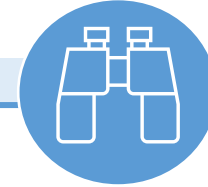




Arneil Johnston

Moray Housing Need & Demand Assessment



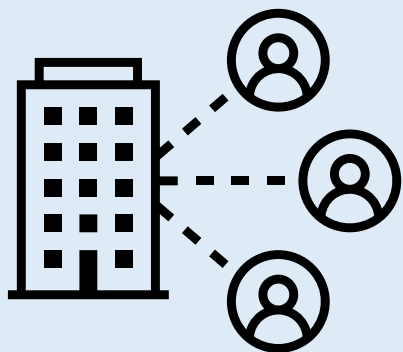
Insight briefing:

- Health & disability profile
- Accessible & wheelchair housing
- Non-permanent housing
- Supported housing
- Care & support for independent living
- Site provision

Core Output 3: Specialist Housing Provision



Housing Need & Demand Assessment Overview



Housing Need & Demand Assessments are designed to give broad, long-run estimates of what future housing need might be, rather than precision estimates.

They provide an evidence-base to inform housing policy decisions in Local Housing Strategy (LHS) and land allocation decisions in Development Plans.

The previous Housing Need & Demand Assessment for the Moray area was produced in 2017.

An HNDA estimates the future number of additional housing units to meet existing and future housing need and demand in a housing market area

It also captures contextual information on the operation of the housing system to assist partners to develop policies on new housing supply, the management of existing stock and the provision of housing related services.

This contextual information includes an analysis of demographic, affordability and wider economic trends which are key drivers of local housing markets.

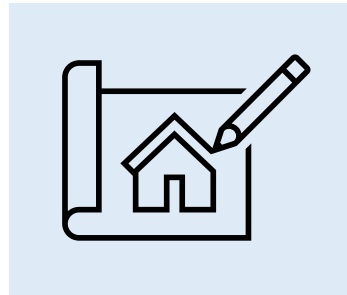
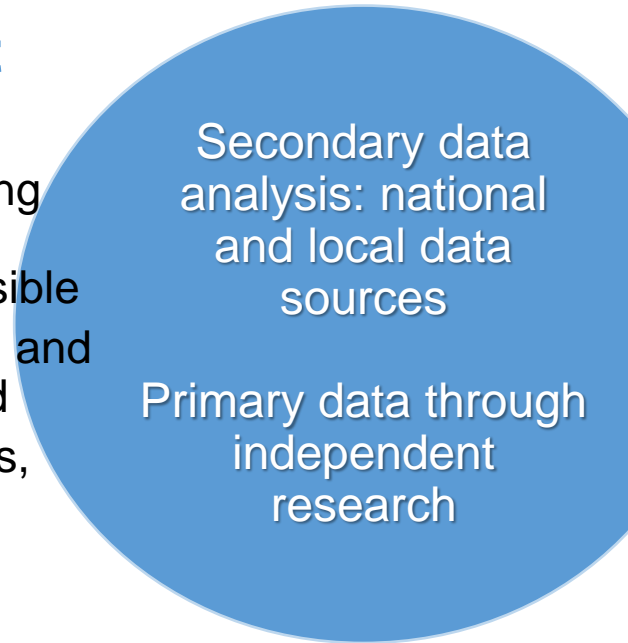
This analysis helps partners to understand local housing market dynamics and make evidence-based choices on meeting housing need and demand



HNDA Specialist Housing Analysis

HNDA Core Output 3: Specialist Housing Provision

- Identifies the contribution of Specialist Housing provision in enabling people to live well, with dignity and independently for as long as possible
- Identifies any gaps/shortfalls in that provision and the future level and type of provision required
- Considers evidence regarding property needs, care and support needs and locational/land needs
- Undertakes consultation with stakeholders involved in the planning, commissioning and delivery of specialist housing and related services
- Reports on the findings of stakeholder consultation
- Gives due consideration to the provisions of the Equality Act (2010)





Core Output 3: Specialist Housing Provision

What's our starting position? This briefing will explore...

Health & disability profile



What proportion of households in the Moray area have health or disability problems which could impact on their housing needs?

