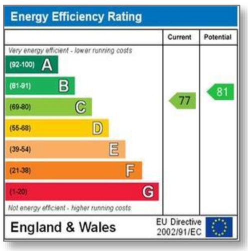


Mid and South West Wales Housing Assessment

Summary of Local Housing Market for

Neath Port Talbot 2019

October 2020

Contents

Neath Port Talbot

Housing Market Summary

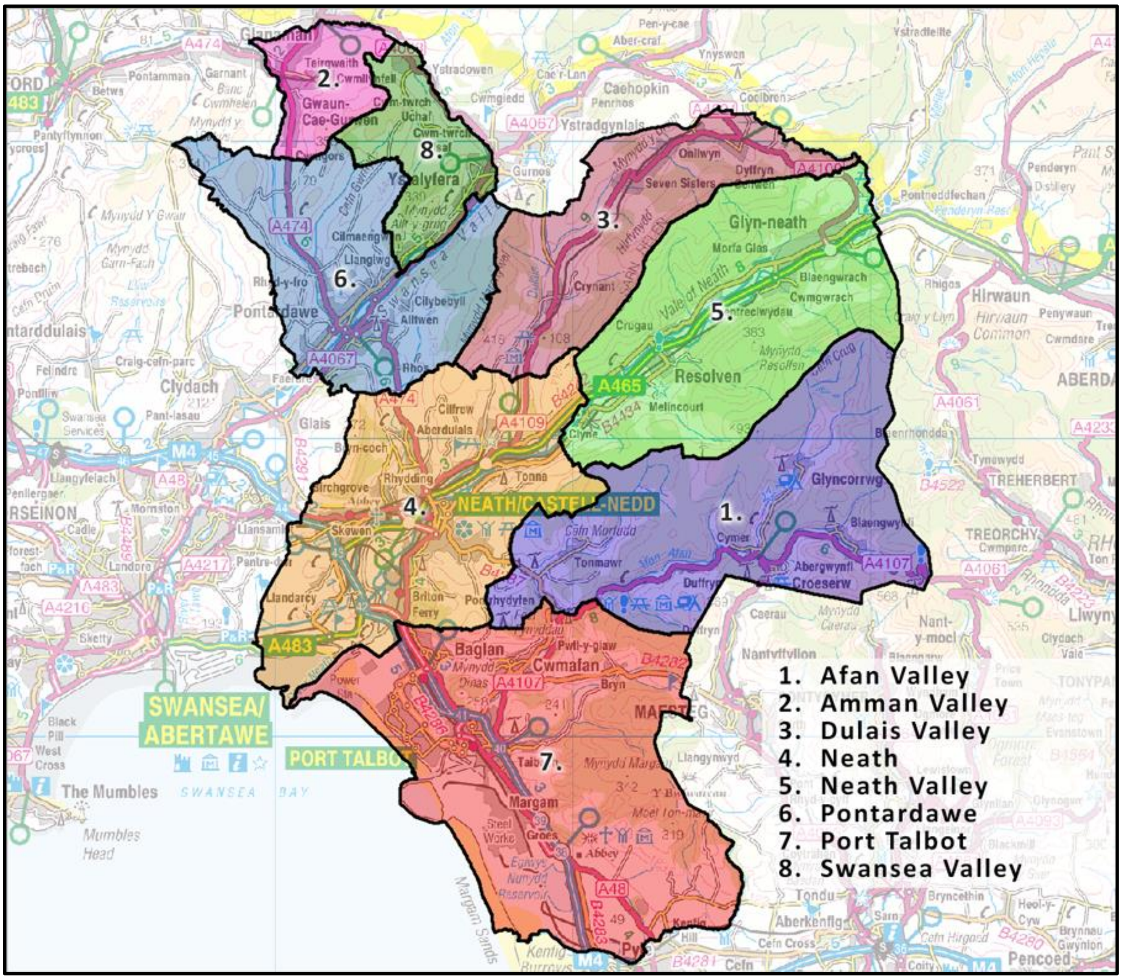
Introduction

1. Opinion Research Services were commissioned by the local authorities of Mid & South West Wales to undertake a cross-border assessment of housing needs in accordance with best practice. This document is a sub-area analysis for Neath Port Talbot; and should be read in parallel with the accompanying wider regional report.

2. Neath Port Talbot Council is one of the unitary authorities in Wales. It borders Bridgend and Rhondda Cynon Taf to the east; Powys, Carmarthenshire and the Brecon Beacons National Park to the north; Swansea to the east; and Swansea Bay to the south. The main towns are Neath, Port Talbot and Pontardawe.

3. Neath Port Talbot's Local Development Plan divides the area into eight sub-areas (Figure 1):

Figure 1: Sub-Areas in Neath Port Talbot



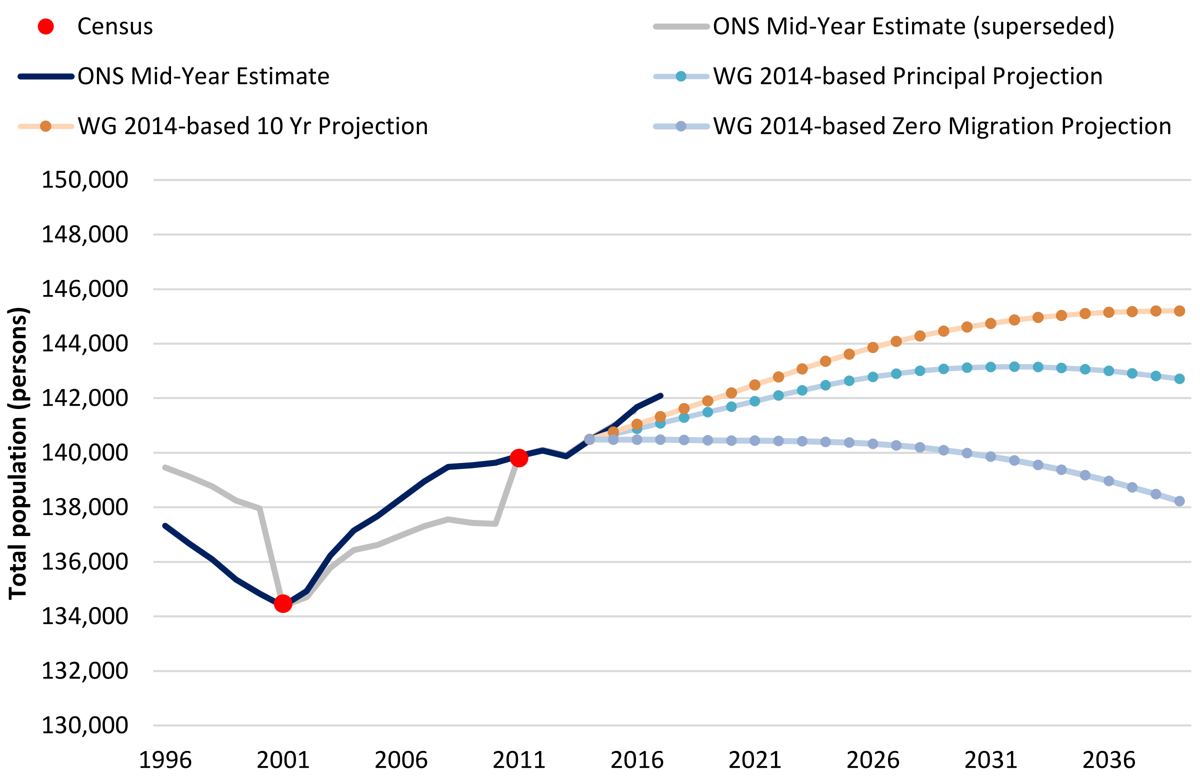
Population Trends and Projections

4. Population and household change are key drivers of demand for homes and these typically form the basis for the assessment of any new housing required.

5. Population projections are based on past trends, and Figure 2 shows the ONS annual mid-year population estimates over the period since 1996 (which take account of data from the 2001 and 2011 Census), together with a range of future projections for the 25-year period 2014-2039 based on various migration trends. The different scenarios clearly show the impact that different migration assumptions can have on the future projections.

