

# **Local Housing Market Assessment**

Neath Port Talbot

October 2025



**Turley**

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## Client

Neath Port Talbot Council

This report was largely completed in early 2023 but had been under preparation since mid-2022, with much of the baseline analysis completed in **July 2022**. Large parts of the report therefore draw upon the data that was available at that point, rather than incorporating further data – for instance from the 2021 Census – which was published at a later date. Further focused updates were made in **May 2025**

## Executive Summary

1. Neath Port Talbot Council ('the Council') is currently preparing its Replacement Development Plan (RLDP) which will supersede the Local Development Plan (LDP) that was adopted in January 2016.
2. The Council has commissioned Turley to produce this Local Housing Market Assessment (LHMA) which estimates the number of additional housing units that may be needed in the future, by tenure, throughout Neath Port Talbot (NPT). The LHMA will form part of the evidence base for the RLDP – as well as future housing-related strategies – and **follows relatively new guidance from the Welsh Government**, which was published in March 2022 and sets a clear framework for the structure of this report.
3. The LHMA reports on the need for affordable housing both throughout NPT and in **specific housing market areas (HMAs) which have been defined to reflect the eight spatial areas established in the LDP**, such an approach having been found to be appropriate and reasonable following analysis of house prices and commuting trends. This report uses the latest available data to explore local trends in each of these areas, wherever possible, in order to establish how their housing markets, socio-economic profiles and demographics compare to each other and to NPT as a whole.
4. This report also considers some **specific housing needs**, focusing – in accordance with the Welsh Government's guidance – on the need for accessible and adapted housing; the needs of multi-generational and/or larger families requiring larger properties; the need for non-permanent housing; the need for housing with care and support; the need for student accommodation; and the needs of people with physical or cultural needs. Tables are presented, as required by the guidance, which outline local policies and strategies of relevance to each group, summarise the types of properties they need, introduce evidence that can be used to further understand each need, summarise relevant stakeholder engagement and identify key issues.
5. Alongside its new guidance, the Welsh Government released **an LHMA Tool which has been configured to provide a range of additional housing need estimates**. The Tool is preloaded with the Welsh Government's latest official 2018-based projections but also allows up to two user-defined projections to be added. The Council has reviewed the range of projections that have been developed by Edge Analytics, to inform the Economic and Housing Growth Assessment that has been separately produced, and opted to test the supplementary adjusted employment-led scenario that allows for improvements to younger household membership rates. This scenario is explained further in that study.
6. While this report presents standard summary tables showing the outcome of each scenario, once incorporated into the LHMA Tool, it subsequently highlights **the Council's decision to use this supplementary adjusted employment-led scenario** as the basis for its additional housing need estimates. This suggests that there will be a net need for **190 affordable homes per annum** throughout NPT over the first five years being covered by the RLDP. This is because the supply appears insufficient to meet a

gross annual need – for 623 such homes – that is predominantly driven by the existing unmet need, which is assumed to be cleared within these five years leaving only the newly arising need for 81 homes per annum to be met thereafter to 2038. While the latter is not converted into a directly comparable net figure, this implies that there will be a need for **1,760 affordable homes in total** over the full 15-year period from 2023 to 2038.

7. The Tool implies that circa 88% of the net need for affordable housing over the next five years is for social rented housing, and of that some 92% is for properties with one bedroom. This does though reduce to circa 53% when focusing on the *gross* need, before allowing for turnover and supply, with 28% needing two bedrooms and 18% needing three bedrooms.
8. The Tool also produces an estimate of the need for market housing, which it assumes will arise each year from households able to afford it. While not an explicit requirement of an LHMA, the Council has requested consideration of the size of housing that could be needed by these households. This report therefore appends analysis which suggests that **circa 60% could need three bedrooms** if existing occupancy trends persist. Around **20-30%** could need two bedrooms with 5-15% needing at least four and 5% needing only one.
9. Consideration is also given, in a separate appendix, to the need for specialist accommodation that could be generated by projected growth in the elderly population. Using available toolkits, it has been estimated that circa **43-54** individuals could need specialist housing (e.g. sheltered housing or extra care) every year between 2021 and 2036, while a further **16-21** bedspaces in communal establishments like care homes could also be needed per annum.

# 1. Introduction

- 1.1 Neath Port Talbot Council ('the Council') is currently preparing its Replacement Development Plan (RLDP) which will supersede the Local Development Plan (LDP) that was adopted in January 2016.
- 1.2 The Council has commissioned Turley to produce this Local Housing Market Assessment (LHMA) which will estimate the number of additional housing units that may be needed in the future, by tenure, throughout NPT. This will form part of the evidence base for the RLDP as well as future housing-related strategies, such as the Local Housing Strategy, the Homelessness Strategy, the Social Housing Grant Prospectus and strategies relating to integrated care services.
- 1.3 The LHMA follows relatively new guidance from the Welsh Government<sup>1</sup> (WG), which was published on 31 March 2022 – as part of its drive to deliver 20,000 new low-carbon social homes by 2026 – and was accompanied by a template that sets the structure for this report. In line with the WG's desire for LHMAs to omit '*unnecessary content*', this report does not attempt to provide background on the general purpose of LHMAs or the method that should be followed in preparing them, with readers advised to review the guidance for this detail.

