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REPORT

Subject : Gypsy and Travellers Housing Needs Assessment
Report to : The Cabinet
Date : Wednesday 30 January 2008
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Cabinet Member for Housing: Councillor Ian Tomes

Purpose:

To inform Members of the provisional results of Wiltshire and Swindon's Gypsy & Traveller Accommodation Assessment (GTAA) and to note the potential implications.

Background:

The Housing Act 2004 places a duty on each local housing authority to undertake a 'Gypsy and Traveller Housing Needs Assessment'. In order to achieve best value the six Wiltshire local authorities – Kennet, North Wiltshire, West Wiltshire, Salisbury, Wiltshire County Council and Swindon Borough Council jointly commissioned the research and report. This approach allowed a more in depth and comprehensive survey to be undertaken than would have otherwise been possible including an examination of the education and health issues of this group. The study was undertaken by David Couttie Associates (DCA) using recognised models of good practice.

The study set out to:

- a determine whether there is existing adequate provision across the county for gypsy and travellers and, if not, where and how future needs should be addressed and
- b provide a planning framework to inform each authority's development plan documents and ensure a consistent planning approach to gypsy and traveller needs across the county.

The information gained from the study is to be used to inform the council's Housing Strategy and Local Development Framework (LDF) Core Strategy. The Local Development Scheme identifies the survey of gypsy and travellers as part of the evidence base for the preparation of the LDF's Core Strategy. Circular 1/2006 states '*The core strategy should set out criteria for the location of gypsy and traveller sites which will be used to guide the allocation of sites in relevant development plan documents. These criteria will also be used to meet unexpected demand*'. The survey is therefore a key piece of research informing the development of future planning and housing policies for both the district's and the new council.

Key Findings

The Executive Summary of the final report is attached at Appendix 1. The full report is now available on the council's web site. The headline finding for Wiltshire and Swindon is that there is a need for an additional 47 new authorised site pitches across Wiltshire and Swindon to be made available between 2006 – 2011 to:

- a. deal with the backlog of demand existing within the study area,
- b. meet emerging demand from new family formation and
- c. meet demand arising from the temporary planning permissions due to expire on Minety in North Wiltshire, and Bonnie Park in West Wiltshire.



The final report includes an action plan to take forward the recommendations of the report. Some actions will need to be taken forward through the council's housing strategy, for example, developing partnership working with the gypsy and traveller community. Some will be led by planning services for example developing a policy to support gypsy and traveller households to access the planning system. Others will require additional research, for example a more in depth assessment of overcrowding. It is proposed, therefore, that the project team set up to oversee the GTAA which includes officers from planning, housing, gypsy liaison and representatives from education and social services from across the study area continue to meet to take forward the action plan and develop a Gypsy & Traveller Strategy for Wiltshire. The final strategy will need to reflect the outcomes of any additional research carried out as recommended by the GTAA.

Secondary Report on Overcrowding and Pitch requirement for the Salisbury District:

The final report indicated in Salisbury there was a pitch requirement for the provision of 9 new pitches by 2011. However, the report recommended that a secondary study be undertaken to establish pitch overcrowding in line with more recent government guidance rather than bed deficiency model used in the report. Early indications are that the original report over-estimated overcrowding and therefore the pitch requirement was also over estimated, the suggestion being that there is adequate supply of pitches to meet need. The results of the investigations into overcrowding will be presented as material evidence for consideration at the examination in public of the Regional Spatial Strategy (RSS). The council has previously submitted the pitch requirements figures given in GTAA (RSS) reserving the right to raise an objection pending the outcome of the additional research into overcrowding.

Planning Issues:

One area of research within the report that was disappointing was the planning element. The planning section of the report reviews current national and regional planning advice in relation to gypsy and travellers, draws together data gleaned from face to face interviews on site preferences but falls short of delivering a site search methodology for identifying sites within a core strategy.

Circular 1/2006 provides quite detailed guidance on the criteria that should be applied when trying to identify a site for new gypsy and traveller accommodation and warns against criteria that are too restrictive. The GTAA recommends a positive set of criteria should be used in core strategy policies and provides some guidance on how the existing gypsy and traveller community integrate with the local community and their use of existing facilities. This information can be used to help develop a criteria based approach to identify appropriate new sites.

