



**GL Hearn**

Part of Capita plc

# London Borough of Croydon - Strategic Housing Market Assessment

Addendum Report

**London Borough of Croydon**

September 2015

## **Prepared by**

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### Limitations

This document has been prepared for the stated objective and should not be used for any other purpose without the prior written authority of GL Hearn; we accept no responsibility or liability for the consequences of this document being used for a purpose other than for which it was commissioned.

## 1 INTRODUCTION

- 1.1 Croydon Council has commissioned GL Hearn to prepare a replacement Strategic Housing Market Assessment (SHMA) for the Borough. The initial SHMA supersedes the Croydon Local Housing Market Assessment 2008 (January 2010).
- 1.2 The original commission did not include detailed modelling of housing need derived from the Greater London Authority's population projections. In light of the comments made in the Inspector's Report into the Further Alterations to the London Plan and in response to the Draft Interim Housing SPG published by the Mayor of London, an addendum to the original Strategic Housing Market Assessment was required.
- 1.3 This is an addendum report to the initial SHMA document and provides that further information relating to housing need within the London Borough of Croydon. Both the initial SHMA and this addendum are to support the Borough Council's Partial Review of the Croydon Local Plan: Strategic Policies
- 1.4 The key outputs to the addendum to provide additional sensitivity analysis and updated outputs as follows:
- Update of overall housing need in the Borough based on the Further Alterations to the London Plan (FALP) projections and latest round of GLA projections (2014)
  - Update of affordable housing need calculations for the Borough
  - Update on mix of market and affordable housing (by size)

### Purpose of the SHMA

- 1.5 Paragraph 159 of the NPPF requires local authorities to have a clear understanding of housing needs in the area and requires them to prepare a SHMA to assess full housing needs. The Assessment should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which:
- Meets the household and population projections, taking account of migration and demographic change;
  - Addresses the need for all types of housing, including affordable housing and the needs of different groups in the community (such as but not limited to, families with children, older people, people with disabilities, service families and people wishing to build their own homes); and
  - Caters for housing demand and the scale of housing supply necessary to meet this demand
- 1.6 The purpose of the replacement SHMA and this addendum was to objectively assess the future quantity of housing needed in the London Borough of Croydon up to 2036, with a cross-tabulated

breakdown by tenure and size. The need for housing refers to the specific number of homes of a particular size and tenure that would have to be built in the borough by 2036 to ensure that everyone projected to live in the borough (when not constrained by anticipated housing supply) has a home that they can afford and satisfies aspirations within their means.

- 1.7 The SHMA and this addendum considers the overall need for housing, for different types of housing and the housing needs arising from different groups within the community.
- 1.8 The preparation of the initial SHMA has followed relevant national policy and guidance, specifically:
- National Planning Policy Framework<sup>1</sup>;
  - National Planning Practice Guidance on *Housing and Economic Development Needs Assessments*<sup>2</sup>.
- 1.9 It also took account of the London Strategic Housing Market Assessment 2013<sup>3</sup>, which has been prepared by the Greater London Authority (GLA) and forms part of the evidence base for the FALP. The SHMA provided a more detailed look at housing need, including demographic projections, for Croydon. This addendum utilises the latest population and household projections published by the GLA in April 2015 after the publication of the adopted FALP.

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<sup>1</sup> CLG (March 2012) *National Planning Policy Framework*

<sup>2</sup> <http://planningguidance.planningportal.gov.uk/blog/guidance/housing-and-economic-development-needs-assessments/>

<sup>3</sup> Mayor of London (Jan 2014) *The London Strategic Housing Market Assessment 2013*

## 2 DEMOGRAPHIC PROJECTIONS

2.1 As part of this addendum report sensitivity analysis has been undertaken using four different scenarios/projections; these draw on the initial SHMA as well as projections developed by the GLA. The projections can be summarised as:

1. FALP – uses the assumptions in the FALP which is essentially the central variant population projection (a projection which assumes some return to longer-term migration patterns) along with headship/household formation rates from the 2012-based CLG household projections
2. FALP (GLH) – using the same population projections as the above but with a different set of headship/household formation rates (in this case using the assumptions in the SHMA which is that the rates would track those in the 2008-based CLG household projections from 2011 onwards)
3. 2014-round – using the GLA 2014 round of population and household projections. The main population projection is based on long-term migration trends with headship/household formation rates being drawn from the 2012-based CLG household projections
4. 2014-round (GLH) – using the same population projection data as the above but with the headship rates assumed in the SHMA (i.e. tracking 2008-based rates)

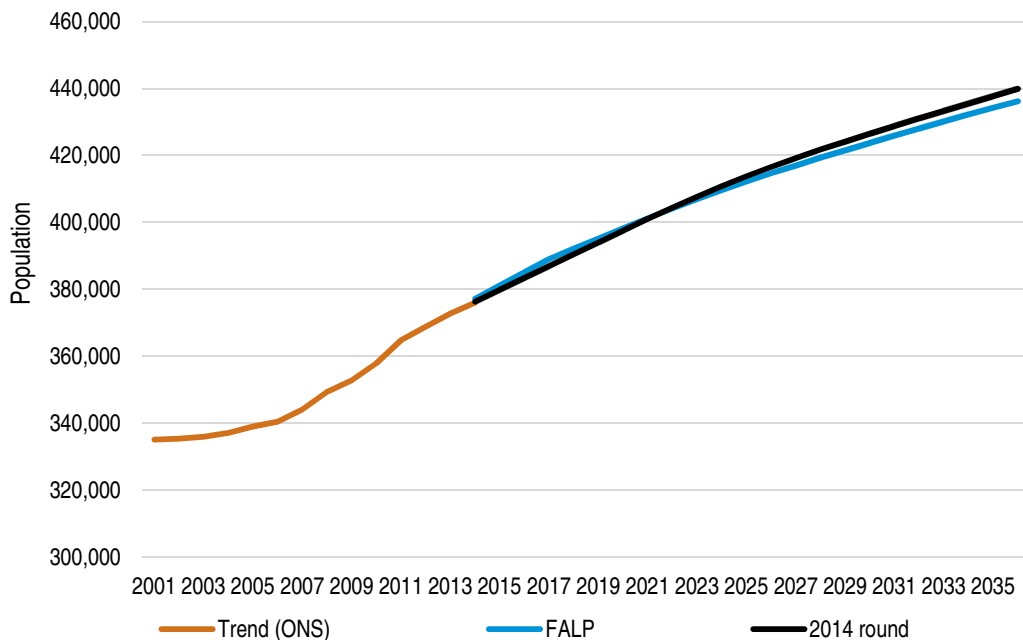
2.2 In line with the Councils requirements each of the scenarios is broken down by three different time periods (2014-26, 2026-36 and 2014-36). The core population outputs of the study are shown in Table 1 below. These set out the start and end population for the given period for both projections.

**Table 1: Population growth 2014-26/36**

Population Projection	Population 2014/2026	Population 2026/2036	Change	% change
<b>2014-26</b>				
FALP Central Variant	377,154	414,654	37,500	9.9%
GLA 2014	376,301	416,566	40,265	10.7%
<b>2026-36</b>				
FALP Central Variant	414,654	436,218	21,564	5.2%
GLA 2014	416,566	439,902	23,337	5.6%
<b>2014-36</b>				
FALP Central Variant	377,154	436,218	59,064	15.7%
GLA 2014	376,301	439,902	63,601	16.9%

2.3 Figure 1 illustrates the population growth for each of the FALP Central Variant and 2014 Round projections produced by the GLA. As illustrated in both the table above and Figure 1 the difference between the two projections is less than 4,000 people over the 22 year period between 2014 and 2036 (206 per annum).