## National policy background

### Section 8 of the Housing Act 1985

- 1.4 Section 8 of the Housing Act 1985<sup>2</sup> places a statutory duty on local authorities to periodically assess the level of housing need in their area. It outlines the importance of authorities having a comprehensive understanding of their local housing market(s) and ensuring that they have a robust evidence base for effective strategic housing and planning services. The production of this LHMA falls under this duty, building upon the requirement to review housing needs through a more holistic review of the whole housing market. It is important to acknowledge that there is an expectation that local authorities will rewrite LHMAs every five years and refresh that LHMA once during that five year period (between years two and three) utilising section 87 of the Local Government Act 2003<sup>3</sup>. This is intended to ensure that the evidence base remains up-to-date and reflective of changing market circumstances.

### Planning Policy Wales

- 1.5 Planning Policy Wales (PPW) confirms that LHMAs form '*a fundamental part of the evidence base for development plans*', and should be '*considered together with other key evidence...in order to identify an appropriate strategy for the delivery of housing in the plan area*'<sup>4</sup>. It proceeds to state that local authorities should work '*in partnership with local stakeholders*' to produce LHMAs, so as to '*develop a detailed understanding of the nature and level of market and affordable housing demand and need in their*

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<sup>1</sup> WG (2022) Undertaking Local Housing Market Assessments (LHMAs) – Guidance, version 1.0

<sup>2</sup> 1985 Housing Act - <https://www.legislation.gov.uk/ukpga/1985/68/section/8>

<sup>3</sup> 2003 Local Government Act - <https://www.legislation.gov.uk/ukpga/2003/26/part/7>

<sup>4</sup> PPW (Edition 11, 2022) paragraph 4.2.6

communities'<sup>5</sup>. It later confirms that the LHMA's estimates of the need for affordable housing should '*support policies and decisions on planning applications*', including negotiations on the mix of new development, recognising the importance of appreciating '*the demand for different types of affordable housing...in relation to supply*'<sup>6</sup>. PPW also requires development plans to state '*a target for affordable housing*', expressed as a number of homes and based on the LHMA, before proceeding to explain how their policies will help to meet any such target<sup>7</sup>.

#### **Future Wales- The National Plan 2040**

- 1.6 Future Wales<sup>8</sup> is strongly influenced by PPW. Policy 7 affirms the commitment of WG to increase the delivery of affordable homes. It requires planning authorities, through their Strategic Development Plans (SDP) and LDPs to develop strong evidence-based policy frameworks to deliver these affordable homes. It references the published range of 'Estimates of additional housing need' (2019-based) which provide national and regional estimates of overall need and the need for affordable homes. It suggests, where these estimates should inform housing requirements to be set out in SDPs and LDPs, that these will differ, with a recognition that the affordability of housing is not uniform across Wales and different responses will be needed in different parts of Wales to meet the needs of local communities.

#### **Independent Review of Affordable Housing Supply**

- 1.7 The 2019 Independent Review of Affordable Housing Supply<sup>9</sup> further affirms the importance of LHMA's and their use of the best possible data on housing need and demand to inform housing policy and decisions regarding affordable housing supply. The Review placed significant emphasis on understanding exactly how many homes are needed, in which geographical areas and in what tenures. It confirms that a robust LHMA is the key means for authorities to identify evidence at a local level.

#### **Housing (Wales) Act 2014**

- 1.8 The Housing (Wales) Act 2014, Sections 50, 51 and 52, requires local authorities to develop a homelessness strategy every four years<sup>10</sup>. The LHMA is expected to play a fundamental role in informing this strategy which must include a review of the resources available to the local authority and other bodies associated with supporting people who are or may become homeless.

#### **Equality Act 2010**

- 1.9 The guidance confirms that it is essential also for local authorities to consider their equality duties under the Equality Act 2010<sup>11</sup> and the Welsh Public Sector Equality Duties.

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<sup>5</sup> *Ibid*, paragraph 4.2.8

<sup>6</sup> *Ibid*, paragraph 4.2.27

<sup>7</sup> *Ibid*, paragraph 4.2.28

<sup>8</sup> WG (2022) - <https://gov.wales/sites/default/files/publications/2021-02/future-wales-the-national-plan-2040.pdf>

<sup>9</sup> Independent Review of Affordable Housing Supply - [https://gov.wales/sites/default/files/publications/2019-04/independent-review-of-affordable-housing-supply-report\\_0.pdf](https://gov.wales/sites/default/files/publications/2019-04/independent-review-of-affordable-housing-supply-report_0.pdf)

<sup>10</sup> Housing (Wales) Act 2014 - <https://www.legislation.gov.uk/anaw/2014/7/contents/enacted>

<sup>11</sup> Equality Act 2010 - <https://www.legislation.gov.uk/ukpga/2010/15/contents>

## Development Plans Manual

- 1.10 National planning guidance requires the Development Plans Manual<sup>12</sup> to be consulted when preparing development plans. The Manual contains guidance on how to prepare, monitor and revise a development plan including guidance on the importance of using robust evidence to ensure plans are effective as set out in PPW.
- 1.11 The Manual identifies how an LHMA should be drawn upon to make '*informed policy decisions*' on where to locate development, such that it influences the spatial distribution of growth having identified '*spatial areas of housing need which should be a key consideration in determining the location of housing growth in the plan*'<sup>13</sup>. The Manual subsequently emphasises the '*significance of the LHMA*', describing the value of this '*core piece of baseline evidence*' in identifying '*a level of housing need, both market and affordable, per annum, both numerically and spatially, as well as the type of need in an area, e.g. tenure mix and house types*'<sup>14</sup>. It confirms that the total affordable housing need identified by the LHMA, as well as its commentary on spatial implications and the predominant tenure mix, should be '*clearly stated in the reasoned justification*' to a development plan, also being '*a key consideration when determining the overall level and location of housing*'<sup>15</sup>.