Accessible & wheelchair housing



What's the profile of the specialist housing stock across the Moray area?

How effective is the specialist housing stock in Moray partner areas in meeting housing need?

Non-permanent housing



What is the role of temporary accommodation in addressing housing crisis?

What are the accommodation needs of key groups such as migrant workers and students?

Supported Housing



What is the role of supportive housing for those who cannot live independently in mainstream housing?

Care & support for independent living



What role do care & support services play in meeting housing need across the Moray area?

What role does aids, adaptation & telecare play in meeting housing need across the Moray area?

Site provision



What provision is available across Moray to meet the housing needs of Gypsy Travellers?

How effective is this provision in meeting housing need?



Moray Health & Disability Profile

Households with a disability/limiting health issue Scottish House Condition Survey 2017-19



52%

of households in Moray contain one or more long term sick or disabled person (44% in Scotland)

66%

of households in Moray's social rented sector contain a LTSD person

51%

of households in Moray's owner occupied sector contain a LTSD person

70%

of older households in Moray contain a LTSD person (Families 34%)

45%

of Moray households have a households members with a health condition or disability: 2023 Moray HNDA Survey



18%

with a long-term illness or disease

17%

with a physical disability

16%

with a mental health condition

6%

with a learning disability

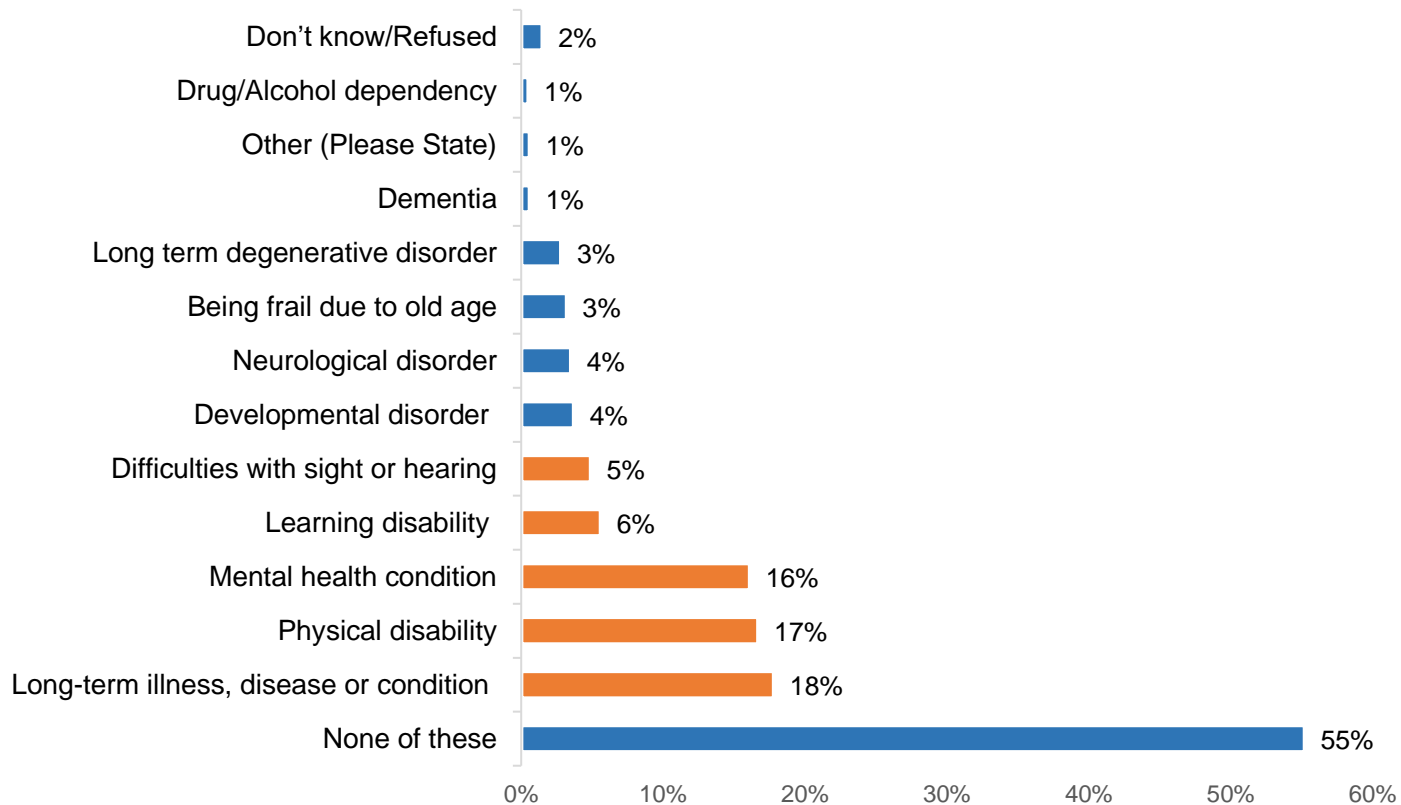
5%

with sight or hearing difficulty



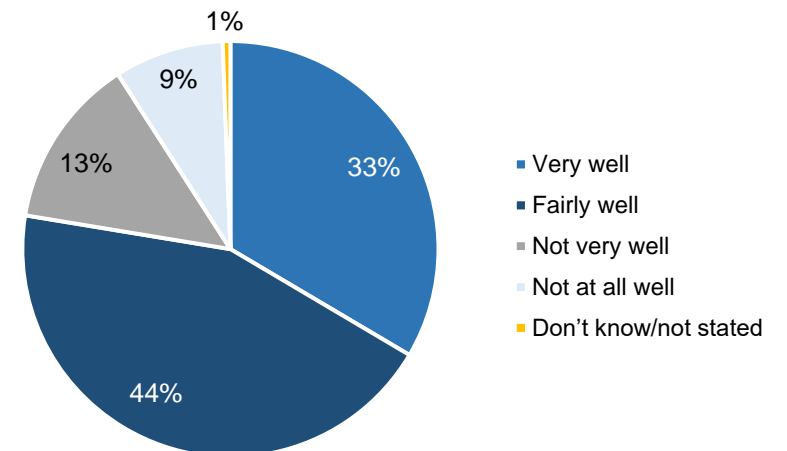
2023 Moray HNDA Survey: Health & Disability Profile

Is there anyone in the household who has any of the following long-term health conditions or disability? (%)



22% of households with a health condition or disability said that their housing **did not meet their need very well or not at all**

How well do you think that your current housing meets health and disability needs? (%)





Need for Accessible, Wheelchair & Supported Housing

16% of Moray households with a health condition or disability problem require specialist housing (2,577 households)

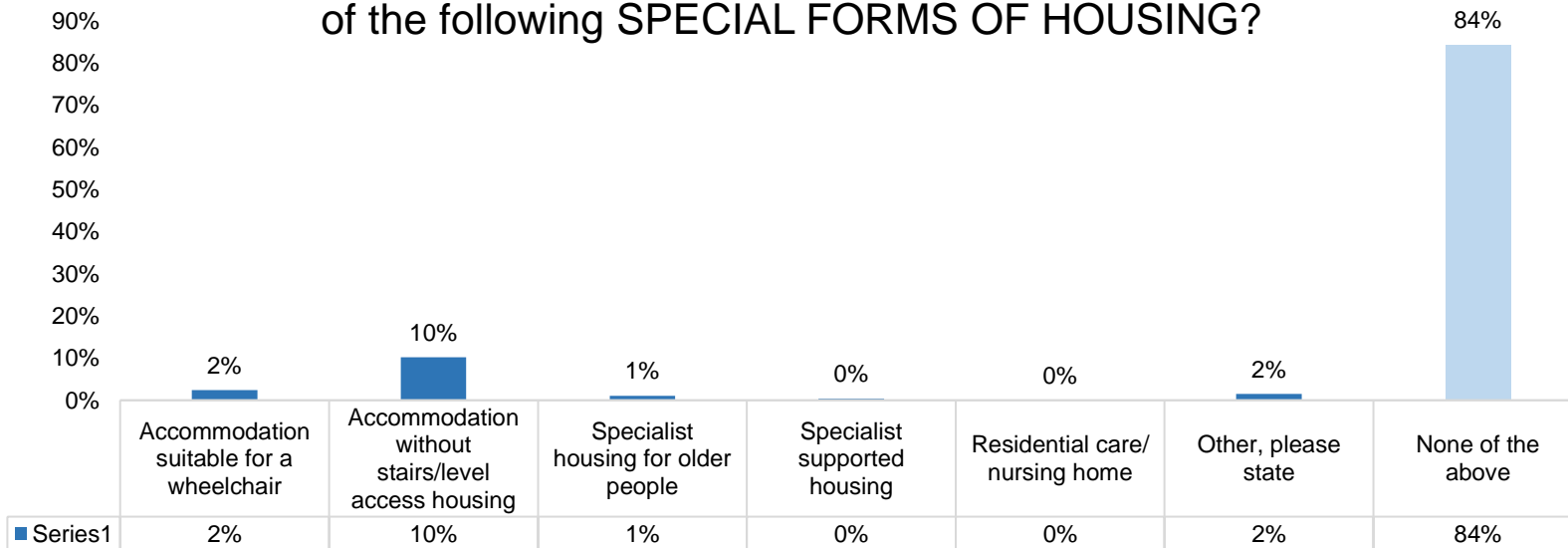
2.4%
require wheelchair housing
(434 households)

