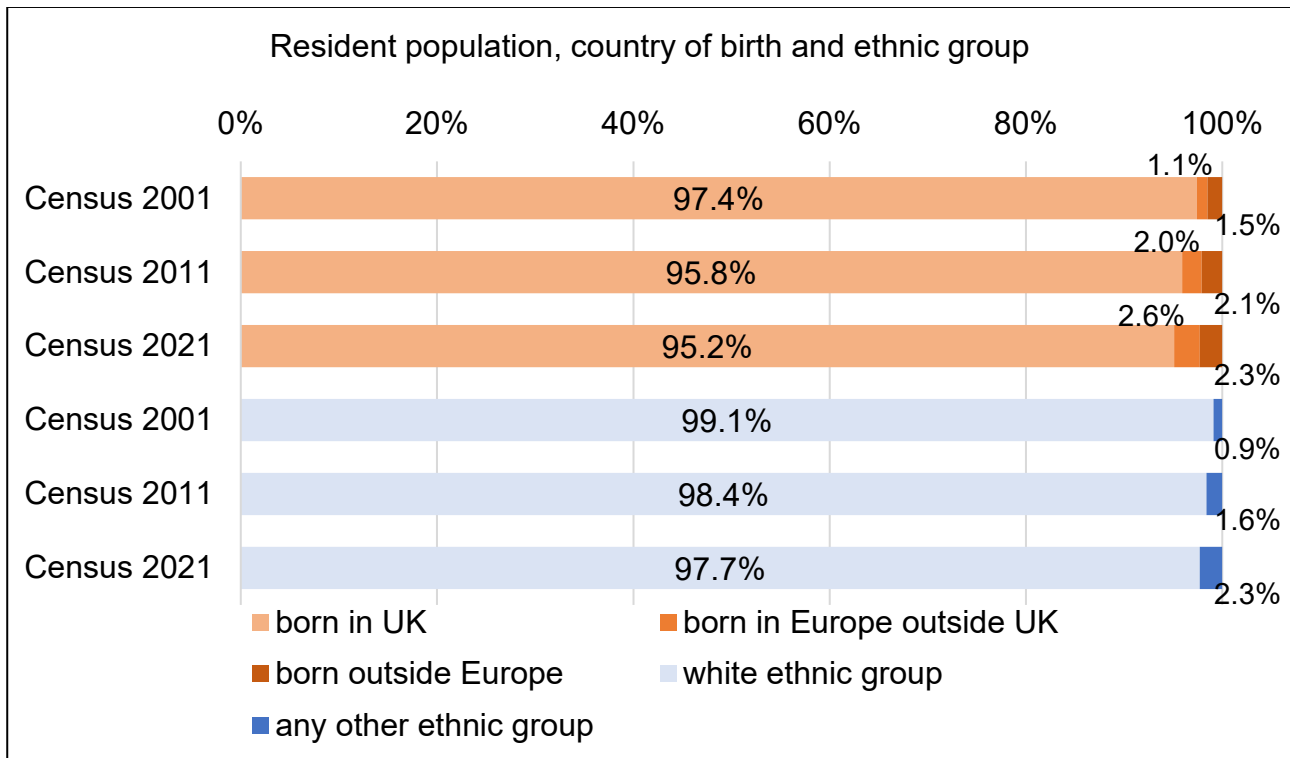


Figure 5 - Resident population, percentage of people with a physical or mental health condition or illness lasting or expected to last 12 months, limiting their day-to-day activities, for Powys County Council area, Census 2001 / 2011 / 2021.

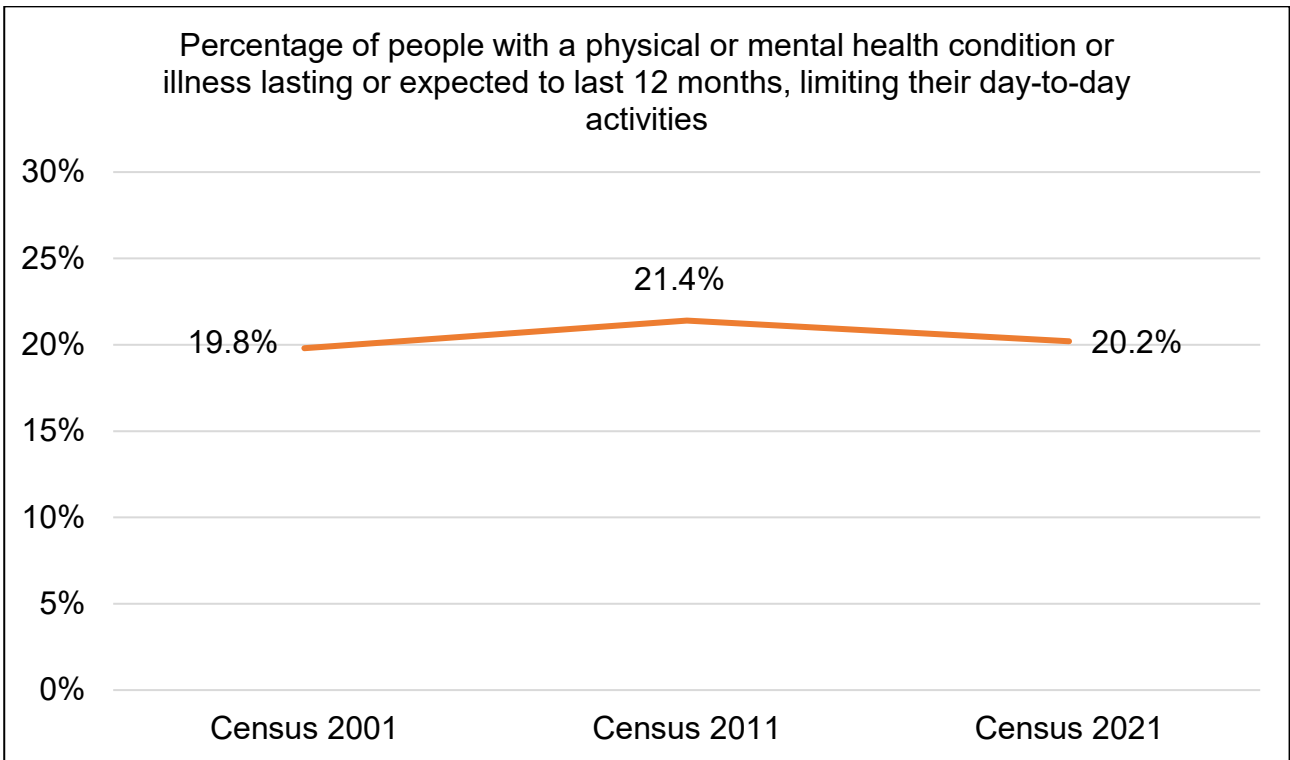


Figure 6 – Resident population, percentage of people aged three or over able to speak Welsh, for Powys County Council area, Census 2001 / 2011 / 2021.

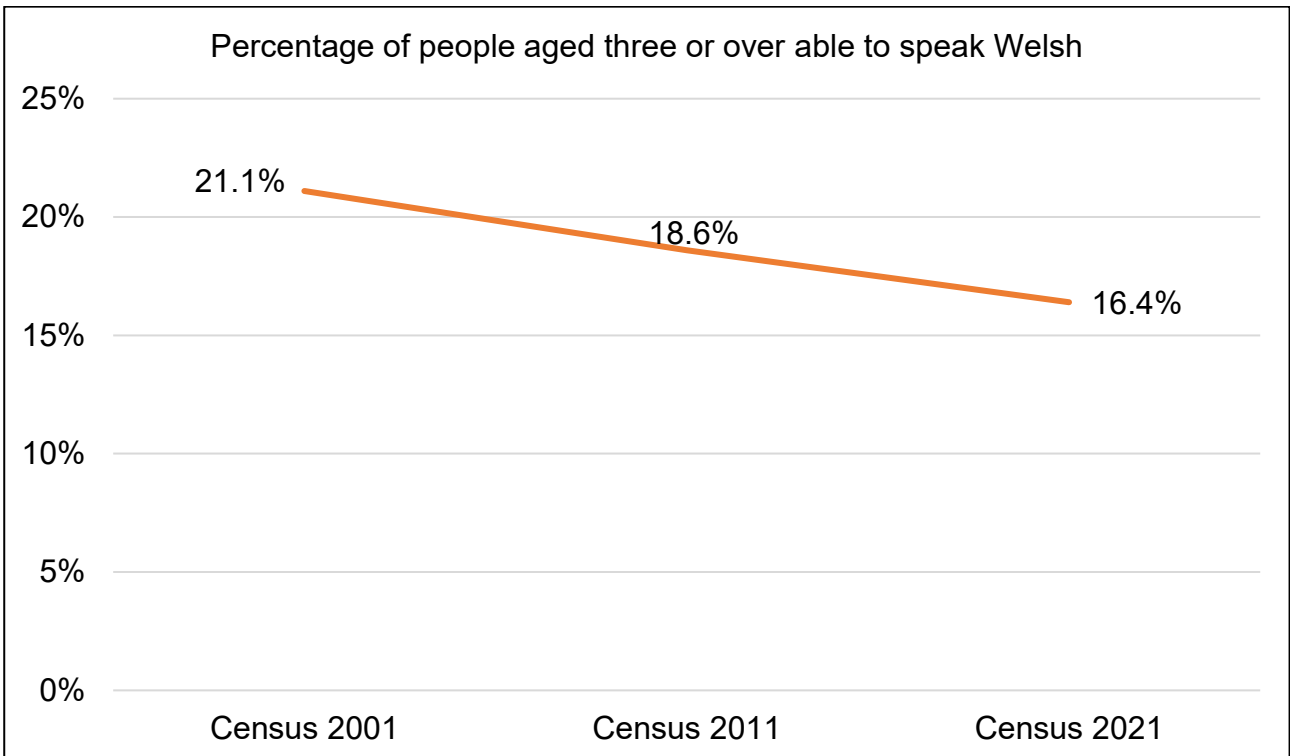


Figure 7- Percentage of households by tenure type, for Powys County Council area, Census 2001 / 2011 / 2021 (for numbers of dwellings and households, see figure 1).

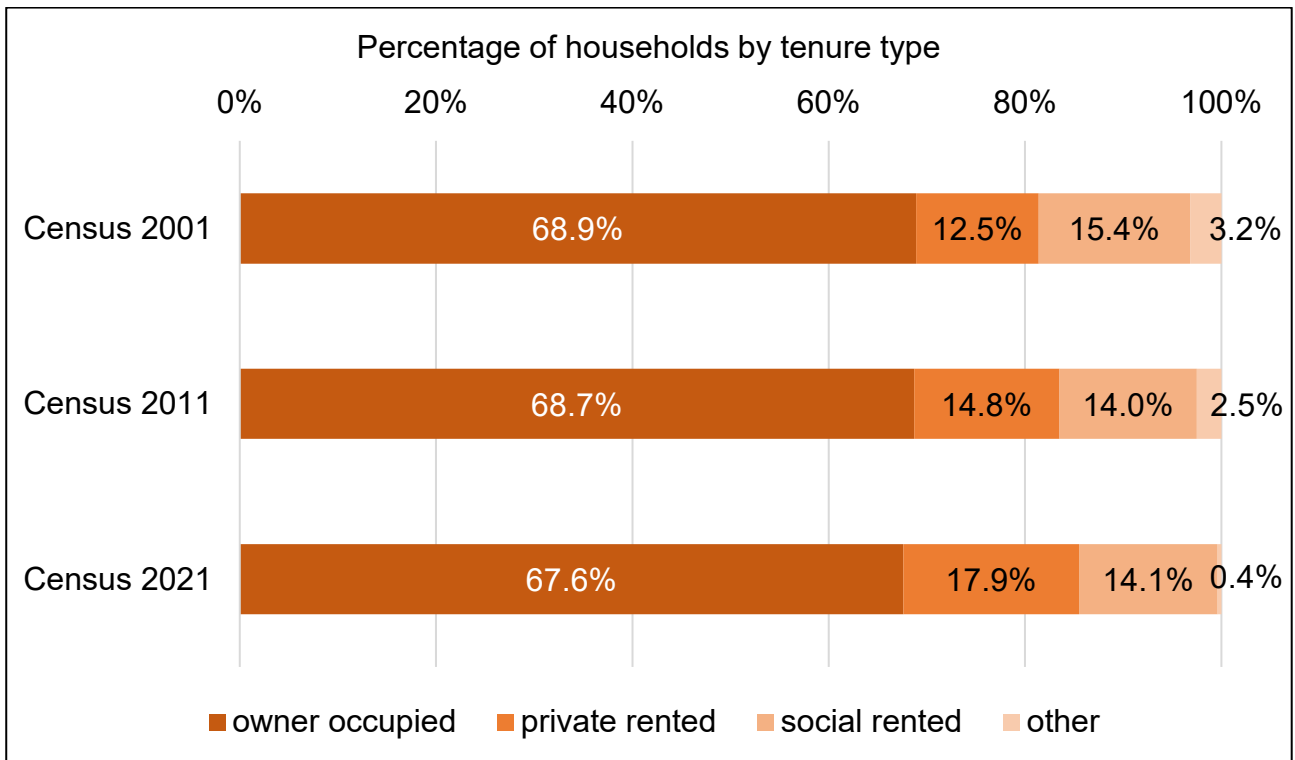
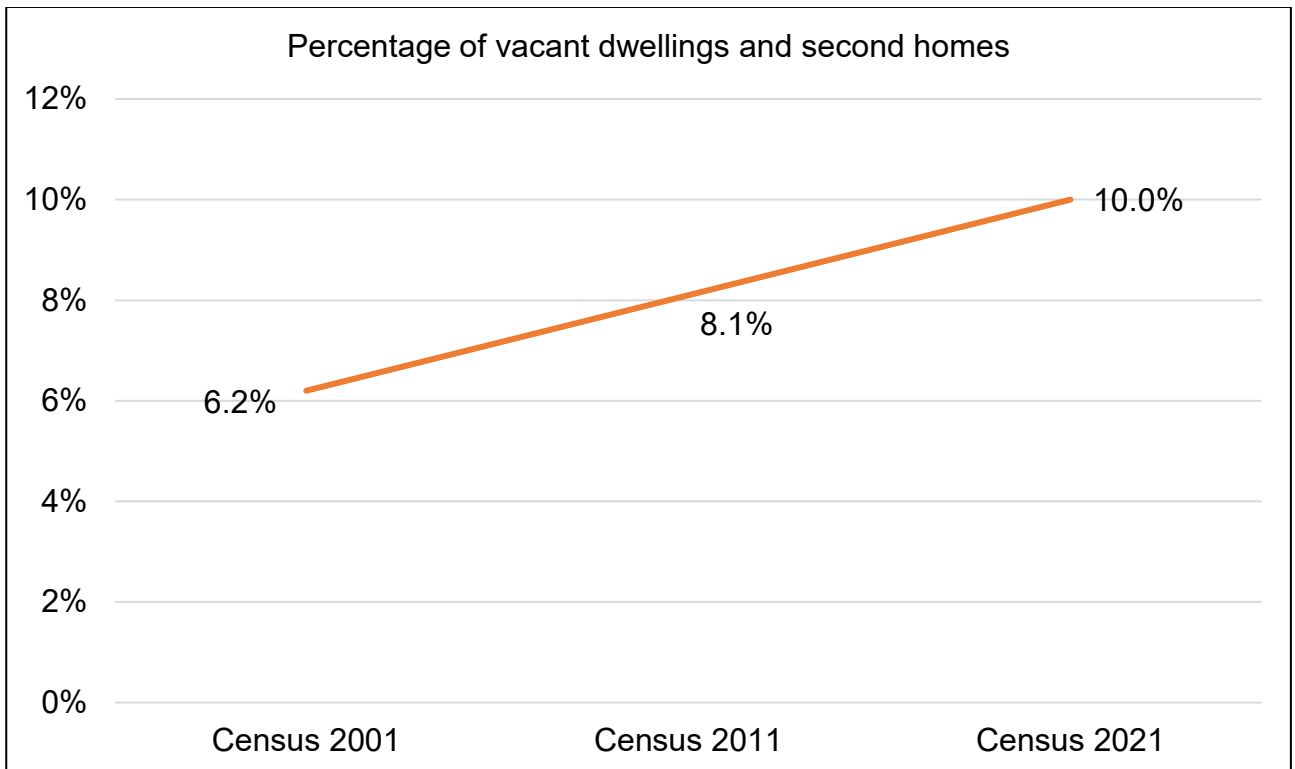


Figure 8 - Percentage of vacant dwellings and second homes, for Powys County Council area, Census 2001 / 2011 / 2021.



7. Housing market areas

Introduction

A Housing Market Area (HMA) is an area that has been defined geographically, based on the functional area where people currently live and would be willing to move home without changing jobs, secondary school, or social network.

This Local Housing Market Assessment (LHMA) adopts the 13 locality areas currently used by Powys County Council, as housing market areas. The areas are used across Council services and are used in the Well-being Assessment by the Powys Public Service Board²⁶.

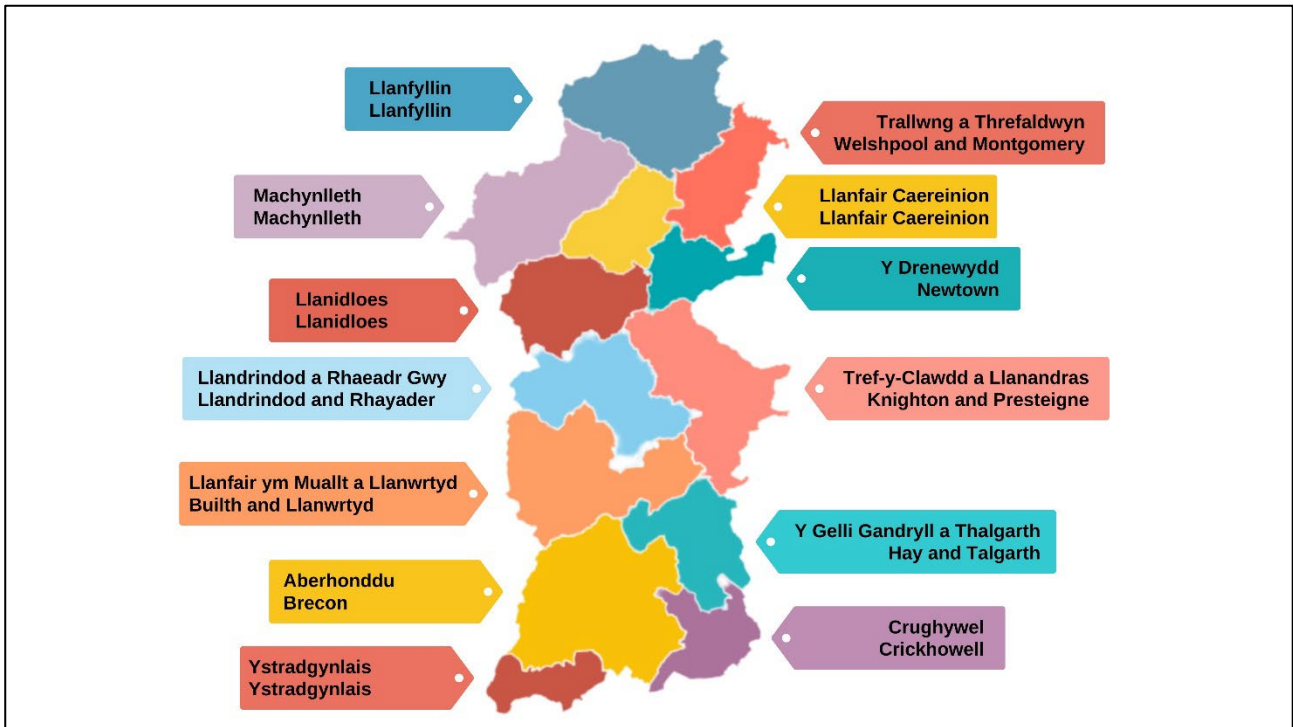
The HMAs are centred around the larger towns in Powys and include their surrounding areas, using boundaries set by the Office for National Statistics. Each HMA includes one, two or three Middle Super Output Areas (MSOAs).

The towns are locations with employment, facilities and services, including secondary school education, doctor's surgeries and transport links. Adopting the locality areas as housing market areas will align with the Council's approach to estimating housing need, using methods identified across Council services and partner organisations. It will enable joint working between services and organisations to justify investment in additional housing.

The housing market areas are shown on the map below.

²⁶ This is the link to the Well-being Assessment for Powys: <https://en.powys.gov.uk/article/5794/Full-Well-being-assessment-analysis>. The Powys Service Board statutory partners that are: Mid and West Wales Fire and Rescue Service; Natural Resources Wales; Powys County Council; Powys Teaching Health Board. Other invited organisations who play a key role in the PSB include: Bannau Brycheiniog National Park Authority; Powys Association of Voluntary Organisations; Dyfed Powys Police; Dyfed Powys Police and Crime Commissioner; Department for Work and Pensions; Welsh Government; Probation Service; One Voice Wales.

Map 2 - Housing market areas in Powys, based on the locality areas.



Source: Powys Well-being Assessment 2022²⁷

To understand more about the Powys geographical areas please visit our interactive report in our [Well-being Information Bank](#). Geography information is in the [Demographics theme](#), specifically the [Powys Geography report](#).

Annexe D includes a list of villages, towns and community and town councils for each housing market area.

Broad price of housing

To consider 'transferability' within the same housing market, house price data at lower super output areas (LSOA) has been looked at. It is concluded that there can be significant differences in median house prices between LSOAs in the same housing market area.²⁸ The average number of residential property sales, during the year ending March 2023, was 18. For areas with a small number of sales, the availability may be of more influence than the median price to enable a move within the same area. .

For social rented housing stock, the price difference does not prevent households moving within the same HMA, because rents are set within the boundaries of Welsh Government policy.

²⁷ This is a link to the Well-Being Assessment [Full Well-being assessment analysis - Powys County Council](#)

²⁸ This is a link to median house prices (dataset 46) and number of sales (dataset 41) by lower super output area (LSOA)
<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/bulletins/housepricestatisticsforsmallareas/yearendingmarch2023/relateddata?sortBy=title&query=number&size=10>

Travel to work areas

Travel to work areas have been developed to approximate self-contained labour market areas. These are areas where most people both live and work and therefore relatively few commuters cross a travel to work area boundary on their way to work. These areas are published by the Office for National Statistics.²⁹

These areas change depending on age, employment type, method of travel to work and qualifications.³⁰ Powys has seen an increase in working from home from 22% in 2011 to 30% in the Census 2021. This was during the pandemic, and it is not clear yet if this remains at 30%.

The Cambrian railway line runs from Aberystwyth through north Powys towards Shrewsbury and Birmingham, connecting the towns of Machynlleth, Newtown and Welshpool with each other, and Ceredigion and Shropshire. A second railway line runs between Swansea and Shrewsbury (the Heart of Wales line) connecting the towns of Llandrindod Wells and Knighton with South Wales and Shropshire. There are several road transport links crossing the county from north to south and east to west. The larger towns can all be accessed via trunk roads. 57% of people travel to work by car according to the Census 2021. However, the 2021 Census also recognised that 13% of households do not own a car.

²⁹ This is a link to the ONS website explaining travel to work areas:

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/traveltoworkareaaanalysinggreatbritain/2016>

³⁰ This is a link to an interactive map with alternative travel to work areas:

<http://ons.maps.arcgis.com/apps/MapSeries/index.html?appid=397ccae5d5c7472e87cf0ca766386cc2>

8. Overview of housing market areas (HMAs)

The Powys Wellbeing Information Bank provides information about a range of topics for each housing market area. These are called locality areas on the website.³¹

Population and households

The largest housing market area is Brecon with 718 km². The smallest is Ystradgynlais with 167 km².

The Welshpool and Montgomery housing market area has the largest number of residents, 18,413, and largest number of households, 8,246, compared with other housing market areas. Least people and households live in Llanfair Caereinion area with 6,147 people and 2,683 households.

The most densely populated housing market area is Newtown, and the least densely populated areas are Builth and Llanwrtyd housing market area and Machynlleth area.

Table 9 - Powys housing markets by area size, population, number of households, population and household density and average household size, Census 2021

HMA	Area km ²	Population	Population density*	Households	Household density*	Household size
Brecon	718	14,225	20	6,334	9	2.25
Builth and Llanwrtyd	584	6,843	12	3,149	5	2.17
Crickhowell	240	6,938	29	3,077	13	2.25
Hay and Talgarth	324	8,456	26	3,957	12	2.14
Knighton and Presteigne	527	9,770	19	4,508	9	2.17
Llandrindod and Rhayader	454	12,825	28	6,108	14	2.10
Llanfair Caereinion	262	6,147	23	2,683	10	2.29
Llanfyllin	534	9,308	18	4,053	8	2.30
Llanidloes	371	6,492	18	3,007	8	2.16
Machynlleth	510	6,205	12	2,808	6	2.21
Newtown	217	17,150	79	7,624	35	2.25
Welshpool and Montgomery	287	18,431	64	8,246	29	2.24
Ystradgynlais	167	10,343	62	4,633	28	2.23
Powys	5,195	133,133	26	60,187	12	2.21

* To calculate the density, the land area has been used. This excludes inland water.

³¹ This is the link to the Powys Well-being Information Bank: <https://en.powys.gov.uk/article/5800/Wellbeing-Information-Bank>

Figure 9 - Area in km2 by housing market area in Powys, Office for National Statistics.

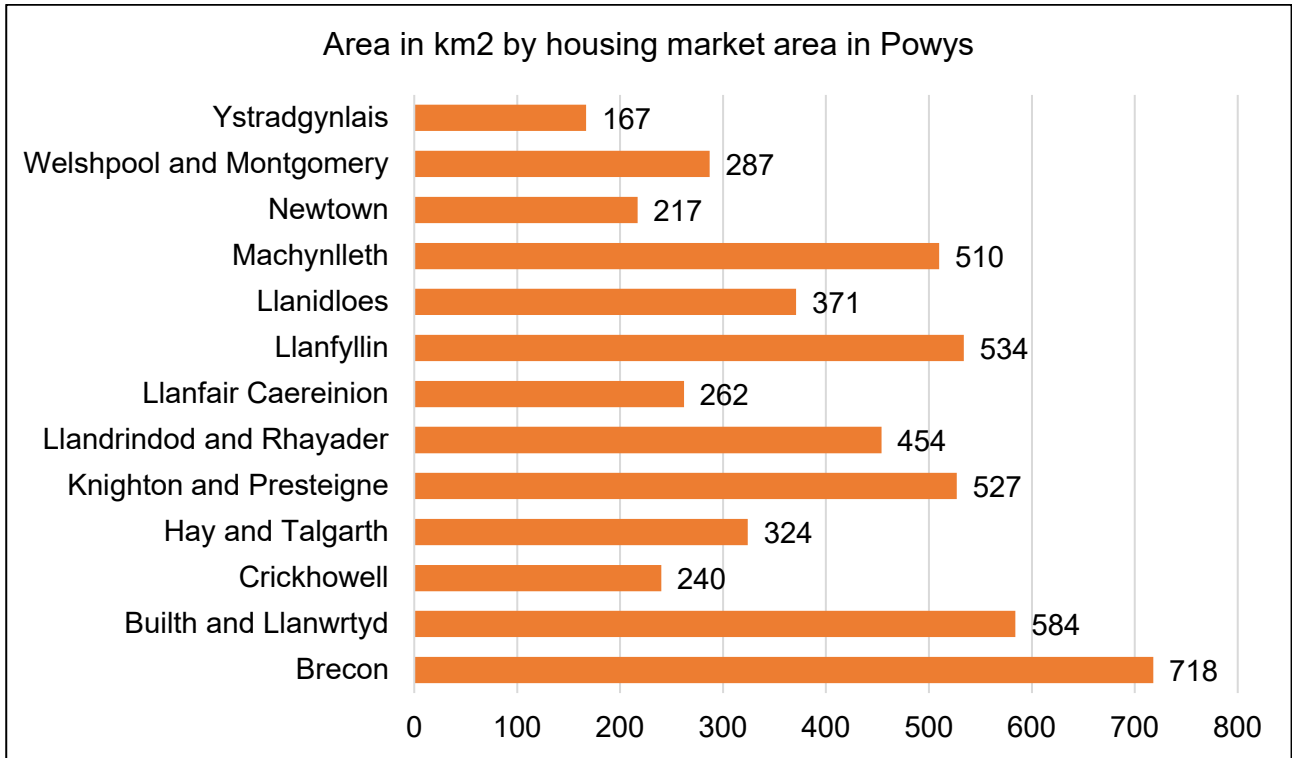


Figure 10 – Usual resident population and number of households, by housing market area in Powys, Census 2021.

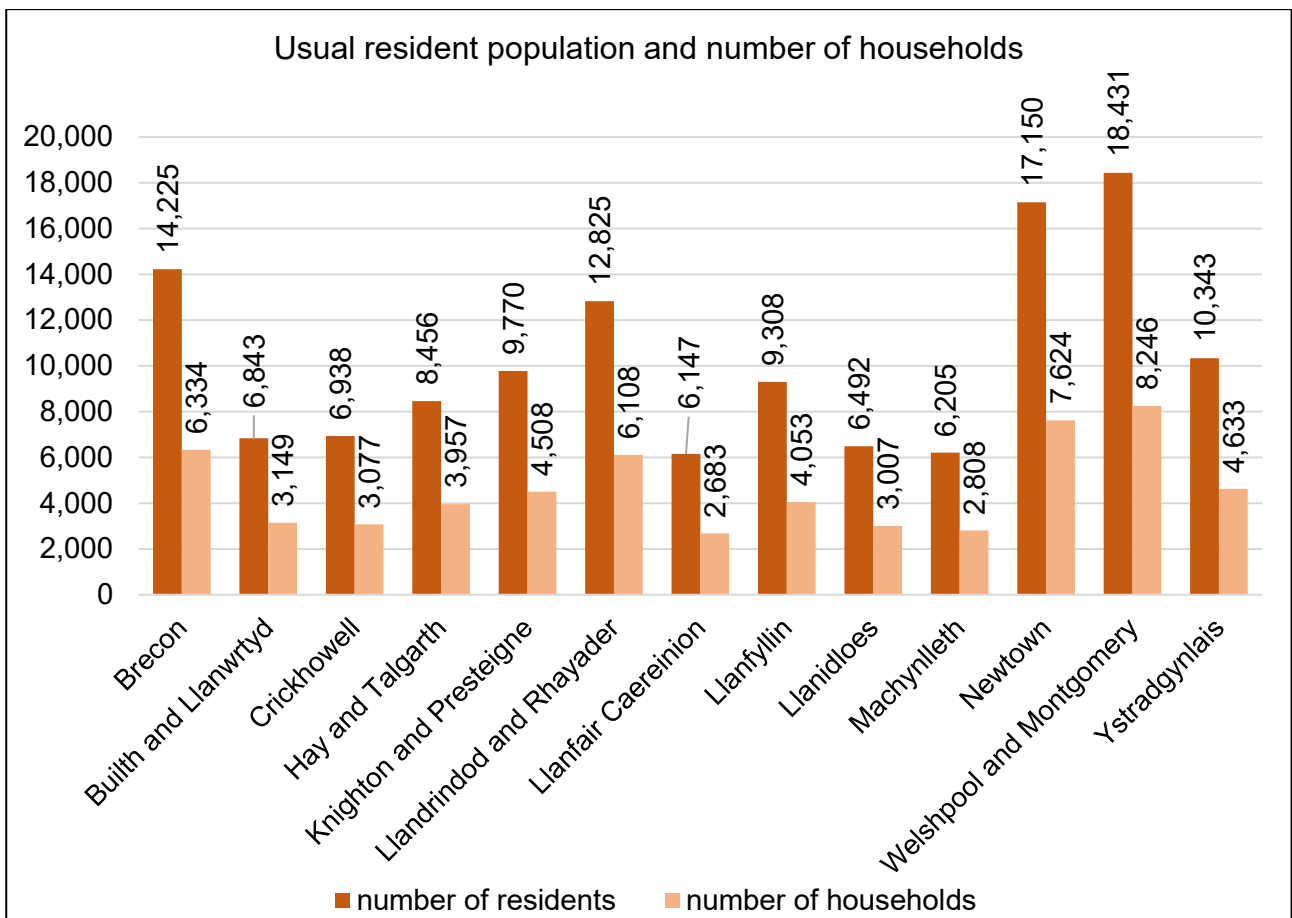
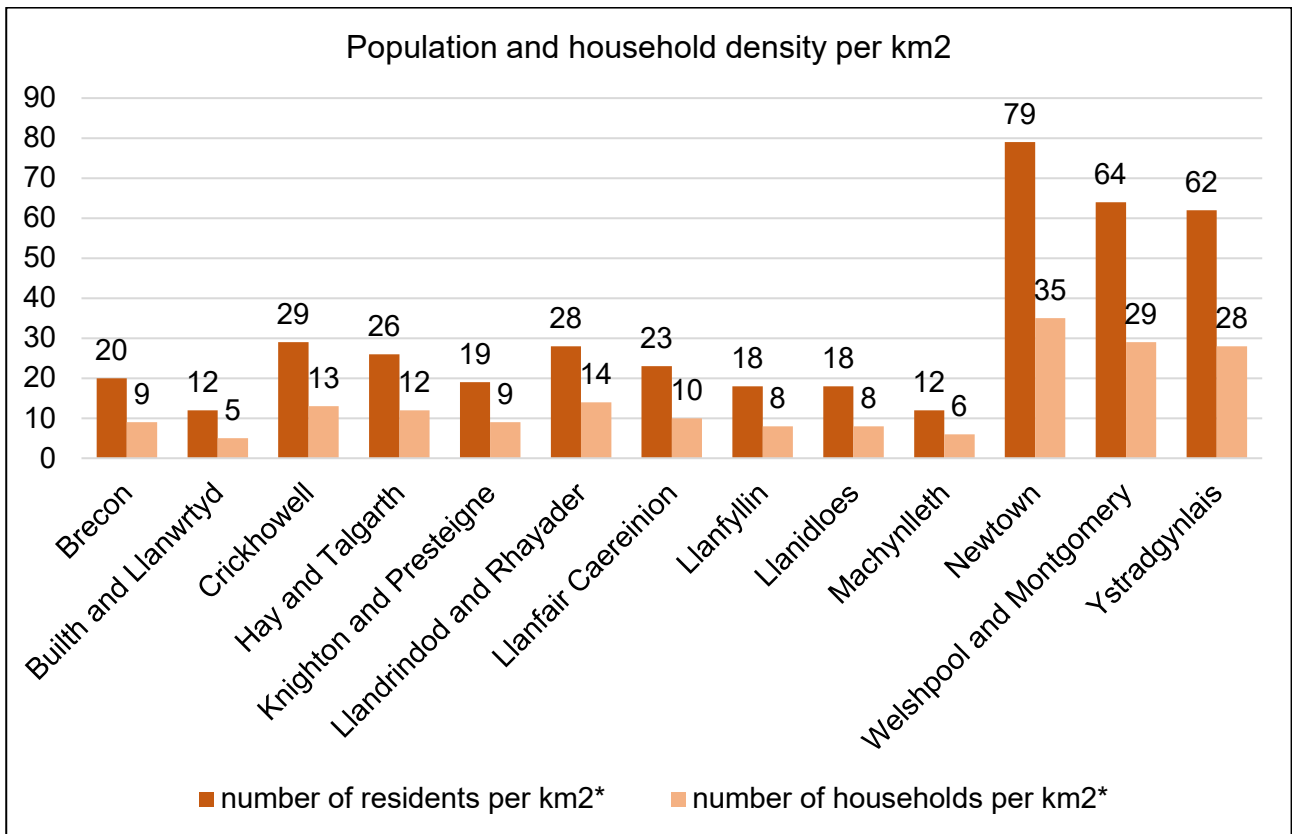


Figure 11 — Population and household density per km2, by housing market area in Powys, Census 2021.