Conclusions for Salisbury:

Although the process for carrying out a Gypsy and Traveller Needs Assessment is complex, and in some respects an evolving area of research, the conclusions in the DCA research in relation to Salisbury are as follows:

- a That the information concerning anticipated demand for new gypsy and traveller accommodation in Salisbury is incomplete and requires a further study into overcrowding. It would be premature at this stage to identify options for new pitches at this stage.
- b There is currently a strong supply of gypsy and Traveller sites within Salisbury
- c The evidence provided by the Gypsy & Traveller Needs Assessment and additional overcrowdings study will provide a robust defence of this position should Salisbury's decision to not allocate a site for gypsy and travellers in the district be challenged.
- d The Salisbury Core Strategy will need to include a criteria based policy on how to assess unforeseen proposals for gypsy and traveller accommodation to meet unexpected demand in accordance with Circular 1/2006.
- e The data provided by DCA on the use of local services and facilities and priorities for access to certain services and facilities within the gypsy and traveller community is a sound basis for developing policy within the core strategy.

Consultation:

Consultation was a key component of the GTAA. This included discussions with organisations and agencies involved with the gypsy and traveller community, liaison with community leaders before site visits took place and face to face interviews with gypsy and traveller households.

On 31st July 2007, at the Corn Exchange in Devizes, a final draft of the GTAA report was subject to direct consultation with the gypsy and traveller community. Generally there was support for the

recommendation that more pitches are needed. Areas of concern related to the definition of overcrowding and the estimate of household formation rates.

Validation of the reports findings through consultation is an essential part of the process if the findings are to be used as evidence to Salisbury's core strategy and housing strategy.

Recommendation:

Cabinet are recommended to accept the conclusions and broad implications of the Gypsy and Traveller Housing Needs Assessment.

Implications:

Financial : None at this stage.

Legal : The Housing Act 2004 requires local authorities to assess the accommodation needs of Gypsies and travellers alongside other forms of housing need. The draft revision to Planning Circular 1/94 - 'Planning for Gypsy and Traveller Sites' (ODPM, 2004) - requires local authorities to make appropriate provision for Gypsy and traveller needs in their Development Plan Documents.

Human Rights : Article 8 –the right to respect for private and family life (this does not mean right to a home)

Personnel : None at this stage

Community Safety : None at this stage

Environmental : None at this stage

Equality and Diversity : As they relate to the Gypsy and Traveller community

Core Values : Promote fairness and equal opportunity for all, Support the disadvantaged, Meet local needs, Provide excellent service, Communicate, especially listening and responding

Wards effected : All

Consultation undertaken: As outlined in the report

1 EXECUTIVE SUMMARY

1.1 Aims & Objectives

- 1.1.1 Wiltshire County, North Wiltshire, West Wiltshire, Salisbury, Kennet and Swindon Councils formally commissioned David Couttie Associates (DCA) in February 2006 to carry out a Sub-Regional study of the accommodation needs and aspirations of Gypsies and Travellers who were housed in bricks and mortar housing or living on authorised or unauthorised sites within the study area.
- 1.1.2 The methodology developed for the Wiltshire and Swindon study was based on draft guidance for Gypsy and Traveller accommodation assessments, issued by ODPM in February 2006 and has built on DCA's experience of carrying out Gypsy and Traveller accommodation needs assessments in other areas.
- 1.1.3 The introduction to the Guidance states: *"The guidance aims to provide advice on carrying out an Accommodation Assessment of the accommodation needs of Gypsies and Travellers. It is not exhaustive or prescriptive. While it is recommended that the basic principles outlined here should be followed, the exact approach will need to be adapted to local circumstances."*
- 1.1.4 This study was commissioned jointly by Swindon Borough and the five Wiltshire local authorities including the County Council. Guidance clearly recommends that Gypsy and Traveller Accommodation Assessments be carried out at a sub regional level in order to achieve:-
- A bigger sample and hence more accurate results, and a better understanding of needs across administrative boundaries;
 - A better understanding of travelling patterns, particularly where they cross administrative boundaries;
 - A common approach and consistency across the study area;
 - Economies of cost and scale;
 - Reduce the risk of double counting;
 - Opportunities for local authorities to work together to devise a strategic approach to Gypsy and Traveller accommodation shortages and enforcement against unauthorised sites.