10.2%
require housing without stairs
(1,856 households)

1.1%
require housing for older people
(206 households)

0.4%
require supported accommodation
(81 households)

Do you or anyone in your household have an UNMET NEED for any of the following SPECIAL FORMS OF HOUSING?



59% of unmet need for specialist housing is in Elgin

13% of unmet need for specialist housing is in Forres

12% of unmet need for specialist housing is in Keith

11% of unmet need for specialist housing is in Buckie



Need for Wheelchair Accessible Housing

Still Minding the Step (2018): National calculation of wheelchair users in housing need was published by CIH Scotland and Horizon Housing Association, estimating the number of wheelchair homes required to meet unmet need in Scotland.

Using the results of the Scottish Households 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.



Overall new housing supply has, on average, only provided homes to wheelchair standard at an approximate 1.07% of all new completions (with the caveat that there is no national data on private sector completions to this standard), and 3.4% of the new affordable housing supply completions. It appears that meeting demand is largely left to the affordable homes sector.

This leaves disabled people and their households with considerably less choice in the housing market than non-disabled people, while adding to the future need for, and cost of, adaptations.

The study makes recommendations for a three tier approach to meeting the need for more wheelchair and accessible homes including:



Design & supply of new homes



Property adaptations



Effective matching of households to adapted properties

3.6%

Households in Scotland contain a wheelchair user

19%

of wheelchair users have an unmet housing need

312

estimate of wheelchair users in significant housing need in Moray using the Mind the Step calculation methodology

121

Households require wheelchair designed housing

191

Households require wheelchair adapted housing



Specialist Provision: Accessible & Wheelchair Housing

Specialist Housing: Social Housing Sector



45%

of all homes in the social housing sector in Moray offer specialist forms of housing provision (4,074 units)

3,174

Moray Council units

900

Moray RSLs units

81%

Specialist homes provide amenity housing for people with mobility needs

16%

Specialist homes provide supported housing including sheltered

3%

Specialist homes are fully wheelchair accessible

Of the 2,649 applicants seeking housing on the Moray Housing Register



24% of applicants (637) are seeking specialist housing including:

- 564 applicants who require accessible housing
- 17 applicants who require wheelchair housing
- 56 applicants who require housing for older people

910 applicants have been awarded points on medical grounds (33%)

- 9 applicants have Category A
- 40 applicants have Category B



Non-Permanent Housing

Temporary Accommodation for Homeless Households

123

number of temporary accommodation units across Moray to meet needs of homeless households

76% community based dispersed housing

16% hostel accommodation

7% refuge accommodation

The rate of households in temporary accommodation is 1.2 households per 1,000 in Moray compared to 3.1 in Scotland

There were approximately 100 households in temporary accommodation across Moray at 31st March 2022. **During 2021/22:**



347 households entered temporary accommodation



351 households exited temporary accommodation

Rapid Rehousing & Temporary Accommodation

Temporary accommodation use in Moray has reduced over the last 3 years, with the length of stay in temporary accommodation reducing from 151 days in 2020/21 to 136 days in 2022/23.

