

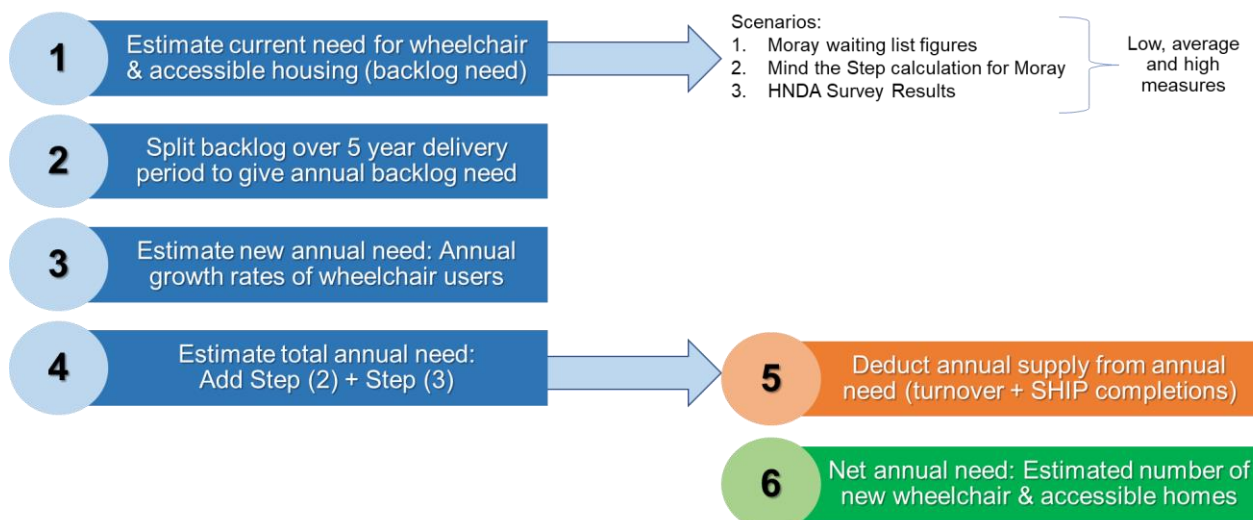
1. Wheelchair & Accessible Housing Estimates: Briefing

Informed by the Housing Need and Demand Assessment Survey for Moray and desk based analysis on housing supply; research outcomes have been integrated and analysed to prepare accessible and wheelchair housing estimates. Primary and secondary research outcomes have been synthesized to develop baseline housing estimates for wheelchair and accessible homes. Housing market partners can use these estimates as the basis of setting all tenure wheelchair targets within the LHS and LDP, considering relevant factors that could affect the pace and scale of future delivery.

Research evidence has enabled the delivery of a baseline housing needs calculation which sets out housing estimates for accessible and wheelchair housing in Moray. A data-book has been developed to prepare wheelchair and accessible housing calculation inputs and assumptions, ensuring there is transparency on the evidence base for setting housing supply targets, and an analytical model that assesses unmet need for wheelchair and accessible housing has been developed. The model is structured around the logic of the Scottish Government's HNDA tool measuring:

- backlog need for wheelchair and accessible housing
- newly arising need for wheelchair and accessible housing
- the impact of the existing housing stock in meet housing need.

The calculation model is a user-friendly tool which provides a clear audit trail of data inputs, assumptions and scenario tests. The wheelchair and accessible housing calculation works on the following basis:



The estimate of current need for wheelchair and accessible housing (Step 1) considers and triangulates Moray waiting list figures (both Moray Council and RSLs), the Mind the Step Calculation for Moray and HNDA Survey Results. This is then split over the five year delivery period to give an annual backlog (Step 2).