6. Neath Port Talbot County Council is basing its future development planning[1] on the 10-year variant of the Welsh Government 2014-based population and household projections, which is based on 10-year migration trends. The 10-year trend migration scenario was selected as it is more likely to capture both highs and lows than shorter trends; and is therefore not as dependent on short-term trends that may be unlikely to be repeated. The 10-year trend also happens to be the highest projection, and as such its use represents an aspirational commitment to growth.

Figure 2: Neath Port Talbot: 2014-based Population Projections with Census and MYE (Source: Census, ONS, Welsh Government)



[1] The Neath Port Talbot Local Development Plan review is scheduled to commence in January 2020

7. Figure 3 shows the annual change in population for Neath Port Talbot together with the components of change, which are broadly classified into two categories:

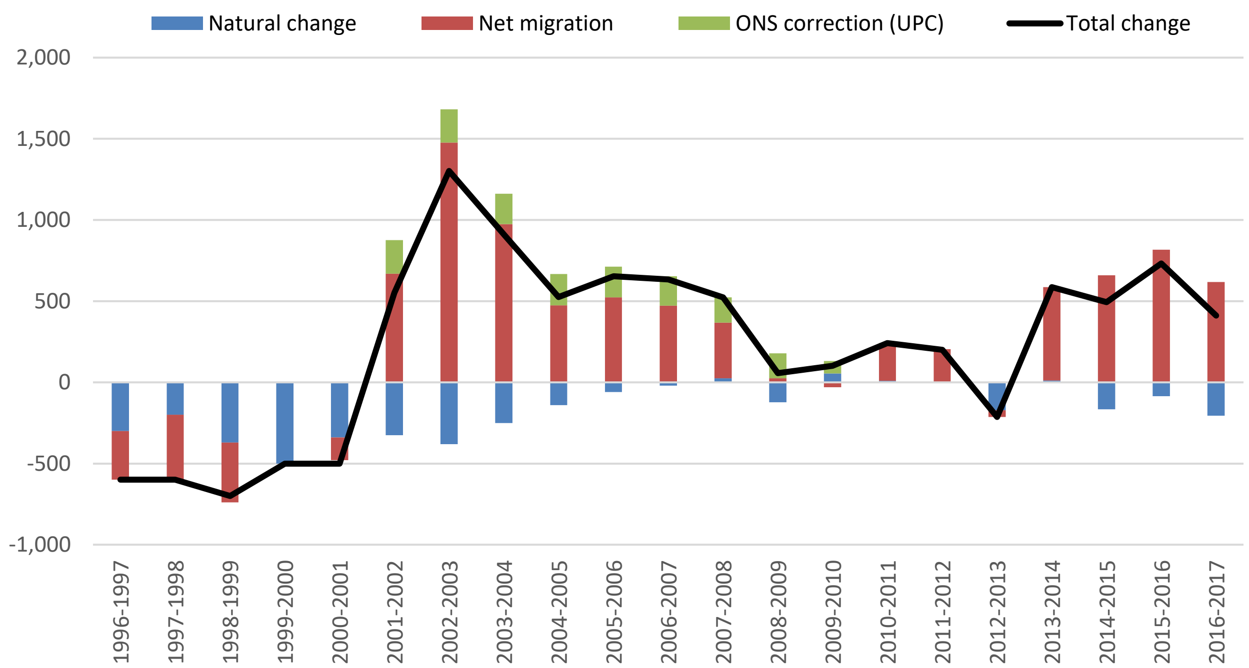
» Natural change in the population (in terms of births and deaths); and

» Changes due to migration, both in terms of international migration and moves within the UK.

8. Given that the population estimates in 2001 and 2011 are far more accurate and robust than the component of change data from year-to-year, the ONS factor in an "accountancy" adjustment to the components of change to correct the data and ensure that it reconciles with the more accurate estimates for the total population in the two Census years. Therefore, in addition to the known population flows, an element of "Unattributable Population Change" (UPC) is included in the figures.

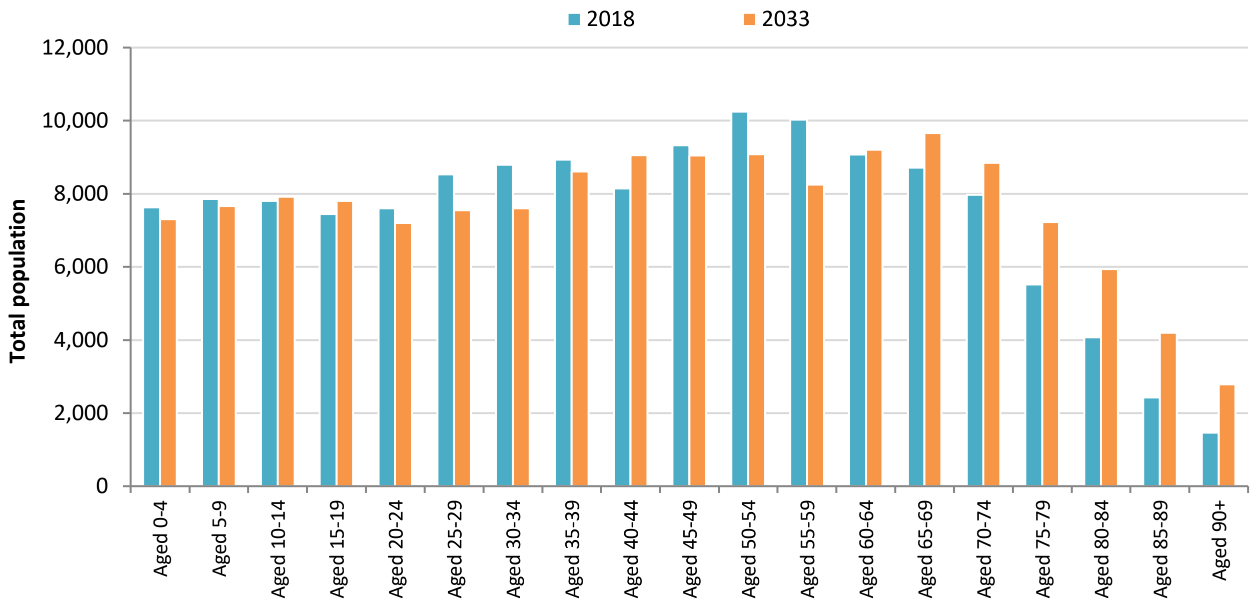
9. The number of deaths has mostly exceeded the number of births each year. Net inward migration peaked in 2002-2003. This growth was not sustained; and lower migration rates since those years are evident. Since 2013 migration rates have started to rise again.

Figure 3: Neath Port Talbot: Components of Population Change (Source: ONS, Census, Welsh Government)



10. Figure 4 considers the age structure of the current and future population. This shows that the number of persons in most groups aged under 60 is expected to reduce over the 15-year period 2018-2033, whereas increases are projected for each group aged 65 and over. The overall number of persons aged 75+ is projected to increase from 13,500 persons in 2018 to 20,100 persons in 2033; this represents an additional 6,700 older persons, a growth of nearly 50%.

Figure 4: Neath Port Talbot: Projected Population by Age: 2014 based Ten-Year Average Migration Variant (Source: Welsh Government)



11. Figure 5 shows the overall population estimates for each sub-area together with the 5-year changes from 2002 to 2017 (Figure 6). It is evident that Neath and Port Talbot both saw substantial population increases during 2002-07 particularly. Other areas saw less dramatic growth, and some areas saw a decline in population.