Key aims of the Rapid Rehousing Transitions Plan 2022/23-2026/27 are to continue this reduction by flipping temporary tenancies to permanent and reducing void times. Furthermore, 10 Housing First tenancies for households with complex needs will be established

The average length of stay spent by homeless households in temporary accommodation in Moray (136 days) is less than in Scotland (207 days)

Respite/Short Stay Provision

Whilst the overall numbers of adults in short stay / respite care places in Moray have decreased by 4% between 2012 and 2022, there has been an increase in respite places for older people (20 in 2022) of 67%.

Overall in Scotland there has been an increase in short term respite places of 1%

	2012	2022	% change
Moray - All people	25	24	-4%
Moray - Older people	12	20	67%
Scotland - All people	1560	1380	-12%
Scotland - Older people	1081	1087	1%

A movement away from the use of care homes in some LAs for short-stay & respite will require alternative forms of accommodation

Shared Lives is becoming an option for short-stay and respite care, where the individual stays with a host family that provides a therapeutic and homely environment for the individual.



Supported Housing: Older People

Care & Support Provision in Moray

There is a lower rate of care home places in Moray (29 per 1,000 population 65+) than in Scotland (39 per 1,000)

584

households were living in care homes across Moray in 2021, with average occupancy levels at 89%

16

Care Homes across Moray

533

Registered places: long & short stay plus respite

Unpaid carers represent 8% of the Moray population. Home care clients have reduced by 21% across Moray between 2011-2017, which is less than the reduction in Scotland (23%)

The 'Home First' theme is a key aspect of the Moray IJB Strategic Plan 2022-2032

The Home First model aims to support people to live at home or in a homely setting for as long as possible.

Housing for Older People



441 units

of social housing is specifically designated for older people including sheltered and very sheltered housing

7%

of all social housing in Moray is designated for older people including

- Castlehill Housing Association 49 units
- Hanover Housing Association 242 units
- Moray Council 150 units



Moray's Aging Population

By 2043 the 65- 84 age group is expected to increase by almost 24% in Moray with the 85+ age group by 85%. This is compared to 22% for the 65-84 age group in Scotland and 64% for the 85+ age group.

These projections will necessitate specialist housing options that enable older people in Moray to live independently and well.

Housing for Older People: Demand

56

applicants on the housing list require sheltered housing

343

applicants on the housing list are older people

206

Respondents in the HNDA survey require sheltered housing

Housing for Older People Turnover (3 year average)