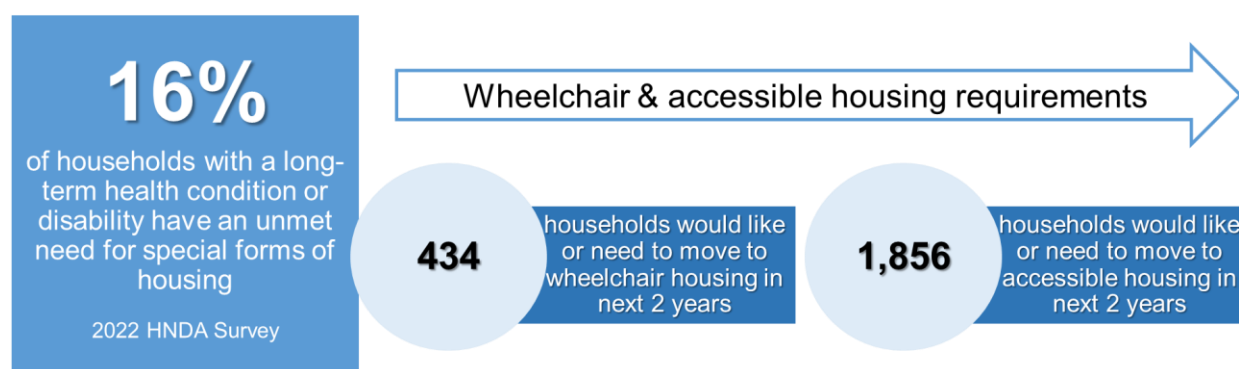
An estimate of new annual need (Step 3) is then added to the backlog to give an estimate of total annual need (Step 4). New build annual supply from SHIP completions and turnover from existing stock is then deducted from this figure (Step 5) to give a Net Annual Need Estimate. The model is provided as an Appendix to this report, with the following briefing paper detailing key calculation inputs, assumptions and outcomes.

1.1 Current Need for Accessible & Wheelchair Housing

A number of estimates were used to derive a measure of current need for both wheelchair and accessible housing requirements including the outcomes of the 2022 HNDA survey, Moray waiting list measures for wheelchair and accessible housing and a calculation reflecting the Mind the Step methodology reflecting the Moray context.

The 2022 Wheelchair & Accessible Survey reveals that of the 45% of households in Moray who have a household member with a long term health condition or disability, 16% currently have an unmet need for a specialist housing solution i.e. their needs cannot be met in their existing home.

To measure the needs arising from the wider population, households were asked whether they **NEED** or would **LIKE** to move from their current home in the next 2 years in order to access wheelchair or accessible housing, providing the following measures:

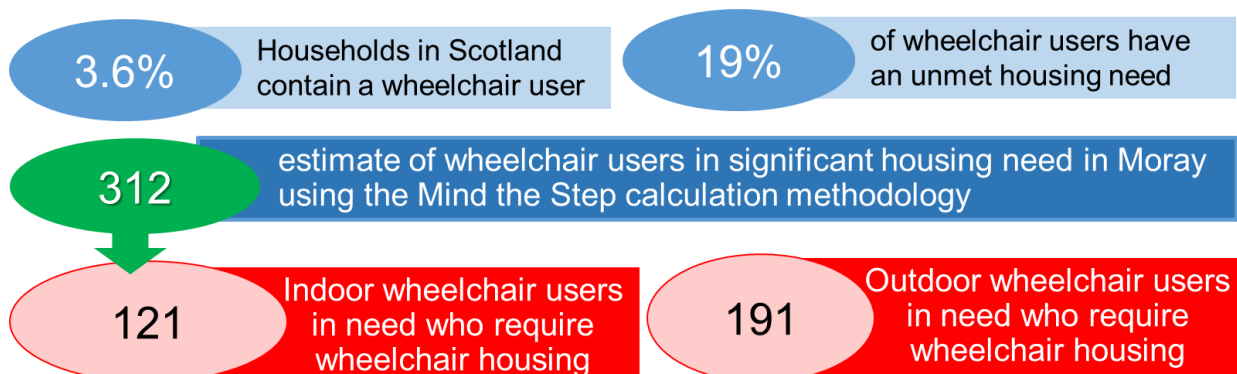


The 2022 survey outcomes suggest that 434 households have an unmet need for wheelchair housing and 1,856 households have an unmet need for accessible housing across Moray.

