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**Report to: Clackmannanshire Council**

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**Date of Meeting: 26 June 2025**

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**Subject: Housing Needs & Demand Assessment (HNDA)**

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**Report by: Director of Place**

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### **1.0 Purpose**

- 1.1. To inform Council of the background requirement of the Housing Need and Demand Assessment (HNDA) and progress of work undertaken to bring the Councils up to date with legislation.
- 1.2. The report details the timetable to completion, including public consultation on the draft HNDA document.

### **2.0 Recommendations**

- 2.1. Note the purpose of the Housing Need & Demand Assessment,
- 2.2. Council to endorse the initial findings of the research to ensure that any planning applications for Housing Development are cognisant of them; and
- 2.3. Approve the public consultation as set out at 3.12 in relation to the HNDA findings, please see draft consultation proposal at Appendix 1.

### **3.0 Considerations**

- 3.1. The HNDA is a statutory document designed to give broad, long-run estimates of what future housing need over all tenures might look like, based on an evidential base. This evidence base will inform housing policy decisions in the future Local Housing Strategy (LHS) and land allocation decisions in the Local Development Plan (LDP).
- 3.2. Each Chapter of the HNDA is signed off by the short term working group, Housing Market Partnership Group, made up of housing, planning and health & social care partnership officers, Registered Social Landlords, Homes for Scotland and the elected members for housing and planning.
- 3.3. The Housing Market Partnership group has met in December 2024, April 2025, May 2025 and June 2025 to approve findings at individual stages of completion and agree the most likely scenarios to enable running the HNDA Tool and give a range of housing estimates.

- 3.4. The HNDA Tool is an Excel Spreadsheet developed by the Scottish Government to allow selection of inputs around demographic and housing affordability scenarios.
- 3.5 The Tool is populated with a range of scenarios about future incomes, house and rental prices (alternative futures). However, it is for HNDA Practitioners to decide which scenario or scenarios best reflect what might happen in their local area in future.
- 3.6 With this in mind, the Tool is designed to produce a range of BROAD housing estimates about several alternative futures; any of which might occur but one or two of which are more likely to occur based on previous housing market trends and local knowledge of housing markets.
- 3.7 The choice of scenarios should not attempt to predict future housing estimates with complete precision. Instead, it should be based on producing a range of broad housing estimates. This gives a range of housing estimates that can be accepted or rejected as the future of the housing market unfolds. A single housing estimate that is too precise cannot provide enough flexibility to plan for a future which will always contain some uncertainty.
- 3.8 At the time of writing, further work is being carried out using the HNDA tool to give a broader range of housing need scenarios, however, the figures below shown, scenario 1, base data (pre-loaded to the excel spreadsheet) and scenario 2 based on agreed inputs from the evidence gathered so far and agreed with the Housing Market Partnership Group.

3.9 Scenario 1 – base figures (per annum). This scenario is pre-loaded into the HNDA

- Principle household growth - 2016 based National Record Of Scotland figures
- Current housing need - the HNDA tool has this pre-loaded at 970 people
- Low increase in cost of renting and buying
- No income growth

This shows the annual requirement by housing tenure going forward and the total numbers over the ten year period to 2034. This is the base line figure of housing need and demand pre-loaded into the HNDA Tool.

<b>Tenure</b>	<b>2025-29</b>	<b>2030-34</b>	<b>10 year Total</b>	<b>10 year Avg Per annum</b>
Social Rent	41	-2	390	39
Below Market Rent	4	-3	10	1
Private Renting	3	-2	10	1
Buyers	5	-3	20	2
<b>Total</b>	<b>54</b>	<b>-10</b>	<b>430</b>	<b>43</b>

- 3.10 Scenario 2 – makes assumptions based on evidence gathered and agreement with the Housing Market Partnership. These figures are entered into and run through the HNDA tool to give estimates of housing need.

High household projections	- 2018 based National Records of Scotland
Current Housing need	- from waiting list data at October 2024 - 1,455
Higher than expected house prices and increase in private renting costs	- as agreed with the Housing Market Partnership
Real terms income growth	- as agreed with the Housing Market Partnership

This shows the annual requirement for each housing tenure going forward and the total numbers over the ten year period to 2034.