Figure 5: Neath Port Talbot: Total Population Estimates 2002-2017 by Sub-Area (Source: ONS Mid-Year Estimates)

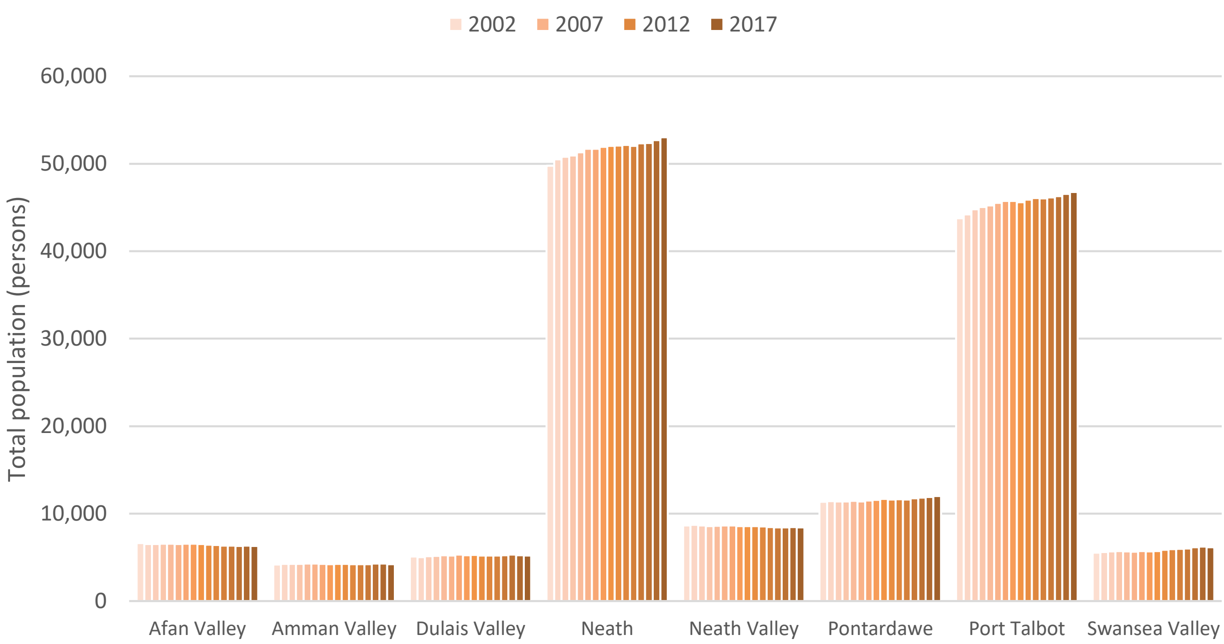
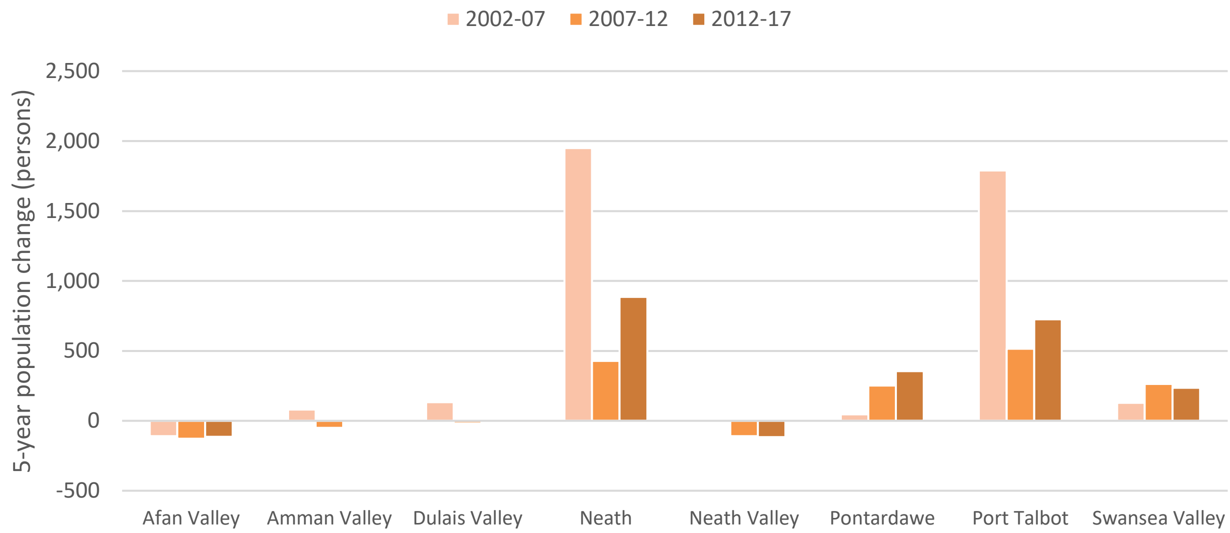
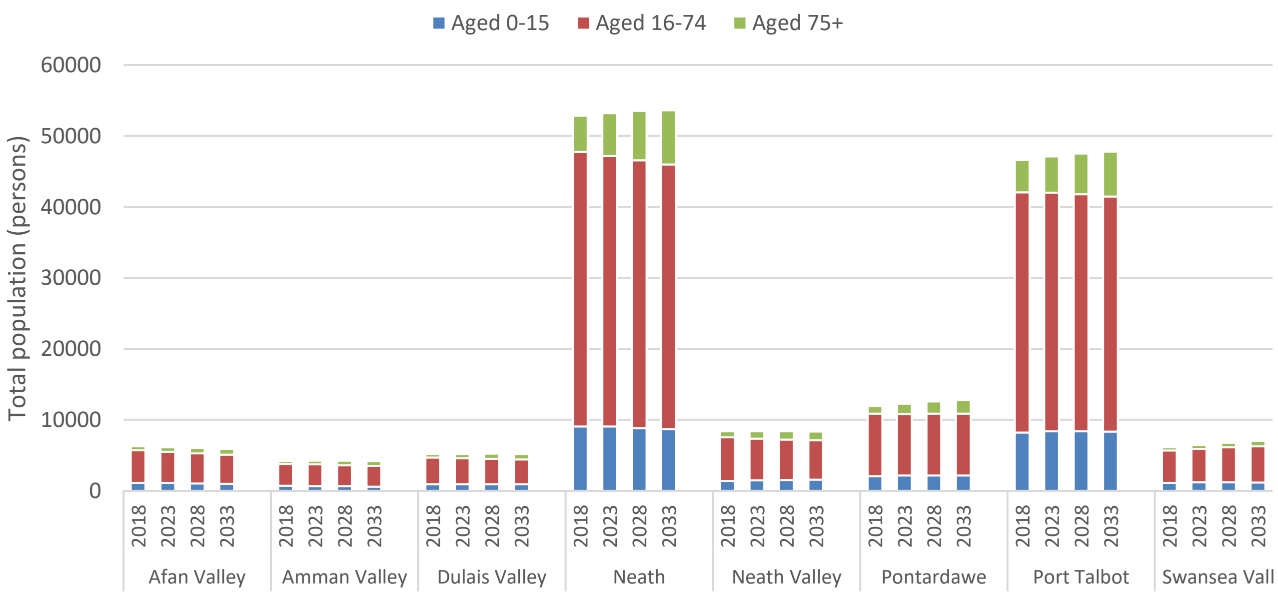


Figure 6: Neath Port Talbot: 5-Year Change in Population Estimates 2002-2017 by Sub-Area (Source: ONS Mid-Year Estimates)



12. Population change by sub-area was calculated through projecting forward past trends in population change for each sub-area; and constraining the total to the overall population projection on a year-by-year basis. Figure 7 shows the projected age profile by area. The largest increase in the elderly population is projected to be in the Neath and Port Talbot areas (an increase of over 2,500 and 1,700 residents aged 75+ respectively), and to a lesser extent in the Pontardawe area (an increase of over 800 residents aged 75+). Afan Valley, Amman Valley and Neath Valley show an overall net population decrease between 2018 and 2033 based on the 10-year projection.

Figure 7: Neath Port Talbot: Projected Population by Age Group and Sub-Area (Source: Welsh Government, ORS Model)



13. Much of the increase in the elderly population can be attributed to current residents aging (rather than though migration into the area), whereas the decrease in the younger population can be primarily attributed to outward migration.

Household Trends and Projections

14. Household projections are based on the population projections, taking account of changes to household characteristics which impact on the number of people in each household. These changes are reflected in variations to average household size.

15. Figure 8 shows that household sizes in Neath Port Talbot are getting smaller. In 1991, the average household size was approximately 2.5 people; whereas by 2001 it was just over 2.3 persons. The household projections indicate that household sizes are likely to reduce to an average of around 2.2 by 2033. The falling household size and projected growth in population also result in a projected growth in the number of households (Figure 9).