25

sheltered housing units became available per annum

2

Wheelchair housing units became available

260

Accessible units became available



Supported Housing: Key Client Groups

Moray HSCP Commissioned Services

Older People Accommodation/Care and Support Provision



Learning Disabilities

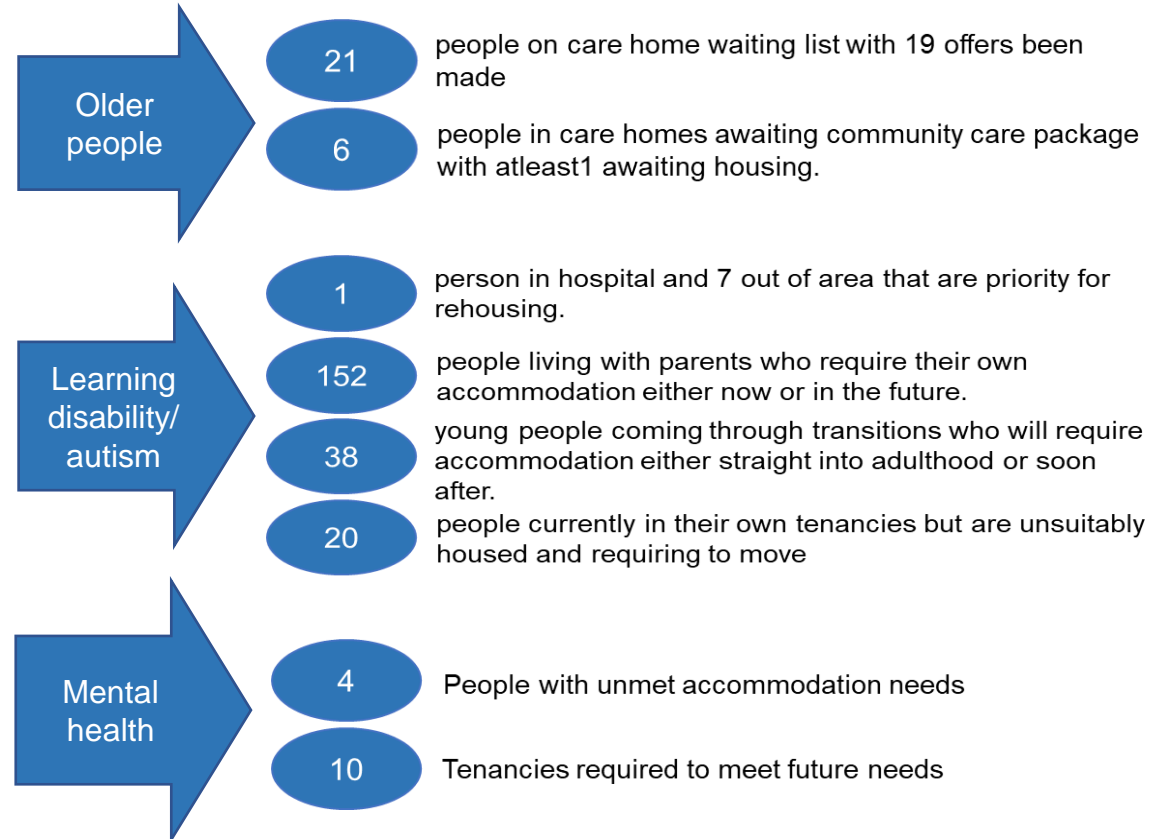
- 6 x care home places
- 118 x tenancies
- 7 x care and support packages

Mental Health

- 1 x commissioned tenancy
- 52 x care and support packages



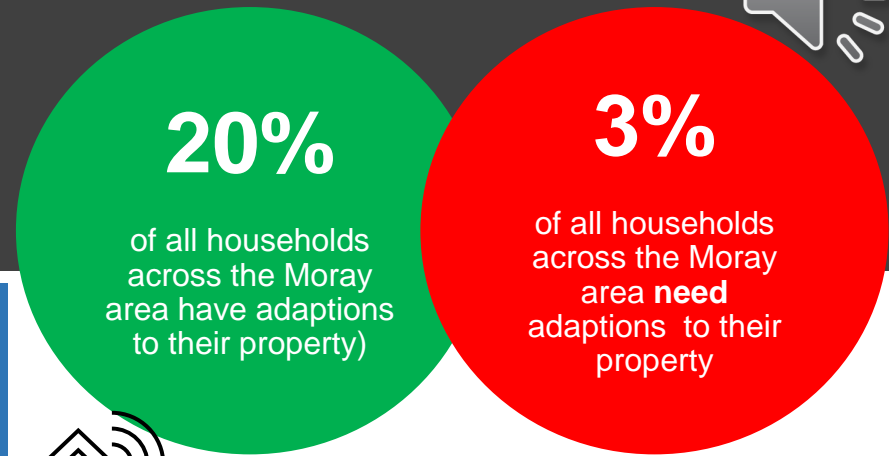
Unmet Need for Supported Housing by Client Group: West Locality



Care & Support for Independent Living



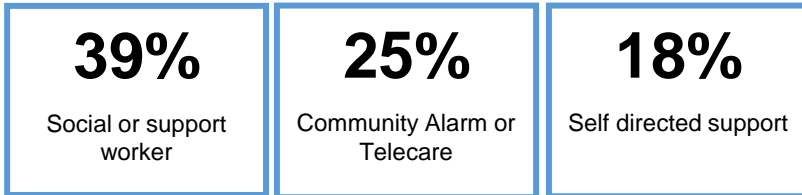
6% of households in Moray receive care services
(Scotland = 7%) Scottish House Condition Survey (2017-19 Local Authority Analysis)