## Local policy background

### RLDP 2023-2038

- 1.12 The existing LDP 2011-2026 was adopted in January 2016. While the intention was for this to be replaced by an RLDP covering the period from 2021 to 2036, the Council took the decision to end this process in summer 2023. In October 2023, following WG agreement, it restarted the plan preparation process and a new Delivery Agreement (DA) for the new RLDP (2023-2038) was published on 1 November 2023.
- 1.13 The existing LDP considers the potential growth in demand for housing given the aspirational scenario for job growth within NPT. The previous LDP found that the growth in demand for housing in NPT was mainly a result of the reduction in average household size. More specifically, based on the project economic-led growth scenario of 3,850 jobs in the area, the plan made provision for 7,800 new residential units, which would increase the population by approximately 7,000 people (to 147,400) by 2026. The approach reflects this aspirational growth scenario for the economy and the reduction in the average household size.
- 1.14 This LHMA will contain evidence relating to housing needs which will be used by the Council to justify policy approaches within the Pre-Deposit (Preferred Strategy) iteration of the RLDP, which the DA identifies will be subject to consultation in 2023. In addition, the housing needs identified in this LHMA will be used to inform the RLDP's High Level Viability Assessment.

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<sup>12</sup> WG - <https://gov.wales/sites/default/files/publications/2020-03/development-plans-manual-edition-3-march-2020.pdf>

<sup>13</sup> *Ibid*, paragraphs 5.14 and 5.18

<sup>14</sup> *Ibid*, paragraphs 5.26 and 5.31

<sup>15</sup> *Ibid*, paragraph 5.32

### **Corporate Plan 2022 – 2027**

- 1.15 The Council's Corporate Plan 'Recover, Reset, Renew' was approved at Cabinet on 28 February 2022 and sets out how the Council will approach recovery from the Covid-19 pandemic in the short, medium and longer term.
- 1.16 The Plan sets out how the Council's purpose, vision, values, relationships and priorities have been reset and renewed to reflect the changing context and the views of those engaged in its development. It provides an overall vision that:
- All children get the best start in life
  - All communities are thriving and sustainable
  - Our local environment, culture and heritage can be enjoyed by future generations
  - Local people are skilled and access high quality, green jobs
- 1.17 The Plan confirms that every service and function within the Council will align their service recovery plans to maximise their contribution to achieving the above vision.
- 1.18 Under the '*all communities are thriving and sustainable*' objective the Plan sets out the Council's commitment to preparing a Rapid Rehousing Transformation Plan.

### **Rapid Rehousing Transition Plan 2022-27**

- 1.19 Production of this LHMA has overlapped with the Council's production of its Rapid Rehousing Transition Plan (RRTP) which was formally approved in October 2022. This responded to the WG's call for local authorities to produce such plans, with a view to helping households quickly exit a homelessness crisis and avoid being homeless again.
- 1.20 The Council acknowledges in the RRTP that its transition to a rapid rehousing model will involve '*a range of actions*', with the '*starting point*' being that more households presented themselves as homeless during the Covid-19 pandemic, more than doubling the demand for emergency housing. Within this context, the Council aims to procure more housing; ensure that its support model is fit for purpose; co-create a housing pathway with its partners; deliver personalised responses; and build on its successful preventative work.

### **Housing Support Programme Strategy 2022-26**

- 1.21 The Housing Support Programme Strategy<sup>16</sup> outlines the Council's strategic direction for its housing support services, and is intended to provide '*a single strategic view*' of the Council's approach to homelessness prevention and housing support services.
- 1.22 The Strategy expresses an aim to '*end homelessness*', an ambition that is acknowledged to be '*challenging*' but is nonetheless intended to '*focus...energies and resources*'. The Council aims to do all that it can to prevent homelessness from happening, and to respond appropriately and compassionately if it does.

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<sup>16</sup> <https://www.npt.gov.uk/media/18174/hsg-strategy-full-eng-e-read.docx?v=20221018144241>



- 1.23 Like the RRTP, the Strategy highlights that legislative changes have more than doubled the demand for emergency housing, with the Council assuming that this will remain in place and planning for this increased demand as a result. It recognises a need to '*work differently*' within this context by procuring more housing; transitioning to a Rapid Rehousing model; ensuring that its support model is fit for purpose; creating a housing pathway through collaboration with partner housing associations, landlords and support agencies; and providing a personalised response to each person.

#### **Social Housing Grant Prospectus 2021**

- 1.24 The first NPT Social Housing Grant Prospectus was produced in 2021 in response to the guidelines outlined by the WG in 2019. The prospectus sets out how the Council intends to use its management of the local WG Housing Capital Grant Programme to provide as much extra affordable housing as possible for those households. This LHMA will provide an updated assessment with regards the need for affordable housing to inform subsequent programmes of delivery.

#### **Governance and Consultation**

- 1.25 This LHMA has been informed by a process of engagement. The original commission saw one-to-one discussions held with various individuals from the Council, including its Homelessness and Housing Options Manager, its interim Environmental Health Team Leader, its Strategic Manager responsible for Partnerships and Community Cohesion and the consultant responsible for its Rapid Rehousing Plan. Correspondence was also had with its Housing Options team. A virtual meeting was also held with representatives from the University of Swansea and the University of Wales Trinity Saint David (UWTSD).