**Figure 1: Population Growth (2001 – 2036)**



## Household growth and housing need

- 2.3 These population projections set out above are translated into households and then dwellings using differing assumptions on headship rates. Population data is converted into households by using the concept of headship rates (essentially the chances of a person in any particular age band being the head of household – i.e. headship rate × population by age band = number of households).
- 2.4 For our analysis here we have looked in some detail at the specific headship rates in each of these sources and how this might change in the future. Tables 2,3 and 4 below show the growth in households and dwelling requirement resulting from the two population projections and:
- a) Headship/household formation rates from the 2012-based CLG household projections; and
  - b) With the headship rates assumed in the initial SHMA (i.e. tracking 2008-based rates), these are indicated with (GLH) in the heading
- 2.5 In translating the household growth into housing need we included a small uplift to take account of short term frictional vacancies (a figure of 2.6% has been used; derived from 2011 Census data). In general, Croydon has very low level of long-term vacant properties therefore using a figure derived from the census will not result in planning to account for or increase the number of long-term vacant properties.



**Table 2: Household and Dwelling Growth (2014-26)**

	FALP	FALP (GLH)	2014 round	2014 round (GLH)
Households 2014	152,137	152,941	152,345	152,732
Households 2026	174,546	178,447	178,291	179,874
Change in households	22,409	25,506	25,946	27,143
Per annum	1,867	2,125	2,162	2,262
Dwellings (per annum)	1,916	2,181	2,218	2,321

**Table 3: Household and Dwelling Growth (2026-36)**

	FALP	FALP (GLH)	2014 round	2014 round (GLH)
Households 2026	174,546	178,447	178,291	179,874
Households 2036	190,571	196,322	197,367	199,093
Change in households	16,025	17,875	19,075	19,218
Per annum	1,602	1,788	1,908	1,922
Dwellings (per annum)	1,644	1,834	1,957	1,972

**Table 4: Household and Dwelling Growth (2014-36)**

	FALP	FALP (GLH)	2014 round	2014 round (GLH)
Households 2014	152,137	152,941	152,345	152,732
Households 2036	190,571	196,322	197,367	199,093
Change in households	38,434	43,381	45,021	46,361
Per annum	1,747	1,972	2,046	2,107
Dwellings (per annum)	1,792	2,023	2,100	2,162

2.5 As set out in the tables above the sensitivity analysis result in a housing need which ranges of between 1,790 and 2,160. The lower end of this range which uses the assumptions the FALP Central variant population projection along with the 2012-based CLG household projections is somewhat of an outlying figure. The other three projections have a much narrower range of between 2,023 and 2,162 dwellings per annum.

### 3 AFFORDABLE HOUSING NEED

3.1 The analysis of affordable housing need draws on information in the original SHMA but with two main changes, these are:

- An updated approach to studying the current need (to more closely align with the categories of need set out in Planning Practice Guidance)
- An updating of the number of newly forming households based on the additional projections developed above

3.2 All other parts of the modelling remain the same, in particular this means that no changes are made to the assessment of affordability (i.e. assumed income and rent levels) or to the assessment of affordable housing supply. The analysis below therefore focuses on the key changes which are then brought together with other parts of the modelling to provide an updated view about affordable need.

#### **Current Affordable Housing Need**

3.3 In line with PPG, the current need for affordable housing need has been based on considering the likely number of households with one or more housing problem. A list is initially set out in paragraph 023 of the PPG and provides the following.

#### **What types of households are considered in affordable housing need?**

The types of households to be considered in housing need are:

- homeless households or insecure tenure (e.g. housing that is too expensive compared to disposable income);
- households where there is a mismatch between the housing needed and the actual dwelling (e.g. overcrowded households);
- households containing people with social or physical impairment or other specific needs living in unsuitable dwellings (e.g. accessed via steps) which cannot be made suitable in situ
- households that lack basic facilities (e.g. a bathroom or kitchen) and those subject to major disrepair or that are unfit for habitation;
- households containing people with particular social needs (e.g. escaping harassment) which cannot be resolved except through a move.

*Source:* PPG [ID 2a-023-20140306]

3.4 This list of potential households in need is then expanded on in paragraph 24 of the PPG which provides a list of the categories to consider when assessing current need. This assessment seeks to follow this list by drawing on a number of different data sources. The table below sets out the data used in each part of the assessment.