* To calculate the density, the land area has been used. This excludes inland water.

The housing market area with the most people under 40 years of age is Newtown. Newtown area has a relatively young population with 44% under the age of 40. The highest number of people aged 60 and over are living in Welshpool and Montgomery housing market area. This is also the housing market area with the highest number of residents of any age. In Crickhowell housing market area, 41% of the population are aged 60 and over and this is the highest percentage in Powys.

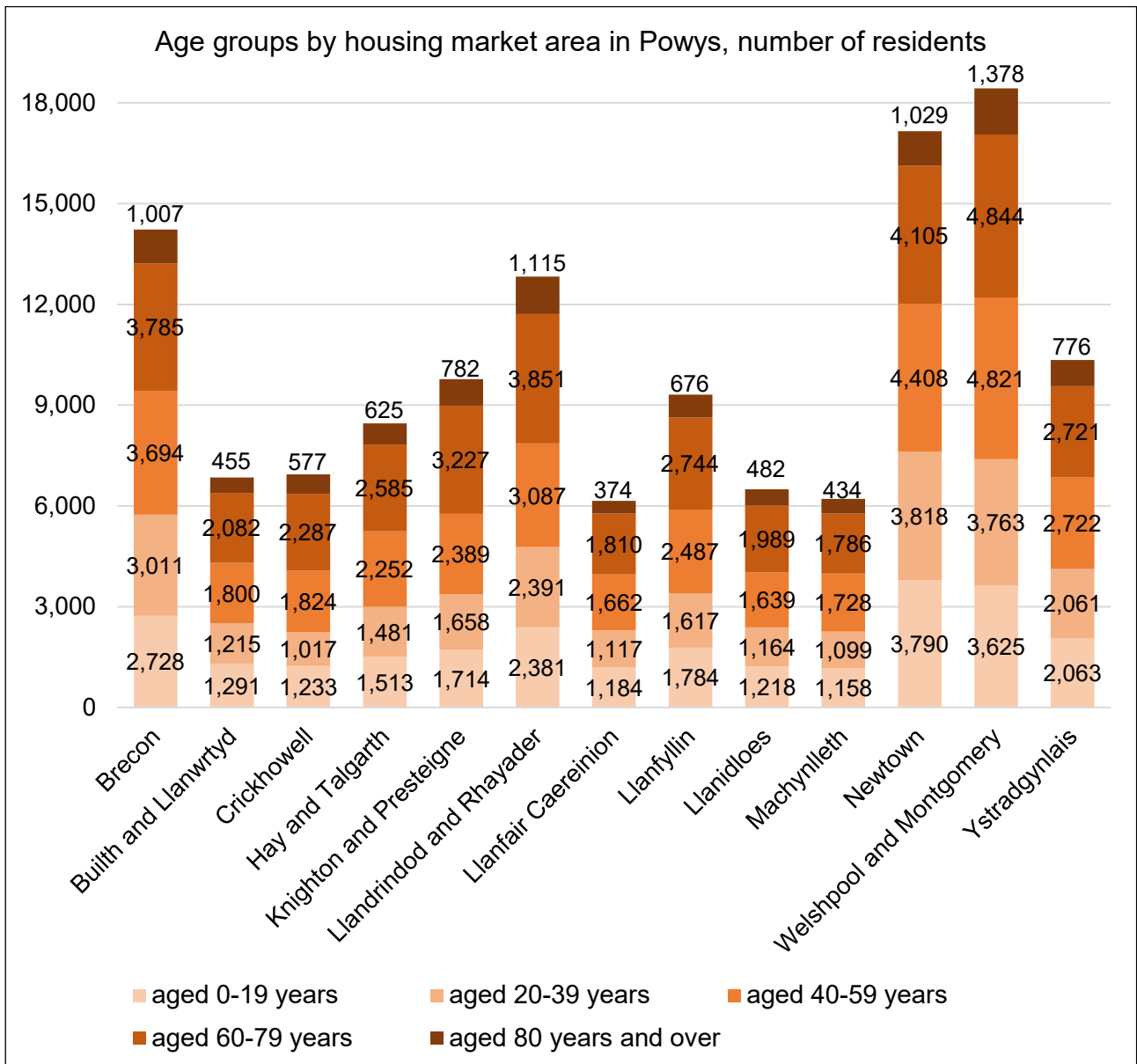
Table 10 - Age groups by number of residents by housing market area in Powys, Census 2021.

HMA	All residents	0-19	20-39	40-59	60-79	80 and over
Brecon	14,225	2,728	3,011	3,694	3,785	1,007
Builth and Llanwrtyd	6,843	1,291	1,215	1,800	2,082	455
Crickhowell	6,938	1,233	1,017	1,824	2,287	577
Hay and Talgarth	8,456	1,513	1,481	2,252	2,585	625
Knighton and Presteigne	9,770	1,714	1,658	2,389	3,227	782
Llandrindod and Rhayader	12,825	2,381	2,391	3,087	3,851	1,115
Llanfair Caereinion	6,147	1,184	1,117	1,662	1,810	374
Llanfyllin	9,308	1,784	1,617	2,487	2,744	676
Llanidloes	6,492	1,218	1,164	1,639	1,989	482
Machynlleth	6,205	1,158	1,099	1,728	1,786	434
Newtown	7,150	3,790	3,818	4,408	4,105	1,029
Welshpool and Montgomery	18,431	3,625	3,763	4,821	4,844	1,378
Ystradgynlais	10,343	2,063	2,061	2,722	2,721	776
Powys	133,133	25,682	25,412	34,513	37,816	9,710

Table 11 - Age groups as a percentage by housing market area in Powys, Census 2021. Figures may not sum due to rounding.

HMA	0-19	20-39	40-59	60-79	80 and over
Brecon	19%	21%	26%	27%	7%
Builth and Llanwrtyd	19%	18%	26%	30%	7%
Crickhowell	18%	15%	26%	33%	8%
Hay and Talgarth	18%	18%	27%	31%	7%
Knighton and Presteigne	18%	17%	24%	33%	8%
Llandrindod and Rhayader	19%	19%	24%	30%	9%
Llanfair Caereinion	19%	18%	27%	29%	6%
Llanfyllin	19%	17%	27%	29%	7%
Llanidloes	19%	18%	25%	31%	7%
Machynlleth	19%	18%	28%	29%	7%
Newtown	22%	22%	26%	24%	6%
Welshpool and Montgomery	20%	20%	26%	26%	7%
Ystradgynlais	20%	20%	26%	26%	8%
Powys	19%	19%	26%	28%	7%

Figure 12 - Age groups by housing market area in Powys, number of residents, Census 2021.

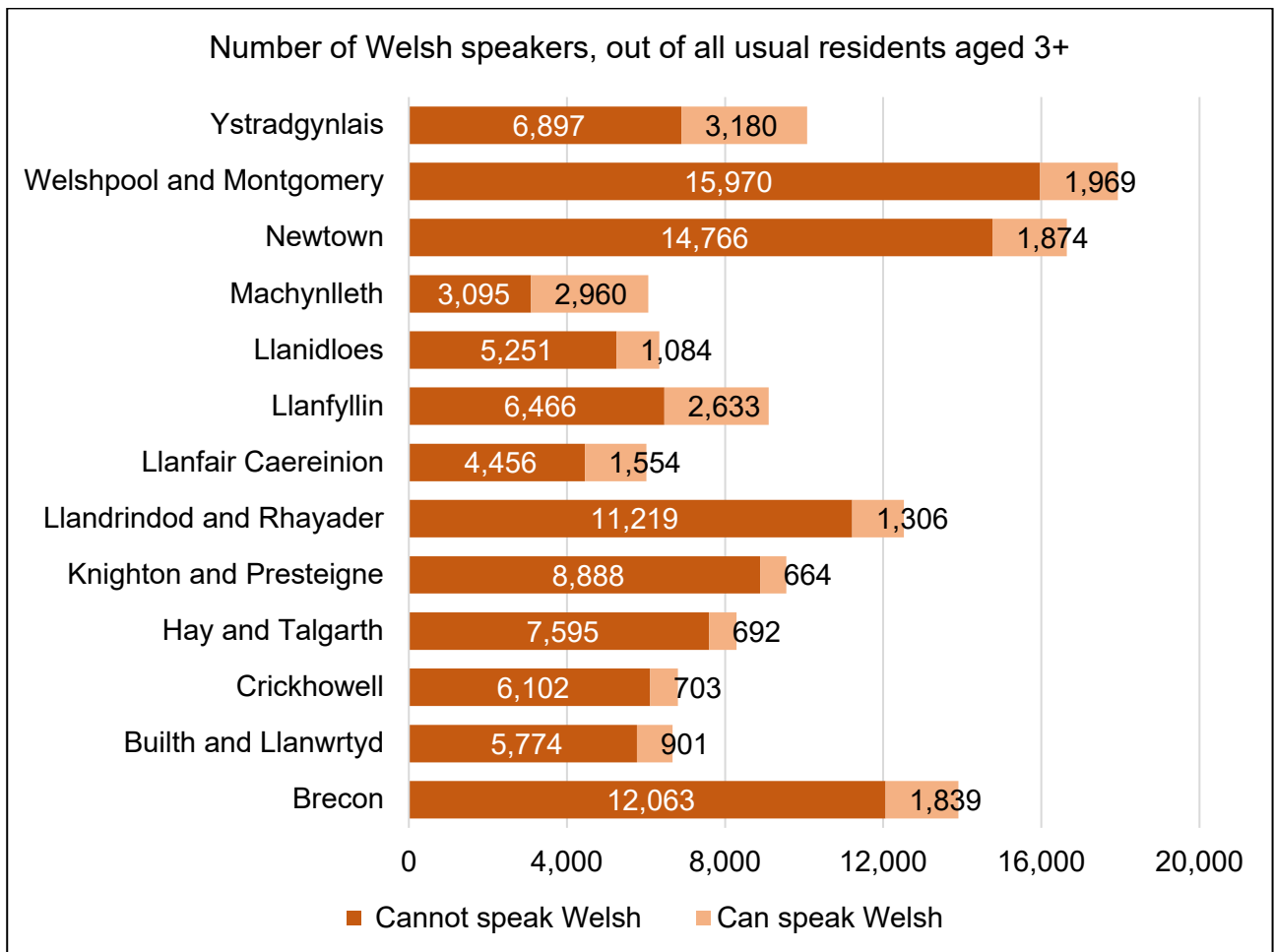


Ystradgynlais housing market area has the highest number of Welsh speaking residents with 3,180. However, Machynlleth area has the highest percentage of Welsh speakers with 49%. The lowest number and percentage of Welsh speakers live in Knighton and Presteigne area.

Table 12 - Number and percentage of Welsh speakers, out of all usual residents aged 3 years and over, by housing market area in Powys, Census 2021.

HMA	Can speak Welsh	Percentage of people that can speak Welsh
Brecon	1,839	13%
Builth and Llanwrtyd	901	13%
Crickhowell	703	10%
Hay and Talgarth	692	8%
Knighton and Presteigne	664	7%
Llandrindod and Rhayader	1,306	10%
Llanfair Caereinion	1,554	26%
Llanfyllin	2,633	29%
Llanidloes	1,084	17%
Machynlleth	2,960	49%
Newtown	1,874	11%
Welshpool and Montgomery	1,969	11%
Ystradgynlais	3,180	32%
Powys	21,359	16%

Figure 13 – Number of Welsh speakers, out of all usual residents aged 3 years and over, by housing market area in Powys, Census 2021.



Brecon is the most ethnically diverse housing market area, both in percentage and number of people, with 5.4% (771) of people who are Black, Asian, Multiple Ethnic or other ethnic group living in the area. The area with the least diversity is Llanfyllin, with 0.8% (75) people who are Black, Asian, Multiple Ethnic or other ethnic group living in the area.

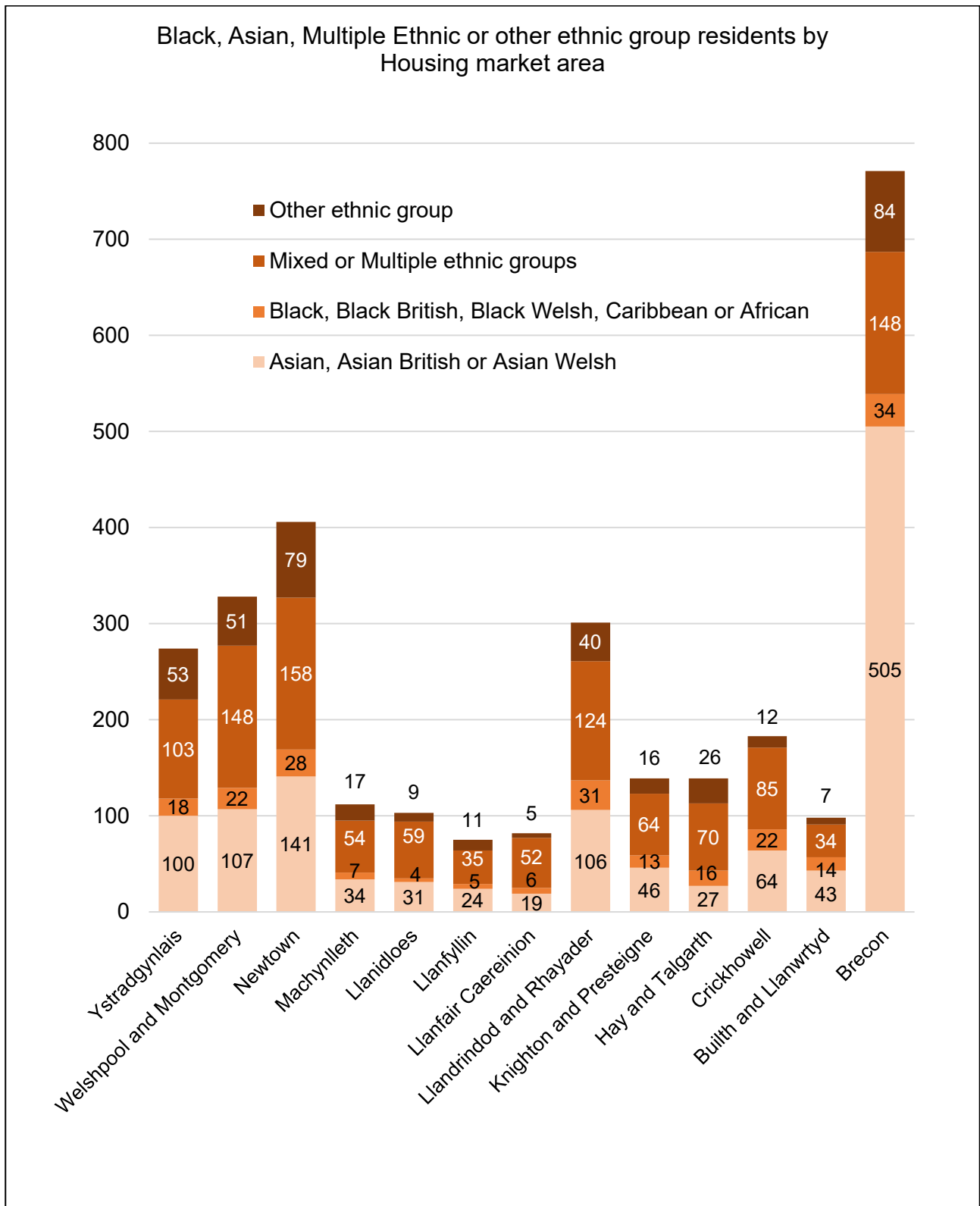
Table 13 - Ethnicity by housing market area in Powys, number of residents, Census 2021

HMA	All usual residents	Asian, Asian British or Asian Welsh	Black, Black British, Black Welsh, Caribbean or African	Mixed or Multiple ethnic groups	White	Other ethnic group
Brecon	14,242	505	34	148	13,471	84
Builth and Llanwrtyd	6,840	43	14	34	6,742	7
Crickhowell	6,942	64	22	85	6,759	12
Hay and Talgarth	8,465	27	16	70	8,326	26
Knighton and Presteigne	9,776	46	13	64	9,637	16
Llandrindod and Rhayader	12,807	106	31	124	12,506	40
Llanfair Caereinion	6,152	19	6	52	6,070	5
Llanfyllin	9,309	24	5	35	9,234	11
Llanidloes	6,486	31	4	59	6,383	9
Machynlleth	6,209	34	7	54	6,097	17
Newtown	17,154	141	28	158	16,748	79
Welshpool and Montgomery	18,434	107	22	148	18,106	51
Ystradgynlais	10,354	100	18	103	10,080	53
Powys	133,170	1,247	220	1,134	130,159	410

Table 14 - Ethnicity white and Black, Asian, Multiple Ethnic or other ethnic group by housing market area in Powys, as a percentage of all usual residents, Census 2021.

HMA	% White	% Black, Asian, Multiple Ethnic or other ethnic group
Brecon	94.6%	5.4%
Builth and Llanwrtyd	98.6%	1.4%
Crickhowell	97.4%	2.6%
Hay and Talgarth	98.4%	1.6%
Knighton and Presteigne	98.6%	1.4%
Llandrindod and Rhayader	97.6%	2.4%
Llanfair Caereinion	98.7%	1.3%
Llanfyllin	99.2%	0.8%
Llanidloes	98.4%	1.6%
Machynlleth	98.2%	1.8%
Newtown	97.6%	2.4%
Welshpool and Montgomery	98.2%	1.8%
Ystradgynlais	97.4%	2.6%
Powys	97.7%	2.3%

Figure 14 – Black, Asian, Multiple Ethnic or other ethnic group residents by Housing market area in Powys, number of residents, Census 2021.

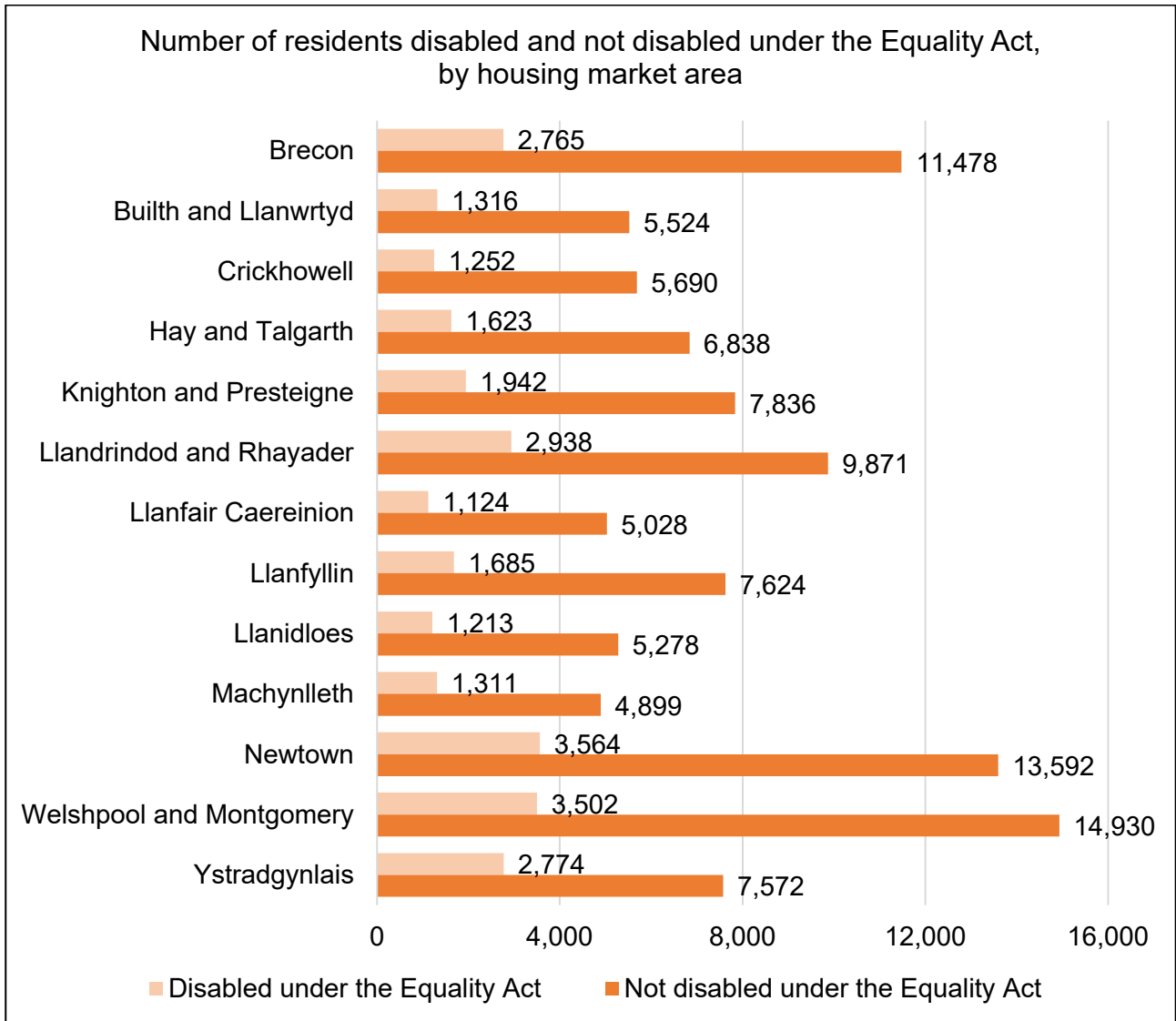


The housing market area where most people live who have a disability is Newtown (3,564) and the area with the lowest number of people with a disability is Llanfair Caereinion (1,124). The highest percentage of people with a disability live in Ystradgynlais area (27%) and the lowest percentage of people with a disability live in Crickhowell, Llanfair Caereinion and Llanfyllin areas (18%).

Table 15 - Number and percentage of residents disabled and not disabled under the Equality Act, by housing market area in Powys, Census 2021.

HMA	All usual residents	Disabled under the Equality Act	Not disabled under the Equality Act	% disabled	% not disabled
Brecon	14,243	2,765	11,478	19%	81%
Builth and Llanwrtyd	6,840	1,316	5,524	19%	81%
Crickhowell	6,942	1,252	5,690	18%	82%
Hay and Talgarth	8,461	1,623	6,838	19%	81%
Knighton and Presteigne	9,778	1,942	7,836	20%	80%
Llandrindod and Rhayader	12,809	2,938	9,871	23%	77%
Llanfair Caereinion	6,152	1,124	5,028	18%	82%
Llanfyllin	9,309	1,685	7,624	18%	82%
Llanidloes	6,491	1,213	5,278	19%	81%
Machynlleth	6,210	1,311	4,899	21%	79%
Newtown	17,156	3,564	13,592	21%	79%
Welshpool and Montgomery	18,432	3,502	14,930	19%	81%
Ystradgynlais	10,346	2,774	7,572	27%	73%
Powys	133,169	27,009	106,160	20%	80%

Figure 15 - Number of residents disabled and not disabled under the Equality Act, by housing market area in Powys, Census 2021.



The highest number of one-person households and couples with no children live in Welshpool and Montgomery housing market area. The lowest number live in Llanfair Caereinion area. The highest percentage of households, 55%, lives in Llandrindod and Rhayader area. The lowest percentage of households, 47% lives in Crickhowell area.

The highest number of couples with dependent children and single parents with dependent children live in Newtown housing market area and the lowest number live in Llanidloes area. The highest percentage of households, 23%, live in Newtown area and the lowest percentage of households, 17%, live in Knighton and Presteigne area.

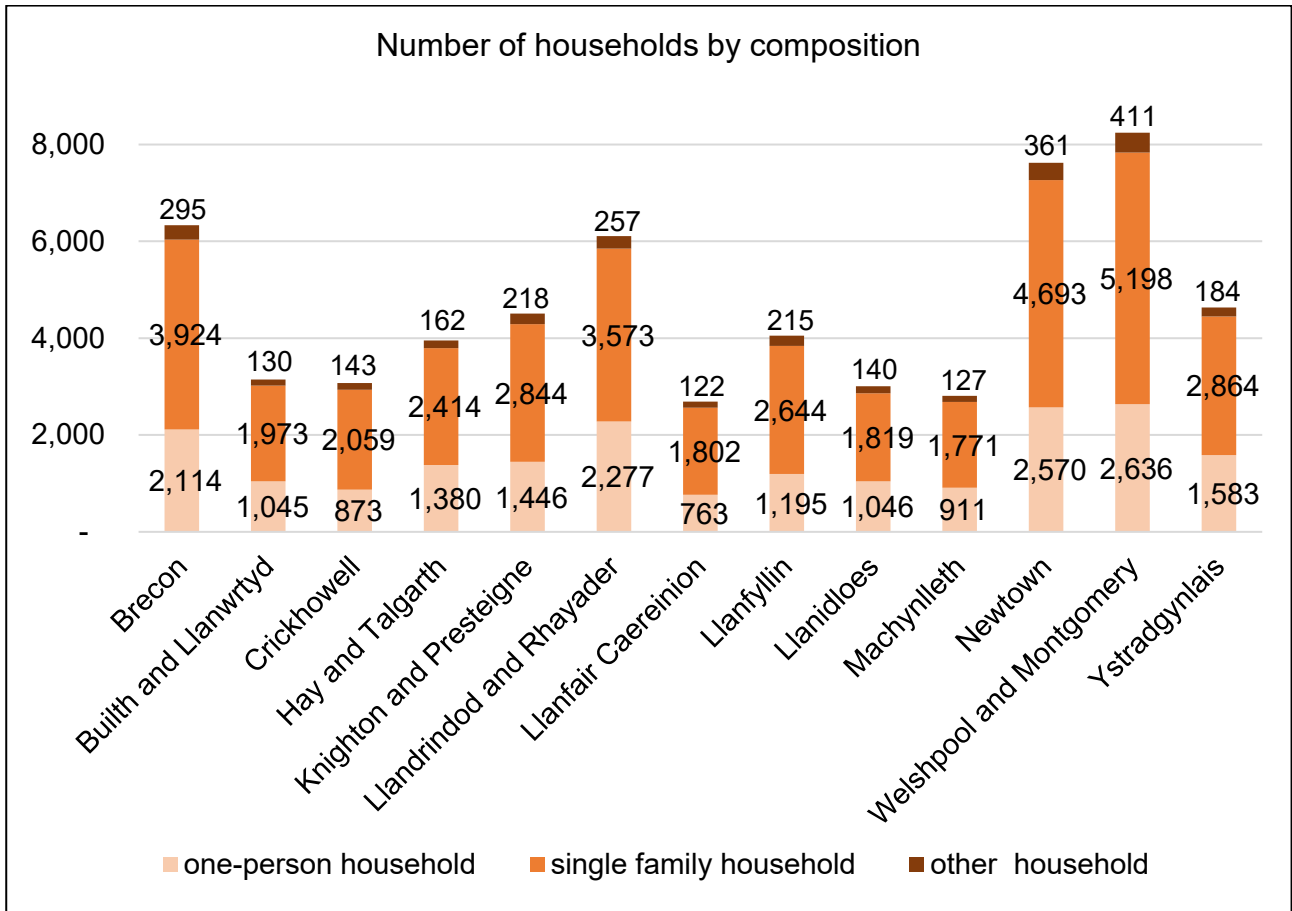
Table 16 – Number of households by composition and by Housing market area in Powys, Census 2021.

HMA	total households	one-person household	couple no children	couple with dependent children	single parent with dependent children	other single-family household	other household type
Brecon	6,333	2,114	1,167	975	328	1,454	295
Builth and Llanwrtyd	3,148	1,045	612	473	142	746	130
Crickhowell	3,075	873	581	484	100	894	143
Hay and Talgarth	3,956	1,380	717	587	180	930	162
Knighton and Presteigne	4,508	1,446	862	632	149	1,201	218
Llandrindod and Rhayader	6,107	2,277	1,102	818	288	1,365	257
Llanfair Caereinion	2,687	763	547	473	91	691	122
Llanfyllin	4,054	1,195	795	662	164	1,023	215
Llanidloes	3,005	1,046	590	429	114	686	140
Machynlleth	2,809	911	530	463	106	672	127
Newtown	7,624	2,570	1,317	1,311	466	1,599	361
Welshpool and Montgomery	8,245	2,636	1,533	1,347	420	1,898	411
Ystradgynlais	4,631	1,583	745	722	295	1,102	184
Powys	60,182	19,839	11,098	9,376	2,843	14,261	2,765

Table 17 – Percentage of households by composition and housing market area in Powys, Census 2021. Figures may not sum due to rounding.

HMA	one-person household	couple no children	couple with dependent children	single parent with dependent children	other single-family household	other household type
Brecon	33%	18%	15%	5%	23%	5%
Builth and Llanwrtyd	33%	19%	15%	5%	24%	4%
Crickhowell	28%	19%	16%	3%	29%	5%
Hay and Talgarth	35%	18%	15%	5%	24%	4%
Knighton and Presteigne	32%	19%	14%	3%	27%	5%
Llandrindod and Rhayader	37%	18%	13%	5%	22%	4%
Llanfair Caereinion	28%	20%	18%	3%	26%	5%
Llanfyllin	29%	20%	16%	4%	25%	5%
Llanidloes	35%	20%	14%	4%	23%	5%
Machynlleth	32%	19%	16%	4%	24%	5%
Newtown	34%	17%	17%	6%	21%	5%
Welshpool and Montgomery	32%	19%	16%	5%	23%	5%
Ystradgynlais	34%	16%	16%	6%	24%	4%
Powys	33%	18%	16%	5%	24%	5%

Figure 16 - Number of households by composition by housing market area in Powys, Census 2021.



Housing

The largest number of owner-occupied dwellings is in the Welshpool and Montgomery housing market area. The largest number of rented dwellings is in Newtown area. The lowest number of owner-occupied dwellings is in Machynlleth area, and the lowest number of rented dwellings is in Llanfair Caereinion area.

The largest proportion, 76%, of dwellings in ownership is in Llanfair Caereinion area. The smallest proportion is in Newtown area, 58%. Newtown area has the largest proportion of rented dwellings, 42%. Llanfair Caereinion area has the smallest proportion with 42%.

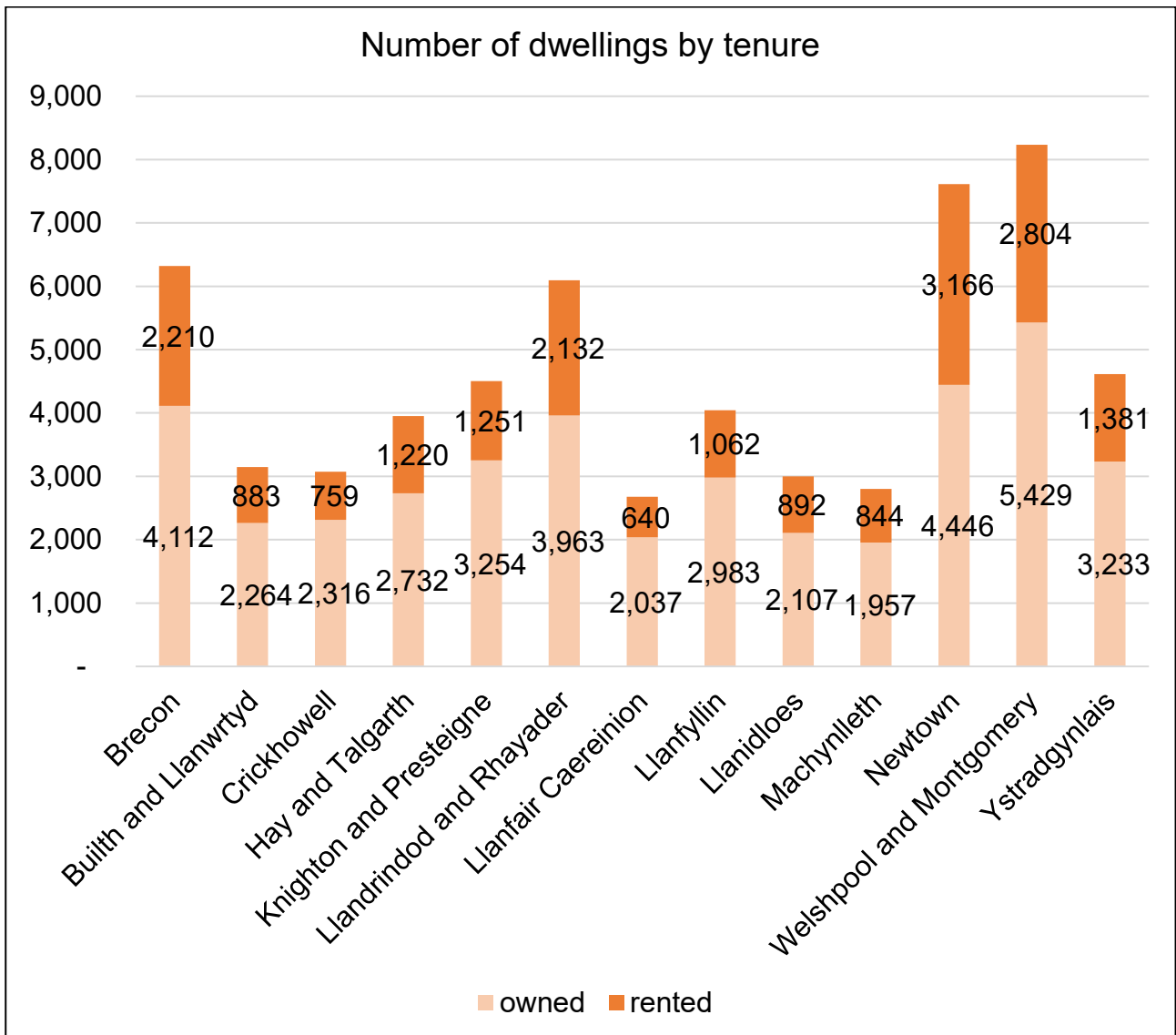
Table 18 - Number of dwellings by tenure by housing market area in Powys, Census 2021.