- 1.26 An online stakeholder workshop was also held in September 2022 to:

- Introduce the LHMA;
- Explain the proposed approach to defining housing market areas;
- Provide an overview of the local housing market;
- Introduce headlines on the need for affordable housing, prior to running the LHMA Tool; and
- Discuss the specific housing needs of various groups referenced by the guidance.

- 1.27 The workshop was attended by 16 people including representatives from:

- Various Council departments;
- The neighbouring City and County of Swansea Council;
- Several Registered Social Landlords (RSLs) including Pobl, Caredig and Tai Tarian, the latter of whom were later engaged once again to assist with a specific query on turnover rates; and
- The development industry, including the Home Builders Federation (HBF).

- 1.28 The feedback and insight provided through this engagement is referenced and drawn upon where appropriate throughout this LHMA.
- 1.29 The LHMA initially went through a sign-off process in early 2023, being scrutinised by officers from the planning and housing departments as well as RSLs. It was presented to the Strategic Housing Partnership for information in February 2023 before key officers from the Council engaged other departments, services and sections and discussed findings with Chief Officers and the RLDP Member Working Group. A seminar for all members was then arranged in April 2023 ahead of the report's submission to the WG for approval.
- 1.30 Feedback subsequently received from the WG did though lead the Council to reconsider some of the assumptions that were made in the LHMA Tool, based on more detailed information that it was able to obtain from Tai Tarian. It consequently made modifications to the Tool, also taking the opportunity to reflect a slight change in the period being covered by the RLDP. Turley was recommissioned to make corresponding updates to this report in May 2025, with changes again presented to both the Strategic Housing Partnership and the Council's Executive Board allowing the amended report to be submitted to WG in September 2025.

## 2. Overview of Assessment and Methodology

### Methodology, inputs and assumptions

- 2.1 The additional housing needs estimates are determined using the LHMA Tool. This Tool uses a formulaic approach to allocate the additional housing need, formed from the existing unmet need and the newly arising need (change in the household projections over the LHMA period), to the different housing tenures. All existing unmet need is allocated to affordable housing and assumed to be covered during the first five years of the LHMA period. The newly arising need is allocated between market and affordable housing using a formulaic approach.
- 2.2 By housing market area (HMA), the LHMA Tool provides default data inputs for rent, house price paid and household projections (used to generate the newly arising need) with local authorities providing the income percentile distributions, existing unmet need and the planned supply and turnover of existing stock. The latter two data inputs are considered over the first five years only of the LHMA period and are fully allocated to affordable housing. This is because it becomes less accurate to predict supply beyond the first five years of the LHMA period. A local authority can have up to 20 HMAs which are defined using wards, middle-layer super output areas (MSOAs) or lower-layer super output areas (LSOAs). Each HMA can have up to 40 wards, MSOAs or LSOAs.
- 2.3 The input data together with a number of assumptions is used to generate an income level above which households would be considered able to meet their needs in the market and a lower income level below which households are considered to be in need of social rent. The intermediate households are those not allocated to market housing or social rent. The LHMA Tool also forecasts how the data inputs may change over the first five years of the LHMA period.
- 2.4 The output tables from the LHMA Tool are used as the starting point for development plans to provide the range of LHMA additional housing need estimates. Appendix 1 sets out where it has been considered necessary to deviate from the methodology and default data and assumptions provided in the Tool, with supporting justification, and also outlines the limitations of certain data sources.