Figure 8: NPT: Average Household Size (Source: Welsh Government Estimates, Welsh Government 2014-based 10-year Average Household Projections)

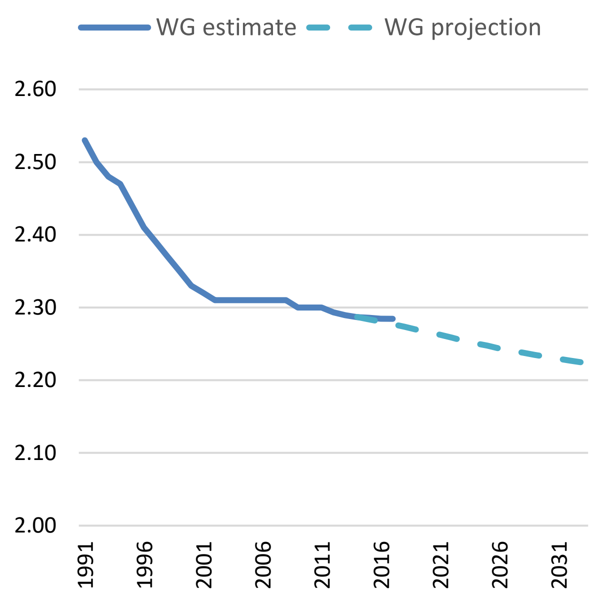
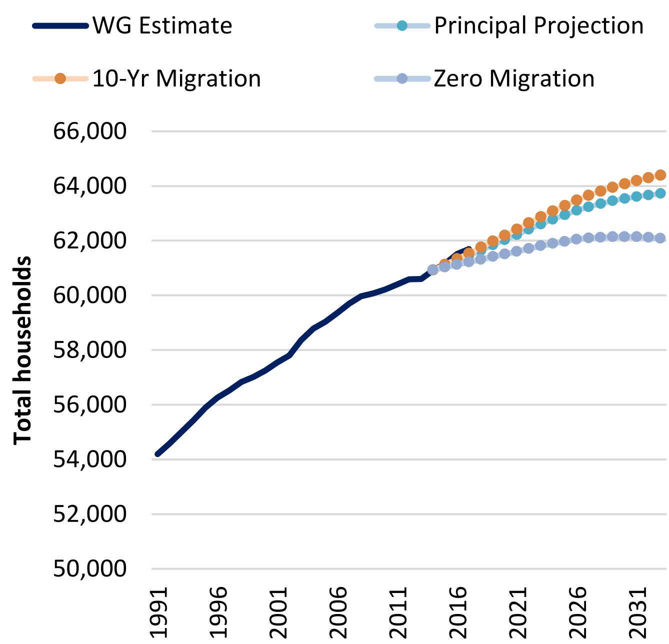


Figure 9: NPT: Household Trends and Projections (Source: Welsh Government Household Estimates, Welsh Government 2014-based Household Projections)



16. Figure 9 and Figure 10 show the number of households projected by the Welsh Government 2014-based projection scenarios. The principal projection is based on 5-year migration trends and suggests an increase in the number of households over the 15-year period 2018-2033; an increase of 2,074 households equivalent to an average of 138 per year. This is similar to the preferred 10-year migration scenario, which identifies an increase of 2,641 households over the same period. However, the zero-migration trend scenario suggests an increase of 769 households, equivalent to an average growth of 51 households per year.

Figure 10: Neath Port Talbot: Projected Household Change 2018-2033 (Source: Welsh Government 2014-based Household Projections)

	Total Households				Total change 2018-33
	2018	2023	2028	2033	
10-year Migration	61,753	62,868	63,809	64,395	+2,641
Principal Projection	61,645	62,600	63,352	63,720	+2,074
Zero Migration	61,312	61,811	62,122	62,081	+769

17. Figure 11 shows the outputs of the demographic modelling analysis undertaken for the housing assessment, which disaggregates the preferred 10-year migration household projection scenario into the identified geographic sub-areas.

18. Considering the households into which the population is projected to form, all sub-areas with the exception of Afan Valley show a net household increase in tandem with their net population increase. The Amman Valley and Neath Valley sub-areas shows a net household increase (despite a reducing population), likely as a function of the previously noted reduction in average household size.

Figure 11: Neath Port Talbot: Projected Household Change 2018-2033 by Sub-Area (Source: Welsh Government, ORS Model. Note: figures may not sum due to rounding)

	Total Households				Total change 2018-33
	2018	2023	2028	2033	
Afan Valley	2,714	2,685	2,651	2,601	-113
Amman Valley	1,824	1,846	1,853	1,849	+25
Dulais Valley	2,231	2,257	2,279	2,284	+53
Neath	23,090	23,430	23,697	23,827	+737
Neath Valley	3,663	3,690	3,707	3,708	+45
Pontardawe	5,101	5,271	5,439	5,556	+455
Port Talbot	20,397	20,776	21,110	21,354	+957
Swansea Valley	2,733	2,912	3,075	3,215	+483
TOTAL	**61,753**	**62,868**	**63,809**	**64,395**	**+2,641**

Housing Tenure

19. The study considered trends in tenure mix for Neath Port Talbot over the last thirty years and this shows some significant changes in the balance between owner occupiers and those renting (Figure 12, Figure 13, Figure 14).

20. In the 1991 Census, students and schoolchildren were treated as usually resident at their 'home' or vacation address. In the 2001 Census students and schoolchildren in full-time education studying away from the family home were enumerated as resident at their term-time address. This contributed to a notable increase in the number of privately renting households areas with high concentrations of students between 1991 and 2001 (dashed lines in Figure 13 and Figure 14), as a result of the term-time renting student population being included in this group as of 2001.

Figure 12: Neath Port Talbot: Households by Tenure 1981-2011 (Source: UK Census of Population. Note: figures may not sum due to rounding)

Tenure	Total Households				Net Change		
	1981	1991	2001	2011	1981-1991	1991-2001	2001-2011
Owner occupied	29,700	38,900	41,100	41,600	+9,200	+2,200	+500
Private rent	2,400	2,000	4,900	7,300	-400	+2,900	+2,400
Social rent	18,700	13,100	11,700	11,500	-5,600	-1500	-100
TOTAL	**50,800**	**54,100**	**57,600**	**60,400**	**+3,200**	**+3,600**	**+2,800**
Owner occupied	58.4%	72.0%	71.3%	68.9%	+13.5%	-0.7%	-2.4%
Private rent	4.8%	3.7%	8.5%	12.0%	-1.1%	+4.7%	+3.6%
Social rent	36.8%	24.3%	20.2%	19.1%	-12.5%	-4.1%	-1.1%

Figure 13: NPT: Number of Households by Tenure 1981-2011 (Source: UK Census of Population. Note: Dashed section denotes change in tenure definition)

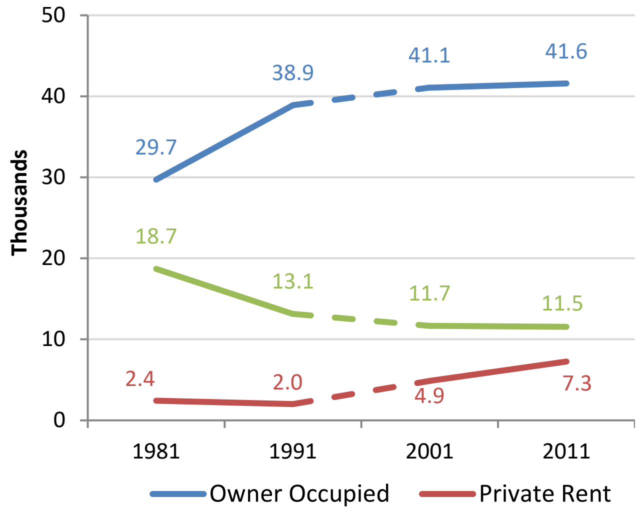
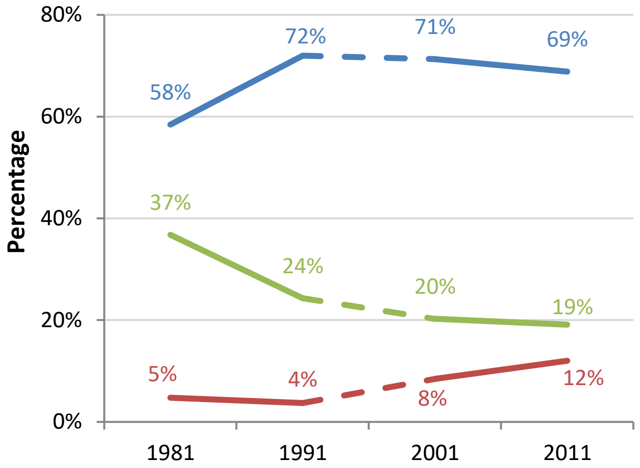