HMA	owned outright	owned other	social rented	private rented	lives rent free	total
Brecon	2,837	1,275	984	1,226	7	6,329
Builth and Llanwrtyd	1,601	663	278	605	1	3,148
Crickhowell	1,612	704	333	426	1	3,076
Hay and Talgarth	1,972	760	463	757	6	3,958
Knighton and Presteigne	2,443	811	472	779	10	4,515
Llandrindod and Rhayader	2,862	1,101	804	1,328	11	6,106
Llanfair Caereinion	1,354	683	238	402	6	2,683
Llanfyllin	2,119	864	354	708	9	4,054
Llanidloes	1,477	630	318	574	6	3,005
Machynlleth	1,371	586	408	436	7	2,808
Newtown	2,870	1,576	1,824	1,342	12	7,624
Welshpool and Montgomery	3,471	1,958	1,155	1,649	14	8,247
Ystradgynlais	2,106	1,127	853	528	20	4,634
Powys	28,095	12,738	8,484	10,760	110	60,187

Table 19 - Percentage of dwellings by tenure by housing market area in Powys, Census 2021. Figures may not sum due to rounding.

HMA	owned outright	owned other	social rented	private rented	lives rent free
Brecon	45%	20%	16%	19%	0%
Builth and Llanwrtyd	51%	21%	9%	19%	0%
Crickhowell	52%	23%	11%	14%	0%
Hay and Talgarth	50%	19%	12%	19%	0%
Knighton and Presteigne	54%	18%	10%	17%	0%
Llandrindod and Rhayader	47%	18%	13%	22%	0%
Llanfair Caereinion	50%	25%	9%	15%	0%
Llanfyllin	52%	21%	9%	17%	0%
Llanidloes	49%	21%	11%	19%	0%
Machynlleth	49%	21%	15%	16%	0%
Newtown	38%	21%	24%	18%	0%
Welshpool and Montgomery	42%	24%	14%	20%	0%
Ystradgynlais	45%	24%	18%	11%	0%
Powys	47%	21%	14%	18%	0%

Figure 17 - Number of dwellings by tenure by Housing market area in Powys, Census 2021.



Private landlords are required to register with Rent Smart Wales. Registrations with Rent Smart Wales last for five years, at which point landlords must renew for a further five-year period. Landlords can end their registration early, but many just let it expire, so the totals cannot be interpreted as a reflection of the status of the private rented sector. Many landlords registered their properties in November 2016, so all local authorities showed a large drop in registrations around November 2021, as landlords who ceased trading during the previous five-year period let their registrations expire.

There is a difference of around 2,000 between the number of registered properties, 8,875, in June 2021 and the number of dwellings counted at the Census 2021 (March 2021), 10,870 dwellings.

Table 20 - Registrations with Rent Smart Wales, Powys, April each year, 2021-2023³²

	2021	2022	2023
Properties	8,875	8,244	8,439
Landlords	5,210	4,641	4,652

³² This is a link to Rent Smart Wales data: <https://rentsmart.gov.wales/en/registrationdashboard/>

Average number of properties per landlord	1.7	1.8	1.8
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The highest number of property sales in the 10-year period 2013-2023, was recorded in the Welshpool and Montgomery housing market area. The lowest number was in Machynlleth area. Measured as an annual percentage of the overall number of dwellings in a housing market area, the highest percentage, 3.21% was recorded in Llandrindod and Rhayader area and the lowest in Llanfyllin area with 2.54%.

Table 21 - Number of residential property sales by housing market area in Powys, 2013-2023. ³³

HMA	Sales January 2013- January 2023	Average sales per year sales January 2013- January 2023	Number of dwellings Census 2021*	Average annual turnover as a % of all dwellings (Census 2021)
Brecon	1,879	188	7,130	2.64%
Builth and Llanwrtyd	990	99	3,539	2.80%
Crickhowell	879	88	3,497	2.51%
Hay and Talgarth	1,175	118	4,443	2.64%
Knighton and Presteigne	1,399	140	5,003	2.80%
Llandrindod and Rhayader	1,961	196	6,557	2.99%
Llanfair Caereinion	794	79	3,100	2.56%
Llanfyllin	1,031	103	4,467	2.31%
Llanidloes	843	84	3,376	2.50%
Machynlleth	809	81	3,262	2.48%
Newtown	2,017	202	8,204	2.46%
Welshpool and Montgomery	2,396	240	8,720	2.75%
Ystradgynlais	1,154	115	5,028	2.30%
Powys	17,327	1,733	66,326	2.61%

* Caravans or other mobile or temporary structures are excluded.

In Powys, the increase in median price paid between 2013 and 2022 was mainly caused by the increase in price of detached properties. Flats and maisonettes have seen the lowest increase in prices paid, both in the amount and as a percentage.

In 2013 a flat would cost half of the median price paid and in 2022 this was down to 38%.

³³ This is a link to the sales volume

<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/numberofresidentialpropertysalesbyymsoaquarterlyrollingyearhpssadatataset01>

Figure 18 - Median residential property price paid by calendar year and property type, Powys, 2013-2022. ³⁴

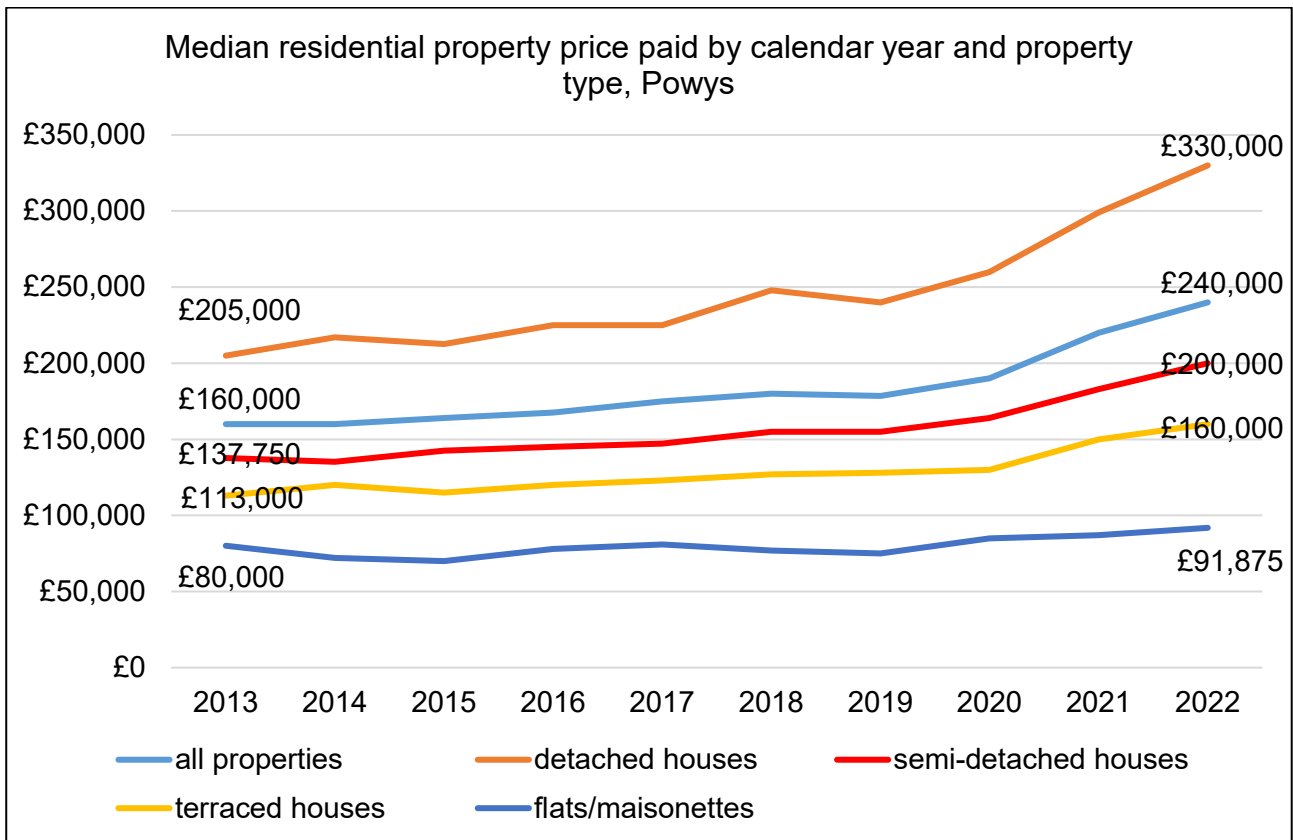


Table 22 - Percentage increase of residential property price paid, Powys, 2013-2022.

Property type	% increase January 2013-January 2023
Flats/maisonettes	15%
Terraced houses	42%
Semi-detached houses	45%
Detached houses	61%
All properties	50%

The highest median price paid, calculated by the LHMA Tool, was in Crickhowell area. The lowest median price paid was in Ystradgynlais area. The difference between the highest median price paid, £349,946, and lowest median price paid, £147,372, equals £202,574.

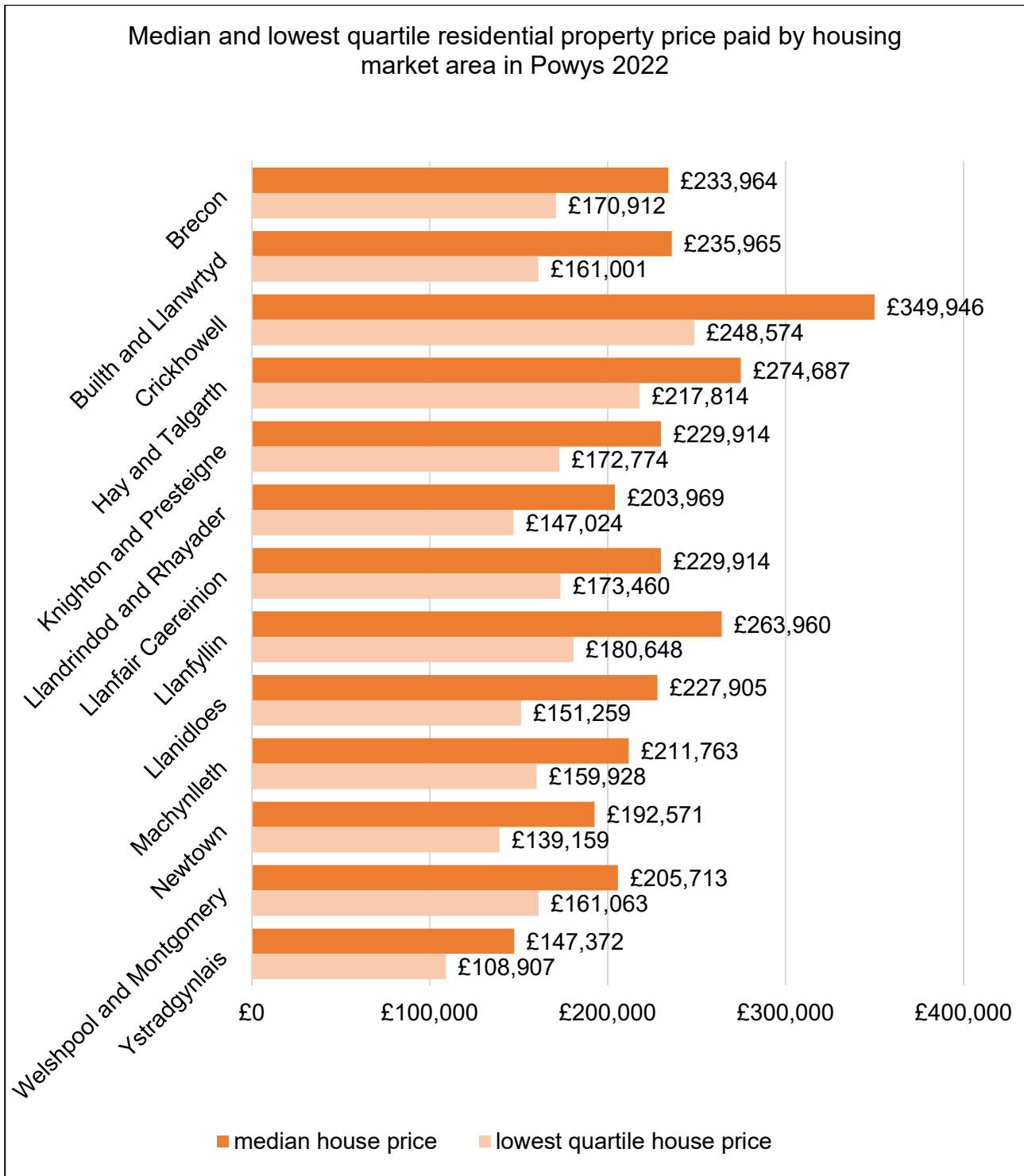
³⁴ This is a link to the median price paid data

<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/medianhousepriceforationalandsubnationalgeographiesquarterlyrollingyearhpsdataset09>

Table 23 - Median and lowest quartile residential property price paid by Housing market area in Powys 2022. Calculated by the LHMA Tool, based on price paid data from the Land Registry.

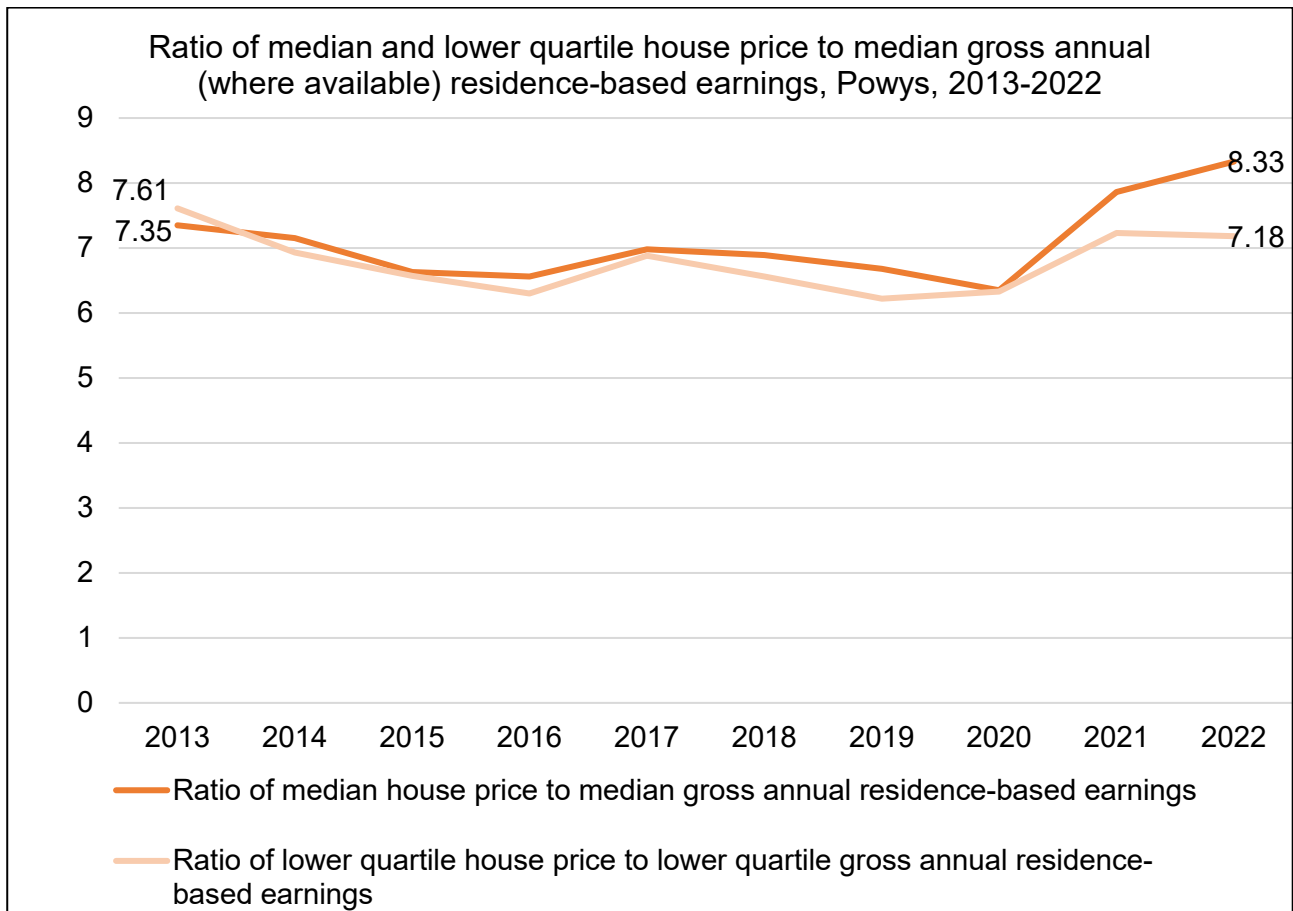
HMA	Median house price	Lowest quartile house price
Brecon	£233,964	£170,912
Builth and Llanwrtyd	£235,965	£161,001
Crickhowell	£349,946	£248,574
Hay and Talgarth	£274,687	£217,814
Knighton and Presteigne	£229,914	£172,774
Llandrindod and Rhayader	£203,969	£147,024
Llanfair Caereinion	£229,914	£173,460
Llanfyllin	£263,960	£180,648
Llanidloes	£227,905	£151,259
Machynlleth	£211,763	£159,928
Newtown	£192,571	£139,159
Welshpool and Montgomery	£205,713	£161,063
Ystradgynlais	£147,372	£108,907

Figure 19 - Median and lowest quartile residential property price paid by housing market area in Powys 2022. Calculated by the LHMA Tool, based on price paid data from the Land Registry.



For Powys, affordability ratios were mostly reducing between 2013 and 2020, after which they went up. Figure 20 shows a noticeable increase in the ratio of median house price paid. Incomes are likely to have dropped at the same time due to the restriction because of the Coronavirus pandemic.

Figure 20 - Ratio of median and lower quartile house price to median gross annual (where available) residence-based earnings, Powys, 2013-2022.³⁵



Ideally, the median and lower quartile house prices are compared against the median and lower quartile income for each housing market area. It was not possible to calculate lower quartile and median income data for each housing market area. The Well-being Information Bank does include the average gross household income for each housing market area. While not ideal, it does give an indication of affordability levels for each housing market area.

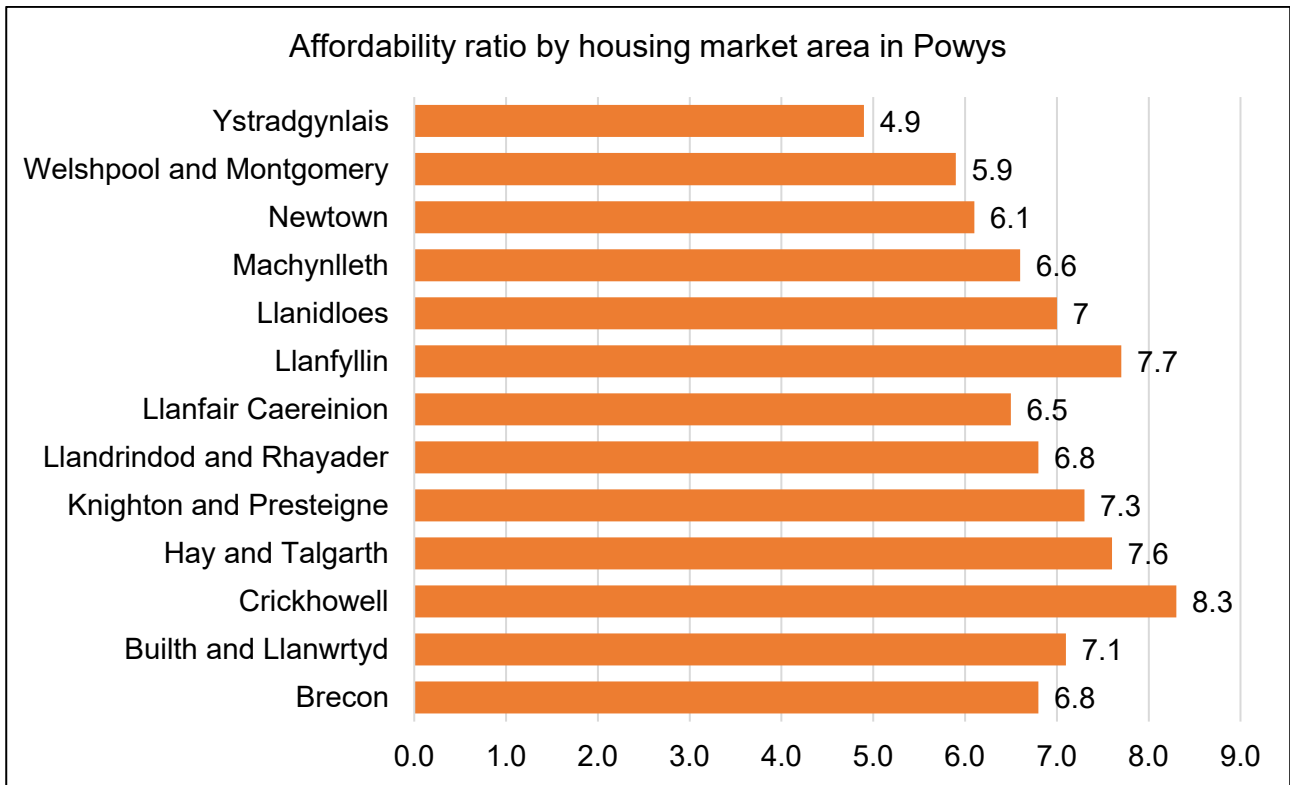
The lowest affordability ratio is 4.9 in Ystradgynlais and the highest is 8.3 in Crickhowell.

³⁵ This is a link to the house price to residence-based earnings ratios <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoresidencebasedearningslowerquartileandmedian>

Table 24 - Affordability ratios by housing market area in Powys, median house price paid 2022 calculated by the LHMA Tool and average household income 2021 from CACI Paycheck. ³⁶

HMA	Average household income 2021	Median house price 2022 (LHMA Tool)	Affordability ratio
Brecon	£34,443	£233,964	6.8
Builth and Llanwrtyd	£33,089	£235,965	7.1
Crickhowell	£42,116	£349,946	8.3
Hay and Talgarth	£36,333	£274,687	7.6
Knighton and Presteigne	£31,678	£229,914	7.3
Llandrindod and Rhayader	£30,140	£203,969	6.8
Llanfair Caereinion	£35,448	£229,914	6.5
Llanfyllin	£34,241	£263,960	7.7
Llanidloes	£32,534	£227,905	7.0
Machynlleth	£32,164	£211,763	6.6
Newtown	£31,788	£192,571	6.1
Welshpool and Montgomery	£34,731	£205,713	5.9
Ystradgynlais	£30,367	£147,372	4.9

Figure 21 - Affordability ratio by housing market area in Powys, median house price paid 2022 calculated by the LHMA Tool and average household income 2021 from CACI Paycheck



³⁶ This is a link to the average household incomes from CACI Paycheck
<https://en.powys.gov.uk/article/12025/Wellbeing-Information-Bank-View-information-about-Household-Income>

Rental market

This subsection includes tables and graphs to show monthly rents.

The Rent Office figures are calendar year 2022.³⁷ The Officers collect information about rent paid by tenants. The number of rentals in some housing market areas may be low and this can influence the median rent figure.

The Local Housing Allowance (LHA) is based on the information collected by Rent Officers. The LHA rate affects how much financial help a tenant can get when renting from a private landlord.³⁸ It is used to work out Housing Benefit and the Universal Credit housing element. A tenant from a private landlord can receive financial benefit up to the LHA rate, if they meet certain criteria. The LHA figures used, are for the financial year 2022/23.

The Rightmove rent is sourced from advertised private rented dwellings during the period November 2021 and December 2022.³⁹ These are new lettings, while Rent Officers also include information about existing tenancies, and they get the information directly from private landlords and their agents. The rents that are advertised may not be the rent that is agreed in the occupation contract, and it may include service charges. The number of rentals in some housing market areas may be low and this can influence the median rent figure.

Social rent figures are collected by Welsh Government.⁴⁰

If there are less than 5 dwellings, the cell has been left blank.

Social rented dwellings need to meet Welsh Housing Quality Standards. These standards are higher than the standards set out in The Renting Homes (Fitness for Human Habitation) (Wales) Regulations 2022. These regulations apply to private and social rented dwellings.

Overall, higher rents and a larger gap between median rent and LHA are showing for Crickhowell area and Hay and Talgarth area. Lower rents and smaller gap are showing for Llandrindod Wells and Rhayader area, Llanidloes area and Ystradgynlais area.

There is insufficient data to calculate affordability ratios for rented homes by housing market area.

Rent levels for 1-bed homes

The figures for 1-bed rented homes show that the rent in Hay and Talgarth housing market area is high compared to other areas. However, this is based on only six tenancies. The lowest rents are recorded for the Llandrindod and Rhayader area.

³⁷ This is a link to Rent Officers Wales: <https://www.gov.wales/rent-officers-wales>.

³⁸ This is a link to Local Housing Allowance: <https://www.gov.wales/local-housing-allowance>.

³⁹ This is a link to Rightmove: <https://www.rightmove.co.uk/>

⁴⁰ This is a link to social rent data: <https://statswales.gov.wales/Catalogue/Housing/Social-Housing-Stock-and-Rents/averageweeklyrentsinselfcontainedstockatsocialrent-by-accomodationtype-numberbedrooms-providertype>

In four housing market areas, private rents recorded by the Rent Officers, are lower than social rent. This may be due to property type, size and required quality of the homes. Social rent is lower than advertised rents in all areas.

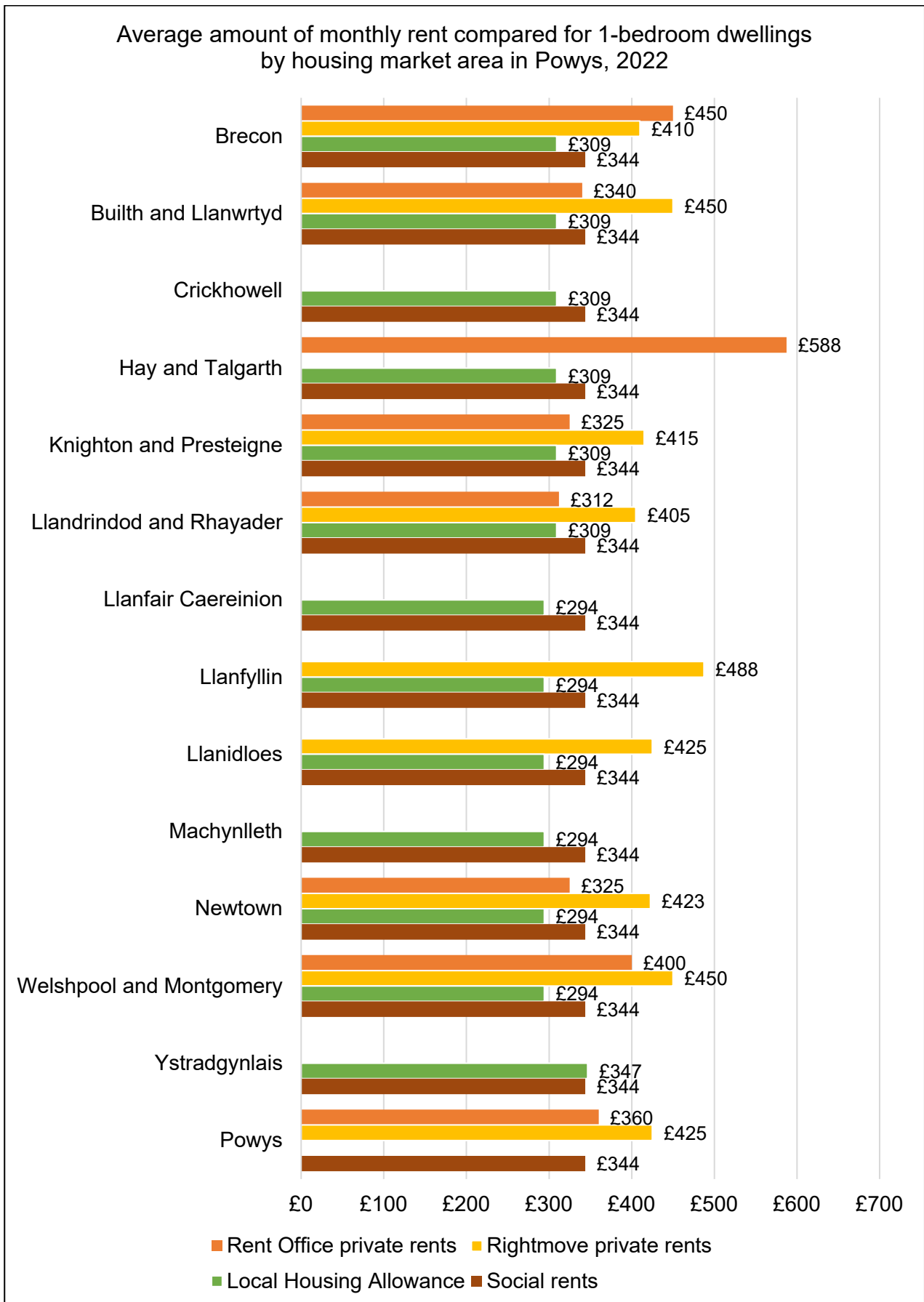
The Local Housing Allowance is lower than the median of private rents, but there are differences between housing market areas. The smaller the difference, the more likely a household can afford the private rent. The larger the difference, the less likely a household can afford the rent. It is noted that the data on rents is far from comprehensive and for several areas there is no data at all.

When comparing LHA with Rent Officers' data, the most affordable housing market area for private renters of 1-bed homes is Llandrindod Wells and Rhayader area. The least affordable area is Hay and Talgarth. For advertised rents the most affordable area is also Llandrindod Wells and Rhayader area and the least affordable area is Llanfyllin.

Table 25 - Average amount of monthly rent compared for 1-bedroom dwellings by housing market area in Powys, 2022.

HMA	Rent Officers (median)	Rightmove (median)	Local Housing Allowance	Social (average)
Brecon	£450	£410	£309	£344
Builth and Llanwrtyd	£340	£450	£309	£344
Crickhowell			£309	£344
Hay and Talgarth	£588		£309	£344
Knighton and Presteigne	£325	£415	£309	£344
Llandrindod and Rhayader	£312	£405	£309	£344
Llanfair Caereinion			£294	£344
Llanfyllin		£488	£294	£344
Llanidloes		£425	£294	£344
Machynlleth			£294	£344
Newtown	£325	£423	£294	£344
Welshpool and Montgomery	£400	£450	£294	£344
Ystradgynlais			£347	£344
Powys	£360	£425	Not available	£344

Figure 22 – Average amount of monthly rent compared for 1-bedroom dwellings by housing market area in Powys, 2022.



Rent levels for 2-bed homes

The figures for 2-bed rented homes show that the private rent in Hay and Talgarth housing market area and Crickhowell area is high compared to other areas.

The lowest private rents are recorded for the Llandrindod and Rhayader area and Llanidloes area.

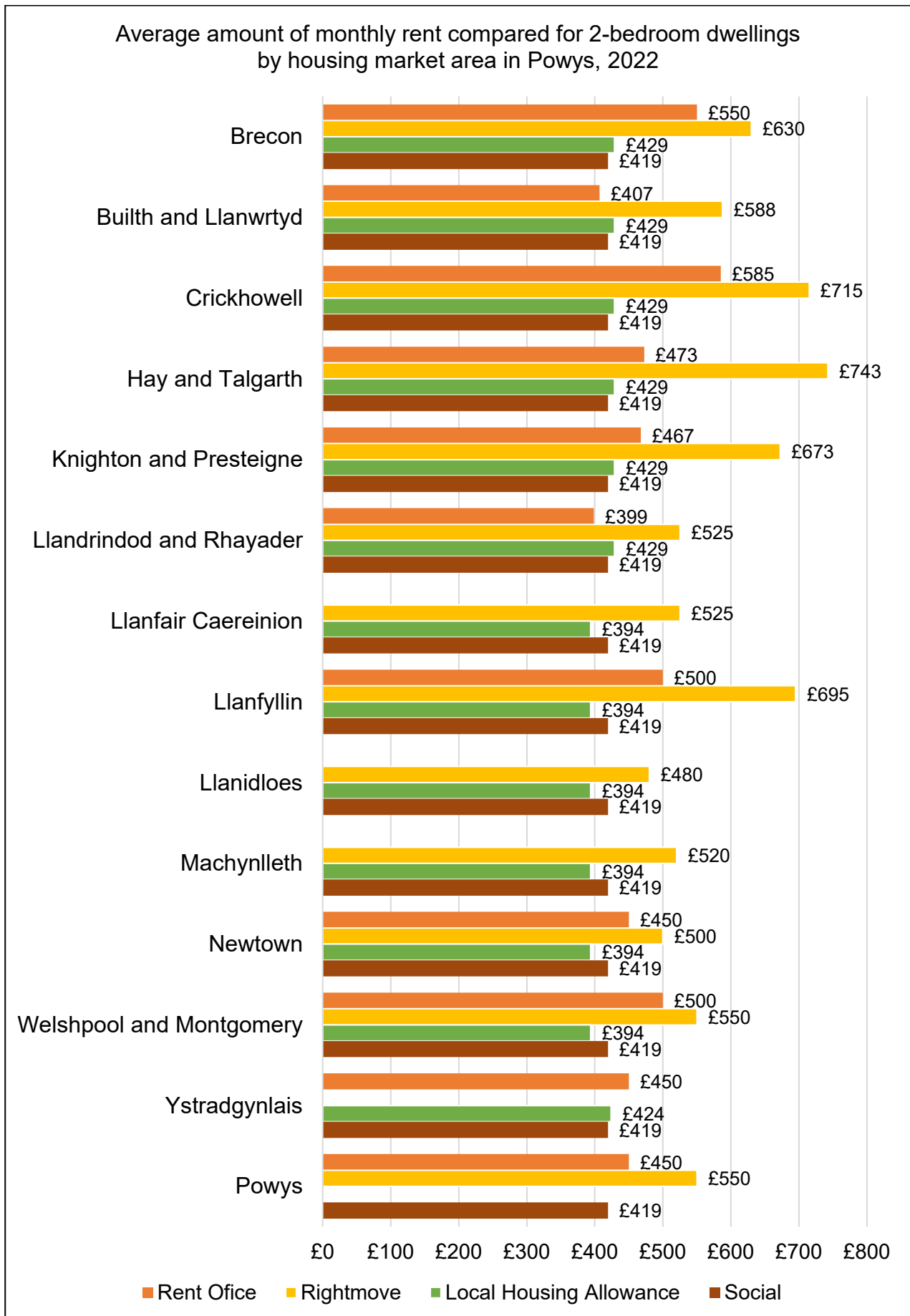
In two housing market areas, private rents recorded by Rent Officers, are lower than social rent. Social rent is in all areas lower than advertised rents.

When comparing LHA with rent office data, the most affordable housing market area for private renters of 2-bed homes is Llandrindod Wells and Rhayader. The least affordable area is Crickhowell. For advertised rents the most affordable area is Llanidloes and the least affordable area is Hay and Talgarth.

Table 26 – Average amount of monthly rent compared for 2-bedroom dwellings by housing market area in Powys, 2022.