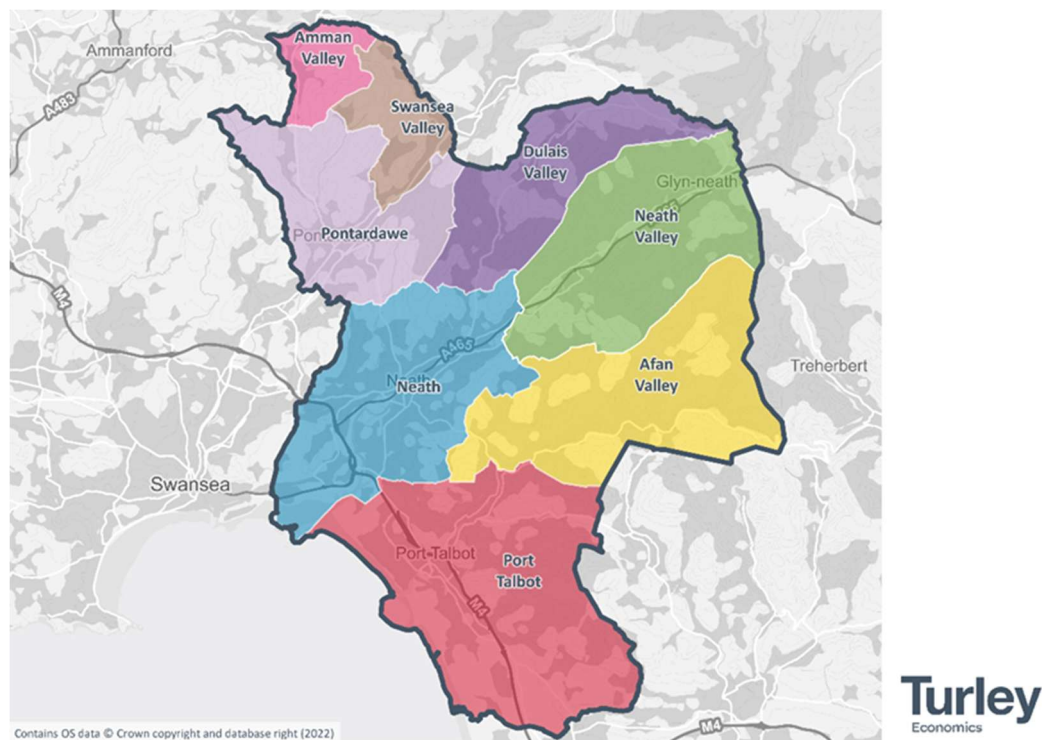
### Housing Market Areas

- 2.5 HMAs are areas that have been defined geographically based on the functional areas where people currently live and would be willing to move home without changing jobs, recognising that housing markets are not constrained by administrative boundaries. A number of key factors need to be taken into account when defining these areas, including the broad price of housing (to consider 'transferability' within the market) and major transport links by road or rail (to take account of commuting patterns).
- 2.6 The WG does not prescribe an approach to defining HMAs, beyond specifying – in the context of its LHMA Tool – that there should be no more than twenty in any

authority<sup>17</sup>. HMAs should also be comprised of no more than forty wards, middle super output areas (MSOAs) or lower super output areas (LSOAs). Each such area can be assigned to only one HMA within the LHMA Tool, meaning that they cannot overlap in this application.

- 2.7 Given this lack of firm guidance, the eight spatial areas defined by the Council when it started to develop the existing LDP – shown at Figure 2.1 below – can be reasonably used as an appropriate basis from which to consider distinct sub-authority geographies. While not explicitly intended to represent HMAs, they are nonetheless of use in distinguishing between areas that have ‘*unique*’ identities<sup>18</sup> having been defined on the basis that they represented identifiable communities.
- 2.8 In the context of applying the toolkit it is also the case that they are based on wards, helpfully therefore aligning with statistical geographies, albeit there have been recent changes to ward geographies with their consequences discussed later in this section.

Figure 2.1: Spatial Areas



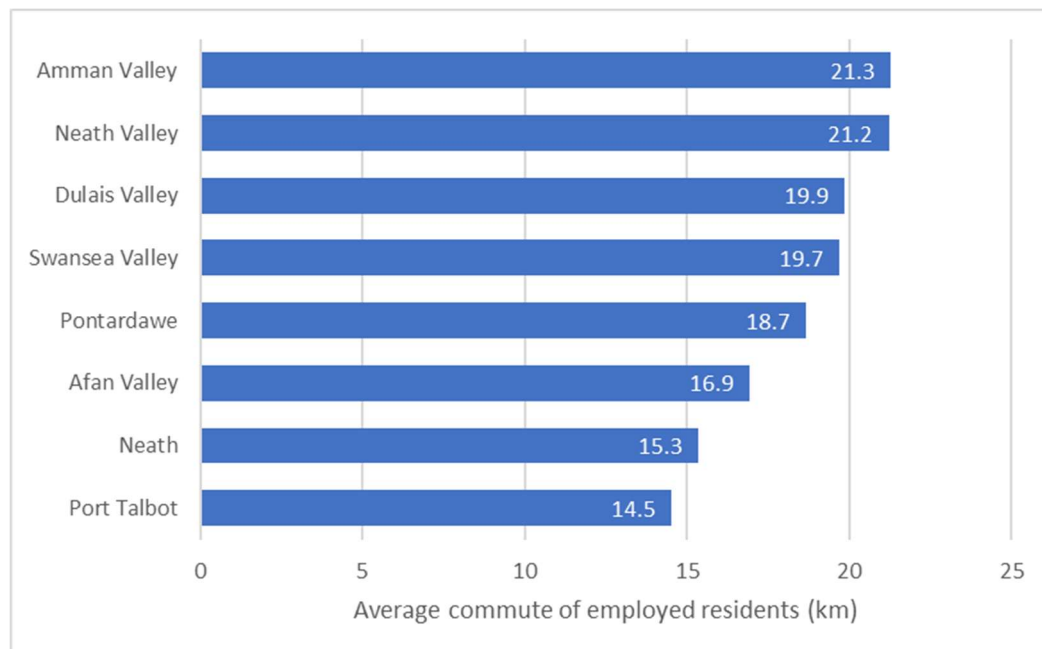
- 2.9 In testing whether these areas can be reasonably treated as HMAs, commuting patterns are a relevant consideration, even if the relative datedness of the 2011 Census – still the most recent detailed survey of local commuting patterns at the time of writing – is an unavoidable issue that will not even be resolved by the release of data from the 2021 Census which will have been skewed by the Covid-19 pandemic. The 2011 Census can be nonetheless observed to have uncovered variation in the distance typically travelled by people living in each spatial area, with the average commute from Neath Valley or Amman Valley some 46% longer than from Port Talbot for example.

<sup>17</sup> WG (2022) Undertaking Local Housing Market Assessments (LHMAs) – Guidance, version 1.0, p18

<sup>18</sup> NPTC (2016) LDP (2011-2026) Paragraph 2.3.6

This is no doubt a reflection of where jobs exist, but ward-level data is unfortunately not available to confirm the actual places of work for people living in each area nor the overall rate of containment.