Figure 14: NPT: Percentage of Households by Tenure 1981-2011 (Source: UK Census of Population. Note: Dashed section denotes change in tenure definition)



21. The tenure changes show:

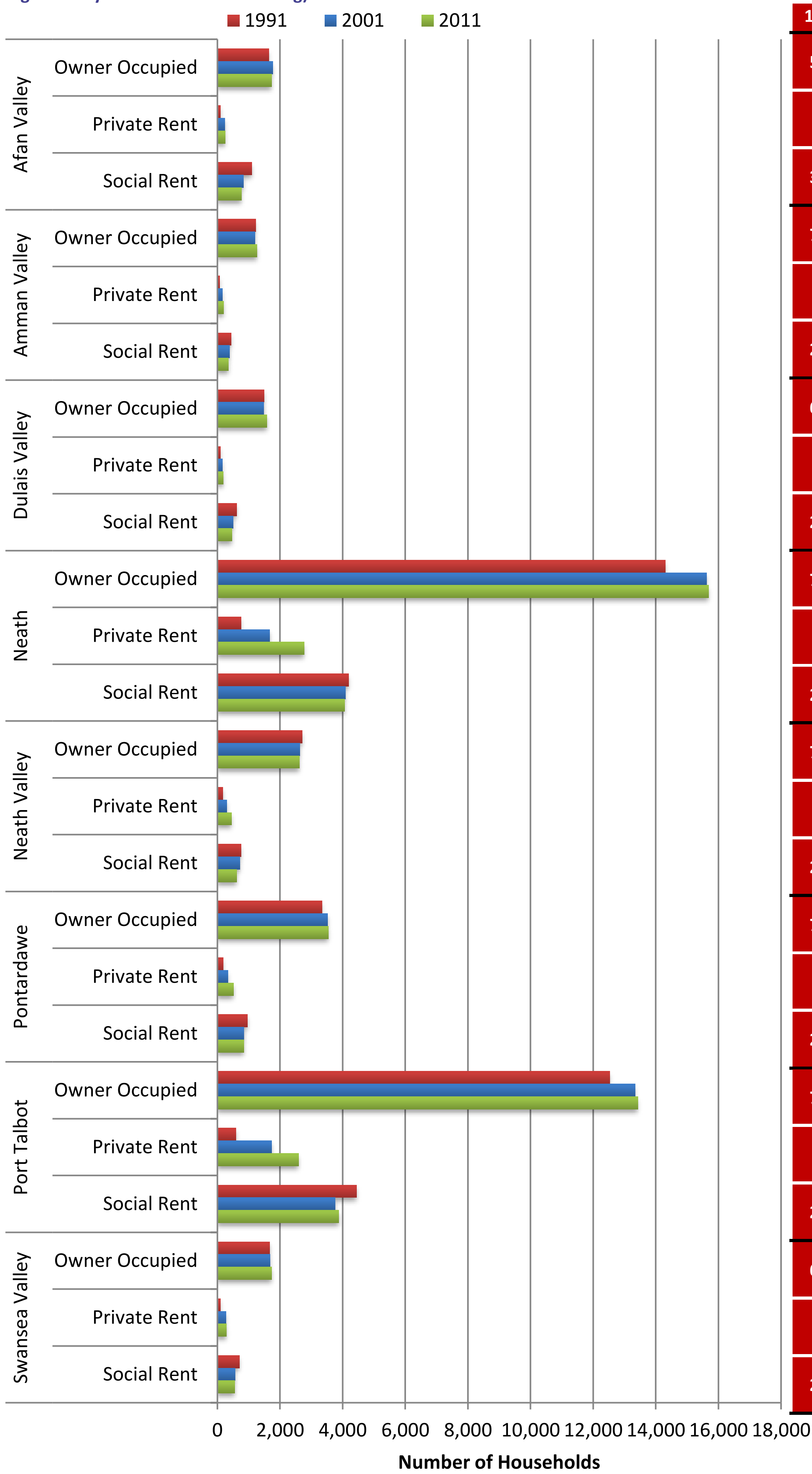
» From 1981-1991: the number of owner occupiers increased from 29,700 to 38,900 households (a gain of almost 10,000). The number of social tenants reduced from 18,700 to 13,100 households (a loss of 5,600) and the number of private tenants also reduced by 400. The reduction in social rent and corresponding increase in owner occupation over this period can be ascribed, in part, to the introduction of the right to buy scheme in 1980.

» From 1991-2001: the number of owner occupiers continued to climb, increasing from 38,900 to 41,100 households (a gain of 2,200); this was alongside a growth of private tenants, increasing from 2,000 to 4,900 households (a gain of 2,900). The number of social tenants reduced by 1,500.

» From 2001-2011: the number of owner occupiers increased by 500, whilst the number of private tenants also increased from 4,900 to 7,300 households (a gain of 2,400). The number of social tenants decreased by 100. It should be noted that the right to buy was abolished throughout Wales in 2019; and this is likely to lead to future increases in the social rented sector.

22. The change in relative tenure varies across Neath Port Talbot (Figure 15). In general, the largest changes are in the areas around the towns of Neath and Port Talbot. This does partly reflect the population density in Neath Port Talbot.

Figure 15: Neath Port Talbot: Tenure by Sub-Area – Neath Port Talbot (Source: Census 1991, Census 2001 and Census 2011. Note: figures may not sum due to rounding)



Sub-Area	Tenure	1991	2001	2011
Afan Valley	Owner Occupied	58%	62%	63%
	Private Rent	4%	8%	9%
	Social Rent	39%	29%	28%
Amman Valley	Owner Occupied	70%	69%	70%
	Private Rent	4%	9%	11%
	Social Rent	26%	22%	19%
Dulais Valley	Owner Occupied	68%	69%	71%
	Private Rent	5%	7%	9%
	Social Rent	28%	23%	21%
Neath	Owner Occupied	74%	73%	70%
	Private Rent	4%	8%	12%
	Social Rent	22%	19%	18%
Neath Valley	Owner Occupied	75%	72%	71%
	Private Rent	5%	8%	12%
	Social Rent	21%	20%	17%
Pontardawe	Owner Occupied	75%	75%	72%
	Private Rent	4%	7%	10%
	Social Rent	21%	18%	17%
Port Talbot	Owner Occupied	71%	71%	67%
	Private Rent	3%	9%	13%
	Social Rent	25%	20%	19%
Swansea Valley	Owner Occupied	68%	67%	67%
	Private Rent	4%	11%	11%
	Social Rent	28%	23%	22%

Cost of Home Ownership

23. Figure 15 shows the lower quartile house prices by bedroom size. The data shows both the lower quartile price for existing properties and new build dwellings. When considering first time buyers in particular, many of the purchasers are likely to be newly forming households seeking smaller homes. The degree to which new build properties are more expensive than existing homes varies considerably by size of dwelling. This is likely to be down to a range of factors which include the location of new build housing, the relative size of properties, gardens and the availability of parking, comparative quality and condition of existing stock, and other intangible issues such as character.

24. House price trends (2001-2018) based on lower quartile house prices are shown in Figure 17. This data has been adjusted to take account of and remove the impact of inflation; therefore, the values reflect real changes in house prices since 2001. Real house prices increased substantially in the period 2001-2008 (from £46,500 to £108,400 at 2018 values, a real increase of 133%). Values continued to fall to mid-2013, and since then they have slightly increased, remaining around £81,000 since 2015. Property prices in Neath Port Talbot have been consistently lower than the Wales average.