1.2 Methodology

- 1.2.1 The aim of the study was to conduct between 150 and 200 interviews with Gypsy and Traveller households across the study area. After consultation with the steering group and examination of the July 2006 Caravan Count, it was decided to set a quota for each local authority area based on the caravan count.
- 1.2.2 Community consultation was a key part of the methodology, ensuring that DCA gained the confidence of the community in both the process and results of the survey. Consultation included:

- Consultation with key community representatives, liaison officers and site staff on the questionnaire design;
- A Community liaison meeting a couple of weeks before interviews started to explain the purpose of the survey and enlist the support of community leaders and local staff in passing the word around;
- One to one contact between Mill Field Services, DCA's fieldwork partners, and local site managers and Gypsy and Traveller liaison officers to arrange access to sites and introduce the interviewers on site;
- Letters and flyers distributed by local staff to all authorised sites in the week before the interviews started;
- Letters delivered to households in bricks and mortar accommodation by staff who already have contact with the housed Gypsy and Traveller community, two weeks before interviews started, inviting them to take part in the study.
- Feedback of the interim findings to the Community Liaison group after the first phase of fieldwork, to test the findings and gain community input into the methodology for phase 2 of the fieldwork.
- Consultation on the draft final report at a meeting with 63 community representatives and front line officers at the Corn Exchange in Devizes. This included distribution of summary reports in glossy and audio format. Additional comments were received from residents on private sites in Salisbury and Hay Lane site in Swindon.
- A seminar to feed back the findings to stakeholders and the community at the end of the project.

1.2.3 After consultation with the steering group it was decided that the fieldwork should be carried out in two phases. The first phase of fieldwork for the study focused on authorised sites and took place between Monday 10th and Sunday 23rd April 2006. The second phase of fieldwork focused on unauthorised developments and encampments and Gypsies and Travellers living in permanent bricks and mortar housing and took place between Monday 26th June and Sunday 9th July 2006. In total, 170 face to face interviews were carried out with Gypsies and Traveller households throughout the one unitary and four District local authority areas across Wiltshire & Swindon, including 20 in bricks and mortar accommodation and 8 on transit sites.

1.2.4 The estimated number of Gypsy and Traveller households within the study area was calculated from the Caravan Count. For authorised sites we took the number of caravans in July 2006 and divide that by the number of living units identified in the survey. 171 households were identified, including 124 on public authorised sites and 47 on private authorised sites. The number of households on unauthorised encampments and developments was derived from the survey data and the caravan count, by applying the number of living units per household identified on unauthorised sites within the study to the average number of caravans counted on unauthorised sites over the last three July counts.

1.2.5 On this basis, the response rate on Authorised sites was 68.4%. 25 interviews were achieved on unauthorised sites compared to an estimate of 21 households based on the July Caravan Count average for the last three years; more households were found during the fieldwork period than estimated on the basis of the caravan count.

Table 1-1 *Number of households and response rate*

	Estimated number of households		Number of interviews achieved	
	Authorised	Unauthorised	Authorised	Unauthorised
	N ^{os.}	N ^{os.}	N ^{os.}	N ^{os.}
North Wiltshire	55	11	47	12**
Kennet	0	0	0	0
West Wiltshire	12	0	10	0
Salisbury	64	0	37*	0
Swindon	40	10	23*	13**
Total	171	21	117	25

* Excluding 3 transit interviews in Salisbury and 5 transit interviews in Swindon

**For the number of households living on unauthorised encampments and developments in these areas more interviews were carried out than households estimated on the basis of the 3 year average Caravan Count. Therefore the number of weighted households in Appendix V has been based on the actual number of interviews undertaken.