Scottish Social Care Survey 2017

In 2017, a total population of **7,520** households were engaging with social care services in Moray

The top 3 social care services which enable independent living in Moray include:



On average, the rate of Home Care clients in Moray is lower (9.84 per 1000) than Scotland (11.04)



Over 1,860 households across Moray are supported to live independently as a result of using assistive technology (Telecare)

- 32% of this population are 75+
- 73% do not rely on Homecare services to meet their needs

Social Care Service Profile	Moray	%
Community Alarm / Telecare	1860	25%
Social Worker / Support Worker ²	2910	39%
Home Care	950	13%
Self-Directed Support (all options) ²	1320	18%
Housing Support *	140	2%
Meals **	140	2%
Direct Payments	200	3%
Total	7520	100%

Social Care Survey 2017 - Local authority analysis

Triangulating secondary data sources suggests that approximately

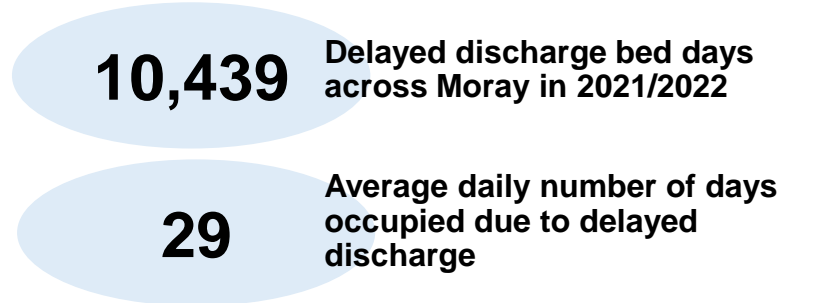
1,300 Households have care packages to enable independence

This evidence includes:

- 1,400 HNDA survey respondents who receive regular support service
- 1,200 – 1,300 households who receive self directed support



Delayed Discharge Statistics 2021/22





HNDA Core Output 3: Specialist Provision Key Issues

Health & disability profile



45% of households in Moray, contain one or more person with a long term sick or disabled (LTSD) person which equal to the national average of 44%. 62% of households in Moray's social housing sector have a person with LTSD. The 2023 Moray HNDA Survey identified that 18% of households surveyed had a long term illness, 17% had a physical disability and 16% had a mental health condition.

Accessible & wheelchair housing



16% of Moray households with a health condition or disability require specialist housing. The largest number 1,856 households require housing without stairs and 434 require wheelchair housing.

There are 4,074 units of specialist housing provision in the social housing sector in Moray. 22% of applicants on the Moray HR require specialist housing.

Non permanent housing



There are 123 temporary accommodation units across Moray to meet needs of homeless households. Time spent in temporary accommodation in Moray is less (at 136 days) than in Scotland (at 207 days). Whilst the overall numbers of adults in short stay / respite care places in Moray have decreased by 4% between 2012 and 2022, there has been an increase in respite places for older people (20 in 2022) of 67%.

Housing for Older People



By 2043, the 85+ age group in Moray is expected to grow by 85%. There are 592 units of social housing specifically designed for older people, with 16 Care Homes across Moray.

Approximately 300 respondents from the Moray HNDA survey expressed a requirement for retirement or sheltered housing compared to an average turnover of 25 sheltered housing properties per annum over the last three years.

Specialist housing for key client groups



The Moray Health & Social Care Partnership commission supported housing services for a range of client groups living in the Moray area. This includes: 678 care home or supported housing places, 250 commissioned care packages and 130 housing support packages for households with learning disabilities. 211 people with learning disability/autism require supported accommodation and 14 people with mental health needs require housing accommodation.

Care & support for independent living



In 2017, there was a population of just under 3,000 households engaging with social care services. Approximately 1,300 households have commissioned care packages to enable them to live independently at home 20% of all households across Moray have adaptations to their property with 3% needing an adaption to their property.