**Table 5: Main sources for assessing the current unmet need for affordable housing**

Source		Notes
Homeless households	CLG Live Table 784	Total where a duty is owed but no accommodation has been secured
Those in priority need who are currently housed in temporary accommodation	CLG Live Table 784	Total in temporary accommodation
Households in overcrowded housing	Census table LC4108EW	Analysis undertaken by tenure
Concealed households	Census table LC1110EW	Number of concealed families (all ages and family types)
Exiting affordable housing tenants in need	Modelled data linking to past survey analysis	Will include households with many of the issues in the first box above (e.g. insecure tenure)
Households from other tenures in need	Modelled data linking to past survey analysis	

Source: PPG [ID 2a-024-20140306]

3.5 The table below therefore shows the initial estimate of the number of households who potentially have a current housing need. These figures are before any consideration of affordability has been made and has been termed ‘the number of households in unsuitable housing’. Overall, the analysis suggests that there are currently some 24,094 households living in unsuitable housing (or without housing) – this is 16% of the estimated total number of households living in the Borough in 2014.

**Table 6: Estimated number of households living in unsuitable housing**

Category of need	Households
Homeless households	0
Those in priority need who are currently housed in temporary accommodation	2,770
Households in overcrowded housing	14,316
Concealed households	2,746
Exiting affordable housing tenants in need	542
Households from other tenures in need	3,721
Total	24,094

Source: CLG Live Tables, Census (2011) and data modelling

3.6 In taking this estimate (24,094) forward, the data modelling estimates housing unsuitability by tenure. From the overall number in unsuitable housing, households living in affordable housing are excluded (as these households would release a dwelling on moving and so no net need for affordable housing will arise). The analysis also excludes 90% of owner-occupiers under the assumption (which is supported by analysis of survey data) that the vast majority will be able to afford housing once savings and equity are taken into account. A final adjustment is to slightly reduce the unsuitability figures in the private rented sector to take account of student-only households – such households could technically be overcrowded/living in unsuitable housing but would be unlikely to be considered as being in affordable housing need. Once these households are removed from the analysis, the remainder are taken forward for affordability testing.

- 3.7 The table below shows that as of mid-2014 it is estimated that there were 14,836 households living in unsuitable housing (excluding current social tenants and the majority (90%) of owner-occupiers) – this represents about 10% of all households in the Borough.

**Table 7: Unsuitable housing by tenure and numbers to take forward into affordability modelling**

	In unsuitable housing	Number to take forward for affordability testing
Owner-occupied	5,044	504
Social rented	4,630	0
Private rented	8,904	8,815
No housing (homeless/concealed)	5,516	5,516
Total	24,094	14,836

Source: CLG Live Tales, Census (2011) and data modelling

- 3.8 Having established the figure of 14,836, it needs to be considered that a number of these households might be able to afford market housing without the need for subsidy, because they could afford a suitable market housing solution. For an affordability test the income data has been used, with the distribution adjusted to reflect a lower average income amongst households living in unsuitable housing – for the purposes of the modelling an income distribution that reduces the level of income to 69% of the figure for all households has been used to identify the proportion of households whose needs could not be met within the market (for households currently living in housing). A lower figure (of 42%) has been used to apply an affordability test for the concealed/homeless households who do not currently occupy housing. These two percentage figures have been based on a consideration of typical income levels of households who are in unsuitable housing (and excluding social tenants and the majority of owners) along with typical income levels of households accessing social rented housing (for those without accommodation). These figures are considered to be best estimates, and likely to approximately reflect the differing income levels of different groups with a current housing problem.

**Table 8: Estimated Current Need**

Area	In unsuitable housing (taken forward for affordability test)	% Unable to Afford	Revised Gross Need (including Affordability)
Households in housing	9,320	59.7%	5,559
No housing (homeless/concealed)	5,516	81.8%	4,509
Total	<b>14,836</b>	<b>67.9%</b>	<b>10,069</b>

Source: CLG Live Tales, Census (2011), data modelling and affordability analysis

- 3.9 Overall, around two-thirds of households with a current need are estimated to be likely to have insufficient income to afford market housing and so the estimate of the total current need is reduced to 10,069 households. The table below shows how current need is estimated to vary across local authority areas.

3.10 Table 9 below sets out the Estimated Level of Affordable Housing Need from Newly Forming Households from each of the population/household projections profiled in the previous chapter. As shown the level of newly forming households has a very narrow range regardless of the projection.