Figure 16: NPT: Lower Quartile Prices for Existing Dwellings and Newly Built Dwellings 2017-18 by Property Size (Source: ONS House Price Statistics, Valuation Office Agency and Land Registry Price Paid Data)

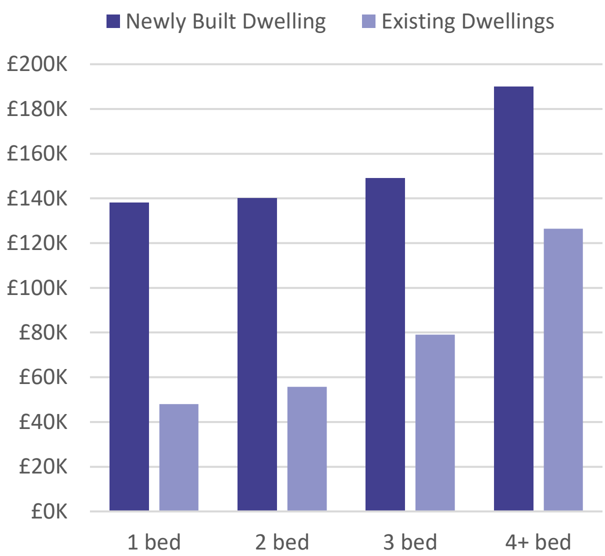
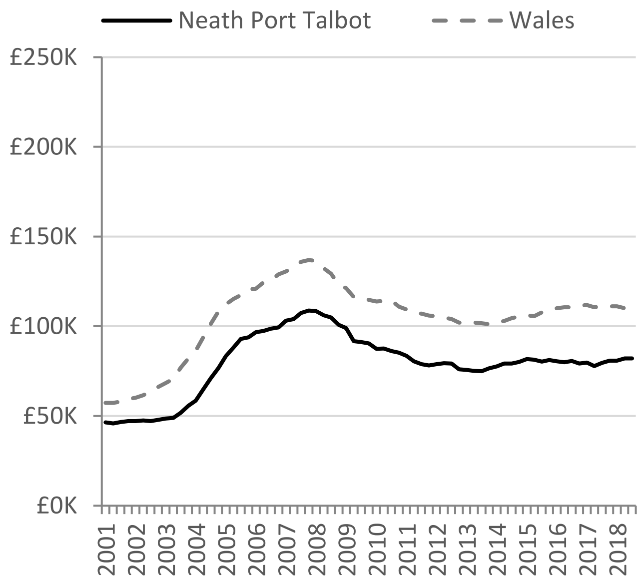


Figure 17: NPT: Real House Price Trends: Lower Quartile Prices Adjusted to 2018 values (Source: ONS House Price Statistics; Bank of England Consumer Prices Index)



25. There is also some variance in house prices across Neath Port Talbot, as shown on the maps below, Figure 18 and Figure 19. House prices in the Pontardawe and Swansea Valley sub-areas have house prices that are over 10% above the Neath Port Talbot average. Prices are below average in Amman Valley, Dulais Valley and Neath Valley; and in particular Afan Valley. In most areas there has been a reduction in house prices in real terms over the last 10 years. The exception to this trend is the Afan Valley, in which prices have increased.

Figure 18: NPT: Sub-Area House Prices Relative to County Average 2017-18 (Source: ONS House Price Data)

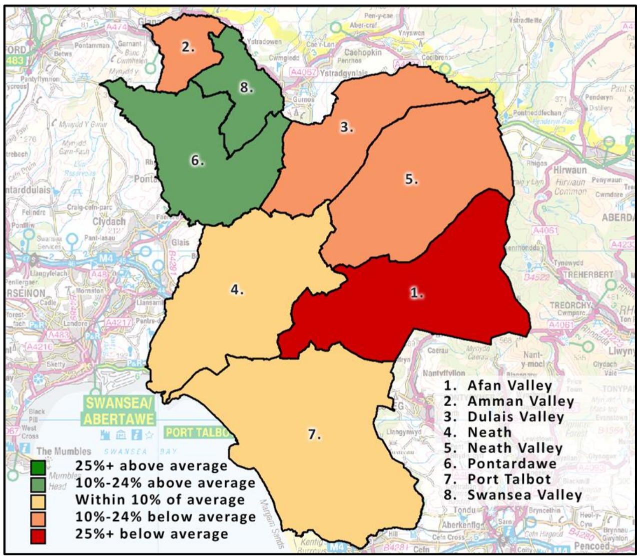
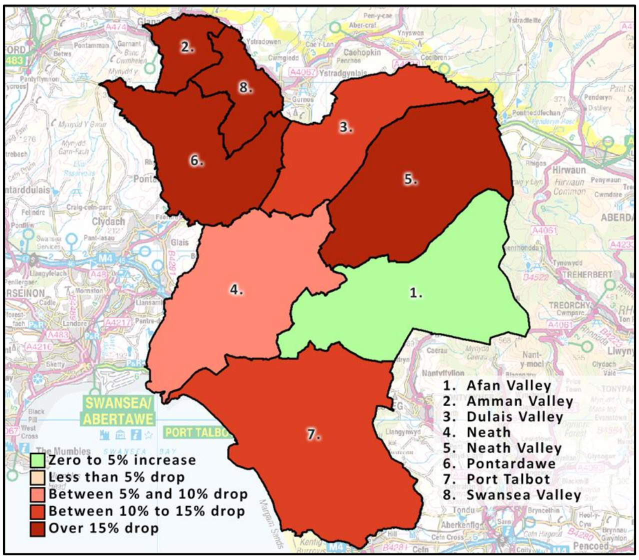
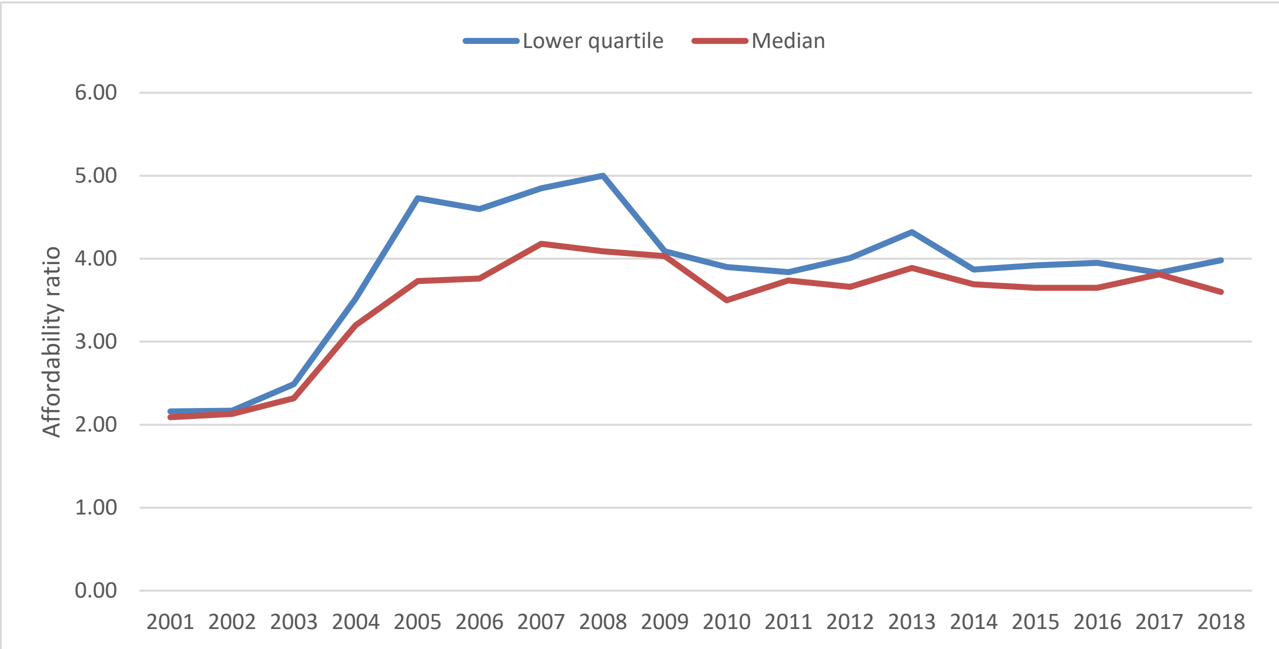


Figure 19: NPT: 10-year Change in Sub-area House Prices 2008-2018 (Source: ONS House Price Data)



26. A key measure of affordability is the ratio of house prices to earnings. Figure 20 shows the variation over time of the workplace-based affordability ratio for both median and lower quartile house prices/incomes based on ONS data[2]. This closely follows the trends in house prices seen in Figure 17, with property becoming steadily more affordable since 2008.