HMA	Rent Office (median)	Rightmove (median)	Local Housing Allowance	Social (average)
Brecon	£550	£630	£429	£419
Builth and Llanwrtyd	£407	£588	£429	£419
Crickhowell	£585	£715	£429	£419
Hay and Talgarth	£473	£743	£429	£419
Knighton and Presteigne	£467	£673	£429	£419
Llandrindod and Rhayader	£399	£525	£429	£419
Llanfair Caereinion		£525	£394	£419
Llanfyllin	£500	£695	£394	£419
Llanidloes		£480	£394	£419
Machynlleth		£520	£394	£419
Newtown	£450	£500	£394	£419
Welshpool and Montgomery	£500	£550	£394	£419
Ystradgynlais	£450	£0	£424	£419
Powys	£450	£550	Not available	£419

Figure 23 - Average amount of monthly rent compared for 2-bedroom dwellings by Housing market area in Powys, 2022



Rent levels for 3-bed homes

The figures for 3-bed private rented homes show that the rent in Hay and Talgarth housing market area and Crickhowell area are high compared to other areas.

The lowest private rents are recorded for Ystradgynlais and Llanidloes areas.

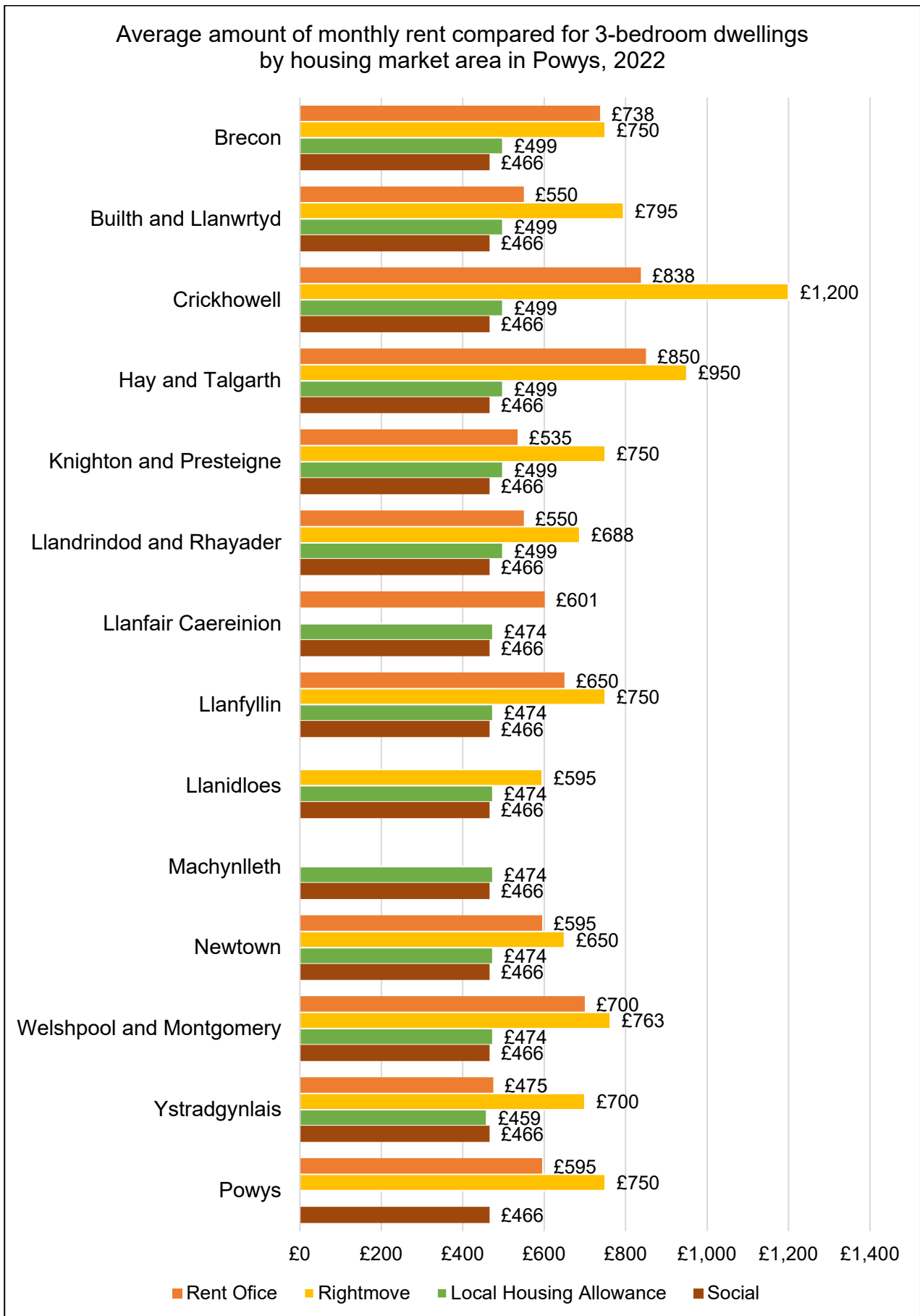
Social rent is in all housing market areas lower than advertised rents.

When comparing LHA with rent office data, the most affordable housing market area for private renters of 3-bed homes is Ystradgynlais and Llanidloes. The least affordable area is Crickhowell. For advertised rents the most affordable area is Llanidloes and the least affordable areas are Hay and Talgarth area and Crickhowell area.

Table 27 - Average amount of monthly rent compared for 3-bedroom dwellings by Housing market area in Powys, 2022

HMA	Rent Office (median)	Rightmove (median)	Local Housing Allowance	Social (average)
Brecon	£738	£750	£499	£466
Builth and Llanwrtyd	£550	£795	£499	£466
Crickhowell	£838	£1,200	£499	£466
Hay and Talgarth	£850	£950	£499	£466
Knighton and Presteigne	£535	£750	£499	£466
Llandrindod and Rhayader	£550	£688	£499	£466
Llanfair Caereinion	£601		£474	£466
Llanfyllin	£650	£750	£474	£466
Llanidloes		£595	£474	£466
Machynlleth			£474	£466
Newtown	£595	£650	£474	£466
Welshpool and Montgomery	£700	£763	£474	£466
Ystradgynlais	£475	£700	£459	£466
Powys	£595	£750	Not available	£466

Figure 24 - Average amount of monthly rent compared for 3-bedroom dwellings by Housing market area in Powys, 2022.



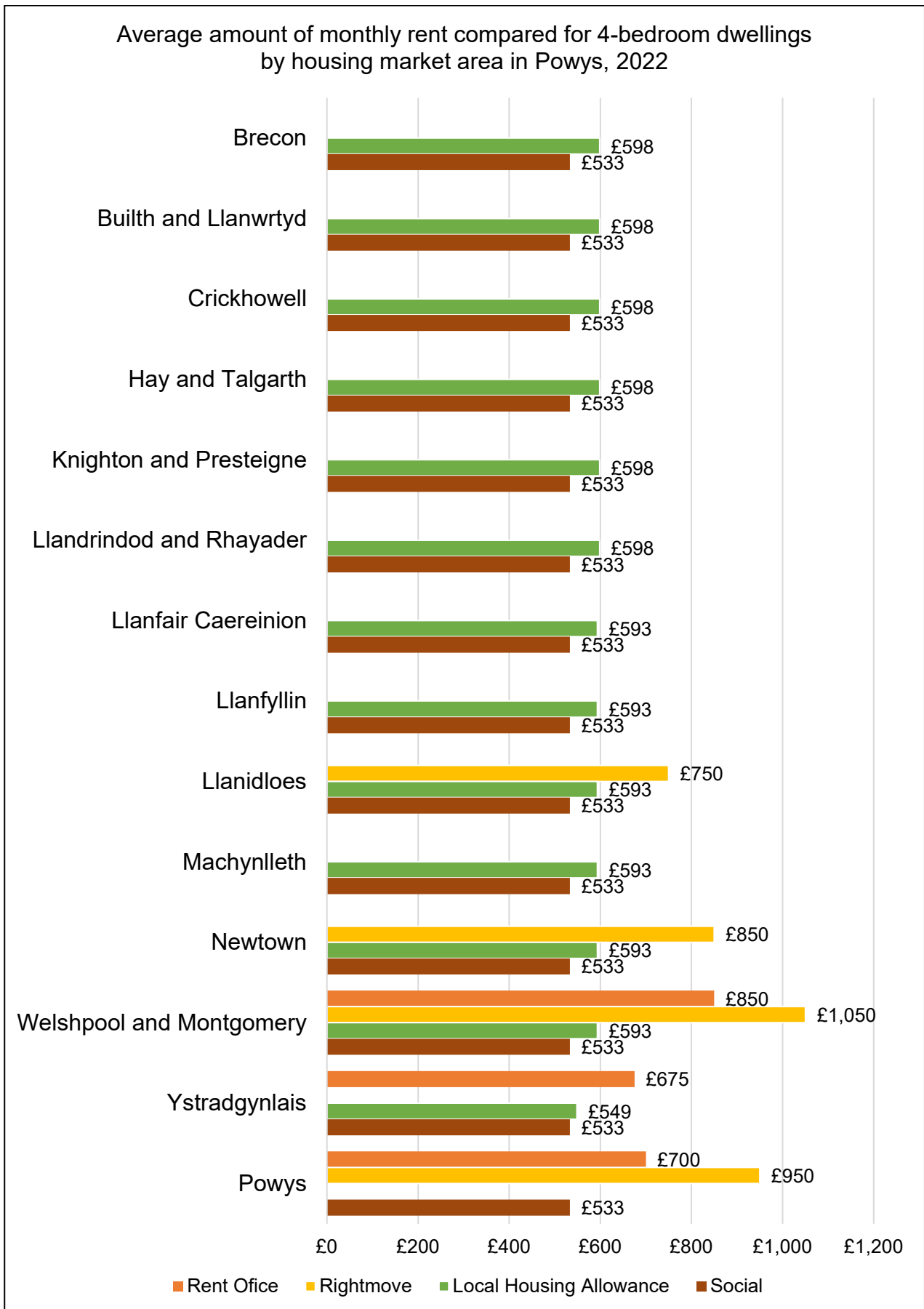
Rent levels for 4-bed homes

There are only a few housing market areas with more than five records of rent level for 4-bed homes. The limited available data show that social rent is lower than private rent. It is noted that several of the private rented homes are situated in rural areas with a large plot size.

Table 28 - Average amount of monthly rent compared for 4-bedroom dwellings by Housing market area in Powys, 2022.

HMA	Rent Office (median)	Rightmove (median)	Local Housing Allowance	Social (average)
Brecon			£598	£533
Builth and Llanwrtyd			£598	£533
Crickhowell			£598	£533
Hay and Talgarth			£598	£533
Knighton and Presteigne			£598	£533
Llandrindod and Rhayader			£598	£533
Llanfair Caereinion			£593	£533
Llanfyllin			£593	£533
Llanidloes		£750	£593	£533
Machynlleth			£593	£533
Newtown		£850	£593	£533
Welshpool and Montgomery	£850	£1,050	£593	£533
Ystradgynlais	£675		£549	£533
Powys	£700	£950	Not available	£533

Figure 25 - Average amount of monthly rent compared for 4-bedroom dwellings by Housing market area in Powys, 2022.



Existing unmet need for affordable housing

Households can apply to be included on the Common Housing Register, called “Homes in Powys”, for social housing.⁴¹ This is a shared register used by all social housing providers in Powys. Council Officers assess applications to determine if the household is in housing need and if they are ready to move. For this LHMA, only those households that are assessed as in housing need and ready to move, have been included. There are additional households that want to move, but are adequately housed now, or not ready to move. All registrations are periodically reviewed to remove households that are no longer in need.

Households can choose out of 174 towns and villages, where they prefer to live. The household can also choose additional places to increase their chance of being successful in getting a tenancy. For this LHMA the first choice is used to determine where the current existing unmet need is.

There is also a register, called “Tai Teg”, for intermediate affordable tenures.⁴² This can include shared ownership or discounted sale, secured through planning obligations from Powys Planning Authority. It is assumed there will be more households that need these intermediate tenures between social rent and market, but it is speculating how large the number is. Tai Teg operates in north Wales. This explains why the number of registrations is higher in the north of Powys, especially Welshpool and Montgomery housing market area, than in the mid and south of Powys. The other factor is that Powys Local Planning Authority require households to register with Tai Teg to confirm eligibility to occupy an affordable dwelling that is provided through planning conditions. Bannau Brycheiniog Planning Authority do not require registration with Tai Teg.

The housing market area with the highest number of unmet need is Newtown. The lowest number of need is in Llanfair Caereinion area. If the number of households with unmet need are compared with the total number of households in a market housing area, the highest percentage is recorded in Newtown, 6.4%. The lowest is recorded in Llanfyllin, 2.4%.

⁴¹ This is a link to the Common Housing Register <https://www.homesinpowys.org.uk/>

⁴² This is a link to the Tai Teg register <https://taiteg.org.uk/en/>

Table 29 - Number of households with an unmet need registered on the Common Housing Register (social rent) and Tai Teg (intermediate affordable tenure, not social rent), by first preference of location, by housing market area in Powys, March 2023. Figures may not add up due to rounding.

HMA	Social Rent	Intermediate rent	LCHO*	Total affordable	Affordable need as a % of all households
Brecon	262	2	6	270	4.3%
Builth and Llanwrtyd	88	0	3	91	2.9%
Crickhowell	95	2	5	101	3.3%
Hay and Talgarth	87	4	7	98	2.5%
Knighton and Presteigne	117	1	1	119	2.6%
Llandrindod and Rhayader	222	3	5	230	3.8%
Llanfair Caereinion	75	0	0	75	2.8%
Llanfyllin	94	3	3	99	2.4%
Llanidloes	97	1	4	102	3.4%
Machynlleth	111	3	2	115	4.1%
Newtown	482	2	4	488	6.4%
Welshpool and Montgomery	387	9	41	436	5.3%
Ystradgynlais	261	0	0	261	5.6%
Powys	2,378	27	79	2,484	4.1%

* Low Cost Home Ownership; if households have been approved for both intermediate rent and low-cost home ownership, they have been allocated as half to both.

Figure 26 - Number of households with an unmet need registered on the Common Housing Register (social rent) and Tai Teg (intermediate affordable tenure, not social rent), by first preference of location, by housing market area in Powys, March 2023.

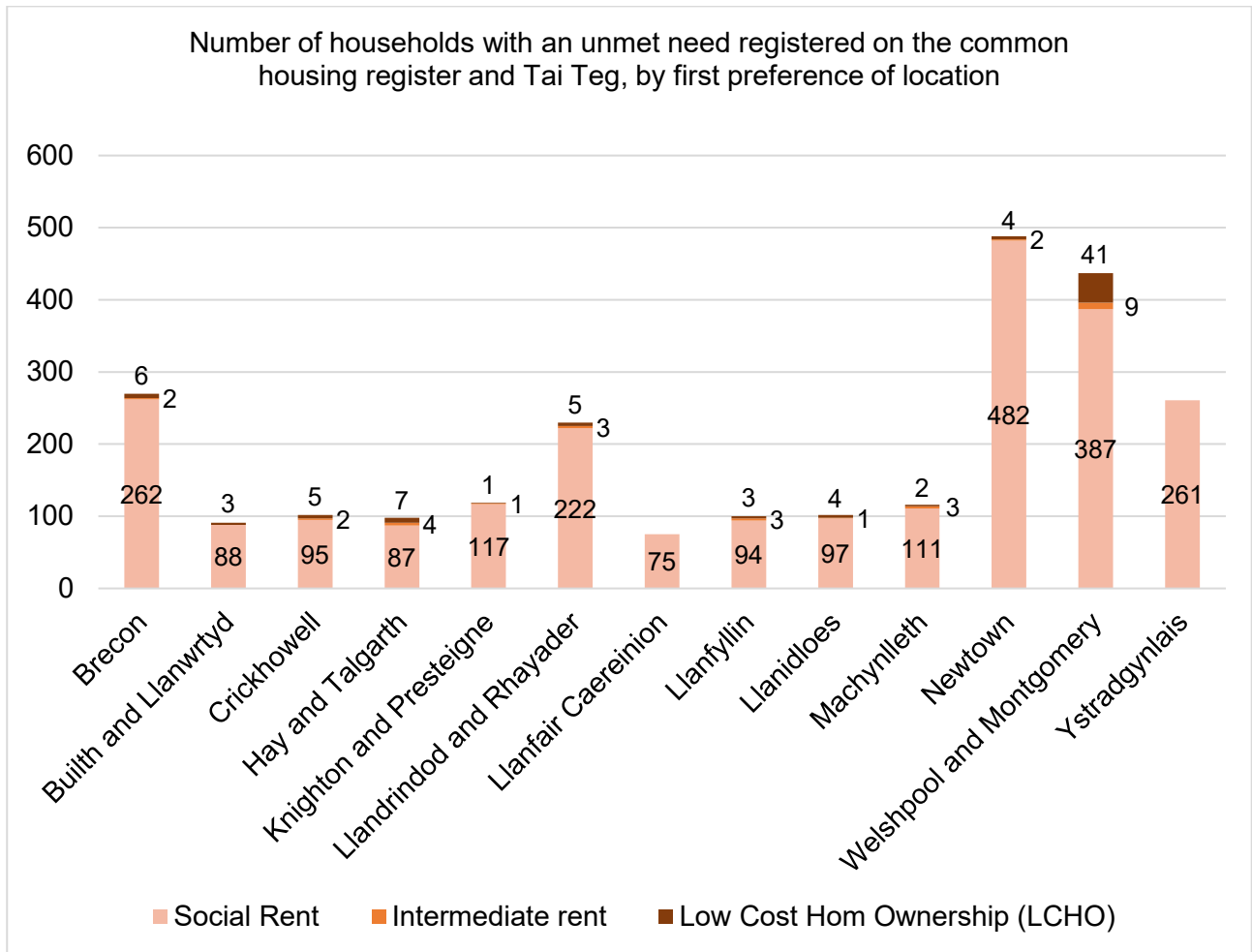


Table 30 shows that most households in need of social housing require a 1 or 2-bedroom dwelling.

Table 30 - Number of households with an existing unmet need registered on the Common Housing Register (social rent), by number of bedrooms required, by housing market area in Powys, March 2023. Figures may not sum due to rounding.

HMA / number of bedrooms	1	2	3	4	5	6	7	Total
Brecon	134	78	26	22	4	0	0	262
Builth and Llanwrtyd	39	35	11	3	1	0	0	88
Crickhowell	39	33	19	4	1	0	0	95
Hay and Talgarth	41	33	8	6	0	0	0	87
Knighton and Presteigne	55	33	23	7	1	0	0	117
Llandrindod and Rhayader	121	65	25	9	3	0	0	222
Llanfair Caereinion	27	28	13	7	2	0	0	75
Llanfyllin	39	42	10	3	2	0	0	94
Llanidloes	34	40	14	7	3	0	0	97
Machynlleth	52	41	14	5	0	0	0	111
Newtown	189	189	62	33	7	2	1	482
Welshpool and Montgomery	168	135	57	28	0	0	0	387
Ystradgynlais	141	83	32	4	1	1	0	261
Powys	1,075	833	311	136	21	3	1	2,378

The number of required bedrooms is calculated by taking the average between the minimum and maximum number of required bedrooms.

Table 31 shows that the social housing stock consists mainly of 2 and 3-bedroom homes.

Table 31 - Existing self-contained general needs and sheltered dwellings let at social rent, by number of bedrooms and Housing market area in Powys, March 2022. Data provided by social housing providers to Powys Council Housing Services.

HMA / number of bedrooms	1	2	3	4	5	6	7	Total
Brecon	202	318	457	21	3	0	0	1,001
Builth and Llanwrtyd	29	154	104	3	0	0	0	290
Crickhowell	85	133	102	6	0	0	0	326
Hay and Talgarth	114	140	171	23	0	0	0	448
Knighton and Presteigne	82	195	189	13	1	0	0	480
Llandrindod and Rhayader	190	377	272	14	2	1	0	856
Llanfair Caereinion	10	157	51	1	0	0	0	219
Llanfyllin	39	173	125	4	0	0	0	341
Llanidloes	90	127	67	8	1	0	0	293
Machynlleth	70	185	179	14	0	0	0	448
Newtown	401	699	754	72	2	2	0	1,930
Welshpool and Montgomery	275	458	397	43	1	1	1	1,176
Ystradgynlais	198	466	233	16	4	0	0	917
Powys	1,785	3,582	3,101	238	14	4	1	8,725

Table 32 shows the number of households in need of social housing, relative to the existing social rent stock in the housing market areas. Cells coloured red show the figure is above the Powys average of 27%. Green is below the average. The table shows that the relative need is primarily for 1-bedroom dwelling and 4-bedroom dwellings. Table 32 also highlights that most of the housing market areas with less than 100 households in need of social housing, show a high percentage. These are Builth and Llanwrtyd area, Crickhowell area, Llanfair Caereinion area, Llanfyllin area, and Llanidloes area. This likely means households will have to wait longer before being able to move.

Table 32 - Number of households with an existing unmet need registered on the Common Housing Register (social rent, March 2023), relative to existing self-contained general needs and sheltered dwellings let at social rent (March 2022), by Housing market area in Powys. Red shows above the average of 27%, green indicates below the average.

HMA / number of bedrooms	1	2	3	4 or more	Total
Brecon	66%	24%	6%	104%	26%
Builth and Llanwrtyd	133%	23%	10%	133%	30%
Crickhowell	46%	25%	18%	75%	29%
Hay and Talgarth	36%	23%	4%	26%	19%
Knighton and Presteigne	66%	17%	12%	50%	24%
Llandrindod and Rhayader	63%	17%	9%	68%	26%
Llanfair Caereinion	265%	18%	25%	800%	34%
Llanfyllin	99%	24%	8%	100%	28%
Llanidloes	38%	31%	20%	106%	33%
Machynlleth	74%	22%	8%	36%	25%
Newtown	47%	27%	8%	56%	25%
Welshpool and Montgomery	61%	29%	14%	61%	33%
Ystradgynlais	71%	18%	14%	28%	28%
Powys	60%	23%	10%	62%	27%

Table 33 shows that Powys County Council is the largest provider of social rent stock in Powys with 62%, March 2022. The introduction of the Housing (Wales) Act 2014 has enabled the Council to build Council housing again.

Table 33 - Existing self-contained general needs and sheltered dwellings let at social rent, by provider and Housing market area in Powys, March 2022. Data provided by social housing providers to Powys County Council Housing Service.

HMA	Barcud	Clwyd Alyn	Grŵp Cynefin	Melin	Newydd	Pobl	Powys Council	Wales & West	total
Brecon	8			45			620	328	1,001
Builth and Llanwrtyd	39						173	78	290
Crickhowell				69			172	85	326
Hay and Talgarth	4			26			330	88	448
Knighton and Presteigne	150						312	18	480
Llandrindod and Rhayader	178				60		460	158	856
Llanfair Caereinion	29		3				175	12	219
Llanfyllin	57		47				237		341
Llanidloes	79						210	4	293
Machynlleth	93		7				295	53	448
Newtown	451				227		1,114	139	1,931
Welshpool and Montgomery	352	219					574	31	1,176
Ystradgynlais						177	740		917
Powys	1,440	219	57	140	287	177	5,412	994	8,726

Overcrowding

A household's accommodation can be overcrowded, ideally occupied, or under-occupied. This is calculated by comparing the number of bedrooms the household requires, to the number of available bedrooms.

The number of bedrooms the household requires is calculated according to the Bedroom Standard, where the following should have their own bedroom:

- adult couple
- any remaining adult (aged 21 years or over)
- two males (aged 10 to 20 years)
- one male (aged 10 to 20 years) and one male (aged 9 years or under), if there are an odd number of males aged 10 to 20
- one male aged 10 to 20 if there are no males aged 0 to 9 to pair with him.
- repeat steps 3 to 5 for females
- two children (aged 9 years or under) regardless of sex
- any remaining child (aged 9 years or under)

An occupancy rating of

- -1 and -2 or less implies that a household's accommodation has fewer bedrooms than required (overcrowded)

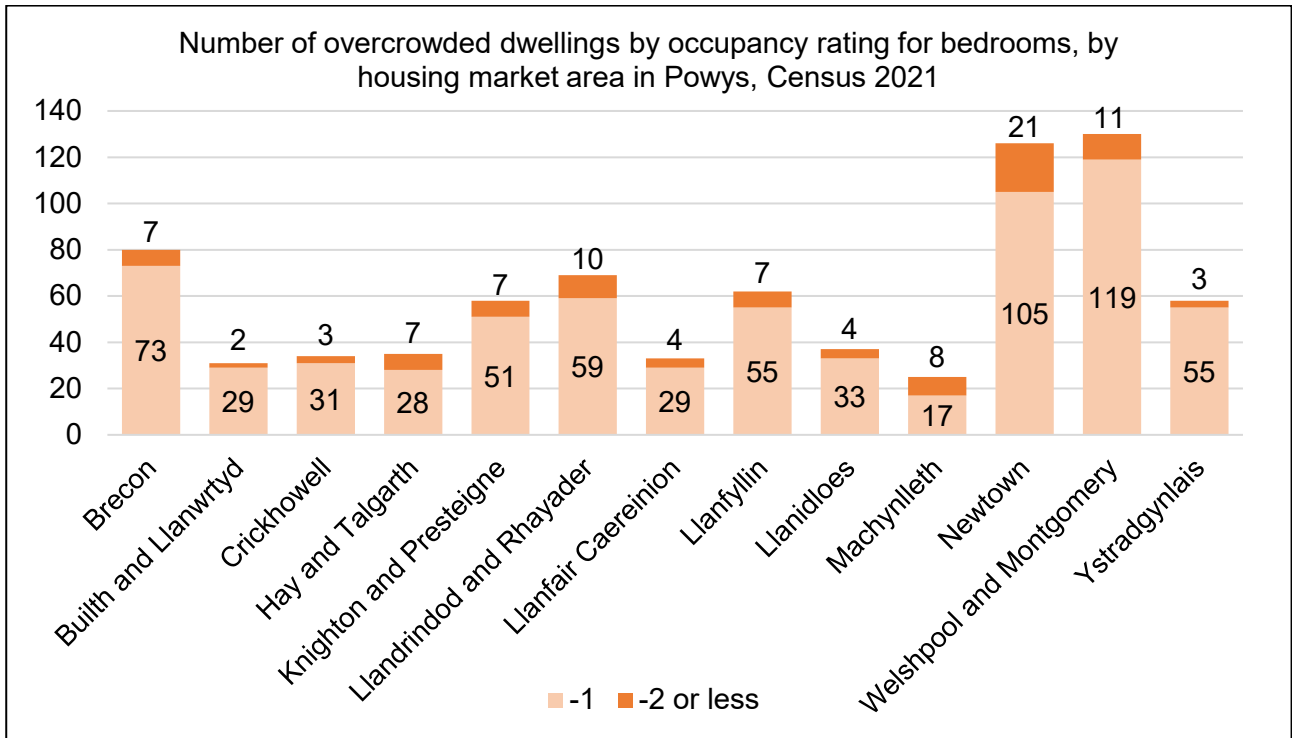
- +1 and +2 or more implies that a household's accommodation has more bedrooms than required (under-occupied)
- 0 suggests that a household's accommodation has an ideal number of bedrooms.

The highest number of overcrowded dwellings is in Newtown area and Welshpool and Montgomery area. The same applies to the percentage of households that are overcrowding. The smallest number of overcrowded dwellings is in Machynlleth area. The smallest percentage is in Hay and Talgarth area. In the whole of Powys there are 778 households that are overcrowding, or 1.3% of all households. Overcrowding households that are looking to move to a social rented home, can register on the Common Housing Register.

Table 34 - Number of dwellings by occupancy rating for bedrooms, by housing market area in Powys, Census 2021

HMA	+2 or more	+1	0	-1	-2 or less	total
Brecon	3,063	2,104	1,086	73	7	6,333
Builth and Llanwrtyd	1,719	982	417	29	2	3,149
Crickhowell	1,803	842	395	31	3	3,074
Hay and Talgarth	2,058	1,247	615	28	7	3,955
Knighton and Presteigne	2,261	1,576	613	51	7	4,508
Llandrindod and Rhayader	2,810	2,143	1,087	59	10	6,109
Llanfair Caereinion	1,437	916	297	29	4	2,683
Llanfyllin	2,101	1,318	571	55	7	4,052
Llanidloes	1,443	1,038	489	33	4	3,007
Machynlleth	1,302	1,014	467	17	8	2,808
Newtown	3,317	2,587	1,594	105	21	7,624
Welshpool and Montgomery	3,833	2,854	1,428	119	11	8,245
Ystradgynlais	2,021	1,687	867	55	3	4,633
Powys	29,168	20,308	9,926	684	94	60,180

Figure 27 - Number of overcrowded dwellings by occupancy rating for bedrooms, by housing market area in Powys, Census 2021.



9. Household projection variants

Welsh Government calculates household estimates and household projections.⁴³

Household estimates are estimations of historic household numbers. They are produced by making assumptions about household composition and size and applying these to population estimates. These assumptions are based on past trends identified from Census data.

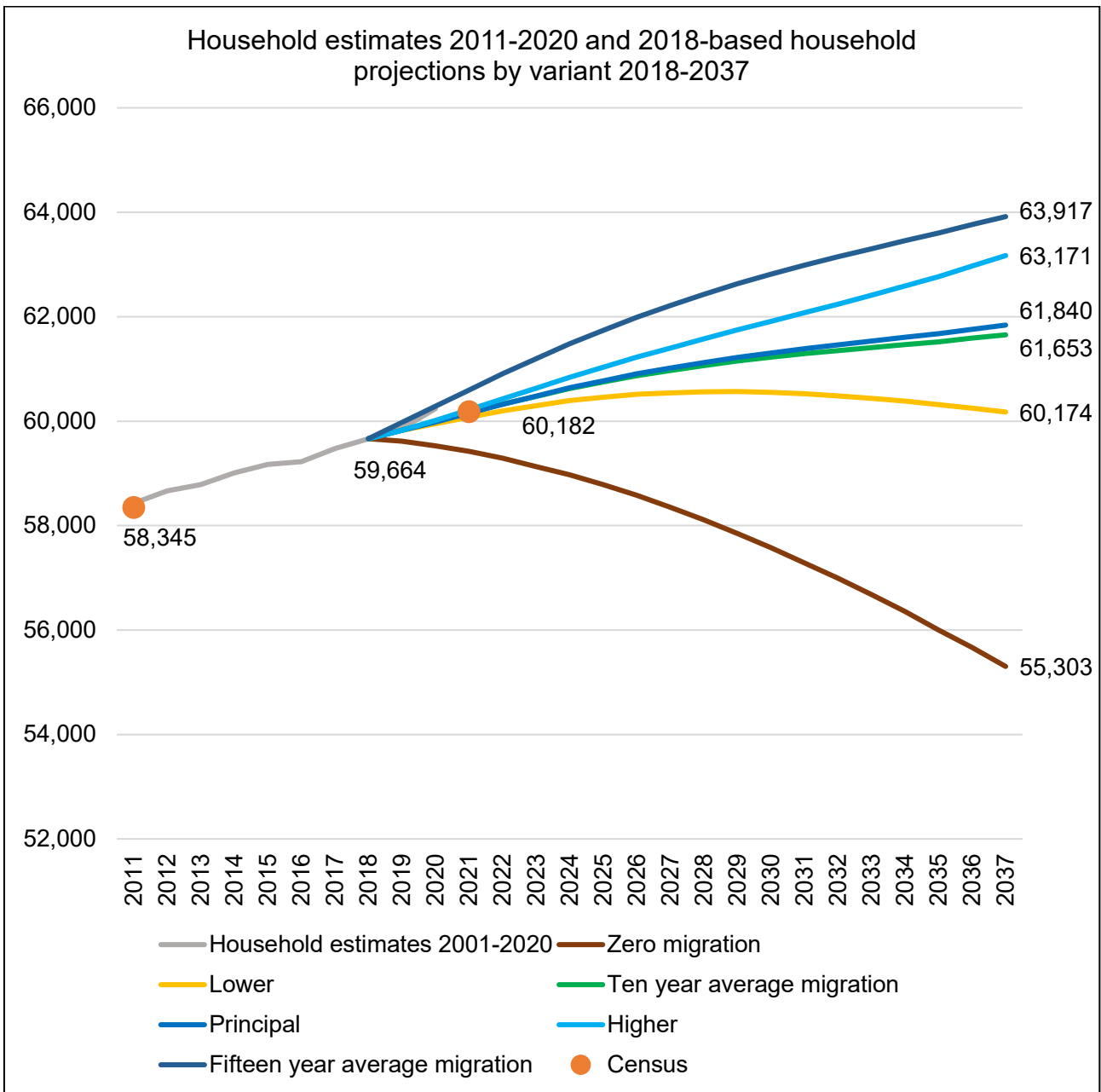
Household projections provide estimates of future numbers of households. Using a similar methodology to household estimates, they are produced by making assumptions about household composition and size and applying these to population projections. The assumptions are based on past trends. Projections done in this way do not make allowances for the effects of local or central government policies on future household levels, distribution and change.

To illustrate the uncertainty associated with projections, variant projections are published alongside the main (or principal) population projection. These variant projections are illustrative to show how possible variations in the fertility, mortality, and migration assumptions affect the projections and how the size of this effect increases the further into the projection period the results are taken. The variant projections, in addition to the principal variant, are as follows:

- A higher population variant which is based on assumptions of higher fertility rates and lower mortality rates.
- A lower population variant which is based on assumptions of lower fertility rates and higher mortality rates.
- Two variants in which the migration assumption is based on the average migration over a longer, 10-year and 15-year period. The lower, principal and higher projections use a 5-year period.
- A zero migration (natural change only) projection to illustrate the projected population if there were no future inward or outward migration.

⁴³ The household estimates and projections are published on StatsWales. This is the link: <https://statswales.gov.wales/Catalogue/Housing/Households>. More detail about how this is calculated can be found on the Welsh Government website via this link <https://www.gov.wales/population-and-household-statistics-technical-information>

Figure 28 - Welsh Government household estimates and 2018-based household projection variants for Powys.



More recent published figures

Below are comparisons between the components of change used in the principal projection and published figures since 2018. There is a difference between the 5-year figures 2013-2018 that are used for the 2018-based population projections and more recent available figures.

In summary, more recent figures show that the population

- decreases more than projected because of natural change, and
- increases more than projected because of migration.

Because of the ageing population, the number of deaths is projected to be higher than the number of births in every year. This means that without migration, the population is

projected to decrease by on average 750 persons per year, or 11,000 persons during the period 2022-2037.

The 2018-based principal projection shows a net inward migration of around 800 people on average annually, totalling 12,100 persons during 2022-2037. 90% of the net inward migration is from the UK and 10% net inward migration is from overseas.

Projected births and deaths compared with recorded births.

Estimated population figures are published for the previous year. A comparison between the projected births and deaths used in the principal 2018-based population projection, with the published figures between 2018 and 2022, may be an indication of how accurate the projected assumptions are.^{44 45}

The comparison shows that the number of births recorded, is lower than projected. On average 10% less births than the projection for the period 2018 – 2022. This is on average 112 less births than projected.

Table 35 – Welsh Government principal variant population projection component of change live births compared with recorded numbers of live births, Powys, 2018-2022

	2018/19	2019/20	2020/21	2021/22	Total
Projected	1,153	1,170	1,155	1,138	4,616
Recorded	1,092	1,031	1,001	1,045	4,169
Difference	-61	-139	-154	-93	-447
Percentage difference	-5%	-12%	-13%	-8%	-10%

The number of deaths is on average 1% higher. This is on average 20 more deaths than projected. The Coronavirus pandemic will have increased the number of deaths, and this is likely to lead to a lower number of deaths in future years.