- 1.2.6 Data from the survey was weighted to reflect the estimated number of Gypsy and Traveller households in the study area, as outlined in Table 1-1 above. The Caravan Count was used as the basis for this calculation, alongside data from the survey showing the number of caravans per household on both authorised and unauthorised sites within each local authority area. Further details of the weighting methodology can be found in appendix V of this report. Analysis of the findings for households living on sites within the study area is shown in section 3 of this report, all the data in this section is expressed as “numbers implied” from the survey.
- 1.2.7 24 transit pitches were identified within the study area, 12 on Odstock, a Local Authority transit site in Salisbury and 12 on Chiseldon Firs a Local Authority transit site in Swindon. We interviewed 8 households living on transit sites, 3 interviews from Odstock and the remaining 5 from the Chiseldon Firs site. The key findings are detailed in section 4 of this report, this data is not weighted. At the time of the study the Chiseldon Firs site was temporarily closed for normal transit occupation because of a group of tolerated trespassers on the site.
- 1.2.8 Mill Field Services achieved 20 interviews with households in bricks and mortar accommodation in the Wiltshire & Swindon study area. 11 interviews were carried out in Swindon, 4 in West Wiltshire, 3 in Salisbury and 2 in North Wiltshire. The findings relating to households living in bricks and mortar accommodation are found in section 6 of this report, this data is not weighted as there us no credible baseline from which to work.
- 1.2.9 Planning issues are addressed in section 7 of the report, following a review of the guidance on site search criteria and analysis of the survey findings.
- 1.2.10 The Gypsy and Traveller Accommodation model is detailed in section 8. The model follows Guidance and outlines the existing stock of pitches, the flow of vacancies and new planning approvals available to meet need, and the need arising from the backlog of overcrowded and new forming households, along with the need arising from those on unauthorised sites, and newly arising need from future family formation and temporary permissions due to expire by 2011.
- 1.2.11 Section 1 sets out the full recommendations from the survey.

1.3 Key Findings from the Survey

1.3.1 DCA asked about current accommodation circumstances:

1.3.1.1 DCA asked households living on sites where they currently live:

- 34.2% are in North Wiltshire, 32.7% in Salisbury, 27.0% in Swindon, and 6.1% in West Wiltshire;
- 117 interviews were achieved on authorised sites and 25 on unauthorised encampments and developments. A further 8 interviews were carried out with households living on authorised transit sites. (The 5 interviews on Chiseldon Firs transit site were with tolerated trespassers occupying the site);
- The survey data was then weighted to reflect the total known population of Gypsy and Traveller households living on permanent authorised and unauthorised sites within the study area. The total weighted household population, (excluding those on transit sites) was 196 households.

1.3.2 DCA asked households how many living units they have per household:

- This was generally higher on authorised than unauthorised sites (1.5 on authorised sites compared to 1.6 on unauthorised).

1.3.3 DCA asked whether this was the main base for the family:

- 97.6% of those on authorised sites, and 76.0% on unauthorised sites said this was their main base. Data suggested 6 households on unauthorised sites were not on their main base, and of those 1 said they were permanently travelling and 4 had no permanent stopping place elsewhere.

1.3.4 DCA asked about overcrowding and whether the home was adequate for the needs of the family:

- A detailed assessment of the level of overcrowding was not possible on the basis of the data received. However, the survey data did allow a comparison of the number of beds with the number of people in the household; and further secondary data analysis allowed an assessment of the pitch capacity on local authority sites. DCA have recommended further work, and a feasibility study to further examine the extent of overcrowding and possible solutions on existing sites.
- A basic over occupation calculation revealed that 21.0% (39 implied) of those living on sites were overcrowded;
- However, only 19 implied households indicated that their accommodation was inadequate because it was too small;
- Levels of adequacy overall were far higher on authorised sites (81.5%) than unauthorised sites (28.0%);
- In terms of inadequacy, problems focused on the lack of facilities on site, that the accommodation / site being too small, and poor facilities on sites.

1.3.5 DCA asked how well sites met the needs of households:

1.3.6 DCA asked about access to amenities on site:

- 86.2% have sole access to water supply and 88.6% to a WC. 8.7% had no access to water supply, and 36.8% have no Council rubbish collection service. All those without access to a water supply were living on unauthorised sites.

1.3.7 DCA asked about health and safety worries:

- Overall, 27.9% of households had health and safety worries (37.5% on unauthorised sites);
- Concerns focused on rats / vermin, lack of basic amenities and fire prevention issues.

1.3.8 DCA asked about general levels of satisfaction with the site:

- 47.4% said they were very satisfied, although this rose to 51.2% on authorised sites and was as low as 20.8% on unauthorised sites.

1.3.9 DCA asked about the good and bad things about where people lived:

- People could think of more good than bad things. The quality of the site and neighbours / other people living on the site were the most positive aspects. The bad things focused on the temporary nature of the accommodation, access to shops and access to doctors.