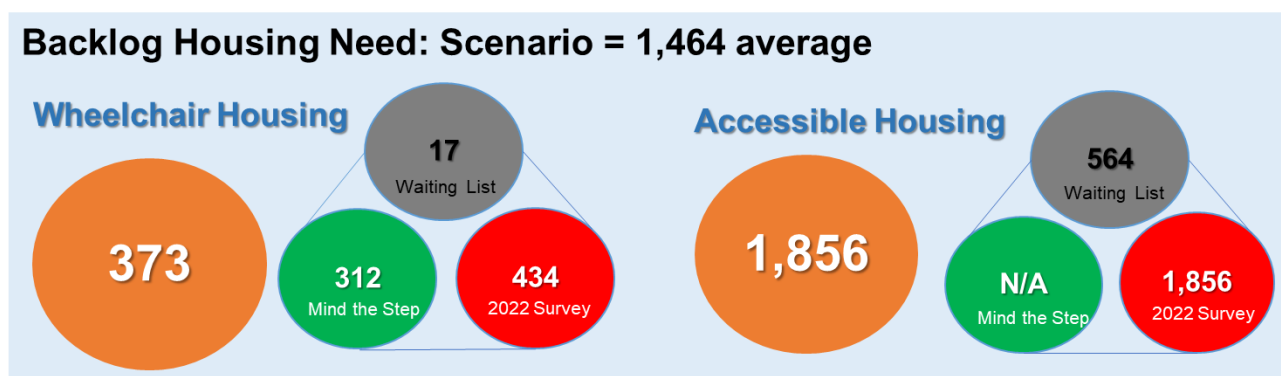
In total there are 17 households are currently listed on the Moray housing list awaiting an offer of wheelchair adapted housing in the social housing sector, with 564 households who are awaiting an offer of accessible housing. These figures reflect the needs of households who have expressed demand for social housing not all households who need to move to wheelchair or accessible homes. On this basis, this specific measure has been discounted as a basis for measuring backlog need.

To create a final measure of current need for wheelchair and accessible housing, the Mind the Step Methodology was applied to create estimates for Moray. Still Minding the Step was published by CIH Scotland and Horizon Housing Association in 2018 and offers a nationally recognised methodology for calculating the number of wheelchair users in housing need, estimating the number of wheelchair homes required to meet unmet need in Scotland. Using the results of the Scottish Household Survey, the Mind the Step Calculation estimates the number of indoor wheelchair users in housing need (25%) and the number of outdoor wheelchair users in housing need (19%) to calculate how many wheelchair and accessible homes are required. Future estimates are then calculated using household growth projections.

Using these incidence rates and applying them to the Moray household base creates estimates for wheelchair and accessible housing need as follows:



Using all of the evidence available, the various data sources were considered to provide the aggregate estimates of current need for wheelchair and accessible housing using the HNDA survey outcomes and Mind the Step analysis.



1.2 Newly Arising Need for Accessible & Wheelchair Housing

Estimating new annual need is calculated by considering the annual growth rates in wheelchair users derived from the Mind the Step calculation methodology. Applying the same logic, the calculation applies a 1.7% annual increase to the measure of backlog need (2,229), creating an annual measure of 158. The same growth rate is applied to the average annual number of households projected to enter the 60+ age band between 2022-27 (389), creating an annual measure of 158. Combining these measures produces an estimates of new need for wheelchair and accessible housing as follows:

	Wheelchair housing	Accessible housing	Total
Backlog = 2,229	26	131	158
Number of new 60+ households = 389	11	55	66
Total annual need	37	186	224