Table 36 - Welsh Government principal variant population projection component of change deaths compared with recorded numbers of deaths, Powys, 2018-2022.

	2018/19	2019/20	2020/21	2021/22	Total
Projected	1643	1685	1696	1711	6735
Recorded	1624	1746	1687	1756	6813
Difference	-19	61	-9	45	78
Percentage difference	-1%	4%	-1%	3%	1%

The number of births minus the number of deaths is called natural change. A comparison of the projected and recorded natural change shows that the recorded decrease in

⁴⁴ This is a link to population projected components of change by local authority and year <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Projections/Local-Authority/2018-based/populationprojectioncomponentsofchange-by-localauthority-year>

⁴⁵ This is a link to components of change by local authority and year <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Components-of-Change/componentsofpopulationchange-by-localauthority-component>

population was 25% more than projected. This is a natural decrease of the population with 105 persons more than projected on average per year.

Table 37 - Welsh Government principal variant population projection components of change live births and deaths compared with Office for National Statistics published estimated numbers of live births and deaths, Powys, 2018-2022.

	2018/19	2019/20	2020/21	2021/22	Total
Projected	-490	-515	-541	-573	-2,119
Recorded	-532	-715	-686	-711	-2,644
Difference	-42	-200	-145	-138	-525
Percentage difference	-9%	-39%	-27%	-24%	-25%

It is beyond this assessment to estimate how this exactly translates to the number of households. It would be too simple to divide the number of people by the average household size of 2.2. It is also unclear how the figures exactly translate to housing need.

The projections are based on fertility and mortality rates, and it is beyond this assessment to calculate rates, based on the number of births and deaths since 2018.

Projected migration compared with published estimates

There will be people moving into Powys (inward migration) and moving out of Powys (outward migration). If the number of people that move into Powys is larger than the number of people that move out, there is net inward migration. If the net inward migration is higher than the net negative natural change, the overall population will grow.

A comparison between the figures used in the 2018-based projection with the published figures for 2018-2022, show that inward migration was higher than the projection. Over the four-year period 2018-2022, the net UK inward migration was 144% higher than projected. This is on average 688 persons per year. It is unclear if the high UK inward migration to Powys is an outlier or if the net UK inward migration will remain at a relatively high level.

Table 38 - Welsh Government principal variant population projection component of change net UK migration compared with recorded numbers of net UK migration, Powys, 2018-2022.

	2018/19	2019/20	2020/21	2021/22	Total
Projected	361	467	519	560	1,907
Recorded	269	1,426	2,094	869	4,658
Difference	-92	959	1,575	309	2,751
Percentage difference	-25%	205%	303%	55%	144%

International migration was recorded as negative during 2018 to 2021. This means more international migrants left Powys than moved into Powys. 2021-2022 saw a net inward migration. Over the four-year period international inward migration was 127% lower than projected. This is a difference of 97 persons on average per year.

Table 39 - Welsh Government principal variant population projection component of change net international migration compared with recorded numbers of net international migration, Powys, 2018-2022.

	2018/19	2019/20	2020/21	2021/22	Total
Projected	76	76	76	76	304
Recorded	-107	-93	-73	190	-83
Difference	-183	-169	-149	114	-387
Percentage difference	-241%	-222%	-196%	150%	-127%

The total net inward migration between 2018 and 2022 is 107% higher than projected. This is just over double and on average 519 more persons than projected.

Table 40 - Welsh Government principal variant population projection component of change net UK and international migration combined compared with recorded numbers of net UK and international migration, Powys, 2018-2022.

	2018/19	2019/20	2020/21	2021/22	Total
Projected	437	543	595	636	2,211
Recorded	162	1,333	2,021	1,059	4,575
Difference	-275	790	1,426	423	2,364
Percentage difference	-63%	145%	240%	67%	107%

It is speculation what the future migration figures will be. The Coronavirus pandemic is likely to have had an influence.

As with births and deaths, it is beyond this assessment to provide updated projections and a translation to the number of households and impact on future housing needs.

Table 41 shows the total net change in population, including natural change and migration, has been calculated for 2018 to 2022. It shows a difference of 296 people per year. Instead of a projected decrease of the population with on average 13 persons per year, there has been an increase of 460 people per year. This is mainly due to the migration figures.

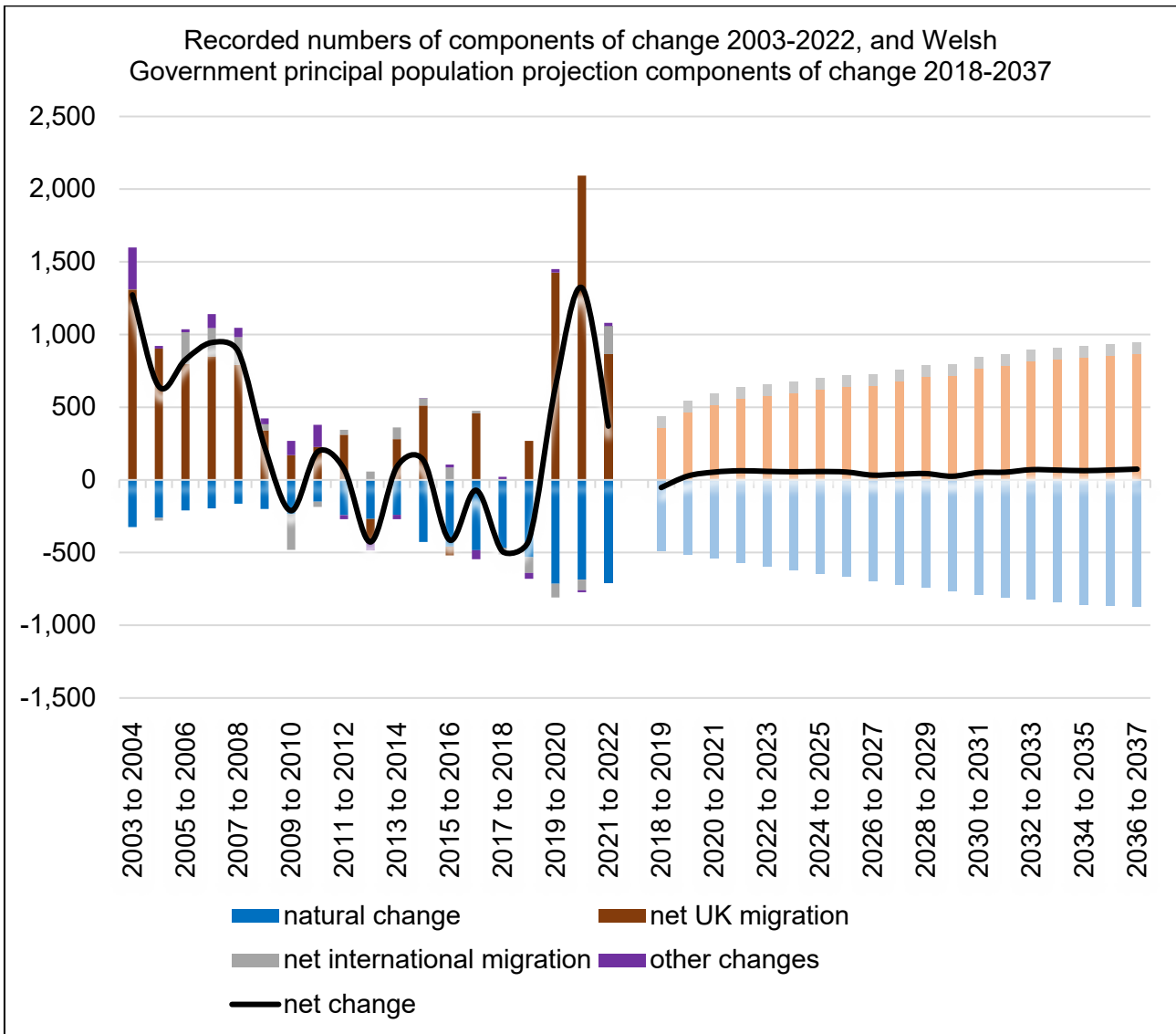
Table 41 - Welsh Government principal variant population projection change compared with recorded change, Powys, 2018-2022.

	2018/19	2019/20	2020/21	2021/22	Total
Projected	-53	28	54	63	92
Recorded	-370	618	1,335	348	1,931
Difference	-317	590	1,281	285	1,839
Percentage difference	-598%	2,107%	2,372%	452%	1,999%

It is beyond this assessment to estimate what this means for the number of households and housing need.

Figure 29 shows published figures on the left and projected figures on the right. It shows the volatility of migration figures.

Figure 29 - Recorded numbers of components of change 2003-2022, and Welsh Government principal population projection components of change 2018-2037.



Preferred household projection

The comparisons show that that the natural change seems to decrease faster than projected. When the migration figures are compared, the higher net migration into Powys shows growth of the population.

What does this mean for choosing the most likely household projection variant?

Looking at natural change only, it is likely that a projection below the principal variant is most realistic. There is insufficient information how much lower.

The average natural change each year for the five-year period up to 2018, was -415. The recorded change between 2018 and 2022 was -661. The Coronavirus pandemic is likely to have had an influence. The lower variant is based on assumptions of lower fertility rates and higher mortality rates, as well as lower assumptions of migration rates.

The average net inward migration over the 15-year period 2003 to 2018 was 491 people per year. The 15-year migration variant is based on this average.

The average recorded inward migration for the four-year period 2018 to 2022 was 591 people per year. This is higher than the 15-year migration average variant. The Coronavirus pandemic is likely to have had an influence.

Calculating population and household projections are complex.⁴⁶ This assessment needs to state which household projection variant is used in the LHMA Tool to estimate future housing need. In other words, what is the most likely outcome by 2037.

The preferred variant that is used is the higher variant.

This reflects the expectation that migration will be the key driver for household growth and outweigh the natural decline of the population in Powys. The decision to make the higher variant the preferred variant for this assessment, also considers that there is a political ambition for growth and job creation and increasing the number of households of working age, as set out in “A Vision for Growing Mid Wales”.⁴⁷

⁴⁶ This is a link to the technical information on calculating population and household projections <https://www.gov.wales/population-and-household-statistics-technical-information>

⁴⁷ This is a link to a Vision for Growing Mid Wales https://growingmidwales.co.uk/media/11185/A-vision-for-growing-mid-Wales/pdf/Vision_for_Growing_Mid_Wales_FINAL_ENGpdf.pdf?m=1612436327177

10. Range of additional housing need estimates

Methodology, inputs and assumptions

The housing need figures are estimated using the LHMA Tool developed by Welsh Government.⁴⁸ This tool uses a formulaic approach to identify the additional housing need, formed from the existing unmet need and the newly arising need. The newly arising need is derived from change in the household projections over the 15-year LHMA period 2022-2037.

Detail of all inputs and any issues are included in annexe A. Annexe B includes the output tables from the LHMA Tool for four household projections variants. The output tables are used as the starting point for development plans to provide a range of additional housing need estimates.

In summary, the methodology is explained by Welsh Government as follows.

High level flow process of the methodology used to estimate the additional housing need by tenure and housing market area

Step 1: Data input and key assumptions

The user will need to complete the following steps:

1. Split the local authority into housing market areas (HMAs) using wards or Middle Super Output Areas (MSOAs) or Lower Super Output Areas (LSOAs).
2. Establish the average annual newly arising need using the default data (Welsh Government Household Projections). User projections are available to understand the impact of a local policy on the additional housing need estimates.
3. Provide, at a HMA level, the existing unmet need split by key categories and number of bedrooms. This need is allocated to affordable housing.
4. Provide, at a HMA level, the turnover of existing stock and planned supply of affordable properties and number of bedrooms. The additional affordable housing need is reduced by this estimated supply to identify any under or over supply of housing units.
5. Provide, at a HMA level, the percentile income distribution data and set the key assumptions.
6. Review the appropriateness of the default data provided for the household projections, rent and house price paid data. If alternative data is used, it must be justified why this data is more appropriate than the default data provided.

Step 2: LHMA calculations / Affordability analysis

1. Using a formulaic approach, the tool uses the data and assumptions from step 1 to estimate the additional housing needs by HMA at both a 2-way and 5-way tenure.
2. The tenure splits are market housing, covering owner occupier and private rented sector and affordable housing, covering Low Cost Home Ownership (LCHO), intermediate rent and social rent.

⁴⁸ The LHMA Tool is available via this link to the Welsh Government website: <https://www.gov.wales/local-housing-market-assessment-lhma-guidance-local-authorities>.

3. The tool produces the additional housing need estimates over the 15-year LHMA period, with all existing unmet need assumed to be covered over the first 5 years.
4. The additional affordable housing need is reduced by the turnover of existing stock and planned supply (step 1: point 4) to show an over or under supply of housing units by HMA during the first 5 years of the LHMA period.

Step 3: Output tables and charts

The tool summarises the calculations from step 2 into several output tables and charts:

1. Additional market housing need (owner occupier and private rented sector) estimates by HMA for the LHMA period.
2. Additional affordable housing need estimates (LCHO, intermediate rent and social rent), before and after an allowance of the turnover of existing stock and planned supply, by HMA for the LHMA period.
3. By HMA, summary of the additional market and affordable housing need estimates over the LHMA period, and for the social rent the allocation split by number of bedrooms.
4. Scenario testing templates are provided to understand the change to the additional housing need estimates under different sets of data and assumptions.
5. Tables of the additional housing need using the different Welsh Government household projections which will be used in the LHMA report.

The Council has used the default settings for rent data and house price paid data, because the Council is not aware of more accurate data that suggest the default settings should be changed (Step 1.6). A user projection for the 15-year average migration household projection has been added to the three default projections variants (principal, lower and higher).

Different scenarios have been evaluated (Step 3.4). This included different income thresholds for first-time buyers, changes in income growth, and changes in private rent prices. Different scenarios provided little difference in the outcome of tenures. The used assumptions for the four variants are shown below in the outcome tables in Annexe B. Annexe A sets out in detail which data has been used and any identified issues.

Summary estimated housing need using the LHMA Tool for Powys

This includes estimates of need for each housing market area. The orange-shaded tables 41 to 45 contain a summary of the estimated housing need, using four different household projections variants. The estimates are split into the first five years and the following ten years. The LHMA period is fifteen years in total, 2022-2037.

The estimates are split in two different tenures. Affordable housing includes social rent, intermediate rent and low cost home ownership. Market housing includes owner occupancy and private rent.

Figures may not always sum due to rounding. The LHMA Tool works to decimal places but the data in the tables below is rounded to the nearest whole number.

Section 9 “Household projection variants”, explains that the higher variant is the most likely outcome variant for Powys.

In tables 42 to 46, the higher, preferred, variant is bold and black. The outcomes from the other variants are black, but not in bold font.

Table 42 - LHMA Tool outcomes per variant: additional affordable housing need for Powys 2022-2037.

variant	0-5 years (a)	6-15 years (b)	0-15 years (c)=(a)+(b)
Lower variant	368	41	410
Principal variant	467	377	844
Higher variant	547	646	1,193
15-year average migration variant	578	744	1,321

Table 43 - LHMA Tool outcomes per variant: additional market housing need for Powys 2022-2037.

variant	0-5 years (d)	6-15 years (e)	0-15 years (f)=(d)+(e)
Lower variant	38	76	114
Principal variant	348	695	1,043
Higher variant	595	1,190	1,785
15-year average migration variant	685	1,370	2,054

Table 44 - LHMA Tool outcomes per variant: additional affordable and market housing need for Powys 2022-2037.

variant	0-5 years (g)=(a)+(d)	6-15 years (h)=(b)+(e)	0-15 years (i)=(g)+(h)
Lower variant	406	117	523
Principal variant	814	1,073	1,887
Higher variant	1,142	1,836	2,978
15-year average migration variant	1,262	2,113	3,376

The LHMA Tool estimates for the higher variant an additional housing need for 2,978 households. This includes 1,193 (40%) affordable dwellings and 1,785 (60%) market dwellings.

In tables 45 and 46, the housing need estimates from the LHMA Tool are shown by planning authority. Four housing market areas are situated in both planning authorities. The estimated need for each of the four housing market areas is split using the number of existing residential addresses. For example, if 60 residential addresses are situated in Bannau Brycheiniog and 40 in Powys, the housing estimate for the housing market area is split 60% / 40%.

Table 45 - LHMA Tool outcomes per variant: additional housing need for Powys Planning Authority 2022-2037.

	affordable	market	total
lower variant	305	95	400
principal variant	653	866	1,520
higher variant	934	1,483	2,416
15-year average migration variant	1,036	1,707	2,743

Table 46 - LHMA Tool outcomes per variant: additional housing need for Bannau Brycheiniog Planning Authority inside Powys 2022-2037.

	affordable	market	total
lower variant	105	19	124
principal variant	191	177	367
higher variant	260	302	562
15-year average migration variant	285	348	633

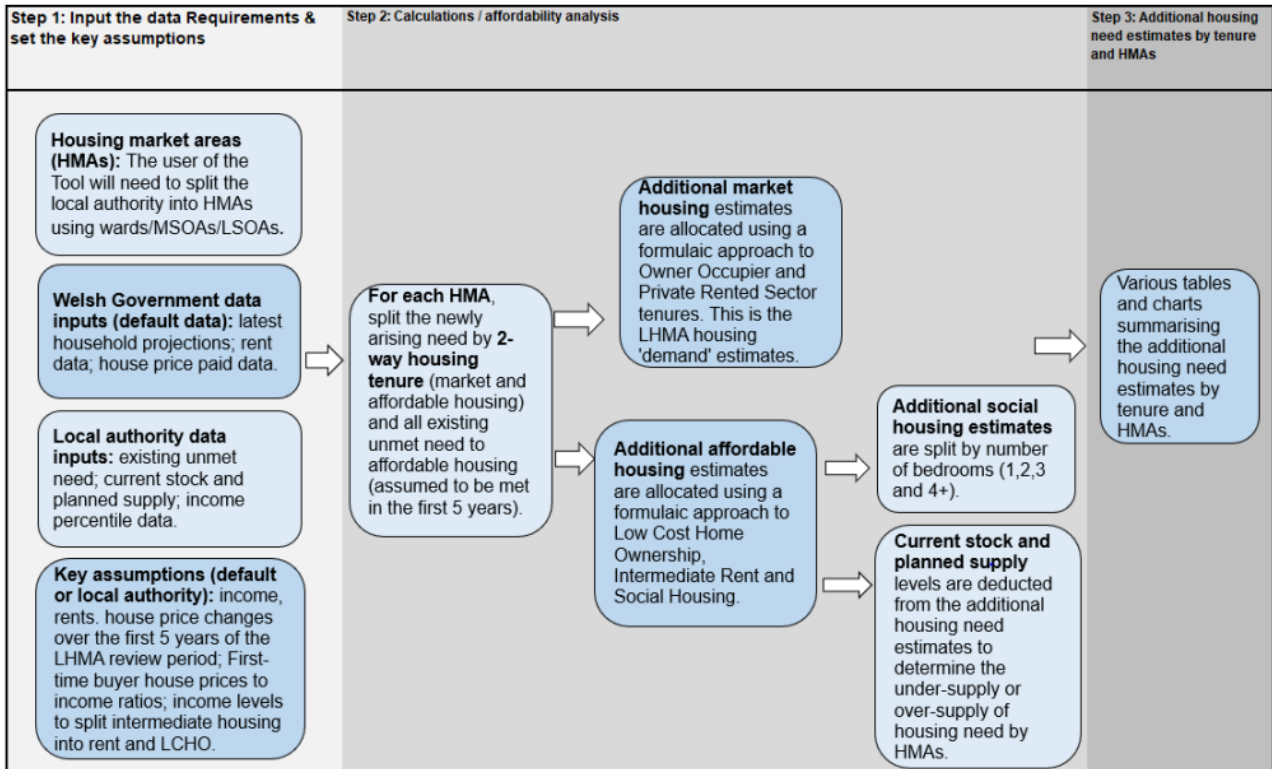
11. Estimated housing need for the preferred higher variant household projection

To calculate the estimated housing need for Powys, the Local Housing Market Assessment (LHMA) Tool has been used.⁴⁹ All housing authorities in Wales must use this LHMA Tool to ensure a consistent approach in the way future housing needs are calculated.

High level overview of the LHMA Tool

The diagram below shows the 3 main steps of the LHMA Tool covering the data requirements and assumptions, the calculations/affordability analysis and the key additional housing need estimates by the different tenures and housing market areas.

Figure 30 - Undertaking Local Housing Market Assessments (LHMAs) Version 1.0



Source: Welsh Government Guidance: Undertaking Local Housing Market Assessments (LHMAs) Version 1.0 – Published March 2022.

⁴⁹ This is a link to the Welsh Government website that includes the LHMA Tool <https://www.gov.wales/local-housing-market-assessment-lhma-guidance-local-authorities>

Overview of the calculation process

Step 1. Estimate the average annual additional housing need

This is the newly arising need from the household projections over the 15 years of the LHMA period. As explained in section 9 “Household projection variants”, the preferred variant is the higher variant. The higher variant shows an estimated increase of, on average, 184 households in need each year. Over the 15-year period this is 2,760 additional households.

The existing unmet need for affordable housing is used for the first 5 years of the LHMA period. The existing unmet need consists of registered need for social housing and other forms of affordable housing.

The expected reletting and new build homes are taken away from the number of households in need of affordable housing. This results in the net need for affordable housing. The assumption is that the existing unmet need is met within the first five years of the assessment.

The existing gross unmet need (March 2023) is 2,378 households for social rent and 106 households for intermediate tenures. It is estimated that there will be almost 2,800 relets of social rented homes in the first 5-year period. There were 374 social rent homes committed to be newly built during the first 5 years and 156 homes for affordable sale are committed through planning conditions.

Step 2: Newly arising need allocated to market housing

The element of the newly arising need considered appropriate for market housing is determined using the following formula: Minimum income to be considered appropriate for market housing is where the median private rent equates to 30% or less of income. This is calculated for each housing market area.

The LHMA Tool shows a need for 119 market housing homes each year.

Step 3: Market housing need (newly arising need only) allocated to owner occupier and private rented sector tenures

The following formula is used to allocate an element of the market housing need to owner occupier tenure: The estimated first-time buyers (FTB) property price for a housing market area is divided by the FTB property value to income ratio (4.45) to give the minimum income at which households are considered for owner occupier tenure. The FTB prices are included in annexe B under key assumptions. These households are multiplied by a percentage of those households considered appropriate for owner occupier that go onto buy. This LHMA assumes 50%.

The private rented sector housing need is the market housing need less the owner occupier housing need.

The annual additional market housing need is 119 each year, consisting of 29 owner occupier and 90 private rented.

Step 4: Affordable housing need

The affordable newly arising housing need is the total newly arising need less the market

newly arising housing need (step 2 above). The newly arising need is 65 affordable homes each year.

All existing unmet need is allocated to affordable housing.

Step 5: Affordable housing need allocated to intermediate housing and social rent tenures

The social rent housing need is determined from the following formula: The upper threshold income for a household to be considered in need of social rent is where the 30th percentile rent value equates to 35% or more of income. The LHMA Tool shows a newly arising need of 38 social rent each year.

Intermediate housing need is the affordable housing need less the social rent housing need. This is 201 each year.

Table 47 - Outcome of the calculation process using the LHMA Tool, average newly annual arising need, 2022-2037 (15 years).

Total annual newly arising need	184	Step 1
Consisting of:		
Market rent	90	Step 3
Market purchase	29	Step 3
Affordable intermediate rent / LCHO*	21	Step 5
Affordable social rent	44	Step 5

* Low Cost Home Ownership

Table 48 - Existing unmet need for affordable housing, averaged over 5 years, 2022-2027. Taken from the Common Housing Register (CHR) and Tai Teg, March 2023.

Total existing unmet need	497
Consisting of:	
Affordable intermediate rent (Tai Teg)	5
Affordable LCHO* (Tai Teg)	16
Affordable social rent (CHR)	476

* Low Cost Home Ownership

Table 49 - Estimated reletting and committed supply for affordable housing, average per year, 2022-2027 (5 years).

Total reletting and committed supply	665
Estimated reletting social rent	559
Committed supply social housing	75
Committed supply low cost home ownership	31

The existing gross unmet need, reletting and committed supply are calculated for each housing market area by number of bedrooms. This means that the total number reletting and committed supply cannot be simply taken away from the existing unmet need to calculate the net existing unmet need.

Table 50 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, first 5 years 2022-2027, Powys County Council area. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate rent	LCHO*	total market	owner occupier	market rent	total
Brecon	111	98	13	-	60	15	45	171
Builth and Llanwrtyd	38	35	3	-	34	7	27	72
Crickhowell	23	11	7	5	29	5	24	52
Hay and Talgarth	29	11	14	5	37	7	30	67
Knighton and Presteigne	42	34	8	-	46	9	37	88
Llandrindod and Rhayader	15	3	11	-	67	15	52	81
Llanfair Caereinion	29	24	5	-	25	7	19	54
Llanfyllin	32	20	12	-	39	9	31	71
Llanidloes	12	5	6	-	30	8	22	42
Machynlleth	27	19	8	1	28	7	22	55
Newtown	30	17	13	-	77	22	54	107
Welshpool and Montgomery	99	52	26	21	78	22	56	177
Ystradgynlais	61	54	7	-	44	16	28	105
Powys	547	384	132	31	595	147	448	1,142

* Low Cost Home Ownership

Table 51 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, following 10 years 2027-2037, Powys County Council area. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate	total market	owner occupier	market rent	total
Brecon	72	51	21	120	29	91	193
Builth and Llanwrtyd	26	19	7	69	14	55	95
Crickhowell	36	25	11	58	10	48	95
Hay and Talgarth	47	28	19	75	14	61	122
Knighton and Presteigne	46	32	14	91	17	74	138
Llandrindod and Rhayader	53	35	18	134	29	105	186
Llanfair Caereinion	32	22	10	51	13	37	83
Llanfyllin	47	28	19	79	17	62	125
Llanidloes	31	21	11	60	16	45	92
Machynlleth	29	19	11	56	13	43	86
Newtown	79	57	22	153	44	109	232
Welshpool and Montgomery	94	60	34	156	44	112	251
Ystradgynlais	53	39	14	88	33	55	141
Powys	646	435	211	1,190	294	896	1,836

Table 52 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, 15 years 2022-2037, Powys County Council area. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate	total market	owner occupier	market rent	total
Brecon	183	150	34	180	44	136	364
Builth and Llanwrtyd	64	54	10	103	21	82	167
Crickhowell	59	36	23	87	16	72	147
Hay and Talgarth	76	39	38	112	21	91	189
Knighton and Presteigne	89	66	23	137	26	111	226
Llandrindod and Rhayader	67	38	29	201	44	157	268
Llanfair Caereinion	61	46	15	76	20	56	136
Llanfyllin	79	48	30	118	26	92	197
Llanidloes	43	26	17	90	24	67	134
Machynlleth	56	37	19	85	20	65	141
Newtown	109	74	35	230	66	163	339
Welshpool and Montgomery	193	112	81	234	66	169	427
Ystradgynlais	114	93	20	132	49	83	245
Powys	1,193	820	374	1,785	441	1,344	2,978

Table 53 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, first 5 years 2022-2027, Powys Planning Authority area. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate rent	LCHO*	total market	owner occupier	market rent	total
Brecon	18	16	2	-	10	2	7	28
Builth and Llanwrtyd	38	35	3	-	34	7	27	72
Crickhowell	1	1	0	0	2	0	1	3
Hay and Talgarth	15	6	7	3	20	4	16	35
Knighton and Presteigne	42	34	8	-	46	9	37	88
Llandrindod and Rhayader	15	3	11	-	67	15	52	81
Llanfair Caereinion	29	24	5	-	25	7	19	54
Llanfyllin	32	20	12	-	39	9	31	71
Llanidloes	12	5	6	-	30	8	22	42
Machynlleth	27	19	8	1	28	7	22	55
Newtown	30	17	13	-	77	22	54	107
Welshpool and Montgomery	99	52	26	21	78	22	56	177
Ystradgynlais	53	47	6	-	38	14	24	92
Powys Planning Authority	411	280	108	24	494	124	370	906

* Low Cost Home Ownership

Table 54 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, following 10 years 2027-2037, Powys Planning Authority area. Figures may not sum due to rounding. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate	total market	owner occupier	market rent	total
Brecon	12	8	3	20	5	15	31
Builth and Llanwrtyd	26	19	7	69	14	55	95
Crickhowell	2	1	1	3	1	3	5
Hay and Talgarth	25	15	10	40	7	32	65
Knighton and Presteigne	46	32	14	91	17	74	138
Llandrindod and Rhayader	53	35	18	134	29	105	186
Llanfair Caereinion	32	22	10	51	13	37	83
Llanfyllin	47	28	19	79	17	62	125
Llanidloes	31	21	11	60	16	45	92
Machynlleth	29	19	11	56	13	43	86
Newtown	79	57	22	153	44	109	232
Welshpool and Montgomery	94	60	34	156	44	112	251
Ystradgynlais	46	34	12	77	29	48	123
Powys Planning Authority	522	351	172	989	249	740	1,511

Table 55 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, 15 years 2022-2037, Powys Planning Authority area. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate	total market	owner occupier	market rent	total
Brecon	30	24	6	29	7	22	59
Builth and Llanwrtyd	64	54	10	103	21	82	167
Crickhowell	3	2	1	5	1	4	8
Hay and Talgarth	41	21	20	60	11	49	100
Knighton and Presteigne	89	66	23	137	26	111	226
Llandrindod and Rhayader	67	38	29	201	44	157	268
Llanfair Caereinion	61	46	15	76	20	56	136
Llanfyllin	79	48	30	118	26	92	197
Llanidloes	43	26	17	90	24	67	134
Machynlleth	56	37	19	85	20	65	141
Newtown	109	74	35	230	66	163	339
Welshpool and Montgomery	193	112	81	234	66	169	427
Ystradgynlais	100	82	18	115	43	72	215
Powys Planning Authority	934	630	303	1,483	373	1,110	2,416

Table 56 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, first 5 years 2022-2027, Bannau Brycheiniog Planning Authority (in Powys) area. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate rent	LCHO*	total market	owner occupier	market rent	total
Brecon	93	82	11	-	50	12	38	143
Builth and Llanwrtyd	-	-	-	-	-	-	-	-
Crickhowell	22	11	7	4	28	5	23	49
Hay and Talgarth	14	5	6	2	18	3	14	31
Knighton and Presteigne	-	-	-	-	-	-	-	-
Llandrindod and Rhayader	-	-	-	-	-	-	-	-
Llanfair Caereinion	-	-	-	-	-	-	-	-
Llanfyllin	-	-	-	-	-	-	-	-
Llanidloes	-	-	-	-	-	-	-	-
Machynlleth	-	-	-	-	-	-	-	-
Newtown	-	-	-	-	-	-	-	-
Welshpool and Montgomery	-	-	-	-	-	-	-	-
Ystradgynlais	8	7	1	-	5	2	3	13
Bannau Brycheiniog Planning Authority (in Powys)	136	104	25	7	101	22	78	236

* Low Cost Home Ownership

Table 57 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, following 10 years 2027-2037, Bannau Brycheiniog Planning Authority (in Powys) area. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate	total market	owner occupier	market rent	total
Brecon	61	43	18	100	25	76	161
Builth and Llanwrtyd	-	-	-	-	-	-	-
Crickhowell	35	24	11	55	10	45	90
Hay and Talgarth	22	13	9	35	7	29	57
Knighton and Presteigne	-	-	-	-	-	-	-
Llandrindod and Rhayader	-	-	-	-	-	-	-
Llanfair Caereinion	-	-	-	-	-	-	-
Llanfyllin	-	-	-	-	-	-	-
Llanidloes	-	-	-	-	-	-	-
Machynlleth	-	-	-	-	-	-	-
Newtown	-	-	-	-	-	-	-
Welshpool and Montgomery	-	-	-	-	-	-	-
Ystradgynlais	7	5	2	11	4	7	17
Bannau Brycheiniog Planning Authority (in Powys)	124	85	39	202	45	157	325

Table 58 - LHMA Tool outcome for the 2018-based household projection higher variant: additional housing need per housing market area, 15 years 2022-2037, Bannau Brycheiniog Planning Authority (in Powys) area. Figures may not sum due to rounding.

HMA	total affordable	social	intermediate	total market	owner occupier	market rent	total
Brecon	154	125	28	151	37	114	304
Builth and Llanwrtyd	-	-	-	-	-	-	-
Crickhowell	56	34	22	83	15	68	139
Hay and Talgarth	36	18	18	53	10	43	89
Knighton and Presteigne	-	-	-	-	-	-	-
Llandrindod and Rhayader	-	-	-	-	-	-	-
Llanfair Caereinion	-	-	-	-	-	-	-
Llanfyllin	-	-	-	-	-	-	-
Llanidloes	-	-	-	-	-	-	-
Machynlleth	-	-	-	-	-	-	-
Newtown	-	-	-	-	-	-	-
Welshpool and Montgomery	-	-	-	-	-	-	-
Ystradgynlais	14	12	3	16	6	10	30
Bannau Brycheiniog Planning Authority (in Powys)	260	189	70	302	67	235	562

Estimated social rent need by number of bedrooms and housing market area

Table 59 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, first 5 years 2022-2027, Powys County Council area. Figures may not sum due to rounding.

HMA	1 bedroom	2 bed-rooms	3 bed-rooms	4 or more bed-rooms	total
Brecon	77	-	-	21	98
Builth and Llanwrtyd	30	-	-	5	35
Crickhowell	7	-	2	3	11
Hay and Talgarth	-	11	-	-	11
Knighton and Presteigne	29	-	-	6	34
Llandrindod and Rhayader	2	-	-	1	3
Llanfair Caereinion	20	-	-	4	24
Llanfyllin	18	-	-	3	20
Llanidloes	-	-	-	5	5
Machynlleth	19	-	-	-	19
Newtown	-	-	-	17	17
Welshpool and Montgomery	33	-	-	19	52
Ystradgynlais	54	-	-	0	54
Powys Council	287	11	2	85	384

Table 60 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, following 10 years 2027-2037, Powys County Council area. Figures may not sum due to rounding.

HMA	1 bedroom	2 bed-rooms	3 bed-rooms	4 or more bed-rooms	total
Brecon	23	19	6	3	51
Builth and Llanwrtyd	9	7	2	1	19
Crickhowell	11	10	3	1	25
Hay and Talgarth	13	11	3	2	28
Knighton and Presteigne	14	12	4	2	32
Llandrindod and Rhayader	16	13	4	2	35
Llanfair Caereinion	10	8	2	1	22
Llanfyllin	13	11	3	2	28
Llanidloes	9	8	2	1	21
Machynlleth	8	7	2	1	19
Newtown	26	22	6	3	57
Welshpool and Montgomery	27	23	7	3	60
Ystradgynlais	18	15	4	2	39
Powys Council	197	166	48	24	435

Table 61 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, 15 years 2022-2037, Powys County Council area. Figures may not sum due to rounding.