1.3.10 DCA asked about access to health and education services and facilities locally:

- 20 implied households living on sites were identified as having school age children not in school (27.0% of households with school age children). Over half of the children missing school lived on unauthorised sites. Overall site based children were more likely to be missing school than those in bricks and mortar accommodation;
- Problems focused on disrupted schooling because of mobility, problems getting a school place, and local hostility;
- 87.1% of site based households were registered with a doctor, compared to all of those in bricks and mortar accommodation. However 96.4% of those on authorised sites were registered compared to just 24.0% on unauthorised sites;
- 59.8% of site based respondents were registered with a dentist. However 66.3% of those living on an authorised site were registered with a dentist compared to only 16.0% of those living on an unauthorised site.

1.3.11 DCA asked about the needs of people with a disability:

- 30.4% of households included someone with a chronic illness and 12.1% had someone with a disability or long term illness (around 15% is typical in general housing needs assessments);
- Walking difficulties, mental health problems and asthmatic / respiratory problems were the main issues;

- 4 implied households identified themselves as needing adaptations to the home. Bath / toilet/ shower adaptations were the main needs identified;
- Only 2 implied households said they had adaptations to their home, the local authority had carried these out.

1.3.12 DCA asked about income and the affordability of site accommodation:

- Levels of declared income were low, 98.0% earned below £10,000. However only 25.0% of households responded to the income question;
- 60.4% of households said they receive financial support and 62% of households on authorised local authority sites receive housing benefit;
- 96.8% of households paid less than £50 per week for their site. About a quarter would be prepared to pay more for improved facilities on site.

1.3.13 DCA asked about travel patterns:

- 51.9% of the sample had lived in their current accommodation more than 5 years, all being on authorised sites;
- Only 20.1% of households had travelled in the last 12 months;
- Eviction / enforcement action accounted for 40.5% of movement and 29.7% of households travelled when work dried up (11 implied);
- Most households did not travel in large groups; 40.0% travelled as a single household and on average households travelled with 4.5 vehicles;
- The main reasons given for travelling included way of life, nowhere to settle and work;
- Those who had lived anywhere other than their current location were asked where they had previously lived. Nearly half had moved within the study area and could be considered “local”.

1.3.14 DCA asked about future accommodation needs

1.3.15 DCA asked about the needs of existing households currently living on sites:

- 30 implied households had plans to move. The site not being permanent and eviction / enforcement action were the main reasons for moving;
- 5 implied households wanted to move but could not do so;
- Planned movement was not generally “local”, i.e. only 29.9% (7 implied moving households) plan to remain in the study area;
- 5 implied movers planned to move to bricks and mortar accommodation.

1.3.16 We asked about the needs of concealed households currently living on sites:

- 27 implied individuals were identified, living within 20 implied existing households but needing independent accommodation;
- There was demand from 1 concealed household for bricks and mortar accommodation. 42.1% of concealed households want a local authority site;
- 73.3% of demand was for accommodation within the study area, with most planning to remain in the local authority area where they currently live.

1.3.17 DCA asked for views on ideal sites:

- Preference from respondents, living in site accommodation, was for smaller sites. 63.6% would prefer transit sites with less than 15 pitches and 67.4% would prefer permanent sites with less than 20 pitches. Whilst those households living in bricks and mortar accommodation would still prefer smaller transit sites (55% preferred less than 15 pitches), there was a preference for larger permanent sites with 57.8% preferring sites with over 20 pitches.
- 64.9% of Gypsy and Traveller households would prefer to live in the rural areas; a further 27.2% would prefer to live in a village;
- Preference is for mobile home accommodation (88.4%);
- Preference was for private site provision (81.6%);
- Preferences were for a location within the study area, with a high correlation between existing and ideal locations.

1.3.18 The need for transit sites:

- Transit sites are used to accommodate families moving through the district, to manage unauthorised camping in order to accommodate move on of vulnerable households following eviction;
- There are 24 authorised transit pitches in the study area; and 8 households were interviewed on transit pitches during the study;
- 4 households living on a transit site in Swindon had been there for more than a year and 3 households had no plans to move in the next 12 months; these families were tolerated trespassers and the site had been closed for normal transit use because of their occupation;
- All those living on a transit site described it as their main home although 1 had a base elsewhere;
- 4 households felt their accommodation was inadequate; 6 households had health and safety concerns;
- There is a need for around 24 households to be accommodated on transit pitches over a 12 month period. This would include households moving through the area and vulnerable households needing temporary accommodation following eviction;
- As there are already 24 transit pitches in the study area, the data suggests no need for additional provision. However, data on unauthorised camping suggests a concentration in North Wiltshire, while local staff report limited use of the Odstock transit site in Salisbury;
- The ability of existing transit sites to meet identified need will depend on turnover of pitches as existing households move on; the quality of site accommodation offered and management standards.