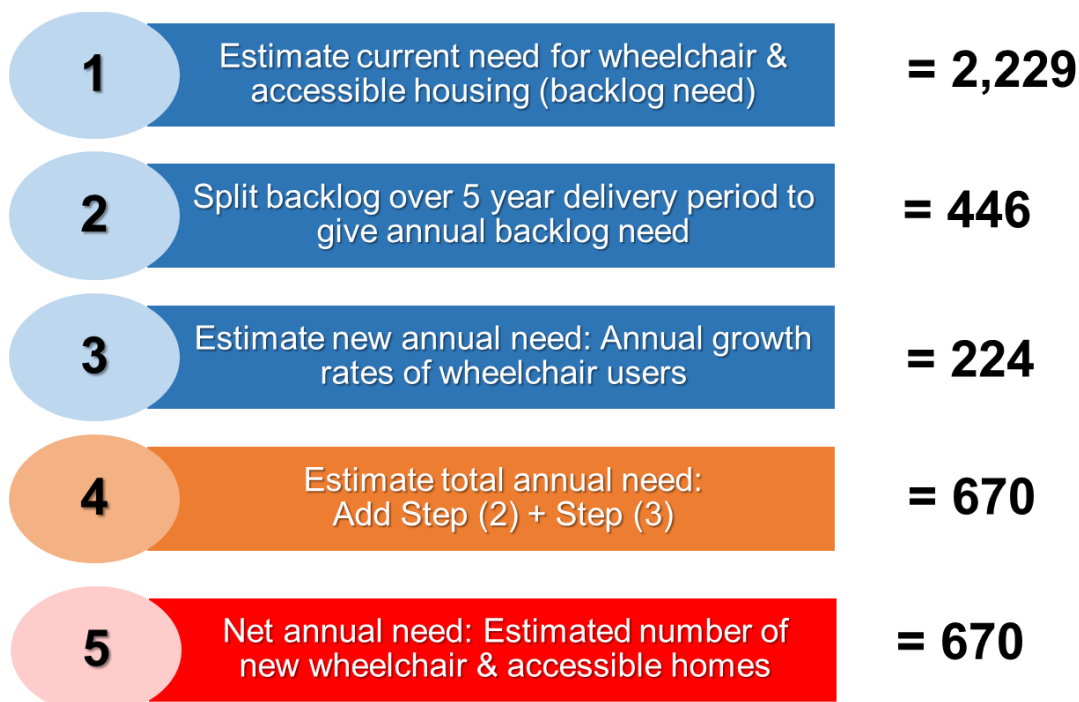
Table 1.1: Number of new households requiring wheelchair and accessible housing per annum

1.3 Gross Annual Need for Wheelchair & Accessible Housing

Estimates of annual backlog need and newly arising need are combined to provide a gross annual estimate for wheelchair and accessible housing as follows:

	Wheelchair housing	Accessible housing	Total
1. Backlog Need	373	1,856	2,229
2. Annual Backlog (5 Years)	75	371	446
3. Annual New Need	37	186	224
4. Total Annual Need (GROSS)	112	558	670

Table 1.2: Total number of new households requiring wheelchair and accessible housing per annum



The baseline calculation assumes that the backlog of households in current need for wheelchair and accessible housing will be met over a 5-year period. A range of scenarios have been prepared to produce wheelchair and accessible housing estimates over a 5 and 10 year period as follows:

Backlog Need = 2,229	Wheelchair housing	Accessible housing	Total
Gross annual estimates over 5 years	112	558	670
Gross annual estimates over 7 years	75	372	447

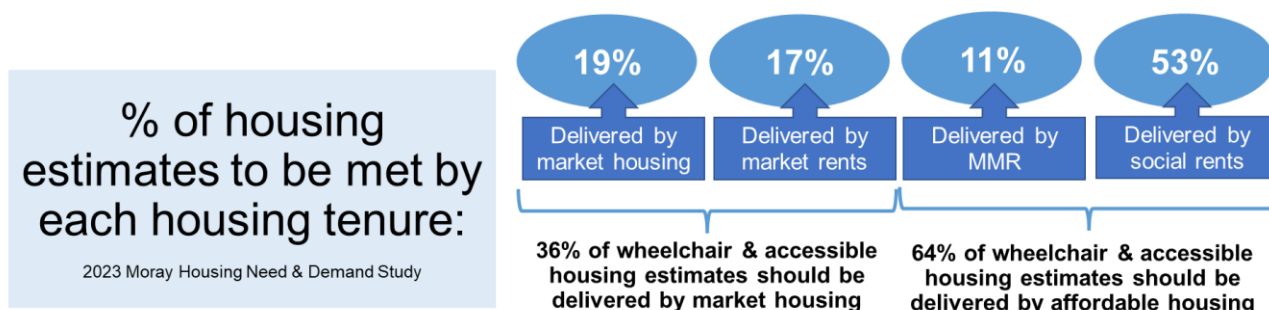
Table 1.3: Annual estimates of unmet need for wheelchair and accessible housing over a 5 and 10 year period