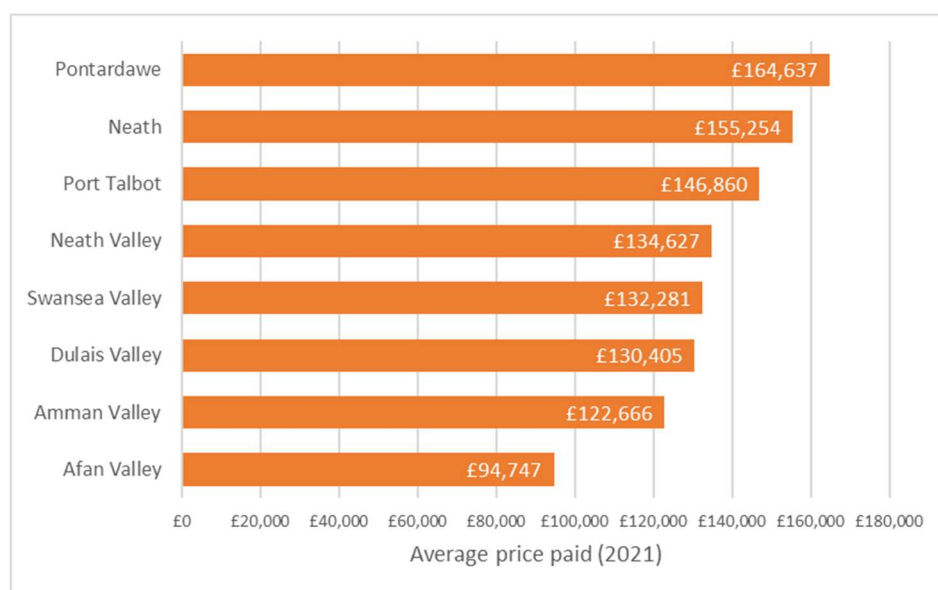
Figure 2.2: Average Length of Commute from Spatial Areas (2011)



Source: Census 2011

- 2.10 There is also variation in house prices, with the average price paid in Pontardawe last year some 74% higher than in Afan Valley for example. Prices in the latter, to the east of Neath Port Talbot (NPT), were at least 23% lower than in any other spatial area.

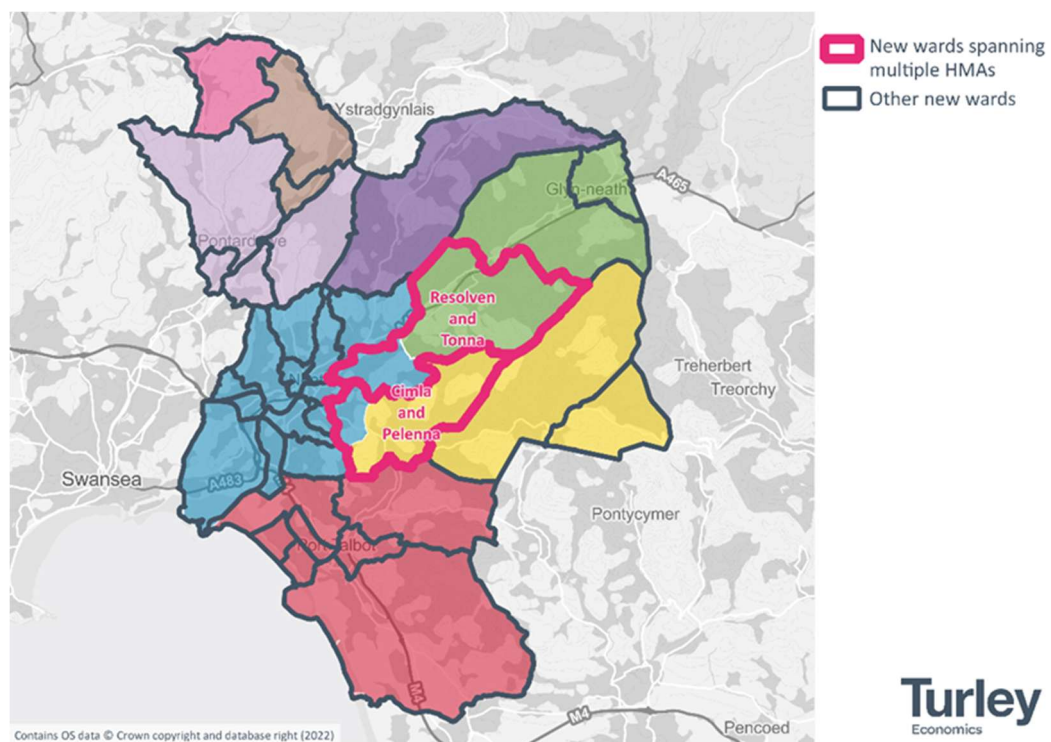
Figure 2.3: Average Price Paid in Spatial Areas (2021)



Source: Land Registry; Turley analysis

- 2.11 The above indicates that **it is indeed appropriate and reasonable to treat the spatial areas as HMAs, for the purposes of applying the LHMA Tool**. This is also possible in a practical sense, where the Tool allows for use and amalgamation of the ward geographies on which they are based.
- 2.12 It is nonetheless important to acknowledge that ward boundaries have recently changed, and while the Tool is not yet compatible with these new geographies they will likely need to be used at some point in the near future. This should be a relatively straight forward process in NPT, however, as the new geographies can be seen from Figure 2.4 to largely fit with the spatial areas that form the HMAs for this study, with only two exceptions.