HMA	1 bedroom	2 bed-rooms	3 bed-rooms	4 or more bed-rooms	total
Brecon	100	19	6	24	150
Builth and Llanwrtyd	39	7	2	6	54
Crickhowell	18	10	4	4	36
Hay and Talgarth	13	21	3	2	39
Knighton and Presteigne	43	12	4	7	66
Llandrindod and Rhayader	18	13	4	3	38
Llanfair Caereinion	30	8	2	5	46
Llanfyllin	30	11	3	4	48
Llanidloes	9	8	2	7	26
Machynlleth	27	7	2	1	37
Newtown	26	22	6	21	74
Welshpool and Montgomery	61	23	7	22	112
Ystradgynlais	71	15	4	2	93
Powys Council	485	176	50	109	820

Table 62 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, first 5 years 2022-2027, Powys Planning Authority area. Figures may not sum due to rounding.

HMA	1 bedroom	2 bed-rooms	3 bed-rooms	4 or more bed-rooms	total
Brecon	13	-	-	4	16
Builth and Llanwrtyd	30	-	-	5	35
Crickhowell	0	-	0	0	1
Hay and Talgarth	-	6	-	-	6
Knighton and Presteigne	29	-	-	6	34
Llandrindod and Rhayader	2	-	-	1	3
Llanfair Caereinion	20	-	-	4	24
Llanfyllin	18	-	-	3	20
Llanidloes	-	-	-	5	5
Machynlleth	19	-	-	-	19
Newtown	-	-	-	17	17
Welshpool and Montgomery	33	-	-	19	52
Ystradgynlais	47	-	-	0	47
Powys Planning Authority	210	6	0	64	280

Table 63 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, following 10 years 2027-2037, Powys Planning Authority area. Figures may not sum due to rounding.

HMA	1 bedroom	2 bed-rooms	3 bed-rooms	4 or more bed-rooms	total
Brecon	4	3	1	0	8
Builth and Llanwrtyd	9	7	2	1	19
Crickhowell	1	1	0	0	1
Hay and Talgarth	7	6	2	1	15
Knighton and Presteigne	14	12	4	2	32
Llandrindod and Rhayader	16	13	4	2	35
Llanfair Caereinion	10	8	2	1	22
Llanfyllin	13	11	3	2	28
Llanidloes	9	8	2	1	21
Machynlleth	8	7	2	1	19
Newtown	26	22	6	3	57
Welshpool and Montgomery	27	23	7	3	60
Ystradgynlais	16	13	4	2	34
Powys Planning Authority	159	133	39	20	351

Table 64 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, 15 years 2022-2037, Powys Planning Authority area. Figures may not sum due to rounding.

HMA	1 bedroom	2 bed-rooms	3 bed-rooms	4 or more bed-rooms	total
Brecon	16	3	1	4	24
Builth and Llanwrtyd	39	7	2	6	54
Crickhowell	1	1	0	0	2
Hay and Talgarth	7	11	2	1	21
Knighton and Presteigne	43	12	4	7	66
Llandrindod and Rhayader	18	13	4	3	38
Llanfair Caereinion	30	8	2	5	46
Llanfyllin	30	11	3	4	48
Llanidloes	9	8	2	7	26
Machynlleth	27	7	2	1	37
Newtown	26	22	6	21	74
Welshpool and Montgomery	61	23	7	22	112
Ystradgynlais	63	13	4	2	82
Powys Planning Authority	369	139	39	84	630

Table 65 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, first 5 years 2022-2027, Bannau Brycheiniog Planning Authority area inside Powys. Figures may not sum due to rounding.

HMA	1 bedroom	2 bedrooms	3 bedrooms	4 or more bedrooms	total
Brecon	64	-	-	18	82
Builth and Llanwrtyd	-	-	-	-	-
Crickhowell	6	-	1	3	11
Hay and Talgarth	-	5	-	-	5
Knighton and Presteigne	-	-	-	-	-
Llandrindod and Rhayader	-	-	-	-	-
Llanfair Caereinion	-	-	-	-	-
Llanfyllin	-	-	-	-	-
Llanidloes	-	-	-	-	-
Machynlleth	-	-	-	-	-
Newtown	-	-	-	-	-
Welshpool and Montgomery	-	-	-	-	-
Ystradgynlais	7	-	-	0	7
Bannau Brycheiniog Planning Authority (in Powys)	77	5	1	21	104

Table 66 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, following 10 years 2027-2037, Bannau Brycheiniog Planning Authority area inside Powys. Figures may not sum due to rounding.

HMA	1 bedroom	2 bedrooms	3 bedrooms	4 or more bedrooms	total
Brecon	19	16	5	2	43
Builth and Llanwrtyd	-	-	-	-	-
Crickhowell	11	9	3	1	24
Hay and Talgarth	6	5	1	1	13
Knighton and Presteigne	-	-	-	-	-
Llandrindod and Rhayader	-	-	-	-	-
Llanfair Caereinion	-	-	-	-	-
Llanfyllin	-	-	-	-	-
Llanidloes	-	-	-	-	-
Machynlleth	-	-	-	-	-
Newtown	-	-	-	-	-
Welshpool and Montgomery	-	-	-	-	-
Ystradgynlais	2	2	1	0	5
Bannau Brycheiniog Planning Authority (in Powys)	38	32	9	5	85

Table 67 - LHMA Tool outcome for the 2018-based household projection higher variant. Estimated need for social rent by number of bedrooms, 15 years 2022-2037, Bannau Brycheiniog Planning Authority area inside Powys. Figures may not sum due to rounding.

HMA	1 bedroom	2 bed-rooms	3 bed-rooms	4 or more bed-rooms	total
Brecon	84	16	5	20	125
Builth and Llanwrtyd	-	-	-	-	-
Crickhowell	17	9	4	4	34
Hay and Talgarth	6	10	1	1	18
Knighton and Presteigne	-	-	-	-	-
Llandrindod and Rhayader	-	-	-	-	-
Llanfair Caereinion	-	-	-	-	-
Llanfyllin	-	-	-	-	-
Llanidloes	-	-	-	-	-
Machynlleth	-	-	-	-	-
Newtown	-	-	-	-	-
Welshpool and Montgomery	-	-	-	-	-
Ystradgynlais	9	2	1	0	12
Bannau Brycheiniog Planning Authority (in Powys)	116	37	11	25	189

12. Factors to consider outside the LHMA Tool

Existing unmet need and committed supply for market housing

The LHMA Tool does not consider existing unmet need and committed supply for market housing. This includes private rented housing and owner occupation. Any evidence of existing unmet need and committed supply figures for market housing could be taken into account when calculating dwelling requirements.

Newly arising need for social rented housing

The LHMA Tool calculates the estimated newly arising housing need based on 2018-based household projections. The income distribution and other variables determine the tenure that these households will need in the future.

The other element is the existing unmet need for affordable housing. This existing need is reduced by the expected reletting of affordable housing and the committed supply.

The possibility that there will be newly arising need for social rented housing not captured by the LHMA Tool, is considered in annexe C.

Vacancy rates

The estimated housing need for households is not necessarily equal to the number of additional dwellings needed. The reason is that a percentage of dwellings is not permanent occupied. Examples are when a dwelling is empty between a household moving out and another household moving in, or where a sole occupier has died. Another reason that a dwelling is not available for permanent occupation, can be short-term letting as holiday accommodation. There are also long-term empty dwellings and second homes.

Census 2021 show a vacancy rate in Powys of 10%. Powys had 5,655 vacant dwellings and 1,039 second homes with no usual residents. The total number of dwellings at the Census date was 66,866.

If an occupancy rate of 90% would be applied to dwelling requirements, the dwelling requirement is 111.1% of the estimated households in need ($1 / 0.9 = 1.11$). It is likely the occupancy rate for newly built homes will be higher than 90% to start with.

Census 2021 figures show a vacancy rate in Powys of 10%. Powys had 5,655 vacant dwellings and 1,039 second homes with no usual residents. The total number of dwellings at the Census date was 66,866.

Table 68 - Number of vacant dwellings and second homes (with no usual residents), by housing market area in Powys, Census 2021. Figures may not sum due to rounding.

HMA	Total dwellings	Vacant	Second homes	Vacancy rate	Second home rate	Total rate
Brecon	7,145	695	120	9.7%	1.7%	11.4%
Builth and Llanwrtyd	3,562	345	70	9.7%	2.0%	11.7%
Crickhowell	3,509	340	95	9.7%	2.7%	12.4%
Hay and Talgarth	4,460	410	95	9.2%	2.1%	11.3%
Knighton and Presteigne	5,089	515	65	10.1%	1.3%	11.4%
Llandrindod and Rhayader	6,757	575	75	8.5%	1.1%	9.6%
Llanfair Caereinion	3,112	285	145	9.2%	4.7%	13.8%
Llanfyllin	4,497	355	90	7.9%	2.0%	9.9%
Llanidloes	3,388	335	45	9.9%	1.3%	11.2%
Machynlleth	3,286	350	125	10.7%	3.8%	14.5%
Newtown	8,227	575	25	7.0%	0.3%	7.3%
Welshpool and Montgomery	8,799	525	25	6.0%	0.3%	6.3%
Ystradgynlais	5,035	355	50	7.1%	1.0%	8.0%
Powys	66,866	5,660	1,025	8.5%	1.5%	10.0%

Dwelling counts for vacant and second homes have been rounded to the nearest 5 for each Middle Super Output Area (MSOA) and any counts below 10 in a MSOA areas are suppressed.

13. Specific housing needs requirements

The LHMA provides an estimate of the overall housing need. There are specific housing needs that need to be considered when planning future housing development. Housing is not one-size-fits-all. What may work for one person, a couple or a family won't necessarily suit another, for lots of different personal, cultural and health reasons.

Data sources may be limited for some of the key groups noted below.

Accessible and adapted housing

This includes dwellings that meet the needs of people with a limited mobility and/or dexterity, users of wheelchairs and people with a disability. Most of the provision will be met by adapting existing dwellings to meet the assessed needs of the occupants, regardless of tenure.

New build dwellings provided by social housing providers must meet the lifetime home standard, to future proof if needs of the occupants change in the future.⁵⁰ Social housing providers can also include wheelchair accessible dwellings in developments, where a need is identified.

The Census 2021 data shows that one in five persons is limited in their day-to-day activities due to long term health issue or disability. Figures for each housing market area are included in table 15.

The Common Housing Register gives the option to households to indicate that they need accessible social housing. In March 2023, there were 99 households in housing need that indicated they are in need of wheelchair accessible housing.

⁵⁰ This is a link to Lifetime Homes standard <https://cae.org.uk/our-services/housing-services/lifetime-homes>

Table 69 - Households registered on the Common Housing Register in need of wheelchair accessible housing, by Housing market area in Powys, by maximum number of bedrooms required, March 2023.

HMA/bedrooms	1	2	3	4	5	Total
Brecon	3	8				11
Builth and Llanwrtyd	1	4				5
Crickhowell	1	2		1		4
Hay and Talgarth	2	2				4
Knighton and Presteigne	2	1		1		4
Llandrindod and Rhayader	1	3	3		1	8
Llanfair Caereinion	1	4				5
Llanfyllin		1	1	1		3
Llanidloes		3		1		4
Machynlleth	2	2				4
Newtown	1	11	8	4	1	25
Welshpool and Montgomery	2	10	4	1		17
Ystradgynlais	1	3	1			5
Powys	17	54	17	9	2	99

In addition to wheelchair accessible housing, there are 668 households that indicate they need level access social housing.

Table 70 - Households registered on the Common Housing Register in need of level access housing, by Housing market area in Powys, maximum number of bedrooms required, March 2023.

HMA/bedrooms	1	2	3	4	5	Total
Brecon	33	33	3	2	0	71
Builth and Llanwrtyd	4	20	2	2	0	28
Crickhowell	13	21	3	0	0	37
Hay and Talgarth	9	16	2	0	0	27
Knighton and Presteigne	19	13	1	0	0	33
Llandrindod and Rhayader	21	32	4	2	0	59
Llanfair Caereinion	0	19	0	3	2	24
Llanfyllin	8	17	1	1	0	27
Llanidloes	7	32	5	1	1	46
Machynlleth	8	20	0	0	0	28
Newtown	26	77	10	10	1	124
Welshpool and Montgomery	42	76	13	4	0	135
Ystradgynlais	14	11	4	0	0	29
Powys	204	387	48	25	4	668

Housing, care and support needs

The Council is reviewing the housing need for people with learning disabilities, mental health needs, multiple and complex needs, and physical disabilities & sensory loss. Support needs can be permanent or temporary to enable people to live without support afterwards. As of 2022 the Council provides the following housing provisions.

Table 71 – Powys Council supported housing options, 2022. Source: Accommodation & Support Live Well Delivery Plan.

Housing Options	Description
Extra Care	<p>Larger scale building with several self-contained flats or bedsits or shared properties. Some shared facilities in the building such as launderette, lounge, games room and usually an office or sleep-in facilities for staff. This may be sheltered housing like:</p> <ul style="list-style-type: none"> • Clustered flats or bedsits <p>Mixed shared and self-contained</p>
Residential / Nursing Placement Registered with Care Inspectorate Wales.	Such accommodation is usually shared living and shared facilities. Although there may be some private facilities e.g., cooker, ensuite bathroom, it is not fully self-contained accommodation. Staff may be permanently on site.
Housing First	Accommodation provided through the Housing First model is for those with high and complex needs and a history of difficulty of maintaining tenancies and/or repeated experiences of rough sleeping. It centres on quickly moving people experiencing homelessness into independent and permanent housing and then providing additional support and services as needed.
Rapid Rehousing	Similarly to the Housing First model, this is accommodation with floating support – a much less intensive approach aimed at supporting those with low needs into accommodation.
Temporary Accommodation	<p>This type of accommodation can include private rented housing, bed-and-breakfasts as well as hostels.</p> <p>Temporary accommodation is typically provided to support people swiftly who are homeless. This may support people with trauma, complex mental health conditions, ex-offenders and those living with substance misuse challenges.</p>
Individuals Living with Family	Family members who provide accommodation and support in ordinary housing.
Shared Lives Scheme	Shared Lives Powys provides support for adults. It helps arrange for people, who may need some additional help, to have short breaks or live long term, in the homes of carefully selected and trained people called Shared Lives Carers.

Self-contained Independent Housing	Various forms of care and support are possible, incl.: <ul style="list-style-type: none"> • Rented from local authority, registered social landlord or private landlords. • Rented from parents. • Sub-letting lodgers. • Outright ownership. • Shared ownership.
Locality-based Housing Shared facilities and/or staff can be used by tenants.	Properties grouped in geographical area, self-contained or shared. Can include a central resource core and cluster model such as: <ul style="list-style-type: none"> • Community support network • Mixed shared and self-contained units

Table 72 - Provision of individual placements for people with learning disabilities and mental health need, 2023. Source: Accommodation & Support Live Well Delivery Plan.

	Supported housing	Residential care	Total
In County	188	18	206
Out of County	26	98	124
Total	214	116	330

Table 73 - Provision of support for homeless individuals & complex needs, 2023 Source: Accommodation & Support Live Well Delivery Plan.

Accommodation	individuals
Temporary accommodation	204
Bed & breakfast	21
Rough sleeping	4
Total	229

Table 74 – Demand forecast 2021-2026 for young people transitioning into adulthood, with learning disabilities and mental health needs, April 2022. Source: Accommodation & Support Live Well Delivery Plan.

Area	units
Welshpool area	15
Newtown area	18
Llandrindod Wells area	12
Brecon area	16
Ystradgynlais area	11
Total	72

The council's "Accommodation for an ageing population" of 2018 estimated the additional need for extra care accommodation until 2035.⁵¹ The Council is reviewing the need for an ageing population through extra care and housing suitable for older people.

Table 75 - Indicative existing and additional need for extra care accommodation in Powys, 2016 - 2035, June 2018.

Area	Need	Committed or provided, April 2023	Remaining need
Llanfyllin, Welshpool and Montgomery	116	66	50
Machynlleth	25	0	25
Newtown, Llanfair Caereinion and Llanidloes	106	48	58
Knighton and Presteigne	44	0	44
Llandrindod and Rhayader, Builth and Llanwrtyd	90	0	90
Brecon, Hay and Talgarth, Crickhowell	118	68	50
Ystradgynlais	45	41	4
Powys	544	223	321

Multi-generational and/or larger families requiring larger properties

These are larger dwellings, to meet the needs of larger households This can be to accommodate cultural needs associated with multi-generational living. The Census 2021 shows there were 233 households including seven or more persons, living in Powys. There were 977 multi-generational households recorded. 145 of these households were overcrowded by having fewer bedrooms than required.

On the Common Housing Register, there are 36 households registered for needing 5 or more bedrooms in social housing.

⁵¹ This is a link to the market position statement housing for an ageing population in Powys https://powys.moderngov.co.uk/documents/s28312/Market_Position_Statement_Older%20Peoples%20Accommodation.pdf

Table 76 - Households on the Common Housing Register, assessed as in need and ready to move, in need of a dwelling with 5 or more bedrooms, by Housing market area in Powys and maximum number of bedrooms required, March 2023.

HMA	5 bedrooms	6 bedrooms	7 bedrooms	Total
Brecon	5	0	0	5
Builth and Llanwrtyd	1	0	0	1
Crickhowell	1	0	0	1
Hay and Talgarth	0	0	0	0
Knighton and Presteigne	1	0	0	1
Llandrindod and Rhayader	3	0	0	3
Llanfair Caereinion	3	0	0	3
Llanfyllin	3	0	0	3
Llanidloes	5	0	0	5
Machynlleth	0	0	0	0
Newtown	9	2	1	12
Welshpool and Montgomery	0	0	0	0
Ystradgynlais	1	1	0	2
Powys	32	3	1	36

The report “Housing Overcrowding and Ethnicity: A Literature Review” for Wales concludes there is a gap in knowledge and evidence.⁵² This is also the case for Powys.

Non-permanent housing

It is not always possible for a household to find the preferred permanent housing to meet their needs. If there is a shortage of permanent housing, households often live in non-permanent housing. This can be Bed and Breakfast, hotel, mobile home or caravan, or a dwelling with a temporary contract.

Non-permanent housing can be used by homeless households, refugees, asylum seekers, migrant workers, or students.

The Council’s “Rapid Rehousing Transition Plan 2023 – 2028” shows that in March 2023, there were 260 households in temporary accommodation.⁵³ There were 55 homeless households in Bed and Breakfast type accommodation, 12 in supported accommodation, 4 in the private rented sector. The majority is housed in self-contained council (154) and RSL (25) housing. The council’s housing service has identified a need for around 25 dwellings for 24/7 supported accommodation for homeless households with high support needs.

⁵² This is a link to the research report “Housing overcrowding and ethnicity: a literature review”

<https://www.gov.wales/housing-overcrowding-and-ethnicity-literature-review>

⁵³ This is a link to the Rapid Rehousing Transition Plan 2023 – 2028

<https://powys.moderngov.co.uk/documents/s80685/Appendix%20A%20-%20Rapid%20Rehousing%20Transition%20Plan%20v6.pdf>

All temporary housed homeless households are required to register their need on the Common Housing Register in Powys as part of their plan to find permanent accommodation.

It is anticipated that the full dispersal plan will include a target for dispersal accommodation that is required for asylum seekers. The full dispersal plan will require every local authority in Wales to assist the Home Office finding accommodation for people that have their asylum claims processed.

In June 2023, there are 77 Ukrainian households (188 individuals) hosted in Powys. This is a combination of 20 self-contained and 57 shared host accommodation. In addition, Powys has 39 offers of host accommodation that are currently unfilled which potentially could be used to meet the accommodation needs of other households in housing need.

Locational needs for student or apprentice accommodation

No locational needs have been identified.

Locational needs for people with physical or cultural needs

This may relate to the proximity to shops, places of worship and services. The needs of people from diverse backgrounds, including those from particular Black, Asian or Minority Ethnic groups may differ in terms of location and types of accommodation. No specific needs have been identified, but there is a gap in knowledge and evidence. This doesn't mean there aren't any needs.

Other specific needs

The lack of accommodation for key and other workers are mentioned several times by respondents to the public consultation. There is a gap in knowledge how large this need is.

There is a separate assessment by the Council of accommodation need for gypsies and travellers in Powys.

14. Quality assurance statement and sign off

The Council's Housing Service produced this Local Housing Market Assessment (LHMA) report. The development of this assessment has been overseen by the Council's Senior Manager Housing Resources.

The LHMA Tool has been developed and approved for use by Welsh Government.

Quality assurance statement

The council's Business Intelligence and Governance service have provided quality assurance of this document. They have ensured that figures in the narrative match those in the tables, figures are arithmetically correct, figures are rounded consistently, data is fully sourced, and figures / charts are labelled in full and consistently.

Annexe A sets out the quality assurance of data used in the LHMA Tool, including any comments.

Sign off and review

This Local Housing Market Assessment is approved by the council's Cabinet on . (insert link to decision).

This Local Housing Market Assessment is reviewed by the LHMA Team in Welsh Government. The following recommendations were made: ... / No recommendations were made to make changes.

15. Annexe A - LHMA Tool steps and data used

The version of the tool that is used was released on 24 November 2023. The version used was for 2022.

❖ Tab: Housing_Market_Areas_(HMAs)

LA = Powys

Year of calculation = 2022

HMAs are defined by MSOA

Comment: would LSOA make it easier to split Powys and BBNP planning authorities?

❖ Table 1 - HMAs and associated geographical coding

Added HMA names

Added MSOAs

Comment: the reason is that this aligns with the well-being assessment and the areas are used corporately. Planning Policy Officers of both LPAs are happy with this. The public consultation in June/July 2023 provided support and no alternative suggestions were made.

❖ Tab: LA_Household_Projs._by_HMA

Variants

All three scenarios high / principal / low are calculated plus 15 year migration variant (source StatsWales https://statswales.gov.wales/v/M_N).

Table 2a - Estimated percentage allocation of the average annual newly arising need (from the household projections) by HMA using the estimated growth in each HMA.

The percentages are based on the 2021 Census data. Household distribution per HMA.

Comment: it was considered to use the household growth distribution between 2011 and 2021 census. Due to relative small numbers over the 10-year period, it was decided to use the distribution in 2021.

Table 2b - Estimated average annual newly arising need by HMA using the estimated percentage growth for each HMA from table 2a.

Table 3 - LA social rent allocation policy for the different household units within the household projections.

Calculated by analysing two years of lettings March 2021 to March 2023. Number of bedrooms required is recorded and bedrooms of new tenancy is recorded. The averages of the two years have been used in the tool.

Comment: there is no historic record of household size or composition of households at the start of a tenancy.

The allocation policy for the CHR determines eligibility for the number of bedrooms depending on household composition.

- 1 person 1-2 bedrooms
- 2 persons (No children) 1-2 bedrooms
- 2 persons (1 adult, 1 child) 2-3 bedrooms
- 3 persons (No children) 2-3 bedrooms
- 3 persons (2 adults, 1 child) 2-3 bedrooms
- 3 persons (1 adult, 2 children) 2-3 bedrooms
- 4 persons (No children) 3-4 bedrooms
- 4 persons (2+ adults, 1+ children) 3-4 bedrooms
- 4 persons (1 adult, 3 children) 3-4 bedrooms
- 5+ persons (No children) 4+ bedrooms
- 5+ persons (2+ adults, 1+ children) 4+ bedrooms
- 5+ persons (1 adult, 4+ children) 4+ bedrooms

❖ **Tab: User_Projections**

The 15-year migration variant has been used.

❖ **Tab: Rent_Data_by_HMAs**

Rent data provided by rent office is used. January 2022-January 2023.

Annexe A 1 - Screenshot of LHMA tool tab showing rent data by HMAs

Powys												
HMA	Number of Rentals				Rent at the 30th Percentile position				Rent at the 50th Percentile position			
	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Brecon	37	21	20	3	£416.00	£525.00	£635.00		£450.00	£550.00	£737.50	
Builth and Llanwrtyd	17	8	9	2	£327.00	£400.00	£550.00	£590.00	£340.00	£407.00	£550.00	£650.00
Crickhowell	2	9	16	5		£530.00	£725.00			£585.00	£837.50	
Hay and Talgarth	6	24	13	3	£525.00	£422.50	£583.00	£965.00	£587.50	£472.50	£850.00	£975.00
Knighton and Presteigne	13	14	16	4	£325.00	£425.00	£472.50		£325.00	£467.49	£535.00	
Llandrindod and Rhayader	64	46	24	4	£307.67	£368.33	£415.57	£625.00	£312.04	£398.67	£550.00	£650.00
Llanfair Caereinion	0	2	6	2			£525.00				£601.25	
Llanfyllin	5	18	16	3	£361.50	£402.50	£537.50	£668.00	£367.50	£500.00	£650.00	£700.00
Llanidloes	0	4	3	1								
Machynlleth	5	5	1	1	£406.00	£492.00	£620.00	£750.00	£450.00	£520.00	£620.00	£750.00
Newtown	24	25	29	0	£318.00	£404.00	£550.00		£325.00	£450.00	£595.00	
Welshpool and Montgomery	27	41	27	10	£337.00	£450.00	£593.00	£600.00	£400.00	£500.00	£700.00	£850.00
Ystradgynlais	5	39	42	6		£420.00	£450.00	£612.50		£450.00	£475.00	£675.00
zWhole Local Authority Area	205	256	222	44	£325.00	£405.00	£495.00	£650.00	£360.00	£450.00	£595.00	£700.00

Notes:

1. Figures are Calendar Monthly Rents
2. Where there are less than 5 items the percentile figures have not been calculated
3. Data extracted for 12 month period starting 01/01/2022

Comment: Llanidloes and Machynlleth HMAs have insufficient data to calculate any of the 30 and 50 percentiles. Instead, the average figures for Powys have been used. Where single cells did not have data the figure for Powys has been used.

Comment: the rent data are of existing tenancies. Tenants starting a tenancy may have to pay a higher rent than existing tenancies. Landlords will review rent levels and consider improvements between the old tenant moving out and the new tenant moving in.

Potential alternative: advertised rents online.

❖ Tab: Income_Data_by_HMAs

CACI Paycheck data provided by the Council's Business Intelligence for 2021.

100k+ is calculated manually from the provided figures.

❖ Tab: House_Price_Paid_Data

Land Registry data is used, calculated by the tool.

Rate of change used is default by the tool.

❖ Tab: House_Price_Paid_Data

Land Registry data is used, calculated by the tool.

Rate of change used is default by the tool.

❖ **Tab: Existing_Unmet_Need**

Table 8 - Existing Unmet Need

For **social rent**, the Common Housing Register 1 March 2023 has been used. All registered households have been reviewed within the past six months. Households that did not respond, were removed. Only band 1-3 is included. These are households assessed as being in housing need and ready to move.

Band 4 and 5 are households assessed as not being in housing need or not ready to move.

The first choice determines the HMA.

Comment: Households may not record their true first choice, but instead record a location with more available social housing. They may think that this increases their chance of being offered social housing. If this happens need may be skewed towards towns and large villages instead of small villages. It is assumed that it does not have an impact on the need per HMA. In the allocation policy it does not matter if it is first or subsequent choice, so people are encouraged to record their true first choice.

Comment: It was considered to also include the second or subsequent preference. This was not done because it is assumed that households are looking for a home in one market area. If households are looking in different HMAs, this is not taken into account.

Comment: The CHR records the minimum and maximum number of bedrooms required for a household. For the tool they have been averaged. For example, if there are

100 households that require a minimum of 1 bedroom and a maximum of 2 bedrooms, and 50 as in need of 1 bedroom only and 20 in need of 2 or 3 bedrooms,

The calculation is as follows:

50 x 1 bed and 50 x 2 bed

50 x 1 bed

10 x 2 bed and 10 x 3 bed

Comment: After being asked how many registered households were currently living in Powys, an additional query was done in August 2023. There were 103 households in band 1-3 with a correspondence address outside Powys (4.6%). 64 (2.9%) had an address in one of the neighbouring local authority areas and 39 (1.7%) not. 37 households have a local connection to Powys. 66 have a correspondence address outside Powys and no local connection with Powys (2.9%).

There is no record of who lived outside Powys from the figures used in the tool. In future it could be considered to exclude households that have no local connection and are not living in a neighbouring county.

Comment: Households that are homeless or at risk of homelessness are included in these figures.

Comment: Data about concealed and overcrowded households from the Census 2021 is not yet available. The data is available for the Census 2001. This is now out of date and is

therefore not used. It is assumed that if they are in social housing need, they will have registered on the CHR.

For **intermediate rent and LCHO**, the households on the Tai Teg register in March 2023 have been used. The households selected are “ready to apply”. The first choice in Powys determines the HMA to which the need is allocated.

If a household is approved for both intermediate rent and LCHO, the number has been halved. For example, 10 households approved for both, then 5 will be included in intermediate rent and 5 to LCHO.

Comment: from experience it is known households start to register if intermediate tenure homes, which require an eligibility assessment from Tai Teg, become available. Tai Teg is operating in North Wales. Powys LPA uses Tai Teg for affordable housing secured through the planning system. The BBNPA does not use Tai Teg.

Comments: there is no more accurate data of intermediate tenure need available than Tai Teg. It is assumed there is an unrecorded need, but it is unknown how large this need is.

❖ **Tab: Key_Assumptions**

Defaults are used, as there is no evidence to suggest a different percentage. The text below is copied from the tool.

Affordability criteria for market housing sets the minimum income for a household to be considered for market housing tenure. The default assumption is where median rent equates to no more than 30% of income. The 30% was set by the technical working group for the national and regional housing need estimates. You can use a different percentage if sufficiently evidenced and justified as to why it is better than the default percentage.

Affordability criteria for social rent sets an upper threshold for income below which it is assumed households require social rent. The default assumption is set so 30th percentile private rent equates to 35% or more of income. The 35% was set by the technical working group for the national and regional housing need estimates. You can use a different percentage if sufficiently evidenced and justified as to why it is better than the default percentage.

Table 9 - FTB property price

Percentile value at which FTBs enter the market should be between 25% and 40%. Included 32.5% as the average between 25% and 40%.

Comment: a lower percentage means more purchase need and a higher percentage means more private rented need.

Comment: There may be differences between HMAs due to difference in purchase prices. It may be possible to calculate, but would need further analysis and a model to calculate figures.

Welsh Government (using UK Finance data) property value to income ratio for the local authority (requested through the LHMA mailbox): 4.45 (August 2022).

2.7.3 Percentage of households that qualify for owner occupier tenure and decide to go on and buy.

50% is chosen, but have no evidence to back it up.

2.7.4.1 Income - change to median household income

Default

2.7.4.2 Income - change to distribution of household income

No change

2.7.4.3 Rents - change to private rental prices

Default

2.7.4.4 House prices - change to house prices

Default

2.7.5 Calculation of intermediate rents

3 options:

Option 1: intermediate housing

Option 2: LCHO / intermediate rent (upper threshold income for social rent)

Option 3: LCHO / intermediate rent (minimum income for intermediate rent)

We have chosen for option 1, because the numbers are relatively low. Splitting them in smaller groups is not meaningful.

❖ **Tab: Existing_stock_&_planned_supply**

Table 12 - Existing stock and planned supply of affordable housing over the next 5 years.

Committed supply for RSL and LA have been taken from the SHG Programme Delivery Plan. This is mainly social rent and a limited amount of shared ownership. Only general needs accommodation is included. Excluded is extra care and supported housing.

There is one known demolition scheme of social rent included. No other demolition plans are known.

Expected relets of social rent has been calculated using the CHR figures of the past two years March 2021 – March 2023.

Comment: This may include mutual exchanges.

Committed supply for intermediate tenure has been provided by the LPAs. These have been included as LCHO, because the majority is expected to be for sale, based on current experience.

❖ **TAB: Social_Rent_Split_by_bedrooms**

There is no evidence to suggest the default table needs changing.

After the principal variant also calculated higher and lower variant and 15-year average migration variant (user variant).

❖ **TAB: Key_Assumptions - scenarios**

Output tables for the four scenarios below, are included in annexe E.

Scenario 1: Default higher variant

Scenario 2: Updated OBR data

The data has been sourced from:

2.7.4.1: [Chapter 2 charts and tables March 2023.xlsx \(live.com\)](#)

Chart 2.17: Real household disposable income per person

2.7.4.3 [Economy supplementary tables March 2023-1.xlsx \(live.com\)](#)

Table 1.19: Eligible rent growth assumptions

2.7.4.4 : [Economy supplementary tables March 2023-1.xlsx \(live.com\)](#)

Table 1.17: Housing market

Updated OBR forecast scenario shows a 5% net increase in affordable housing for the first five years 2022-2027. From 106 to 111 each year.

Scenario 3: Intermediate rent income change

For all housing market areas, the minimum and maximum income for intermediate rent is set at £16,000 and £45,000. These amounts are used by Tai Teg.

This scenario shows a decrease of social rent and increase of intermediate rent with 1% for the first five years 2022-2027. Social rent goes from 74 to 73 each year.

Scenario 4: property value to income ratio change

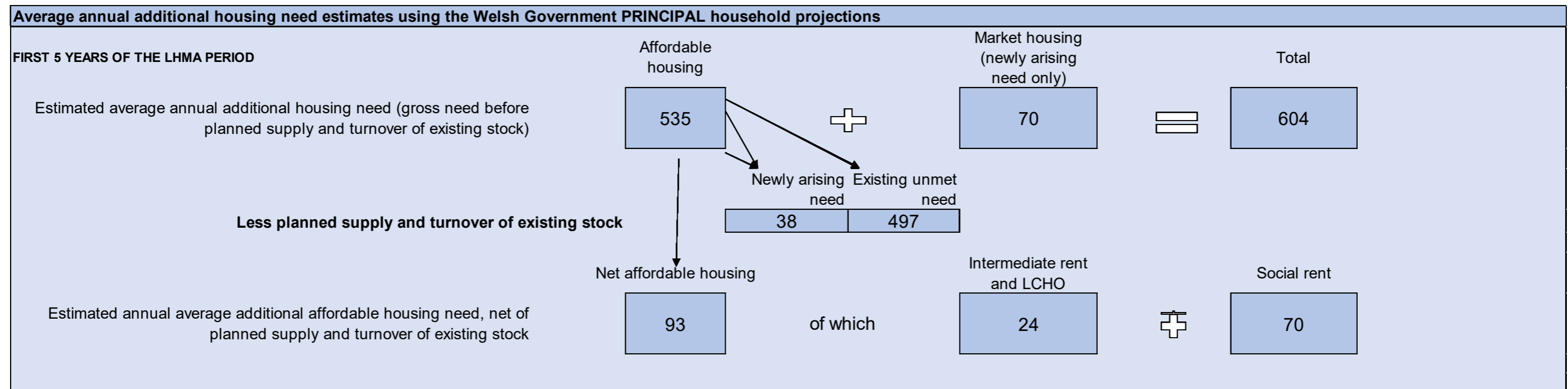
Welsh Government (using UK Finance data) property value to income ratio for the local authority (requested through the LHMA mailbox). Was 4.45. Scenario testing to increase to 4.75.

There is no change at all.