Gross annual estimates for wheelchair and accessible housing therefore sit in a range between 670 - 447 homes per annum depending on assumptions over how long it should take to eliminate backlog need.

1.4 Wheelchair & Accessible Housing Estimates by Tenure

Using the wheelchair and affordable housing estimates developed under 5 and 10 year projection scenarios, the calculation also assesses the proportion of homes to be delivered via affordable and market housing developers plus homes which become available each year as a result of existing stock.

To achieve this, housing estimates have been broken down by tenure using the outcome split provided by the 'High Migration' scenario from the 2023 Moray Housing Need & Demand study, as follows:



Applying this tenure split over each scenario produces the following outcomes:

	Market housing	Affordable housing	Total
Wheelchair housing estimates over 5 years	40	72	112
Accessible housing estimates over 5 years	201	357	558
Total housing estimates over 5 years	241	429	670

Table 1.4: Annual number of wheelchair & accessible housing units required by tenure over a 5 year projection period

	Market housing	Affordable housing	Total
Wheelchair housing estimates over 10 years	27	48	75
Accessible housing estimates over 10 years	134	238	372
Total housing estimates over 7 years	161	286	447

Table 1.5: Annual number of wheelchair & accessible housing units required by tenure over a 10 year projection period

1.5 Annual Wheelchair & Accessible Housing Supply

Estimates of current and newly arising need for wheelchair chair and accessible housing are then adjusted to take into account the number of existing and new-build homes available each year to meet unmet need.

The existing annual supply of wheelchair and accessible housing in the social housing sector is estimated as follows:

	Wheelchair housing	Accessible housing	Total
Stock Turnover: Moray Council & RSLs	2	220	222
Total SHIP over next 5 years annualised	9	36	45
Total Supply	11	256	267

Table 1.6: Annual number of wheelchair and accessible affordable housing units available to meet need

As there is no published available data on the turnover or development of wheelchair and accessible homes in the private housing sector, the following calculation has been performed to estimate the number of accessible and wheelchair homes available each year in the Moray housing market:

1	Estimate total number of dwellings in Moray (NRS Small Area Statistics on Households and Dwellings 2022)	= 46,166
2	Total market dwellings in Moray (66%) (2023 HNDA Core Output 4 analysis)	= 30,470
3	Assumption: 9% of market dwellings in Moray are accessible (1% wheelchair/8% accessible)	= 2,742
4	5% annual average market turnover (2017-2022) Applied to average annual market completions in Moray	= 137

Of the estimated 46,166 dwellings, 66% are located in the owner occupied sector and could become available for sale in the Moray housing market each year (30,470 homes).

Of this number, it is estimated that 9% of all market homes are accessible; based on the proportion of social housing units which are accessible (8%) and the Mind the Step analysis which suggests that 1% of all private sector housing supply meets wheelchair standards. Whilst the proportion of accessible homes is likely to be higher in the social housing sector than in market housing, this assumption is based on credible evidence of the Moray stock profile. Applying this 9% equates to 2,742 accessible market homes across Moray.

Analysis of house sale transactions in Moray over the last 5 years, suggests that on average 5% of homes are sold in the Moray market each year. Applying this 5% turnover rate to the stock of accessible market homes, estimates that 137 accessible properties which will be sold in the Moray housing market each year.

In the absence of evidence on the accessibility profile of market housing in Moray, it is therefore assumed that of the 137 accessible homes sold in the Moray housing market per annum, 15 will be fully wheelchair accessible (1%), with 122 partially accessible (8%).