Figure 1.1: Overlaying New Ward Boundaries to HMAs

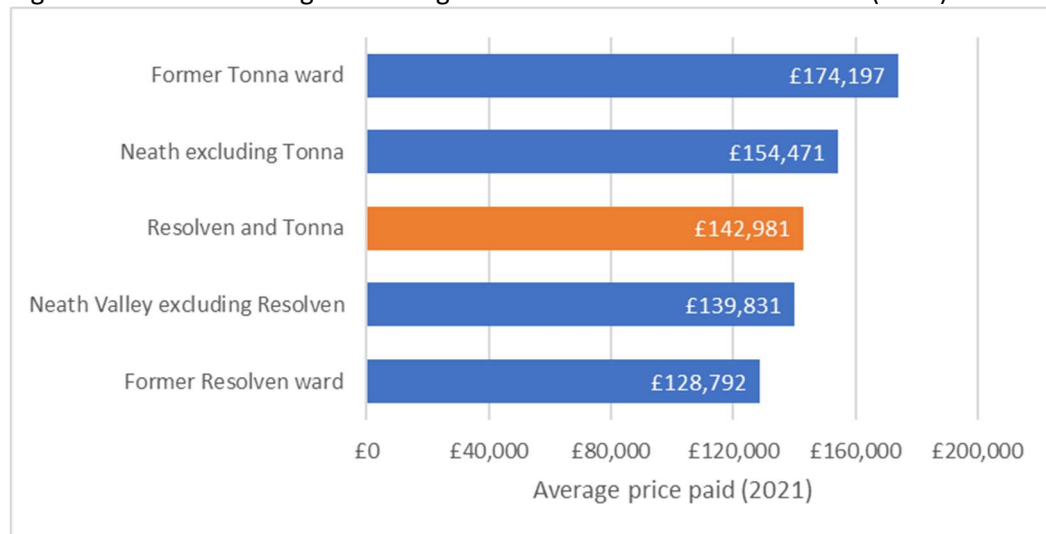


Source: Welsh Government; Turley analysis

- 2.13 One of only two apparent issues relates to Tonna, a ward that was previously part of the Neath spatial area but has now merged with Resolven, in Neath Valley. While it is ultimately for the Council to decide how to deal with this change in the context of planning, it can be noted that most (55%) of the individuals living in the newly defined area live in the former Resolven ward<sup>19</sup>. The average price paid in this area also skews towards the lower average of the former Resolven ward, aligning more closely with the rest of Neath Valley – excluding Resolven – than the rest of Neath, excluding Tonna.

<sup>19</sup> ONS (2021) Population estimates – small area based by single year of age, mid-2020

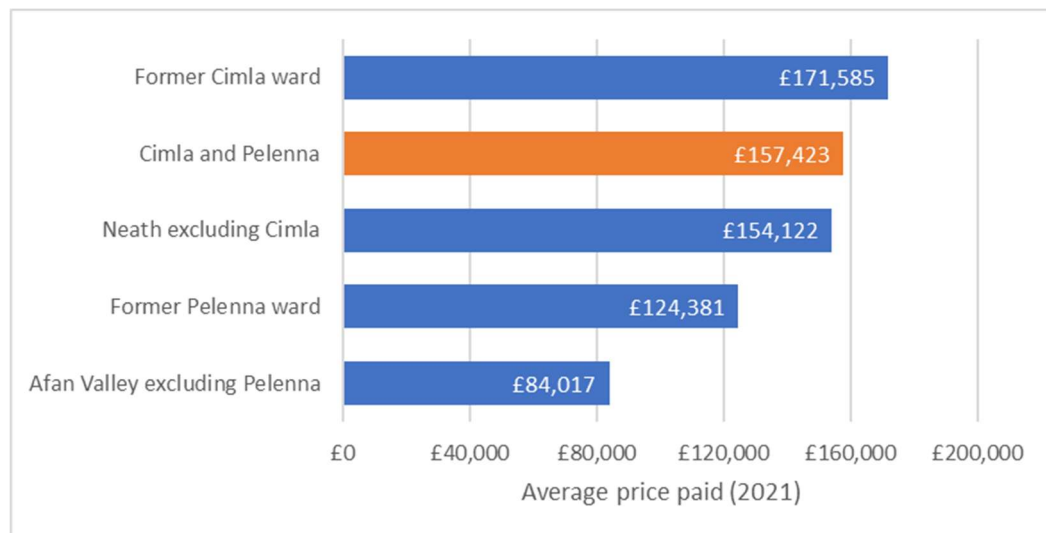
Figure 2.5: Benchmarking the Average Price Paid in Resolven and Tonna (2021)



Source: Land Registry; Turley analysis

- 2.14 The second issue involves Cimla, which was similarly a ward that was part of the Neath spatial area but has now been merged with Pelenna, in Afan Valley. Some 77% of the residents of this newly enlarged geography live in the area covered by the former Cimla ward<sup>20</sup>. House prices also align more with the average recorded in the other parts of the Neath spatial area, typically being some 87% higher than prices in the other parts of Afan Valley.

Figure 2.6: Benchmarking the Average Price Paid in Cimla and Pelenna (2021)