16. Annexe B - Output summary tables from the LHMA Tool

Principal variant household projections

Annexe B 1 - Output summary table from LHMA toolkit. Average annual additional housing need estimates using the Welsh Government PRINCIPAL household projections. First 5 years of the LHMA period.



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

Annexe B 2 - LHMA Report Table 1 (Principal): Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	52	2	0	16	70	18	6	93
Brecon	14	-	-	4	19	2	-	20
Builth and Llanwrtyd	6	-	-	1	7	0	-	7
Crickhowell	1	-	0	1	2	1	1	3
Hay and Talgarth	-	2	-	-	2	2	1	5
Knighton and Presteigne	5	-	-	1	6	1	-	7
Llandrindod and Rhayader	-	-	-	0	0	2	-	2
Llanfair Caereinion	4	-	-	1	4	1	-	5
Llanfyllin	3	-	-	0	3	2	-	5
Llanidloes	-	-	-	1	1	1	-	2
Machynlleth	3	-	-	-	3	1	0	5
Newtown	-	-	-	3	3	2	-	5
Welshpool and Montgomery	6	-	-	4	9	4	4	17
Ystradgynlais	10	-	-	-	10	1	-	11

Annexe B 2 - LHMA Report Table 1 (Principal) table provides the additional affordable housing need estimates on the following basis:

*at HMA level

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

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

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

Annexe B 3 LHMA Report Table 2 (Principal): Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	501	34	535	19	51	70	604
Brecon	55	3	58	2	5	7	65
Builth and Llanwrtyd	19	1	20	1	3	4	24
Crickhowell	20	2	22	1	3	3	26
Hay and Talgarth	19	3	22	1	3	4	27
Knighton and Presteigne	25	1	26	1	4	5	32
Llandrindod and Rhayader	46	3	49	2	6	8	57
Llanfair Caereinion	16	1	17	1	2	3	20
Llanfyllin	20	2	23	1	3	5	27
Llanidloes	21	2	22	1	3	4	26
Machynlleth	23	1	25	1	2	3	28
Newtown	100	2	102	3	6	9	111
Welshpool and Montgomery	81	12	93	3	6	9	102
Ystradgynlais	54	1	55	2	3	5	60

Annexe B 3 LHMA Report Table 2 (Principal) table provides the additional total housing need estimates on the following basis:

*includes market and affordable housing

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

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

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

Annexe B 4 LHMA Report Table 3 (Principal): Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	25	12	38	19	51	70	107
Brecon	3	1	4	2	5	7	11
Builth and Llanwrtyd	1	0	2	1	3	4	6
Crickhowell	1	1	2	1	3	3	6
Hay and Talgarth	2	1	3	1	3	4	7
Knighton and Presteigne	2	1	3	1	4	5	8
Llandrindod and Rhayader	2	1	3	2	6	8	11
Llanfair Caereinion	1	1	2	1	2	3	5
Llanfyllin	2	1	3	1	3	5	7
Llanidloes	1	1	2	1	3	4	5
Machynlleth	1	1	2	1	2	3	5
Newtown	3	1	5	3	6	9	14
Welshpool and Montgomery	3	2	6	3	6	9	15
Ystradgynlais	2	1	3	2	3	5	8

Annexe B 4 LHMA Report Table 3 (principle) table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

*the affordable housing need estimates in column (C) should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing. No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

Headline 15-year Affordable Housing Need Estimate

Annexe B 5 Table 4 (Principal): Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

HMA	Average annual estimates			15-year estimates		
	(a)	(b)	(c)	(a)	(b)	(c)
	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)
Additional housing need estimates by tenure	40	16	56	602	242	844
Brecon	8	1	10	123	21	143
Builth and Llanwrtyd	3	0	3	44	6	50
Crickhowell	2	1	3	23	16	39
Hay and Talgarth	2	2	3	25	26	51
Knighton and Presteigne	3	1	4	49	14	63
Llandrindod and Rhayader	1	1	3	22	18	39
Llanfair Caereinion	2	1	3	34	9	43
Llanfyllin	2	1	4	34	19	53
Llanidloes	1	1	2	17	11	28
Machynlleth	2	1	3	28	12	40
Newtown	3	1	5	50	21	71
Welshpool and Montgomery	5	4	9	81	59	140
Ystradgynlais	5	1	6	73	12	85

Annexe B 5 Table 4 (Principal) table provides the additional affordable housing need estimates on the following basis:

*at HMA level

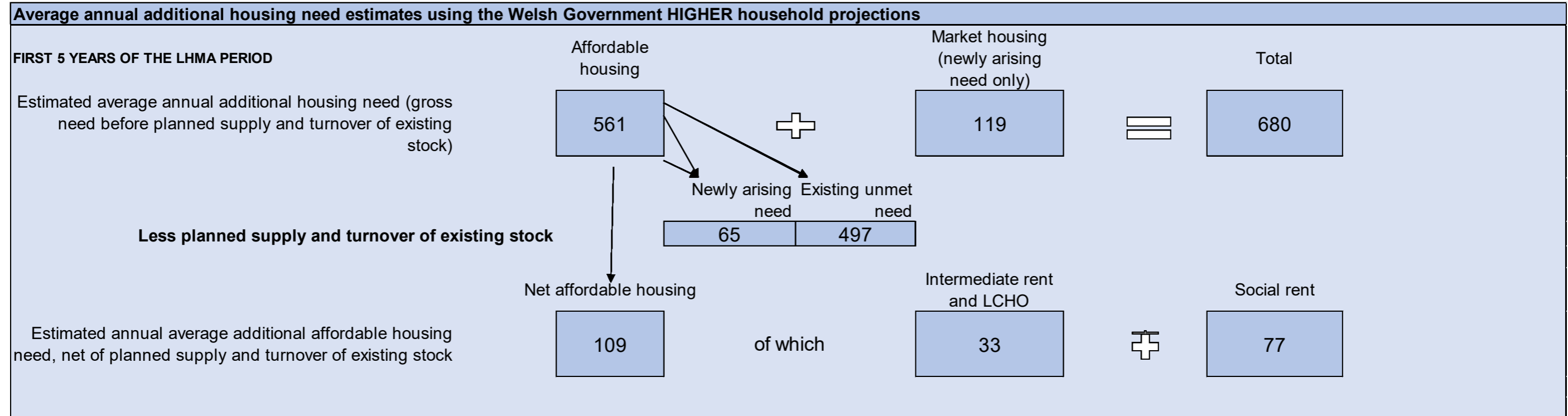
*by tenure (intermediate housing and social rent)

*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates in column (C) are a combination of the additional estimates from table 1 (net estimates) and table 3 (no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5).

Higher variant household projections

Annexe B 6 - Output summary table from the LHMA toolkit. Average annual additional housing need estimates using the Welsh Government HIGHER VARIANT household projections. First 5 years of the LHMA period.



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

Annexe B 7 LHMA Report Table 1 (Higher): Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	57	2	0	17	77	26	6	109
Brecon	15	-	-	4	20	3	-	22
Builth and Llanwrtyd	6	-	-	1	7	1	-	8
Crickhowell	1	-	0	1	2	1	1	5
Hay and Talgarth	-	2	-	-	2	3	1	6
Knighton and Presteigne	6	-	-	1	7	2	-	8
Llandrindod and Rhayader	0	-	-	0	1	2	-	3
Llanfair Caereinion	4	-	-	1	5	1	-	6
Llanfyllin	4	-	-	1	4	2	-	6
Llanidloes	-	-	-	1	1	1	-	2
Machynlleth	4	-	-	-	4	2	0	5
Newtown	-	-	-	3	3	3	-	6
Welshpool and Montgomery	7	-	-	4	10	5	4	20
Ystradgynlais	11	-	-	0	11	1	-	12

Annexe B 7 LHMA Report Table 1 (Higher) table provides the additional affordable housing need estimates on the following basis:

*at HMA level

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

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

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

Annexe B 8 LHMA Report Table 2 (Higher): Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	519	42	561	29	90	119	680
Brecon	58	4	61	3	9	12	73
Builth and Llanwrtyd	20	1	21	1	5	7	28
Crickhowell	22	2	24	1	5	6	30
Hay and Talgarth	20	4	24	1	6	7	32
Knighton and Presteigne	27	2	28	2	7	9	38
Llandrindod and Rhayader	48	3	51	3	10	13	65
Llanfair Caereinion	17	1	18	1	4	5	23
Llanfyllin	22	3	24	2	6	8	32
Llanidloes	21	2	24	2	4	6	30
Machynlleth	24	2	26	1	4	6	32
Newtown	102	3	105	4	11	15	121
Welshpool and Montgomery	83	13	97	4	11	16	112
Ystradgynlais	56	1	57	3	6	9	66

Annexe B 8 LHMA Report Table 2 (Higher) table provides the additional total housing need estimates on the following basis:

*includes market and affordable housing

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

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

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

Annexe B 9 LHMA Report Table 3 (Higher): Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	44	21	65	29	90	119	184
Brecon	5	2	7	3	9	12	19
Builth and Llanwrtyd	2	1	3	1	5	7	9
Crickhowell	3	1	4	1	5	6	9
Hay and Talgarth	3	2	5	1	6	7	12
Knighton and Presteigne	3	1	5	2	7	9	14
Llandrindod and Rhayader	4	2	5	3	10	13	19
Llanfair Caereinion	2	1	3	1	4	5	8
Llanfyllin	3	2	5	2	6	8	13
Llanidloes	2	1	3	2	4	6	9
Machynlleth	2	1	3	1	4	6	9
Newtown	6	2	8	4	11	15	23
Welshpool and Montgomery	6	3	9	4	11	16	25
Ystradgynlais	4	1	5	3	6	9	14

Annexe B 9 LHMA Report Table 3 (Higher) table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

Headline 15-year Affordable Housing Need Estimate

Annexe B 10 Table 4 (Higher): Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

	Average annual estimates			15-year estimates		
	(a)	(b)	(c)	(a)	(b)	(c)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)
Additional housing need estimates by tenure	55	25	80	820	374	1,193
Brecon	10	2	12	150	34	183
Builth and Llanwrtyd	4	1	4	54	10	64
Crickhowell	2	2	4	36	23	59
Hay and Talgarth	3	3	5	39	38	76
Knighton and Presteigne	4	2	6	66	23	89
Llandrindod and Rhayader	3	2	4	38	29	67
Llanfair Caereinion	3	1	4	46	15	61
Llanfyllin	3	2	5	48	30	79
Llanidloes	2	1	3	26	17	43
Machynlleth	2	1	4	37	19	56
Newtown	5	2	7	74	35	109
Welshpool and Montgomery	7	5	13	112	81	193
Ystradgynlais	6	1	8	93	20	114

Annexe B 10 Table 4 (Higher) table provides the additional affordable housing need estimates on the following basis:

*at HMA level

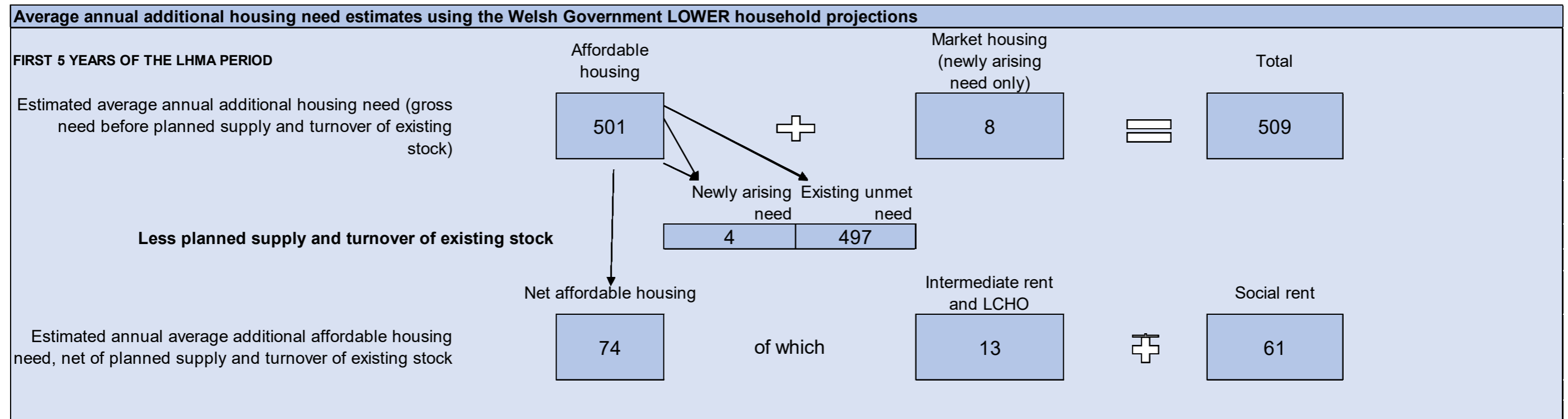
*by tenure (intermediate housing and social rent)

*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates in column (C) are a combination of the additional estimates from table 1 (net estimates) and table 3 (no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5).

Lower variant household projections

Annexe B 11 Output summary table from the LHMA toolkit. Average annual additional housing need estimates using the Welsh Government LOWER VARIANT household projections. First 5 years of the LHMA period.



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

Annexe B 12 LHMA Report Table 1 (Lower): Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	45	1	0	15	61	7	6	74
Brecon	13	-	-	4	17	1	-	18
Builth and Llanwrtyd	5	-	-	1	6	0	-	6
Crickhowell	0	-	0	0	1	0	1	2
Hay and Talgarth	-	1	-	-	1	1	1	3
Knighton and Presteigne	4	-	-	1	5	0	-	6
Llandrindod and Rhayader	-	-	-	0	0	1	-	1
Llanfair Caereinion	3	-	-	1	4	0	-	4
Llanfyllin	2	-	-	0	3	1	-	3
Llanidloes	-	-	-	1	1	0	-	1
Machynlleth	3	-	-	-	3	1	0	4
Newtown	-	-	-	3	3	0	-	4
Welshpool and Montgomery	4	-	-	3	8	2	4	14
Ystradgynlais	9	-	-	-	9	0	-	9

Annexe B 12 LHMA Report Table 1 (Lower): table provides the additional affordable housing need estimates on the following basis:

*at HMA level

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

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

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

Annexe B 13 LHMA Report Table 2 (Lower): Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	478	23	501	2	6	8	509
Brecon	53	2	54	0	1	1	55
Builth and Llanwrtyd	18	1	18	0	0	0	19
Crickhowell	19	1	20	0	0	0	21
Hay and Talgarth	18	2	20	0	0	0	20
Knighton and Presteigne	24	0	24	0	0	1	25
Llandrindod and Rhayader	45	2	46	0	1	1	47
Llanfair Caereinion	15	0	15	0	0	0	16
Llanfyllin	19	1	20	0	0	1	21
Llanidloes	20	1	21	0	0	0	21
Machynlleth	22	1	23	0	0	0	24
Newtown	97	1	98	0	1	1	99
Welshpool and Montgomery	78	10	88	0	1	1	89
Ystradgynlais	52	0	53	0	0	1	53

Annexe B 13 LHMA Report Table 2 (Lower) table provides the additional total housing need estimates on the following basis:

*includes market and affordable housing

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

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

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

Annexe B 14 LHMA Report Table 3 (Lower): Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	3	1	4	2	6	8	12
Brecon	0	0	0	0	1	1	1
Builth and Llanwrtyd	0	0	0	0	0	0	1
Crickhowell	0	0	0	0	0	0	1
Hay and Talgarth	0	0	0	0	0	0	1
Knighton and Presteigne	0	0	0	0	0	1	1
Llandrindod and Rhayader	0	0	0	0	1	1	1
Llanfair Caereinion	0	0	0	0	0	0	1
Llanfyllin	0	0	0	0	0	1	1
Llanidloes	0	0	0	0	0	0	1
Machynlleth	0	0	0	0	0	0	1
Newtown	0	0	1	0	1	1	1
Welshpool and Montgomery	0	0	1	0	1	1	2
Ystradgynlais	0	0	0	0	0	1	1

Annexe B 14 LHMA Report Table 3 (Lower) table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

Headline 15-year Affordable Housing Need Estimate

Annexe B 15 Table 4 (Lower): Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

HMA	Average annual estimates			15-year estimates		
	(a)	(b)	(c)	(a)	(b)	(c)
	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)
Additional housing need estimates by tenure	22	5	27	332	78	410
Brecon	6	0	6	89	4	93
Builth and Llanwrtyd	2	0	2	31	1	32
Crickhowell	0	0	1	5	7	12
Hay and Talgarth	0	1	1	7	11	18
Knighton and Presteigne	2	0	2	29	2	31
Llandrindod and Rhayader	0	0	0	3	4	7
Llanfair Caereinion	1	0	1	20	1	21
Llanfyllin	1	0	1	15	4	20
Llanidloes	0	0	1	6	2	8
Machynlleth	1	0	1	16	4	20
Newtown	1	0	2	20	4	23
Welshpool and Montgomery	3	2	5	42	32	74
Ystradgynlais	3	0	3	48	1	49

Annexe B 15 Table 4 (Lower) table provides the additional affordable housing need estimates on the following basis:

*at HMA level

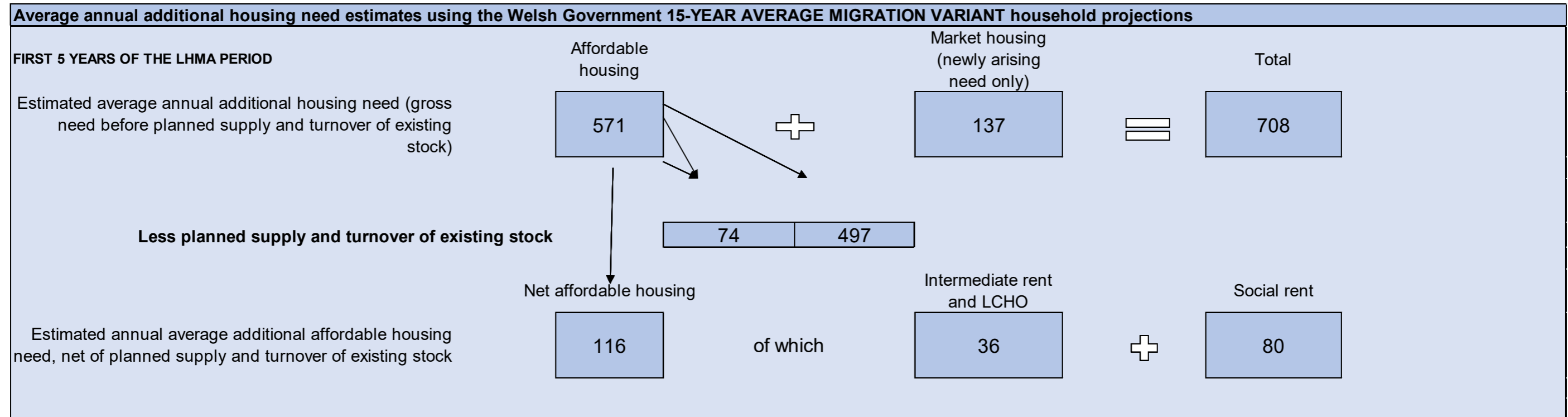
*by tenure (intermediate housing and social rent)

*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates in column (C) are a combination of the additional estimates from table 1 (net estimates) and table 3 (no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5).

15-year average migration variant household projection

Annexe B 16 Output summary table from the LHMA toolkit. Average annual additional housing need estimates using the Welsh Government 15-YEAR AVERAGE MIGRATION VARIANT household projections. First 5 years of the LHMA period.



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

Annexe B 17 LHMA Report Table 1 (15-year average migration): Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	60	2	0	17	80	30	6	116
Brecon	16	-	-	4	20	3	-	23
Builth and Llanwrtyd	6	-	-	1	7	1	-	8
Crickhowell	2	-	0	1	2	2	1	5
Hay and Talgarth	0	2	-	-	2	3	1	6
Knighton and Presteigne	6	-	-	1	7	2	-	9
Llandrindod and Rhayader	1	-	-	0	1	3	-	3
Llanfair Caereinion	4	-	-	1	5	1	-	6
Llanfyllin	4	-	-	1	4	3	-	7
Llanidloes	-	-	-	1	1	1	-	3
Machynlleth	4	-	-	-	4	2	0	6
Newtown	-	-	-	4	4	3	-	6
Welshpool and Montgomery	7	-	-	4	11	6	4	21
Ystradgynlais	11	-	-	0	11	2	-	13

Annexe B 17 LHMA Report Table 1 (15-year average migration) table provides the additional affordable housing need estimates on the following basis:

*at HMA level

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

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

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

Annexe B 18 LHMA Report Table 2 (15-year average migration): Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	526	45	571	34	103	137	708
Brecon	58	4	62	3	10	14	76
Builth and Llanwrtyd	20	1	21	2	6	8	29
Crickhowell	22	3	24	1	6	7	31
Hay and Talgarth	21	4	25	2	7	9	34
Knighton and Presteigne	27	2	29	2	9	11	40
Llandrindod and Rhayader	48	4	52	3	12	15	67
Llanfair Caereinion	18	1	19	2	4	6	24
Llanfyllin	22	3	25	2	7	9	34
Llanidloes	22	2	24	2	5	7	31
Machynlleth	24	2	26	2	5	6	33
Newtown	103	4	107	5	13	18	124
Welshpool and Montgomery	84	14	98	5	13	18	116
Ystradgynlais	57	2	58	4	6	10	68

Annexe B 18 LHMA Report Table 2 (15-year average migration) table provides the additional total housing need estimates on the following basis:

*includes market and affordable housing

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

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

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

Annexe B 19 LHMA Report Table 3 (15-year average migration): Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)
Additional housing need estimates by tenure	50	24	74	34	103	137	211
Brecon	6	2	8	3	10	14	22
Builth and Llanwrtyd	2	1	3	2	6	8	11
Crickhowell	3	1	4	1	6	7	11
Hay and Talgarth	3	2	5	2	7	9	14
Knighton and Presteigne	4	2	5	2	9	11	16
Llandrindod and Rhayader	4	2	6	3	12	15	21
Llanfair Caereinion	3	1	4	2	4	6	9
Llanfyllin	3	2	5	2	7	9	14
Llanidloes	2	1	4	2	5	7	11
Machynlleth	2	1	3	2	5	6	10
Newtown	7	3	9	5	13	18	27
Welshpool and Montgomery	7	4	11	5	13	18	29
Ystradgynlais	5	2	6	4	6	10	16

Annexe B 19 LHMA Report Table 3 (15-year average migration) table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

Headline 15-year Affordable Housing Need Estimate

Annexe B 20 Table 4 (15-year average migration): Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

	Average annual estimates			15-year estimates		
	(a)	(b)	(c)	(a)	(b)	(c)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)	Social rent	Intermediate rent and LCHO	Affordable Housing (c) = (a) + (b)
Additional housing need estimates by tenure	60	28	88	900	421	1,321
Brecon	11	3	13	159	39	198
Builth and Llanwrtyd	4	1	5	58	11	69
Crickhowell	3	2	4	41	26	67
Hay and Talgarth	3	3	6	45	42	87
Knighton and Presteigne	5	2	7	72	26	98
Llandrindod and Rhayader	3	2	5	45	33	78
Llanfair Caereinion	3	1	4	50	17	67
Llanfyllin	4	2	6	54	35	88
Llanidloes	2	1	3	29	20	49
Machynlleth	3	1	4	41	21	62
Newtown	6	3	8	83	40	123
Welshpool and Montgomery	8	6	14	124	88	212
Ystradgynlais	7	2	8	101	24	124

Annexe B 20 Table 4 (15-year average migration): provides the additional affordable housing need estimates on the following basis:

**at HMA level*

**by tenure (intermediate housing and social rent)*

**annual estimate for the 15 years of the LHMA period*

**the affordable housing need estimates in column (C) are a combination of the additional estimates from table 1 (net estimates) and table 3 (no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5).*

Key assumptions used for all variants*Annexe B 21 Data items / Key assumptions table 1*

	Basis	-1/0	0/1	1/2	2/3	3/4
Change in income growth	User	0.00%	3.74%	3.79%	3.57%	3.50%
Change in house prices	Default	7.38%	1.33%	1.46%	2.47%	3.05%
Change in private rent prices	User	0.00%	2.84%	2.63%	2.93%	3.20%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Annexe B 22 Data items / Key assumptions table 2

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	30%
Social rent affordability criteria	35%

Annexe B 23 Data items / Key assumptions table 3

Data item	Data Sources	Basis of the data
Income data by HMA	Paycheck	2021
House price paid data by HMA	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	All Projections	

Annexe B 24 Data items / Key assumptions table 4

Percentage of households considered for owner occupier tenure that go on to buy	50%
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Annexe B 25 Data items / Key assumptions table 5

HMA assumptions				
HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
Brecon	£187,907	4.5	£17,383	£22,247
Builth and Llanwrtyd	£182,209	4.5	£14,294	£17,096
Crickhowell	£273,499	4.5	£21,718	£28,606
Hay and Talgarth	£231,598	4.5	£17,008	£24,361
Knighton and Presteigne	£193,329	4.5	£14,834	£18,834
Llandrindod and Rhayader	£161,975	4.5	£12,226	£15,742
Llandrindod and Rhayader	£190,061	4.5	£18,034	£23,630
Llanfair Caereinion	£198,482	4.5	£15,853	£22,190
Llanfyllin	£165,940	4.5	£14,563	£19,361
Llanidloes	£173,478	4.5	£14,563	£19,361
Machynlleth	£150,226	4.5	£14,805	£18,618

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Welshpool and Montgomery	£175,461	4.5	£16,183	£22,362
Ystradgynlais	£119,867	4.5	£15,123	£18,848

17. Annexe C - Estimates of future social housing need based on the Common Housing Register

This annexe looks at social rent housing only. The LHMA Tool calculates an additional social housing need for 44 households each year plus an additional 32 annually for the first five years (76 households) to meet the existing unmet needs.

When looking at the calculated outcomes per housing market area, some areas show a lower need for social rented housing, than expected and in the experience of housing officers. For example, Crickhowell housing market area has a calculated estimated need of 36 social rent in 15 years, with no committed supply. Llanidloes housing market area has a calculated estimated need for social rented housing of 26 households, and Hay and Talgarth housing market area shows an estimated need of 39 for 15 years.

Some areas have a relative high number of committed supply, which can also be taken into account.

For all tables in this Annexe C, Figures may not sum due to rounding, and negative outcomes have been changed to 0 with the negative number in brackets.

Annexe C Table 1- LHMA Tool outcome for the 2018-based household projection higher variant: Estimated overall additional need for social rented housing, 2022-2037, by housing market area, Powys County Council area.

HMA	Social rent	Committed supply (March 2023)
Brecon	150	0
Builth and Llanwrtyd	54	0
Crickhowell	36	0
Hay and Talgarth	39	0
Knighton and Presteigne	66	0
Llandrindod and Rhayader	38	60
Llanfair Caereinion	46	35
Llanfyllin	48	16
Llanidloes	26	0
Machynlleth	37	14
Newtown	74	154
Welshpool and Montgomery	112	91
Ystradgynlais	93	4
Powys	820	374

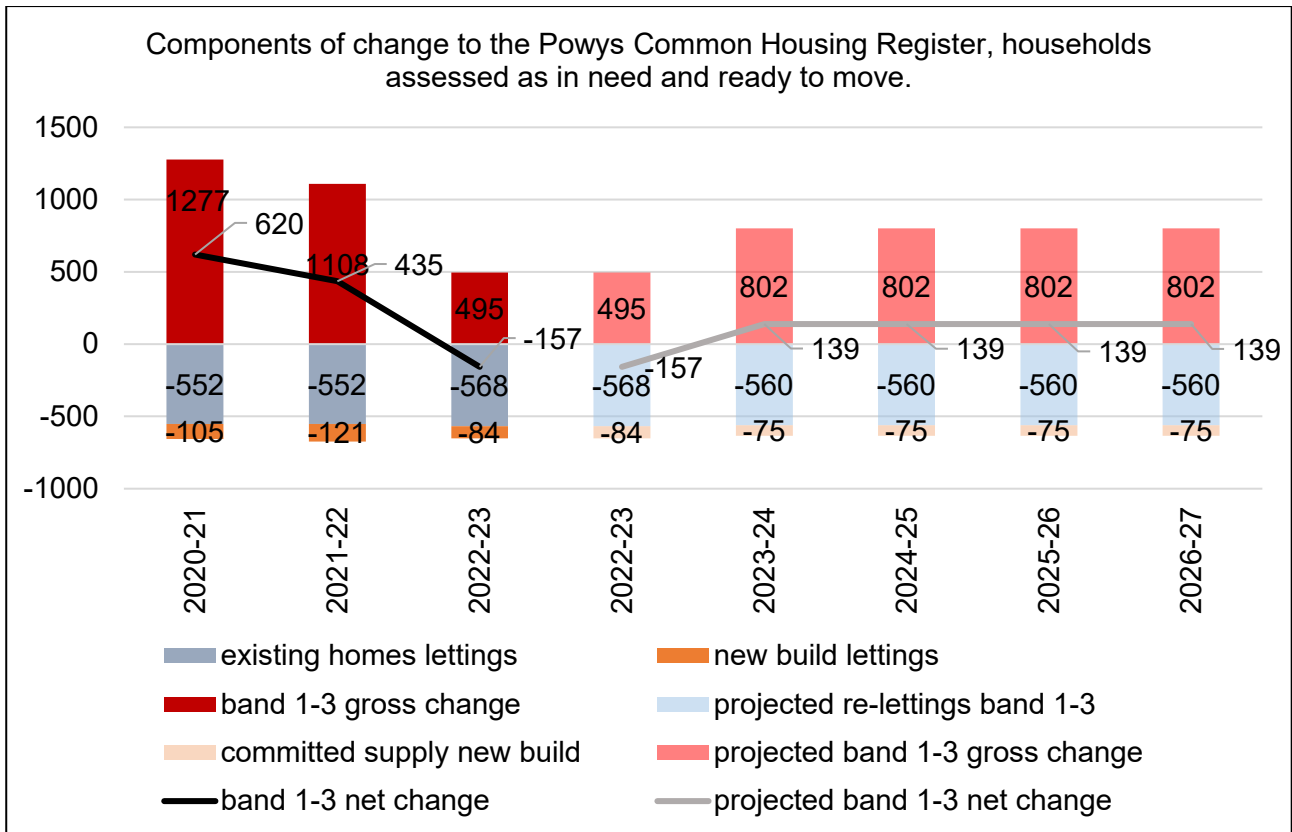
If the scenario of greater income inequality of 1% is chosen, this results in an additional need for 10 households in 15 years.

There is a lack of quality data to include user-based projections in the LHMA Tool. This is the case for user defined assumptions on household composition and income distribution.

To try to understand why the estimates calculated in the LHMA Tool are lower than expected, the Common Housing Register data has been analysed.

The graph below shows the relation between the components of change and the net need. The Common Housing Register was introduced during 2019-2020 and figures are available from April 2020.

Annexe C Figure 1 – Components of change to the Powys Common Housing Register, households assessed as in need and ready to move.



Below the horizontal line with value 0, are the lettings of existing social rented homes and additional social rented homes made available through new build and acquisitions. Above 0 is the number of additional households on the Common Housing Register assessed as in need of social housing and ready to move. If the number of lettings is larger than the additional number of registrations, there will be a net reduction of registered households in need. This is the case for 2022/23 with a reduction of 157. If the increase of registrations is larger than the number of lettings, the number of households in need increases. This was the case in 2020/21 (+620) and 2021/22 (+435).

The three columns on the left show the historic Common Housing Register figures between April 2020 and April 2023. The five columns to the right show the expected number of relets, committed supply for social rented housing and expected additional households registering as in need. The expected reletting and additional number of registered households are the average of 2021/22 and 2022/23. The year 2020/21 was the first year of the Coronavirus pandemic and this caused more households to seek

assistance from the Council as homeless. Reviewing existing registrations was not a priority during the Coronavirus pandemic and it is likely there were more households than usual that should have been deleted from the Common Housing Register, because they were no longer in housing need. Therefore, 2020/21 it is not included in estimating future registrations.

The downward trend of additional registered households may continue, flatten out, or increase again.

The above graph shows the picture for Powys, but there are differences between housing market areas. The net and gross need has been calculated as follows.

Step 1: net change

The number of households assessed as in need and ready to move on 1 April 2021, 2022, and 2023. This is a 2-year period.

The realised figure for 2022/23 plus four times the average over the two years, is the net estimated increase for 2022-2027. This is calculated by housing market area and number of bedrooms. Bedrooms are calculated as the average between the minimum and maximum number of bedrooms required.

Step 2: lettings

These are included in the LHMA Tool. This is the estimated number of reletting and lettings of additional social rented housing, by housing market area and number of bedrooms. This is estimated for the 5-year period 2022-2027.

Step 3: gross change

This is the net change (step 1) plus the lettings (step 2).

Step 4: newly arising need in the LHMA Tool

The estimated newly arising need for the 5-year period 2022-2027, by housing market area and number of bedrooms. The higher variant for 2018-based household projections has been used. This newly arising need calculated using the LHMA Tool is deducted from the net and gross change.

Step 5: negative and positive

If the outcome is negative, this is set at 0 to calculate the totals per housing market area and number of bedrooms.

When estimating future housing and dwelling needs, it can be considered to include the additional estimated net or gross change for households in need of social rented housing. It could be considered to include half of the additional estimated need of households on the Common Housing Register for the period 2022-2027 and half for the years 2027-2032. This would aim to meet the needs within the first five years of arising. As an example, if a household is included on the housing register in 2026/27, and the aim would be to meet the need within five years, the need should be met no later than 2031/2032.

Annexe C Table 2 - Estimated net change of Common Housing Register, taking into account additional new need calculated by the LHMA Tool for the 2018-based household projection higher variant, 2022-2027, by housing market area, Powys County Council area.

HMA	1 bed	2 beds	3 beds	4+ beds	Total
Brecon	43	85	11	17	156
Builth and Llanwrtyd	22	0 (-6)	0 (-12)	3	24
Crickhowell	0	16	0 (-10)	10	26
Hay and Talgarth	0 (-23)	0 (-6)	0 (-5)	6	6
Knighton and Presteigne	34	33	22	5	93
Llandrindod and Rhayader	3	1	7	9	20
Llanfair Caereinion	9	2	1	10	22
Llanfyllin	0 (-36)	26	0 (-25)	0 (-12)	26
Llanidloes	0 (-20)	15	0 (-5)	0 (-12)	15
Machynlleth	0 (-55)	0 (-46)	0 (-8)	0 (-2)	0
Newtown	9	243	79	41	373
Welshpool and Montgomery	0 (-146)	0 (-72)	45	21	66
Ystradgynlais	0 (-79)	0 (-38)	10	0 (-16)	10
Powys	120	422	174	122	838

Four housing market areas are situated in both planning authorities. The estimated change for each housing market area is split using the number of existing residential addresses. For example, if 60 residential addresses are situated in Bannau Brycheiniog and 40 in Powys, the estimate change for the housing market area is split 60% / 40%.

Annexe C Table 3 - Estimated net change of Common Housing Register, taking into account additional new need calculated by the LHMA Tool for the 2018-based household projection higher variant, 2022-2027, by housing market area, Powys Planning Authority area.