Aligned to local planning policy that 10% of all market homes in Moray should be built to accessible standards, it is assumed that 27 accessible homes will be developed per annum. This has been calculated by applying a 7.5% assumption (10% adjusted for the affordable housing policy of 25% on all completions) on average market completions over the last 5 years (based on 273 completions between 2016/17 and 2020/21). The market housing supply of wheelchair and accessible housing is therefore estimated as follows:

	Wheelchair housing	Accessible housing	Total
Stock Turnover Market Housing	15	122	137
Annual New Build Supply		27	27
Total Annual Supply	15	149	164

Table 1.7: Annual number of wheelchair and accessible market housing units available to meet need

1.6 Net Annual Wheelchair & Accessible Housing Estimates

Adjusting total annual need for wheelchair and accessible housing with annual housing supply creates the following estimates for wheelchair and accessible housing:

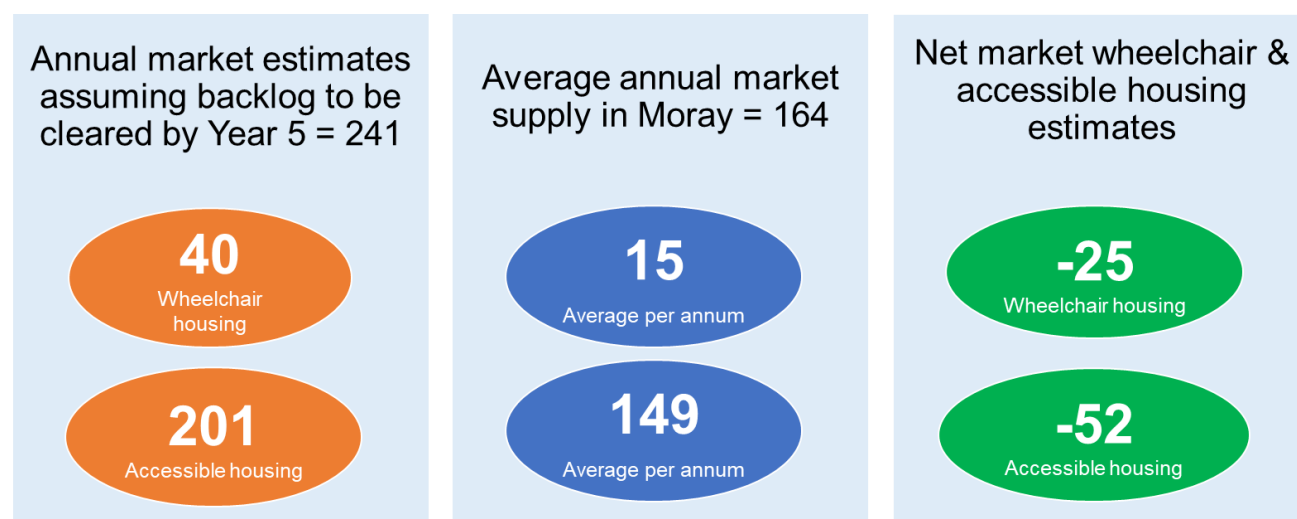
NET Wheelchair housing estimates	Market housing	Affordable housing	Total
Total Annual Requirement (5 years)	-25	-65	-90
Total Annual Requirement (10 years)	-12	-41	-53

Table 1.8: Annual number of wheelchair & accessible housing units required by tenure over a 5 year projection period

NET Accessible housing estimates	Market housing	Affordable housing	Total
Wheelchair housing estimates over 5 years	-52	-101	-153
Accessible housing estimates over 10 years	15	18	33