**Table 9: Estimated Level of Affordable Housing Need from Newly Forming Households (per annum)**

Area	Number of new households	% unable to afford	Total in need
FALP	4,012	50.0%	2,004
FALP (GLH)	4,123	50.0%	2,060
2014-round	3,951	50.0%	1,973
2014-round (GLH)	4,123	50.0%	2,059

Source: Projection Modelling/Income analysis

3.11 Similarly Table 10 sets out the overall level of affordable housing need from each of the population/household projections profiled in the previous chapter. This also takes into account existing households falling into need and the supply from re-lets. Again this shows a level of need in very narrow range regardless of the projection.

**Table 10: Estimated level of Affordable Housing Need per annum**

Area	Current need	Newly forming households	Existing households falling into need	Total Need	Supply	Net Need
FALP	458	2,004	419	2,880	603	2,277
FALP (GLH)	458	2,060	419	2,936	603	2,333
2014-round	458	1,973	419	2,850	603	2,247
2014-round (GLH)	458	2,059	419	2,936	603	2,333

Source: 2011 Census/CoRe/Projection Modelling and affordability analysis

3.12 As established in the initial SHMA this identified level of need includes some households which may not require an additional household and therefore should not be directly compared to the overall housing need as set out in chapter 2 of this addendum.

## 4 HOUSING MARKET MODEL OUTPUTS

- 4.1 There are a range of factors which influence housing demand. These factors play out at different spatial scales and influence both the level of housing demand (in terms of aggregate household growth) and the nature of demand for different types, tenures and sizes of homes. It is important to understand that the housing market is influenced by macro-economic factors, as well as the housing market conditions at a regional and local level.
- 4.2 Demographic changes are however expected to be a key long-term driver. It is reasonable to consider the implications of demographic trends (and in particular changes in the age structure of the population) as a starting point for considering what mix of housing might be needed over the period to 2036.
- 4.3 This section of the addendum provides further analysis of the resultant size and tenure split from the sensitivity analysis undertaken earlier in this report.

**Table 11: Estimated Size of Dwellings Needed 2014 to 2036 – Market Housing – FALP projection**

Size	2014		2036		Additional households		Additional dwellings		% of additional dwellings
	2014	2036	2014	2036	2014	2036	2014	2036	
1 bedroom	17,921	20,307	2,386	2,448	2,386	2,448	10.3%		
2 bedrooms	34,310	40,522	6,212	6,373	6,212	6,373	26.9%		
3 bedrooms	47,732	57,558	9,826	10,081	9,826	10,081	42.6%		
4+ bedrooms	24,431	29,069	4,637	4,758	4,637	4,758	20.1%		
<b>Total</b>	<b>124,395</b>	<b>147,455</b>	<b>23,061</b>	<b>23,660</b>	<b>23,061</b>	<b>23,660</b>	<b>100.0%</b>		

Source: Housing Market Model

**Table 12: Estimated Size of Dwellings Needed 2014 to 2036 – Affordable Housing – FALP projection**

Size	2014		2036		Additional households		Additional dwellings		% of additional dwellings
	2014	2036	2014	2036	2014	2036	2014	2036	
1 bedroom	7,983	13,046	5,064	5,195	5,064	5,195	32.9%		
2 bedrooms	10,041	15,456	5,414	5,555	5,414	5,555	35.2%		
3 bedrooms	8,225	12,368	4,143	4,251	4,143	4,251	27.0%		
4+ bedrooms	1,493	2,245	752	772	752	772	4.9%		
<b>Total</b>	<b>27,742</b>	<b>43,116</b>	<b>15,374</b>	<b>15,773</b>	<b>15,374</b>	<b>15,773</b>	<b>100.0%</b>		

Source: Housing Market Model

**Table 13: Estimated Size of Dwellings Needed 2014 to 2036 – Market Housing – FALP projection with GL Hearn headship/household formation rates**