1.3.19 DCA asked about the needs of households living in bricks and mortar accommodation

- 20 households were interviewed in bricks and mortar accommodation. The data for this group has not been weighted, as the total number of households in bricks and mortar accommodation is not known;
- The majority of those interviewed were well settled, living in permanent accommodation, 50% (10) were renting from a social landlord, 30% (6) were owner-occupiers;
- Family size was marginally larger amongst families living in bricks and mortar accommodation (3.4) compared to those living on sites (3.0). 12 households (60%) in the sample included at least one member with a disability or long term illness, far higher than the site based sample;
- Only 1 household had travelled in the last 12 months, and none had any plans to move from their current home;
- 6 (30%) existing households from the bricks and mortar sample included a member needing independent accommodation in the next 3 years. 5 wanted to remain in bricks and mortar accommodation; one would prefer a site.

1.4 Key Recommendations and Action Plan

Recommendation	Action Points	Targets
New permanent pitch provision	Provide accommodation for 47 households across the Wiltshire and Swindon study area	By 2011
	Provide accommodation for 24 households in North Wiltshire, including 16 households currently living on Minety	By 2011
	Provide accommodation for 9 households in Salisbury	By 2011
	Provide accommodation for 7 households in West Wiltshire, including 6 currently living on Bonnie Park	By 2011
	Provide accommodation for 7 households in Swindon	By 2011
	Provide 82% of new pitches on private authorised sites	By 2011
	All new pitch approvals to accommodate 2 living units, where possible, plus space for an additional vehicles	On going 2006 – 2011
	Consideration to planning approvals that allow expansion of sites to accommodate growing families	On going 2006 – 2011

Recommendation	Action Points	Targets
Planning Policy	Make provision for identified needs through Local Development Frameworks	2007
	Develop site search criteria alongside a proactive approach to identifying suitable land for site development	2007
	Develop new sites with reference to Draft Guidance on Site Design (May 2007) and in consultation with the community	On going 2006 – 2011
	Monitor the level of new planning approvals against the recommendations of this report	Ongoing 2006 – 2011
	Develop a policy to provide support to Gypsy and Traveller households accessing the Planning System	2011
	Put in place systems to monitor the number of Gypsy and Traveller households in bricks and mortar accommodation	2007
	Carry out future Gypsy and Traveller Accommodation Assessments every 5 years	2011
Overcrowded and Concealed Households	Undertake a feasibility study to assess the options available to address overcrowding on individual sites	2008
Partnership working	Develop plans to ensure the Gypsy and Traveller community is part of future plans and strategies affecting them	2011
	Develop a Gypsy and Traveller strategy for the Wiltshire Districts, and separately for Swindon	2011
	Continue to develop links between the Gypsy and Traveller community and the education service	2011
	Develop a code of guidance to enable Gypsy and Traveller households to access adaptations to their homes	2011
	Develop financial options to enable Gypsy and Traveller households to access finance for site development in partnership with local RSLs	2011
Site management	Continue to support the existing site management structure led by a senior manager	2011
	Establish consistent monitoring of site management information across the study area	2007

1.5 Conclusions:

- 1.5.1 From the survey and from data collected from the local authorities within the study area, a need is emerging for additional new permanent site pitches across the study area. The survey results indicate that:
- There is a high level of turnover of pitches on authorised local authority sites, with local site management data showing noticeable peaks on Bonnie Park (West Wiltshire) and Oak Tree Fields (Salisbury); no new pitches are planned and there is a low level of new pitches approved through the planning system each year;
 - There are waiting lists for sites across the study area and there is a backlog of need from households currently living on unauthorised developments or encampments within the study area;
 - The survey data suggests there is some overcrowding within the study area, although Wiltshire County Council has no recorded complaints of overcrowding on the sites for which it is responsible, and further work is recommended to assess the extent of overcrowding and possible solutions on individual sites;
 - The survey data also showed a backlog of concealed households seeking independent accommodation within the area;
 - New family formation at 3.8% over the next 5 years is likely to continue adding pressure to demand.