<b>Tenure</b>	<b>2025-29</b>	<b>2030-34</b>	<b>10 year Total</b>	<b>10 year Avg Per annum</b>
Social Rent	130	36	830	83
Below Market Rent	14	46	300	30
Private Renting	10	26	180	18
Buyers	17	46	315	31
<b>Total</b>	<b>171</b>	<b>154</b>	<b>1,625</b>	<b>162</b>

- 3.11 As Council is aware, due to the Clackmannanshire's HNDA being out of date, the Scottish Government Reporter has allowed developments to proceed without consideration of affordable housing needs. Whilst the result of this process is still to be consulted upon and verified by the Scottish Government, Council is asked to endorse the initial findings from the tables at 3.9 and 3.10, although broad estimates at this stage, both show a requirement for new affordable housing. This is to ensure that in any such case in the interim period, the planning service has an evidence base to revert to and would assist any discussions with the Scottish Government Reporter.
- 3.12 It is proposed that the draft HNDA document will go out to public consultation between June and early August 2025. The purpose will be to get feedback on the assumptions made on the data collected in the document and get feedback on the range of housing need estimates made. The proposed consultation is appended to this report.

3.13 The HNDA will be appraised by the Centre for Housing Market Analysis (CHMA) at the Scottish Government. The assessment is likely to take around 8 weeks to complete.

3.14 It is proposed that the HNDA should come to Council in November 2025 for approval.

#### **4.0 Sustainability Implications**

4.1 None

#### **5.0 Resource Implications**

5.1 None

#### **6.0 Financial Details**

6.1 The Service is working with Finance colleagues to determine any potential impact.

#### **6.3. Staffing**

There are no staffing implications from this report.

#### **7.0 Exempt Reports**

7.1 Is this report exempt? Yes ☐ (please detail the reasons for exemption below) No ☒

#### **8.0 Declarations**

The recommendations contained within this report support or implement our Corporate Priorities and Council Policies.

##### **(1) Our Priorities**

Clackmannanshire will be attractive to businesses & people and ensure fair opportunities for all ☒

Our families; children and young people will have the best possible start in life ☒

Women and girls will be confident and aspirational, and achieve their full potential ☐

Our communities will be resilient and empowered so that they can thrive and flourish ☒

##### **(2) Council Policies**

Complies with relevant Council Policies ☐

#### **9.0 Equalities Impact**

9.1 Have you undertaken the required equalities impact assessment to ensure that no groups are adversely affected by the recommendations?

Yes ☐ No ☐

## 10.0 Legality

10.1 It has been confirmed that in adopting the recommendations contained in this report, the Council is acting within its legal powers. Yes ☐

## 11.0 Appendices

11.1 Please list any appendices attached to this report. If there are no appendices, please state "none".

11.2 Appendix 1 Draft Consultation Summary

## 12.0 Background Papers


12.1 Have you used other documents to compile your report? (All documents must be kept available by the author for public inspection for four years from the date of meeting at which the report is considered)

Yes ☐ (please list the documents below) No ☐

### Author(s)

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### Approved by

NAME	DESIGNATION	SIGNATURE
Kevin Wells	Strategic Director of Place	

## Appendix 1

The Housing Need and Demand Assessment (HNDA) is produced every five years to ensure housing in Clackmannanshire reflects the need and demand.

The Housing (Scotland) Act 2001 places a duty on local authorities to carry out an assessment of the following within the local authority area:

- the type and condition of the housing stock,
- the housing needs of the people in the area,
- the demand for, and availability of housing, and
- the specialist housing provision available to meet particular needs.

This Assessment will be used as the evidence base to inform the development of the Council's Local Housing Strategy and Local Development Plan.

Have you read or reviewed the Draft HNDA Summary or Full Report

- Yes/No

Do you feel the HNDA clearly explains its purpose and methodology?

- Yes/No

**Key Housing Drivers** include the assessment of household formation, population, housing affordability and the key drivers to the local and national economy.

The 2018 National Records of Scotland (NRS) statistics show an ageing population and project that by 2043, the profile of the older population in Clackmannanshire will be greater than that in Scotland overall. The HNDA assumes that supporting older population and addressing adaptations will be essential when planning for affordable homes and private developments. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

## Appendix 1

The 2018 NRS statistics project a decrease in population but an increase in the number of households. Compared with a projected increase in the age of the population, the HNDA assumes that in the future, smaller households will predominantly be older single people or couples. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

The HNDA assumes that with the increased requirement for larger deposits for first time buyers, it is becoming more difficult for buyers to enter the market for the first time. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

The HNDA assumes that private renting is unaffordable for lower quartile income households due to a gap between the local housing allowance and rent prices that have to be met by private rented tenants. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

The HNDA assumes and models high population growth scenario to set more ambitious targets for local housing land requirements and to address the increase in number of households. To what extent do you agree with the assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

### Economic issues for the Local Housing Markets

#### ***Current Provision and Needs***

The HNDA assesses that there are currently x number of homes, and the current need is x by type and tenure.