Figure 20: Neath Port Talbot: Workplace Based Affordability Ratio Trends (Source: ONS)



[2]https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoworkplacebasedearningslowerquartileandmedian

Cost of Renting

27. Figure 21 sets out the weekly rents for different property sizes. This includes:

» Median and lower quartile private rent;

» Local Housing Allowance (LHA) maximum (LHA is used to calculate housing benefit, and is based on the 30th percentile of local rented accommodation); and

» Social rent based on existing average rents.

Figure 21: Neath Port Talbot: Weekly Rent Thresholds 2018 (Source: Private Rental Market Statistics, Valuation Office Agency; Welsh Government. Note: Private rent data excludes housing benefit funded tenancies)

Weekly Rent £	Private Rent		Maximum LHA	Social Rent
	Median	Lower Quartile	Neath Port Talbot Broad Rental Market Area	
Room only	-	-	£54.13	-
1 bedroom	£83.71	£78.19	£75.00	£72.69
2 bedrooms	£100.04	£91.99	£91.81	£80.40
3 bedrooms	£109.70	£103.49	£101.11	£89.65
4+ bedrooms	£137.99	£117.29	£121.20	£97.64

28. For all property sizes, the median private rent is the highest figure. Broadly speaking, the LHA rates are lower than the equivalent lower quartile private rents, apart from properties with 4+ bedrooms where the LHA is higher than the lower quartile private rent. Whilst the other LHA rates are lower than the equivalent lower quartile private rents, it is important to note that the Valuation Office Agency (VOA) private rent data exclude housing benefit funded tenancies to ensure the figures are representative of non-subsidised free market rents.

Assessing Overall Housing Need

29. Certain types of household are not included within the projections. Homeless and concealed households increase the requirement for affordable homes, whilst overcrowded properties in the private rented sector also require an affordable property. However, overcrowded households, if rehoused, will leave a market property for occupation by another household (Figure 22).

Figure 22: Neath Port Talbot: Current Households Not Counted by the Household Projections (Source: StatsWales[3], Census 2011, ORS Model. Note: figures may not sum due to rounding)

	Concealed and Homeless Households	Overcrowded in market	Change in affordable households	Change in market households	Net Change to household projections
	(a)	(b)	c=(a)+(b)	(d)=(a)-(c)	(e)=(c)+(d)
Afan Valley	12	2	+14	-2	+12
Amman Valley	6	2	+7	-2	+6
Dulais Valley	8	1	+8	-1	+8
Neath	72	24	+96	-24	+72
Neath Valley	11	3	+14	-3	+11
Pontardawe	14	6	+20	-6	+14
Port Talbot	70	11	+80	-11	+70
Swansea Valley	10	3	+13	-3	+10
TOTAL	**201**	**51**	**+252**	**-51**	**+201**

30. Applying these modifications to the projected housing need results in the following market/affordable household split over the 2018-33 period (Figure 23):

Figure 23: Neath Port Talbot: Housing Need by Tenure 2018-33 (Source: ORS model. Note: figures may not sum due to rounding. Percentages are of positive components only. Positive components are in brackets.)

	Households Requiring Market Housing			Households Requiring Affordable Housing			Overall Total Change 2018-33	%age affordable change within sub-area
	2018	2033	Net Change	2018	2033	Net Change		
Afan Valley	1,812	1,735	-78	901	878	-23	-101	23%
Amman Valley	1,382	1,396	+14	442	458	+16	+30	53%
Dulais Valley	1,658	1,688	+31	574	603	+29	+60	48%
Neath	17,614	18,098	+483	5,476	5,802	+326	+809	40%
Neath Valley	2,819	2,848	+29	845	871	+27	+56	48%
Pontardawe	4,022	4,363	+341	1,079	1,207	+128	+469	27%
Port Talbot	15,086	15,781	+695	5,311	5,642	+331	+1,026	32%
Swansea Valley	2,003	2,351	+348	730	875	+145	+493	29%
TOTAL	**46,396**	**48,259**	**+1,863 (1,943)**	**15,358**	**16,336**	**+978 (1,002)**	**+2,841 (2,945)**	**34%**

[3] 2018-19 ending June 2019 - https://statswales.gov.wales/Catalogue/Housing/Homelessness/Temporary-Accommodation/householdsaccommodatedtemporarily-by-accommodationtype-householdtype - distributed proportionally between sub-areas based on population.

Five-Year Periods

31. In March 2006, Welsh Government published “Local Housing Market Assessment Guide”, which details the methodology that authorities should use to establish need in their local housing markets. It contains a section on enumerating affordable need. This was subsequently supplemented by “Getting Started With Your Local Housing Market Assessment” in November 2014, which outlines a staged, quantitative approach to calculating housing need in detail. One key goal of this document was to introduce a consistency of approach across Wales.

32. The methodology as presented describes a five-year period, before being averaged out to annual figures. It implicitly assumes that any backlog of affordable need will be met within these five years. However, the 2006 guidance contains the following at paragraph 6.42:

> *6.42 In reality, levels of unmet need are unlikely to be reduced to zero given that people’s housing circumstances change, and there will always be households falling in and out of housing need. The quota should be based upon meeting need over a period of five years, or the relevant local development plan time period, whichever is the longer. It does not imply that any individual household has to wait for this period.*
>
> *There may be merit in linking the quota to the remaining time period of the adopted housing policies or the likely time period of any forthcoming housing policies in development plans. It is not generally recommended to use a period of less than five years in which to meet all unmet current need. For the purposes of this assessment, it is necessary to decide the rate at which identified current need should be met. If a five-year period is used, this means that 20% of current unmet need should be addressed each year. However, this is a judgement which partnerships can make at the beginning of, or during, the assessment process.*
>
> **Local Housing Market Assessment Guide – WAG 2006**

33. The rate at which the current identified need (Figure 22) should be met is a judgement for the planning authority in question as part of their planning process. To assist in this judgement, the following tables sub-divides housing need over the 15 years of the plan period into three five-year periods (2018-23, 2023-28, 2028-33). In the first table (Figure 24), the backlog present at the start of the period is spread over the full length of the plan. The second table (Figure 25) illustrates the impact of meeting the backlog of need over the first five years.

34. Note that although the backlog of need is in affordable housing, providing this housing will reduce the market housing requirement (see Figure 22). As a result, the timetable for meeting the backlog of affordable need also impacts on the associated market requirement over each five-year period.

Figure 24: Neath Port Talbot: Housing need by tenure 2018-33 in five-year periods, backlog met over full 15 years (Source: ORS model. Note: figures may not sum due to rounding)

Backlog Over 15 Years	Households Requiring Market Housing							
	2018	Net Change 18-23	2023	Net Change 23-28	2028	Net Change 28-33	2033	Net Change 18-33
Afan Valley	1,812	-21	1,792	-23	1,769	-34	1,735	-78
Amman Valley	1,382	+15	1,397	+3	1,400	-4	1,396	+14
Dulais Valley	1,658	+16	1,674	+13	1,687	+1	1,688	+31
Neath	17,614	+232	17,847	+177	18,023	+74	18,098	+483
Neath Valley	2,819	+18	2,837	+11	2,848	+0	2,848	+29
Pontardawe	4,022	+129	4,150	+126	4,277	+86	4,363	+341
Port Talbot	15,086	+276	15,362	+243	15,605	+177	15,781	+695
Swansea Valley	2,003	+130	2,132	+118	2,250	+101	2,351	+348
TOTAL	**46,396**	**+795**	**47,191**	**+668**	**47,859**	**+400**	**48,259**	**+1,863**
Backlog Over 15 Years	**Households Requiring Affordable Housing**							
	2018	**Net Change 18-23**	**2023**	**Net Change 23-28**	**2028**	**Net Change 28-33**	**2033**	**Net Change 18-33**
Afan Valley	901	-5	897	-7	890	-12	878	-23
Amman Valley	442	+9	451	+5	456	+2	458	+16
Dulais Valley	574	+12	586	+11	596	+6	603	+29
Neath	5,476	+131	5,607	+114	5,721	+80	5,802	+326
Neath Valley	845	+12	857	+9	866	+6	871	+27
Pontardawe	1,079	+46	1,125	+46	1,171	+36	1,207	+128
Port Talbot	5,311	+127	5,438	+114	5,551	+90	5,642	+331
Swansea Valley	730	+53	783	+49	832	+43	875	+145
TOTAL	**15,358**	**+386**	**15,744**	**+340**	**16,084**	**+252**	**16,336**	**+978**
GRAND TOTAL	**61,753**	**+1,181**	**62,935**	**+1,008**	**63,943**	**+652**	**64,595**	**+2,841**