Size	2014	2036	Additional households		Additional dwellings		% of additional dwellings
			2014	2036	2014	2036	
1 bedroom	18,037	20,914	2,876		2,951		11.1%
2 bedrooms	34,532	41,633	7,101		7,286		27.3%
3 bedrooms	48,040	58,958	10,917		11,201		41.9%
4+ bedrooms	24,589	29,723	5,133		5,267		19.7%
<b>Total</b>	<b>125,199</b>	<b>151,228</b>	<b>26,028</b>		<b>26,705</b>		<b>100.0%</b>

Source: Housing Market Model

**Table 14: Estimated Size of Dwellings Needed 2014 to 2036 – Affordable Housing – FALP projection with GL Hearn headship/household formation rates**

Size	2014	2036	Additional households		Additional dwellings		% of additional dwellings
			2014	2036	2014	2036	
1 bedroom	7,983	13,758	5,775		5,926		33.3%
2 bedrooms	10,041	16,134	6,092		6,251		35.1%
3 bedrooms	8,225	12,867	4,642		4,763		26.8%
4+ bedrooms	1,493	2,336	843		865		4.9%
<b>Total</b>	<b>27,742</b>	<b>45,094</b>	<b>17,352</b>		<b>17,803</b>		<b>100.0%</b>

Source: Housing Market Model

**Table 15: Estimated Size of Dwellings Needed 2014 to 2036 – Market Housing – 2014 round GLA projections**

Size	2014	2036	Additional households		Additional dwellings		% of additional dwellings
			2014	2036	2014	2036	
1 bedroom	17,952	20,555	2,603		2,671		9.6%
2 bedrooms	34,368	41,314	6,947		7,127		25.7%
3 bedrooms	47,812	59,445	11,633		11,936		43.1%
4+ bedrooms	24,472	30,302	5,829		5,981		21.6%
<b>Total</b>	<b>124,603</b>	<b>151,616</b>	<b>27,013</b>		<b>27,715</b>		<b>100.0%</b>

Source: Housing Market Model

**Table 16: Estimated Size of Dwellings Needed 2014 to 2036 – Affordable Housing – 2014 round GLA projections**

Size	2014	2036	Additional households		Additional dwellings		% of additional dwellings
			2014	2036	2014	2036	
1 bedroom	7,983	13,980	5,997		6,153		33.3%
2 bedrooms	10,041	16,294	6,253		6,416		34.7%
3 bedrooms	8,225	13,094	4,869		4,995		27.0%
4+ bedrooms	1,493	2,382	890		913		4.9%
<b>Total</b>	<b>27,742</b>	<b>45,750</b>	<b>18,008</b>		<b>18,477</b>		<b>100.0%</b>

Source: Housing Market Model

**Table 17: Estimated Size of Dwellings Needed 2014 to 2036 – Market Housing – 2014 round GLA projections with GL Hearn headship/household formation rates**

Size	2014	2036	Additional households		Additional dwellings		% of additional dwellings
			2014	2036	2014	2036	
1 bedroom	18,007	20,908	2,901		2,976		<b>10.4%</b>
2 bedrooms	34,474	41,745	7,271		7,460		<b>26.1%</b>
3 bedrooms	47,960	59,745	11,784		12,091		<b>42.4%</b>
4+ bedrooms	24,548	30,409	5,861		6,013		<b>21.1%</b>
<b>Total</b>	<b>124,990</b>	<b>152,806</b>	<b>27,816</b>		<b>28,540</b>		<b>100.0%</b>

Source: Housing Market Model

**Table 18: Estimated Size of Dwellings Needed 2014 to 2036 – Affordable Housing – 2014 round GLA projections with GL Hearn headship/household formation rates**

Size	2014	2036	Additional households		Additional dwellings		% of additional dwellings
			2014	2036	2014	2036	
1 bedroom	7,983	14,102	6,119		6,278		<b>33.0%</b>
2 bedrooms	10,041	16,518	6,477		6,645		<b>34.9%</b>
3 bedrooms	8,225	13,256	5,031		5,162		<b>27.1%</b>
4+ bedrooms	1,493	2,410	918		941		<b>4.9%</b>
<b>Total</b>	<b>27,742</b>	<b>46,286</b>	<b>18,544</b>		<b>19,026</b>		<b>100.0%</b>

Source: Housing Market Model