HMA	1 bed	2 beds	3 beds	4+ beds	Total
Brecon	7	14	2	3	26
Builth and Llanwrtyd	22	0 (-6)	0 (-12)	3	24
Crickhowell	0	1	0 (-1)	1	1
Hay and Talgarth	0 (-12)	0 (-3)	0 (-3)	3	3
Knighton and Presteigne	34	33	22	5	93
Llandrindod and Rhayader	3	1	7	9	20
Llanfair Caereinion	9	2	1	10	22
Llanfyllin	0 (-36)	26	0 (-25)	0 (-12)	26
Llanidloes	0 (-20)	15	0 (-5)	0 (-12)	15
Machynlleth	0 (-55)	0 (-46)	0 (-8)	0 (-2)	0
Newtown	9	243	79	41	373
Welshpool and Montgomery	0	0 (-72)	45	21	66
Ystradgynlais	0 (-69)	0 (-33)	9	0 (-14)	9
Powys	84	335	164	95	678

Annexe C Table 4 - Estimated net change of Common Housing Register, taking into account additional new need calculated by the LHMA Tool for the 2018-based household

projection higher variant, 2022-2027, by housing market area, Bannau Brycheiniog Planning Authority area.

HMA	1 bed	2 beds	3 beds	4+ beds	Total
Brecon	36	72	9	14	131
Builth and Llanwrtyd	0	0	0	0	0
Crickhowell	0	15	0 (-9)	9	25
Hay and Talgarth	0 (-11)	0 (-3)	0 (-2)	3	3
Knighton and Presteigne	0	0	0	0	0
Llandrindod and Rhayader	0	0	0	0	0
Llanfair Caereinion	0	0	0	0	0
Llanfyllin	0	0	0	0	0
Llanidloes	0	0	0	0	0
Machynlleth	0	0	0	0	0
Newtown	0	0	0	0	0
Welshpool and Montgomery	0	0	0	0	0
Ystradgynlais	0 (-10)	0 (-5)	1	0 (-2)	1
Powys	36	87	10	27	160

Annexe C Table 5 - Estimated gross change of Common Housing Register, taking into account additional new need calculated by the LHMA Tool for the 2018-based household projection higher variant, 2022-2027, by housing market area, Powys County Council area.

HMA	1 bed	2 beds	3 beds	4+ beds	Total
Brecon	149	234	125	28	536
Builth and Llanwrtyd	36	50	16	3	104
Crickhowell	41	62	9	13	125
Hay and Talgarth	49	49	37	16	152
Knighton and Presteigne	63	123	66	10	261
Llandrindod and Rhayader	149	177	75	14	415
Llanfair Caereinion	14	55	8	15	92
Llanfyllin	0 (-1)	103	28	0 (-6)	132
Llanidloes	15	128	44	3	191
Machynlleth	0 (-21)	47	38	6	92
Newtown	215	499	231	68	1,014
Welshpool and Montgomery	0 (-11)	109	134	27	270
Ystradgynlais	10	103	64	0 (-13)	177
Powys	741	1,740	875	203	3,560

Annexe C Table 6 - Estimated gross change of Common Housing Register, taking into account additional new need calculated by the LHMA Tool for the 2018-based household projection higher variant, 2022-2027, by housing market area, Powys Planning Authority area.

HMA	1 bed	2 beds	3 beds	4+ beds	Total
Brecon	24	38	20	5	88
Builth and Llanwrtyd	36	50	16	3	104
Crickhowell	2	3	0	1	7
Hay and Talgarth	26	26	20	9	81
Knighton and Presteigne	63	123	66	10	261
Llandrindod and Rhayader	149	177	75	14	415
Llanfair Caereinion	14	55	8	15	92
Llanfyllin	0 (-1)	103	28	0 (-6)	132
Llanidloes	15	128	44	3	191
Machynlleth	0 (-21)	47	38	6	92
Newtown	215	499	231	68	1,014
Welshpool and Montgomery	0 (-11)	109	134	27	270
Ystradgynlais	9	90	56	0 (-11)	155
Powys	554	1,450	737	159	2,900

Annexe C Table 7 - Estimated gross change of Common Housing Register, taking into account additional new need calculated by the LHMA Tool for the 2018-based household projection higher variant, 2022-2027, by housing market area, Bannau Brycheiniog Planning Authority area.

HMA	1 bed	2 beds	3 beds	4+ beds	Total
Brecon	124	196	104	24	449
Builth and Llanwrtyd	0	0	0	0	0
Crickhowell	39	59	9	12	119
Hay and Talgarth	23	23	17	8	71
Knighton and Presteigne	0	0	0	0	0
Llandrindod and Rhayader	0	0	0	0	0
Llanfair Caereinion	0	0	0	0	0
Llanfyllin	0	0	0	0	0
Llanidloes	0	0	0	0	0
Machynlleth	0	0	0	0	0
Newtown	0	0	0	0	0
Welshpool and Montgomery	0	0	0	0	0
Ystradgynlais	1	13	8	0 (-2)	22
Powys	188	291	138	44	660

18. Annexe D - Housing market areas

Annexe D Table 1 – Place names used for the Common Housing Register and Community and Town Councils by Housing market area in Powys, March 2023.

Housing Market Area	Community or Town Council	Place used by the Common Housing Register
Brecon	Brecon	Brecon incl. Llanfaes Aberhonddu gan gynnwys Llanfaes
Brecon	Cray	Cray Crai
Brecon	Felin-Fach	Llandefalle Llandefalle
Brecon	Felin-Fach	Llanfilo Llanfilo
Brecon	Glyn Tarell	Libanus Libanus
Brecon	Glyn Tarell	Llanspyddid Llansbyddid
Brecon	Honddu Isaf	Llandefaelog Llandefaelog
Brecon	Honddu Isaf	Lower Chapel Capel Isaf
Brecon	Honddu Isaf	Pwllgloyw Pwllgloyw
Brecon	Llanddew	Llanddew Llanddew
Brecon	Llanfrynach	Llanfrynach Llanfrynach
Brecon	Llanfrynach	Llanhamlach and Groesffordd Llanhamlach a Groesffordd
Brecon	Llywel	Glyntawe Glyntawe
Brecon	Llywel	Trecastle Trecastell
Brecon	Maescar	Sennybridge incl. Defynnog Pontsenni gan gynnwys Defynnog
Brecon	Merthyr Cynog	Pontfaen Pontfaen
Brecon	Talybont-on-Usk	Pencelli Pencelli
Brecon	Talybont-on-Usk	Scethrog Scethrog
Brecon	Talybont-on-Usk	Talybont on Usk Tal-y-bont ar Wysg
Brecon	Trallong	Trallong Trallong
Brecon	Yscir	Cradoc Cradoc
Brecon	Yscir	Felinfach Felinfach
Builth and Llanwrtyd	Aberedw	Aberedw Aberedw
Builth and Llanwrtyd	Builth	Builth Wells (incl. Llanelwedd) Llanfair-ym-Muallt (gan gynnwys Llanelwedd)
Builth and Llanwrtyd	Cilmery	Cilmery Cilmeri
Builth and Llanwrtyd	Glascwm	Hundred House Hundred House
Builth and Llanwrtyd	Llanelwedd	Builth Road Builth Road
Builth and Llanwrtyd	Llanelwedd	(Builth Wells incl.) Llanelwedd (Llanfair-ym-Muallt gan gynnwys) Llanelwedd
Builth and Llanwrtyd	Llangamarch	Llangammarch Wells Llangamarch
Builth and Llanwrtyd	Llanwrthwl	Llanwrthwl Llanwrthwl

Builth and Llanwrtyd	Llanwrtyd Wells	Llanwrtyd Wells Llanwrtyd
Builth and Llanwrtyd	Treflys	Beulah Beulah
Builth and Llanwrtyd	Treflys	Garth Garth
Crickhowell	Crickhowell	Crickhowell Crughywel
Crickhowell	Llanfihangel Cwmdu with Bwlch and Cathedine	Bwlch Bwlch
Crickhowell	Llanfihangel Cwmdu with Bwlch and Cathedine	Cwmdu Cwmdu
Crickhowell	Llanfihangel Cwmdu with Bwlch and Cathedine	Tretower Tretwr
Crickhowell	Llangattock	Llangattock Llangatwg
Crickhowell	Llangors	Llanfihangel Talylyn Llanfihangel Talylyn
Crickhowell	Llangors	Llangorse Llangors
Crickhowell	Llangors	Pennorth Pennorth
Crickhowell	Llangynidr	Llangynidr Llangynidr
Crickhowell	The Vale of Grwyney	Glangrwyney Glangrwyne
Crickhowell	The Vale of Grwyney	Llanbedr Llanbedr
Crickhowell	The Vale of Grwyney	Llangenny Llangenni
Hay and Talgarth	Bronllys	Bronllys Bronllys
Hay and Talgarth	Bronllys	Llyswen (incl. Boughrood) Llyswen (gan gynnwys Bochrwyd)
Hay and Talgarth	Clyro	Clyro Cleirwy
Hay and Talgarth	Erwood	Erwood Erwyd
Hay and Talgarth	Glasbury	Glasbury Y Clas-ar-Wy
Hay and Talgarth	Glasbury	Llanstephan Llansteffan
Hay and Talgarth	Glasbury	(Llyswen incl.) Boughrood (Llyswen gan gynnwys) Bochrwyd
Hay and Talgarth	Gwernyfed	Three Cocks Aberllynfi
Hay and Talgarth	Gwernyfed	Velindre Felindre
Hay and Talgarth	Hay	Hay-on-Wye Y Gelli Gandryll
Hay and Talgarth	Llanigon	Llanigon Llanigon
Hay and Talgarth	Paincastle	Rhosgoch Rhosgoch
Hay and Talgarth	Talgarth	Talgarth Talgarth
Hay and Talgarth	Talgarth	Trefecca Trefecca
Knighton and Presteigne	Beguildy	Beguildy Bugeildy
Knighton and Presteigne	Beguildy	Felindre Felindre
Knighton and Presteigne	Beguildy	Knucklas Cnwclas
Knighton and Presteigne	Beguildy	Lloiney Llwyni
Knighton and Presteigne	Gladestry	Gladestry Llanfair Llythynwg
Knighton and Presteigne	Knighton	Knighton Tref-y-clawdd
Knighton and Presteigne	Llanbadarn Fynydd	Llanbadarn Fynydd Llanbadarn Fynydd
Knighton and Presteigne	Llanbister	Llanbister Llanbister

Knighton and Presteigne	Llanbister	Llanbister Road Llanbister Road
Knighton and Presteigne	Llanddewi Ystradenny	Llanddewi Llanddewi
Knighton and Presteigne	Llanfihangel Rhydithon	Dolau Dolau
Knighton and Presteigne	Llangunllo	Llangunllo Llangynllo
Knighton and Presteigne	New Radnor	New Radnor Maesyfed
Knighton and Presteigne	Old Radnor	Evenjobb Einsiob
Knighton and Presteigne	Old Radnor	Kinnerton Kinnerton
Knighton and Presteigne	Old Radnor	Old Radnor Pencraig
Knighton and Presteigne	Presteigne	Norton Nortyn
Knighton and Presteigne	Presteigne	Presteigne Llanandras
Knighton and Presteigne	Whitton	Whitton Whitton
Llandrindod and Rhayader	Abbey Cwmhir	Abbeycwmhir Abaty Cwm-hir
Llandrindod and Rhayader	Disserth and Trecoed	Howey Hawy
Llandrindod and Rhayader	Llanbadarn Fawr	Crossgates Y Groes
Llandrindod and Rhayader	Llandrindod Wells	Llandrindod Wells Llandrindod
Llandrindod and Rhayader	Llanyre	Llanyre Llan-llyr
Llandrindod and Rhayader	Llanyre	Newbridge-on-Wye Pontnewydd ar Wy
Llandrindod and Rhayader	Nantmel	Nantmel Nantmel
Llandrindod and Rhayader	Penybont	Llandegley Llandeglau
Llandrindod and Rhayader	Rhayader	Rhayader incl. Cwmdauddwr Rhaeadr Gwy gan gynnwys Cwmdauddwr
Llandrindod and Rhayader	St. Harmon	Pant-y-Dwr Pant-y-dwr
Llandrindod and Rhayader	St. Harmon	St Harmon Saint Harmon
Llandrindod and Rhayader	Ystradgynlais	Penybont Pen-y-bont
Llanfair Caereinion	Aberhafesp	Aberhafesp Aberhafesb
Llanfair Caereinion	Aberhafesp	Bwlchyffridd Bwlchyffridd
Llanfair Caereinion	Caersws	Caersws Caersws
Llanfair Caereinion	Caersws	Clatter Cletwr
Llanfair Caereinion	Carno	Carno Carno
Llanfair Caereinion	Dwyrw	Adfa Yr Adfa
Llanfair Caereinion	Dwyrw	Cefn Coch Cefn Coch
Llanfair Caereinion	Llanfair Caereinion	Llanfair Caereinion Llanfair Caereinion
Llanfair Caereinion	Manafon	Manafon Manafon
Llanfair Caereinion	Tregynon	Tregynon Tregynon
Llanfyllin	Llanfechain	Llanfechain Llanfechain
Llanfyllin	Llanfihangel	Dolanog Dolanog
Llanfyllin	Llanfihangel	Llanfihangel Llanfihangel
Llanfyllin	Llanfyllin	Llanfyllin Llanfyllin
Llanfyllin	Llangedwyn	Llangedwyn Llangedwyn
Llanfyllin	Llangyniew	Llangyniew Llangynyw
Llanfyllin	Llangyniew	Pontrobert Pontrobert
Llanfyllin	Llangynog	Llangynog Llangynog
Llanfyllin	Llanrhaeadr-ym-Mochnant	Llanrhaedr Llanrhaeadr

Llanfyllin	Llansantffraid	Llansantffraid Llansantffraid
Llanfyllin	Llangedwyn	Penybontllan'emrys Pen-y-bont Llannerch Emrys
Llanfyllin	Llansilin	Llansilin Llansilin
Llanfyllin	Llanwddyn	Abertridwr Abertridwr
Llanfyllin	Llanwyddyn	Llanwyddyn Llanwddyn
Llanfyllin	Meifod	Bwylch y Cibau Bwlch y Cibau
Llanfyllin	Meifod	Meifod Meifod
Llanfyllin	Pen-y-bont-Fawr	Penybontfawr Pen-y-bont-fawr
Llanidloes	Llandinam	Llandinam Llandinam
Llanidloes	Llangurig	Llangurig Llangurig
Llanidloes	Llanidloes	Llanidloes Llanidloes
Llanidloes	Llanidloes Without	Y-Fan Y Fan
Llanidloes	Trefeglwys	Trefeglwys Trefeglwys
Machynlleth	Banwy	Foel Y Foel
Machynlleth	Banwy	Llangadfan Llangadfan
Machynlleth	Cadfarch	Penegoes Penegoes
Machynlleth	Glantwymyn	Ceinws Ceinws
Machynlleth	Glantwymyn	Cemmaes Cemais
Machynlleth	Glantwymyn	Cemmaes Road Glantwymyn
Machynlleth	Glantwymyn	Cwmlinau Cwmlinau
Machynlleth	Glantwymyn	Llanwrin Llanwrin
Machynlleth	Llanbrynmair	Dolfach Dolfach
Machynlleth	Llanbrynmair	Llanbrynmair Llanbrynmair
Machynlleth	Llanerfyl	Llanerfyl Llanerfyl
Machynlleth	Machynlleth	Aberhosan Aberhosan
Machynlleth	Machynlleth	Machynlleth Machynlleth
Machynlleth	Maescar	Derwenlas Derwenlas
Newtown	Bettws	Bettws Betws
Newtown	Churchstoke	Churchstoke Yr Ystog
Newtown	Kerry	Dolfor Dolfor
Newtown	Kerry	Kerry Ceri
Newtown	Kerry	Sarn Sarn
Newtown	Llandyssil	Abermule Aber-miwl
Newtown	Llandyssil	Llandyssil Llandysul
Newtown	Mochdre	Mochdre Mochdre
Newtown	Newtown and Llanllwchaiarn	Newtown Y Drenewydd
Welshpool and Montgomery	Bausley with Criggion	Bausley Basle
Welshpool and Montgomery	Bausley with Criggion	Crewgreen Crew Green
Welshpool and Montgomery	Berriew	Berriew Aberriw
Welshpool and Montgomery	Berriew	Refail Refail
Welshpool and Montgomery	Carreghofa	Llanymynech Llanymynech
Welshpool and Montgomery	Castle Caereinion	Castle Caereinion Castell Caereinion
Welshpool and Montgomery	Forden with Leighton and Trelystan	Forden Ffordun

Welshpool and Montgomery	Forden with Leighton and Trelystan	Leighton Tre'r-llai
Welshpool and Montgomery	Guilsfield	Groes-lwyd Groes-lwyd
Welshpool and Montgomery	Guilsfield	Guilsfield Cegidfa
Welshpool and Montgomery	Llandrinio	Arddleen Arddlfn
Welshpool and Montgomery	Llandrinio	Llandrinio Llandrinio
Welshpool and Montgomery	Llandysilio	Four Crosses Llandysilio
Welshpool and Montgomery	Montgomery	Montgomery Trefaldwyn
Welshpool and Montgomery	Trewern	Middletown Treberfedd
Welshpool and Montgomery	Trewern	Trewern Trewern
Welshpool and Montgomery	Welshpool	Pool Quay Cei'r Trallwng
Welshpool and Montgomery	Welshpool	Welshpool Y Trallwng
Ystradgynlais	Tawe-Uchaf	Caehopkin Caehopcyn
Ystradgynlais	Tawe-Uchaf	Coelbren Coelbren
Ystradgynlais	Tawe-Uchaf	Yniswen Ynyswen
Ystradgynlais	Ystradfellte	PontNeathVaughan Pontneddfechan
Ystradgynlais	Ystradgynlais	Abercrave Abercraf
Ystradgynlais	Ystradgynlais	Caerbont Caerbont
Ystradgynlais	Ystradgynlais	Cwmgiedd Cwmgiedd
Ystradgynlais	Ystradgynlais	Glanrhyd Glanrhyd
Ystradgynlais	Ystradgynlais	Lower Cwmtwrch incl. Gurnos Cwmtwrch Isaf gan gynnwys Gurnos
Ystradgynlais	Ystradgynlais	Upper Cwmtwrch Cwmtwrch Uchaf
Ystradgynlais	Ystradgynlais	Ystradgynlais incl. Penrhos Ystradgynlais gan gynnwys Penrhos

19. Annexe E - Scenario testing output tables

Annexe E 1 Scenario 1: template default settings. Screenshot from the output table.

Scenario template: default settings			
Over the first 5 years of the LHMA period		Total	Market Housing
Estimated annual average additional housing need	680	125	Affordable Housing
			555
		Total	Newly arising need
Estimated annual average additional affordable housing need	555	58	Existing unmet need
			497
		Total	Intermediate rent and LCHO
Estimated annual average additional affordable housing need net of planned supply and turnover of existing stock	106	31	Social rent
			74
Basis of the household projections		Higher Variant	
Annual average number of new arising need over the projection period		184	
Estimated annual average additional housing need over the LHMA period by tenure			
	First 5 years	Remaining 10 years	
Owner occupier	29	29	
Private rented sector	96	96	
LCHO	16	20	
Intermediate rent	25		
Social rent	514	38	
Total additional future housing need	680	184	

Scenario x: Data sources and key assumptions						
	Basis	2021/22	2022/23	2023/24	2024/25	2025/26
Change to income growth	User	0.00%	3.74%	3.79%	3.57%	3.50%
Change to house prices	Default	7.38%	1.33%	1.46%	2.47%	3.05%
Change to private rent prices	User	0.00%	2.84%	2.63%	2.93%	3.20%
Change to income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	30%
Social rent affordability criteria	35%

Data item	Data sources	Basis of the data
Income	Paycheck	2021
House prices paid	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projections basis	Higher Variant	

Percentage of eligible households for owner occupier tenure that decide to buy	50%
--	-----

HMA assumptions				
HMA	FTB house price	FTB income ratio	Minimum income for intermediate rent	Maximum income for intermediate rent
Brecon	£ 187,907	4.5	£ 16,557	£ 21,210
Builth and Llanwrtyd	£ 182,209	4.5	£ 13,056	£ 15,540
Crickhowell	£ 273,499	4.5	£ 17,539	£ 23,331
Hay and Talgarth	£ 231,598	4.5	£ 15,555	£ 22,535
Knighton and Presteigne	£ 193,329	4.5	£ 12,937	£ 16,451
Llandrindod and Rhayader	£ 161,975	4.5	£ 11,580	£ 14,930
Llandrindod and Rhayader	£ 190,061	4.5	£ 10,800	£ 14,430
Llanfair Caereinion	£ 198,482	4.5	£ 12,935	£ 18,476
Llanfyllin	£ 165,940	4.5	£ 14,563	£ 19,361
Llanidloes	£ 173,478	4.5	£ 14,563	£ 19,361
Machynlleth	£ 150,226	4.5	£ 14,805	£ 18,618
Welshpool and Montgomery	£ 175,461	4.5	£ 16,183	£ 22,362
Ystradgynlais	£ 119,867	4.5	£ 14,517	£ 18,065

Annexe E 2 Scenario 2: OBR updated data

Scenario template: OBR updated data				
Over the first 5 years of the LHMA period		Total	Market Housing	Affordable Housing
Estimated annual average additional housing need		680	115	566
		Total	Newly arising need	Existing unmet need
Estimated annual average additional affordable housing need		566	69	497
		Total	Intermediate rent and LCHO	Social rent
Estimated annual average additional affordable housing need net of planned supply and turnover of existing stock		111	33	78
Basis of the household projections		Higher Variant		
Annual average number of new arising need over the projection period		184		
Estimated annual average additional housing need over the LHMA period by tenure				
		First 5 years	Remaining 10 years	
Owner occupier		24	24	
Private rented sector		91	91	
LCHO		16	22	
Intermediate rent		27		
Social rent		523	47	
Total additional future housing need		680	184	

Scenario x: Data sources and key assumptions						
	Basis	2021/22	2022/23	2023/24	2024/25	2025/26
Change to income growth	User	0.00%	-3.70%	-2.00%	1.70%	1.90%
Change to house prices	User	9.00%	6.10%	-8.10%	-0.90%	3.20%
Change to private rent prices	User	0.00%	4.00%	4.00%	4.00%	4.00%
Change to income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	30%
Social rent affordability criteria	35%

Data item	Data sources	Basis of the data
Income	Paycheck	2021
House prices paid	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projections basis	Higher Variant	

Percentage of eligible households for owner occupier tenure that decide to buy	50%
--	-----

HMA assumptions				
HMA	FTB house price	FTB income ratio	Minimum income for intermediate rent	Maximum income for intermediate rent
Brecon	£ 190,750	4.5	£ 16,557	£ 21,210
Builth and Llanwrtyd	£ 184,869	4.5	£ 13,056	£ 15,540
Crickhowell	£ 277,546	4.5	£ 17,539	£ 23,331
Hay and Talgarth	£ 234,733	4.5	£ 15,555	£ 22,535
Knighton and Presteigne	£ 196,202	4.5	£ 12,937	£ 16,451
Llandrindod and Rhayader	£ 164,172	4.5	£ 11,580	£ 14,930
Llandrindod and Rhayader	£ 192,618	4.5	£ 10,800	£ 14,430
Llanfair Caereinion	£ 201,411	4.5	£ 12,935	£ 18,476
Llanfyllin	£ 168,407	4.5	£ 14,563	£ 19,361
Llanidloes	£ 175,846	4.5	£ 14,563	£ 19,361
Machynlleth	£ 152,408	4.5	£ 14,805	£ 18,618
Welshpool and Montgomery	£ 177,820	4.5	£ 16,183	£ 22,362
Ystradgynlais	£ 121,492	4.5	£ 14,517	£ 18,065

Annexe E 3 Scenario 3: Intermediate rent income change

Scenario template: Intermediate rent income change			
the LHMA period	Total	Market Housing	Affordable Housing
Estimated annual average additional housing need	680	125	555
	Total	Newly arising need	Existing unmet need
Estimated annual average additional affordable housing need	555	58	497
	Total	Intermediate rent and LCHO	Social rent
Estimated annual average additional affordable housing need net of planned supply and turnover of existing stock	106	33	73
Basis of the household projections	Higher Variant		
Number of new arising need over the projection period	184		
Estimated annual average additional housing need over the LHMA period by tenure			
	First 5 years	Remaining 10 years	
Owner occupier	29	29	
Private rented sector	96	96	
LCHO	16	22	
Intermediate rent	27		
Social rent	512	37	
Total additional future housing need	680	184	

TRUE

Scenario x: Data sources and key assumptions						
	Basis	2021/22	2022/23	2023/24	2024/25	2025/26
Change to income growth	User	0.00%	3.74%	3.79%	3.57%	3.50%
Change to house prices	Default	7.38%	1.33%	1.46%	2.47%	3.05%
Change to private rent prices	User	0.00%	2.84%	2.63%	2.93%	3.20%
Change to income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	30%
Social rent affordability criteria	35%

Data item	Data sources	Basis of the data
Income	Paycheck	2021
House prices paid	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Calendar year
	Higher Variant	

Percentage of eligible households for owner occupier tenure that decide to buy	50%
--	-----

HMA assumptions				
HMA	FTB house price	FTB income ratio	Minimum income for intermediate rent	Maximum income for intermediate rent
Brecon	£ 187,907	4.5	£ 16,000	£ 21,210
Builth and Llanwrtyd	£ 182,209	4.5	£ 13,056	£ 15,540
Crickhowell	£ 273,499	4.5	£ 16,000	£ 23,331
Hay and Talgarth	£ 231,598	4.5	£ 15,555	£ 22,535
Knighton and Presteigne	£ 193,329	4.5	£ 12,937	£ 16,451
Llandrindod and Rhayader	£ 161,975	4.5	£ 11,580	£ 14,930
Llandrindod and Rhayader	£ 190,061	4.5	£ 10,800	£ 14,430
Llanfair Caereinion	£ 198,482	4.5	£ 12,935	£ 18,476
Llanfyllin	£ 165,940	4.5	£ 14,563	£ 19,361
Llanidloes	£ 173,478	4.5	£ 14,563	£ 19,361
Machynlleth	£ 150,226	4.5	£ 14,805	£ 18,618
Welshpool and Montgomery	£ 175,461	4.5	£ 16,000	£ 22,362
Ystradgynlais	£ 119,867	4.5	£ 14,517	£ 18,065

Annexe E 4 Scenario 4: Property value to income ratio change

Scenario template: property value to income ratio change			
of the LHMA period	Total	Market Housing	Affordable Housing
Estimated annual average additional housing need	680	125	555
	Total	Newly arising need	Existing unmet need
annual average additional affordable housing need	555	58	497
	Total	Intermediate rent and LCHO	Social rent
Estimated annual average additional affordable housing need net of planned supply and turnover of existing stock	106	31	74
Basis of the household projections	Higher Variant		
Number of new arising need over the projection period	184		
Estimated annual average additional housing need over the LHMA period by tenure			
	First 5 years	Remaining 10 years	
Owner occupier	32	32	
Private rented sector	93	93	
LCHO	16	20	
Intermediate rent	25		
Social rent	514	38	
Total additional future housing need	680	184	

Scenario x: Data sources and key assumptions						
	Basis	2021/22	2022/23	2023/24	2024/25	2025/26
Change to income growth	User	0.00%	3.74%	3.79%	3.57%	3.50%
Change to house prices	Default	7.38%	1.33%	1.46%	2.47%	3.05%
Change to private rent prices	User	0.00%	2.84%	2.63%	2.93%	3.20%
Change to income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	30%
Social rent affordability criteria	35%

Data item	Data sources	Basis of the data
Income	Paycheck	2021
House prices paid	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Calendar year
	basis	Higher Variant

Percentage of eligible households for owner occupier tenure that decide to buy	50%
--	-----

HMA assumptions				
HMA	FTB house price	FTB income ratio	Minimum income for intermediate rent	Maximum income for intermediate rent
Brecon	£ 187,907	4.8	£ 16,557	£ 21,210
Builth and Llanwrtyd	£ 182,209	4.8	£ 13,056	£ 15,540
Crickhowell	£ 273,499	4.8	£ 17,539	£ 23,331
Hay and Talgarth	£ 231,598	4.8	£ 15,555	£ 22,535
Knighton and Presteigne	£ 193,329	4.8	£ 12,937	£ 16,451
Llandrindod and Rhayader	£ 161,975	4.8	£ 11,580	£ 14,930
Llandrindod and Rhayader	£ 190,061	4.8	£ 10,800	£ 14,430
Llanfair Caereinion	£ 198,482	4.8	£ 12,935	£ 18,476
Llanfyllin	£ 165,940	4.8	£ 14,563	£ 19,361
Llanidloes	£ 173,478	4.8	£ 14,563	£ 19,361
Machynlleth	£ 150,226	4.8	£ 14,805	£ 18,618
Welshpool and Montgomery	£ 175,461	4.8	£ 16,183	£ 22,362
Ystradgynlais	£ 119,867	4.8	£ 14,517	£ 18,065

20. Annexe F - Analysis of change in the additional housing need estimates

The figures from the previous Local Housing Market Assessment (LHMA) have been taken from “*Housing Market Evidence for: Mid and South West Wales 2019*” and “*Summary of Local Housing Market for Powys 2019*”, published in October 2020 and adopted by Powys County Council on 14 March 2022. The assessment was done by Opinion Research Services. The methodology was different than the current methodology. Below is a list with comments.

Total housing need estimate (a) / Market housing (b) / Affordable housing (c)

The previous LHMA calculated the existing unmet need counting the number of overcrowded households, concealed households and homeless households. The current LHMA also includes households in housing need for other reasons. It is noted that the combined figures for the planning authorities do not match the figure for Powys County Council. This may be because negative housing need outcomes are changed to 0 for different geographical areas.

Sources previous LHMA: Summary Powys - figure 25 for Powys / Mid and South West - figure 34 for planning authorities.

Annual supply and turnover (e)

Reletting and committed supply were not taken into account in the previous LHMA.

Annual additional housing need estimate split by tenure (g) to (o)

These were previously only calculated for the whole 15-year period. The total figures have been divided by 15. They don't match the figures under (b) and (f). The reason is that the figures under (b) and (f) assume that the existing backlog is met within the first 5 years. The percentages for market housing split have been calculated by the formulas $(g)/((g)+(h))$ and $(h)/((g)+(h))$. The affordable split has been calculated by the formulas $(i)/((i)+(j)+(k))$ and $(j)/((i)+(j)+(k))$ and $(i)/((k)+(j)+(k))$.

Sources: Mid and South West - figures 37 and 38 for tenure splits; figure 36 for bedrooms split.

N.A. means previous figure not available.

The comparison is for the first five years of the LHMA period. For the previous LHMA this is 2018 to 2023. For this current LHMA this is 2022 to 2027.

Annexe F 1 Annual additional housing need estimates

Annual additional housing need estimates	Column index	Current LHMA (2024) Powys County	Previous LHMA (2020) Powys County	Current LHMA (2024) Powys LPA	Previous LHMA (2020) Powys LPA	Current LHMA (2024) Bannau Brycheiniog LPA within Powys County	Previous LHMA (2020) Bannau Brycheiniog LPA within Powys County
Total housing need estimate	(a)	680	N.A.	568	N.A.	113	N.A.
Market housing	(b)	119	72	99	53	20	2
Affordable housing	(c)	561	N.A.	469	N.A.	92	N.A.
Percentage split of additional housing need by market and affordable housing	(b)/(a) : (c)/(a)	17% : 83%	N.A.	17% : 83%	N.A.	18 % : 82%	N.A.
Annual planned supply and turnover of existing stock for affordable housing	(e)	665	N.A.	578	N.A.	87	N.A.

Annual additional housing need estimates	Column index	Current LHMA (2024) Powys County	Previous LHMA (2020) Powys County	Current LHMA (2024) Powys LPA	Previous LHMA (2020) Powys LPA	Current LHMA (2024) Bannau Brycheiniog LPA within Powys County	Previous LHMA (2020) Bannau Brycheiniog LPA within Powys County
Affordable housing need – net of planned supply and turnover of existing stock		109	76	82	66	27	17
Annual additional housing need estimate split by tenure:							
Owner occupier	(g)	29	18	25	16	4	2
Private rented sector	(h)	90	3	74	2	16	0
LCHO – net basis	(i)	6	1	5	1	1	0
Intermediate rent – net basis	(j)	26	7	22	5	5	2
Social rent – net basis	(k)	77	16	56	11	21	5
One bedroom social rent	(l)	57	10	42	N.A.	15	N.A.
Two bedrooms social rent	(m)	2	6	1	N.A.	1	N.A.
Three bedrooms social rent	(n)	0	0	0	N.A.	0	N.A.
Four+ bedrooms social rent	(o)	17	0	13	N.A.	4	N.A.
Market housing percentage split:							
Owner occupier estimate	(g)/(b)	25%	86%	25%	89%	22%	100%
Private rented sector estimate	(h)/(b)	75%	14%	75%	11%	78%	0%
Affordable housing need percentage split:							
LCHO	(i)/(f)	6%	4%	6%	6%	5%	0%
Intermediate rent	(j)/(f)	24%	29%	26%	29%	18%	29%
Social rent	(k)/(f)	70%	67%	68%	65%	77%	71%
Social housing need percentage split by number of bedrooms							
1 bed	(l)/(k)	75%	63%	75%	N.A.	74%	N.A.

Annual additional housing need estimates	Column index	Current LHMA (2024) Powys County	Previous LHMA (2020) Powys County	Current LHMA (2024) Powys LPA	Previous LHMA (2020) Powys LPA	Current LHMA (2024) Bannau Brycheiniog LPA within Powys County	Previous LHMA (2020) Bannau Brycheiniog LPA within Powys County
2 beds	(m)/(k)	3%	38%	2%	N.A.	5%	N.A.
3 beds	(n)/(k)	0%	0%	0%	N.A.	1%	N.A.
4+ beds	(o)/(k)	22%	0%	23%	N.A.	20%	N.A.

Annexe F 2 Data Input and Key assumptions table

Data Input and Key assumptions	Current LHMA	Previous LHMA
Number of HMAs and basis of defining HMAs (ward, MSOA, LSOA)	13 (MSOA)	9 (unknown)
Selected household projection basis	2018-based higher variant	2014-based principal variant
Annual newly arising need	184	94 (Mid and South West figure 13)
Rent data – state default or source used	Rent Officers Wales default	Private Rental Market Statistics, Valuation Office Agency
House price paid data – state default or source used	Land Registry default	ONS House Price Data
Income data – state source used	CACI Paycheck	unknown
Annual existing unmet housing need	497	54 (Mid and South West figure 22)
Market housing affordability criteria	30%	unknown
Social rent affordability criteria	35%	unknown
Percentage of those considered appropriate for owner occupier that go onto buy	50%	unknown
Average FTB property price for the LA	£177,169 (median)	unknown
FTB property value to income ratio for the LA	4.45	unknown
Five-year financial forecast – OBR or alternative source	OBR	unknown
Split of intermediate housing need – method 1, 2 or 3	Method 1	Not applicable

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