Figure 25: Neath Port Talbot: Housing need by tenure 2018-33 in five-year periods, backlog met over initial five years (Source: ORS model. Note: figures may not sum due to rounding)

Backlog Over 5 Years	Households Requiring Market Housing							
	2018	Net Change 18-23	2023	Net Change 23-28	2028	Net Change 28-33	2033	Net Change 18-33
Afan Valley	1,812	-22	1,790	-22	1,768	-33	1,735	-78
Amman Valley	1,382	+14	1,396	+4	1,399	-4	1,396	+14
Dulais Valley	1,658	+15	1,673	+14	1,687	+2	1,688	+31
Neath	17,614	+216	17,831	+185	18,015	+82	18,098	+483
Neath Valley	2,819	+16	2,835	+12	2,847	+1	2,848	+29
Pontardawe	4,022	+125	4,146	+128	4,275	+88	4,363	+341
Port Talbot	15,086	+269	15,355	+247	15,601	+180	15,781	+695
Swansea Valley	2,003	+128	2,130	+119	2,249	+102	2,351	+348
TOTAL	**46,396**	**+761**	**47,156**	**+685**	**47,842**	**+417**	**48,259**	**+1,863**
Backlog Over 5 Years	**Households Requiring Affordable Housing**							
	2018	**Net Change 18-23**	**2023**	**Net Change 23-28**	**2028**	**Net Change 28-33**	**2033**	**Net Change 18-33**
Afan Valley	901	+5	906	-12	895	-16	878	-23
Amman Valley	442	+14	456	+3	458	0	458	+16
Dulais Valley	574	+17	591	+8	599	+4	603	+29
Neath	5,476	+195	5,671	+82	5,753	+48	5,802	+326
Neath Valley	845	+22	866	+4	870	+1	871	+27
Pontardawe	1,079	+60	1,139	+39	1,178	+29	1,207	+128
Port Talbot	5,311	+180	5,491	+87	5,578	+64	5,642	+331
Swansea Valley	730	+61	792	+45	836	+39	875	+145
TOTAL	**15,358**	**+554**	**15,912**	**+256**	**16,168**	**+168**	**16,336**	**+978**
GRAND TOTAL	**61,753**	**+1,315**	**63,068**	**+941**	**64,009**	**+586**	**64,595**	**+2,841**

Bedroom Size

35. Figure 26 represents the household split in Figure 23 calculated as a percentage of the total housing requirement (note that negative figures are omitted from the calculation, these figures are presented as percentages of the total of identified positive change only):

Figure 26: Neath Port Talbot: Housing Need by Tenure 2018-33 represented as percentages of total positive need (Source: ORS model. Note: figures may not sum due to rounding)

	Households Requiring Market Housing	Households Requiring Affordable Housing	Totals
	% of Net Change	% of Net Change	% of Total Net Change
Afan Valley	-	-	-
Amman Valley	0%	1%	1%
Dulais Valley	1%	1%	2%
Neath	16%	11%	27%
Neath Valley	1%	1%	2%
Pontardawe	12%	4%	16%
Port Talbot	24%	11%	35%
Swansea Valley	12%	5%	17%
TOTAL	**66%**	**34%**	**100%**

36. Given this tenure split and the household sizes comprising these totals, the bedroom requirements of the households comprising this change can be derived (Figure 27):

Figure 27: Neath Port Talbot: Changes in Bedroom Requirements by Tenure – Households 2018-33 (Source: Welsh Government, ORS Model. Note: figures may not sum due to rounding)

	Households Requiring Housing				
	1-bedroom	2-bedroom	3-bedroom	4 + bedrooms	TOTAL
MARKET HOUSING					
Afan Valley	0	-9	-57	-11	-78
Amman Valley	+2	+13	+4	-6	+14
Dulais Valley	+1	+7	+21	+1	+31
Neath	+30	+185	+267	+1	+483
Neath Valley	+1	+9	+19	0	+29
Pontardawe	+15	+89	+186	+51	+341
Port Talbot	+18	+128	+489	+60	+695
Swansea Valley	+7	+100	+197	+44	+348
TOTAL MARKET HOUSING	**+73**	**+524**	**+1,126**	**+141**	**+1,863**
AFFORDABLE HOUSING					
Afan Valley	0	-3	-18	-1	-23
Amman Valley	+15	+10	-8	-1	+16
Dulais Valley	+7	+14	+7	+1	+29
Neath	+161	+130	+34	+1	+326
Neath Valley	+13	+11	+4	0	+27
Pontardawe	+48	+48	+28	+4	+128
Port Talbot	+89	+127	+109	+6	+331
Swansea Valley	+31	+67	+43	+4	+145
TOTAL AFFORDABLE HOUSING	**+364**	**+404**	**+198**	**+13**	**+978**

37. Figure 28 represents these changes in bedroom requirements as a percentage of total positive market and affordable change (note that negative figures are omitted from the calculation, these figures are presented as percentages of the totals of identified positive changes only):

Figure 28: Neath Port Changes in Bedroom Requirements by Tenure – Households 2018-33 as a percentage of total positive market change and affordable change respectively (Source: Welsh Government, ORS Model. Note: figures may not sum due to rounding)

	Households Requiring Housing				
	1-bedroom	2-bedroom	3-bedroom	4 + bedrooms	TOTAL
MARKET HOUSING					
Afan Valley	0%	-	-	-	0%
Amman Valley	0%	1%	0%	-	1%
Dulais Valley	0%	0%	1%	0%	2%
Neath	2%	10%	14%	0%	25%
Neath Valley	0%	0%	1%	0%	1%
Pontardawe	1%	5%	10%	3%	18%
Port Talbot	1%	7%	25%	3%	36%
Swansea Valley	0%	5%	10%	2%	18%
TOTAL MARKET HOUSING	**4%**	**27%**	**61%**	**8%**	**100%**
AFFORDABLE HOUSING					
Afan Valley	0%	-	-	-	0%
Amman Valley	1%	1%	-	-	2%
Dulais Valley	1%	1%	1%	0%	3%
Neath	16%	13%	3%	0%	32%
Neath Valley	1%	1%	0%	0%	3%
Pontardawe	5%	5%	3%	0%	13%
Port Talbot	9%	13%	11%	1%	33%
Swansea Valley	3%	7%	4%	0%	14%
TOTAL AFFORDABLE HOUSING	**36%**	**40%**	**22%**	**2%**	**100%**

Summary of Key Findings

38. There has been a consistent increase in owner occupation in each of the previous three intercensal decades (1981-91, 1991-01, 2001-11. There has been a shift away from social rented housing to the private rented sector in the twenty years since 1991. The majority tenure is still owner occupation. House prices have remained stable around £80,00 since 2014.

39. The population is likely to increase**,** although not dramatically according to projections. The age profile is likely to change with an increased number of older people (aged 65+) and reduced numbers in most younger age bands. Nonetheless, in part due to the reducing average household size, the number of households is projected to increase by 2,641 households (176 per year on average) over the 15-year period 2018-33.

40. Of the total housing need, 66% is for market tenures and the remaining 34% is for affordable. There will likely be changes in the types of dwelling required across all tenures, notably an increase in two and three-bedroom properties in the market tenure and one and two-bedroom properties in the affordable tenures.

Table of Figures

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