To what extent do you agree with the HNDA's assessment of current housing needs? – provide info on the total number of homes needed by type and tenure, etc.

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Do you have any other comments?



### ***Future Needs***

Summarise information on future population and household trends.

Do you believe the assessment adequately captures future population and household trends (e.g. inward and outward local migration, aging population)?

- Yes/No

Do you have any other comments?

To what extent do you agree with the HNDA's assessment of future needs?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Which set of assumptions do you think best estimates likely future housing needs?

Do you have any other comments?

### ***Specialist Provision***

Using nationally and locally available sources, the HNDA assumes that there is a lack of information on the needs of specialist housing and housing-related provision for owner occupiers and private rented sector across Clackmannanshire. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Using national statistical data, the HNDA assumes that the rapidly ageing population and worsened physical and mental health of the population has and will continue to have an increased impact on the provision of health and social care services as well as increase in the demand and an unmet need for specialist housing and housing-related provision. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Using local data, the HNDA assumes that there is a significant shortfall in the provision of accessible and adapted housing (including disabled adaptations) across Clackmannanshire. To what extent do you agree with this assessment?

## Appendix 1

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Using the methodology established by Chartered Institute of Housing (CIH), the HNDA uses higher estimates to establish the unmet housing need for wheelchair-user households and estimates that by 2043, there will be 175 wheelchair-user households with unmet housing need. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Historic trends show that homeless presentations have been increasing across Clackmannanshire with an increase in the number of households in temporary accommodation and an increase in the breaches of Unsuitable Accommodation Order. The HNDA assumes that this trend will continue, and that the demand for temporary accommodation to meet the needs of homeless households within Clackmannanshire will continue to increase. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Statistics have shown a reduction in the number of registered care places, the number of care home residents and care home occupancy rates. The HNDA assumes that there is no need for future care home places, and the focus should be on offering more community-based support and alternative models of housing (such as sheltered housing). To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Following locally available data, consultations with partner stakeholders and client groups, the HNDA assumes that there is a lack of sheltered accommodation and other alternative models of housing to meet the needs of older people and disabled people. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Using nationally and locally held data, the HNDA assumes there has been an increase in the number of people with multiple and complex needs who get care at home. To what extent do you agree with this assessment?

## Appendix 1

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Following locally available data, consultations with partner stakeholders and client groups, the HNDA assumes that there are currently gaps in the provision of care and support services to enable independent living, and there is a need to increase the provision of support services going forward to ensure that the system can cope with the increasing demands. To what extent do you agree with this assessment?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

To what extent do you agree with the HNDA's overall assessment about housing provision to meet particular needs?

- Strongly Agree/Agree/Neutral/Disagree/Strongly Disagree

Do you have any other comments?

Are there any groups you believe are missing or underrepresented?

- Yes/No

If so, what groups are missing or underrepresented?

Do you have any additional comments, feedback, or evidence you'd like to submit?

### Equalities questions:

Gender

Age group

- Under 18
- 18-24
- 25-34
- 35-49
- 50-64

## Appendix 1

- 65-74
- 75+
- Not Answered

Do you consider yourself to have a disability

What is your ethnic group/background

What religion, religious denomination or body do you belong to?

Which of the following best describes your sexual orientation?

# Appendix 1

Action	December 2024	March 2025	April 2025	May 2025	June 2025	July 2025	August 2025
Housing Market Partnership	Introduction & Chapter 2 Meeting Demographics		Chapter 3 Meeting Stock	Chapter 5 Meeting Specialist Housing	Chapter 4 Meeting Estimates of future need and demand		Survey & consultation feedback
Specialist Housing Consultation		Consultation Event (multi-agency)  Older Adults' Forum  Alzheimer's Scotland					
Stakeholder event						Events TBA	Events TBA
Citizens Space						Open Survey	Close Survey & feedback to HMP