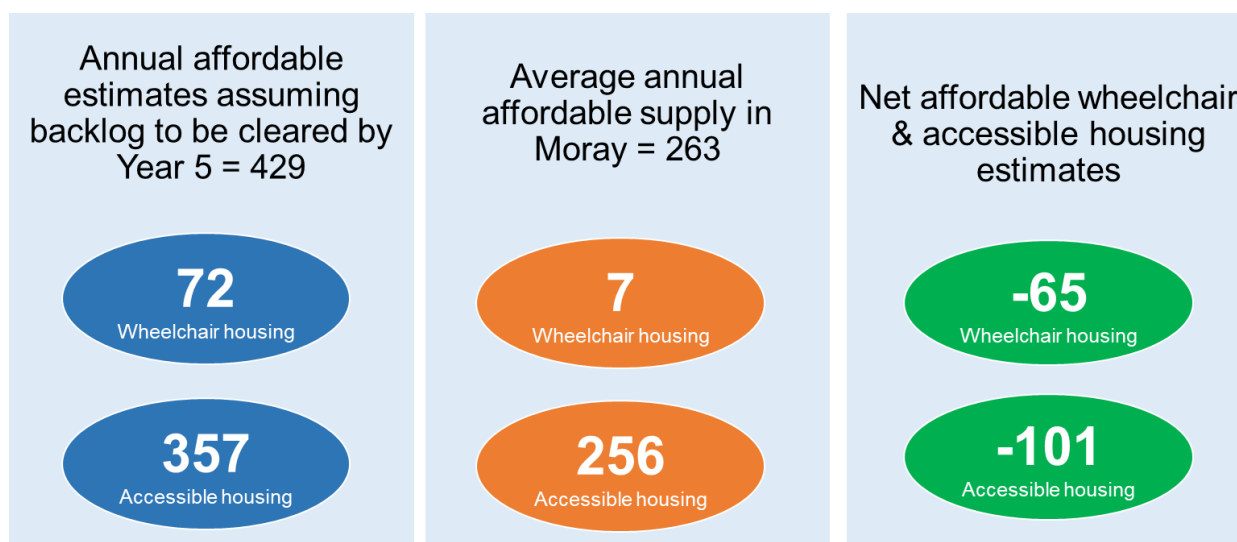
Table 1.9: Annual number of wheelchair & accessible housing units required by tenure over a 7 year projection period

Assuming that a 5-year projections period is utilised to meet the need for wheelchair and accessible market housing, when benchmarked against average annual market supply in Moray (179); it shows a net shortfall of 77 units including a shortfall of 25 wheelchair units and shortfall of 52 accessible units as follows:



This analysis suggests that the current planning policy in place is not sufficient to meet the requirement for homes, assuming that 10% of market turnover in the second hand housing market offers accessible homes. It also indicated that a wheelchair housing target could be set for private developers.

Assuming that a 5-year projections period is utilised to meet the need for wheelchair and accessible affordable housing, when benchmarked against projected annual SHIP completions in Moray (45) as well as the turnover of existing stock (122), an overall shortfall of 13 units is achieved as follows:



Based on an assumption that 10% of the 45 specialist housing units developed per annum under the Moray Strategic Housing Investment Plan (SHIP) will be fully wheelchair accessible homes, an overall shortfall of -65 wheelchair properties is evident per annum. A number of factors influence this outcome:

- The high proportion of accessible homes to be met in the Moray affordable housing sector (66%)
- The low proportion of existing social rented homes which are fully wheelchair accessible (2%)
- The very low turnover of wheelchair accessible homes in the social housing sector (on average 2 units per annum).

A shortfall of -101 accessible homes further exacerbates this further, creating an overall shortfall of 166 units.

1.7 Key Findings: Annual Wheelchair & Accessible Housing Estimates

Steering Group discussion confirmed that the wheelchair and accessible housing calculation should assume that the backlog of households in unsuitable housing should be cleared over a 5 year projection period to minimise the length of time that households require to wait for alternative housing.

On this basis and taking into account potential supply arising from the Moray housing market; the requirement for wheelchair and accessible to be delivered by private housing developers is not met by current supply. An overall shortfall of 77 homes is evident.

Taking into account the turnover of accessible homes arising from the Moray social housing sector; the requirement for wheelchair and accessible to be delivered by social housing developers is also not met by current supply. Notable shortfalls in wheelchair housing (65 per annum) and accessible homes (101) are evident.