Source: Land Registry; Turley analysis

<sup>20</sup> Ibid

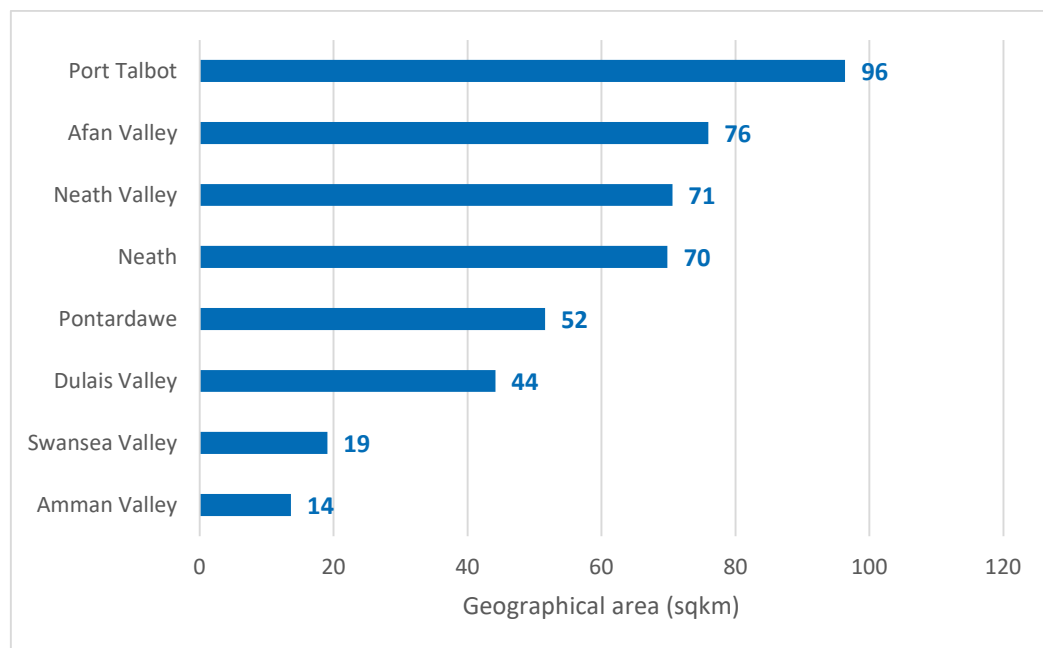
### 3. Overview of Housing Market and Socio-Economic and Demographic Trends

#### Housing market analysis by tenure

##### Geographical size

- 3.1 The administrative area of NPT extends to cover some 441sqkm, ranking as the 11<sup>th</sup> largest of the 22 local authorities in Wales<sup>21</sup>.
- 3.2 Port Talbot is the largest of the eight HMAs within NPT, extending to circa 96sqkm, with Afan Valley the next largest at 76sqkm. Amman Valley (14sqkm) and Swansea Valley (19sqkm) are by some distance the smallest of the eight HMAs, being less than half the size even of Dulais Valley which is the next smallest.

Figure 3.1: Geographical Size of HMAs



Source: ONS

##### Population

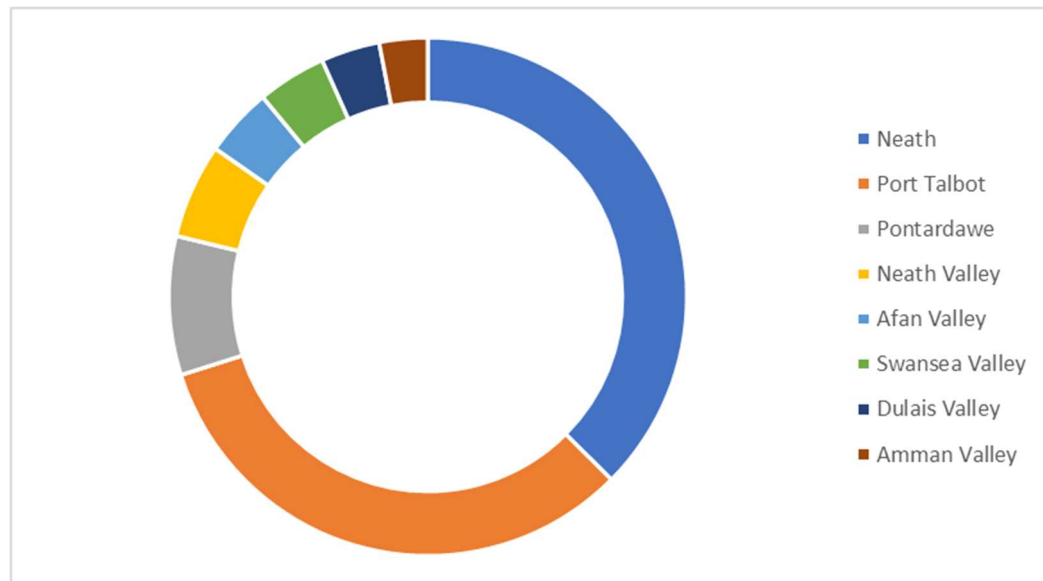
- 3.3 In June 2022 initial 2021 Census data releases indicated that there were 142,300 residents living in NPT in 2021. This made it the 9th most populous local authority in that year in Wales and the 196<sup>th</sup> most populous local authority in that year across England and Wales combined.
- 3.4 The initial release of 2021 Census data was limited to only authority level population and household counts, meaning that – to provide analysis at the HMA level – it is necessary to revert to the most recent published sub-authority population estimates for 2020. While the 2021 data will potentially be used to retrospectively update these

<sup>21</sup> ONS (2021) Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland, MYE5



historic estimates, it currently suggests that NPT was the 12<sup>th</sup> most densely populated local authority as of 2020, with an estimated 144,386 residents<sup>22</sup>. The subsequent release of more detailed data underpinning the 2021 Census population count will enable an understanding of the implications of this higher previous estimate but, in terms of its spatial distribution, it suggests that circa 37% of the residents in 2020 lived in the Neath spatial area, with a further third living in Port Talbot and no other spatial area accommodating more than 9% of the authority's residents<sup>23</sup>.

Figure 3.2: Distribution of NPT Population by Spatial Area (2020)



Source: ONS; Turley analysis

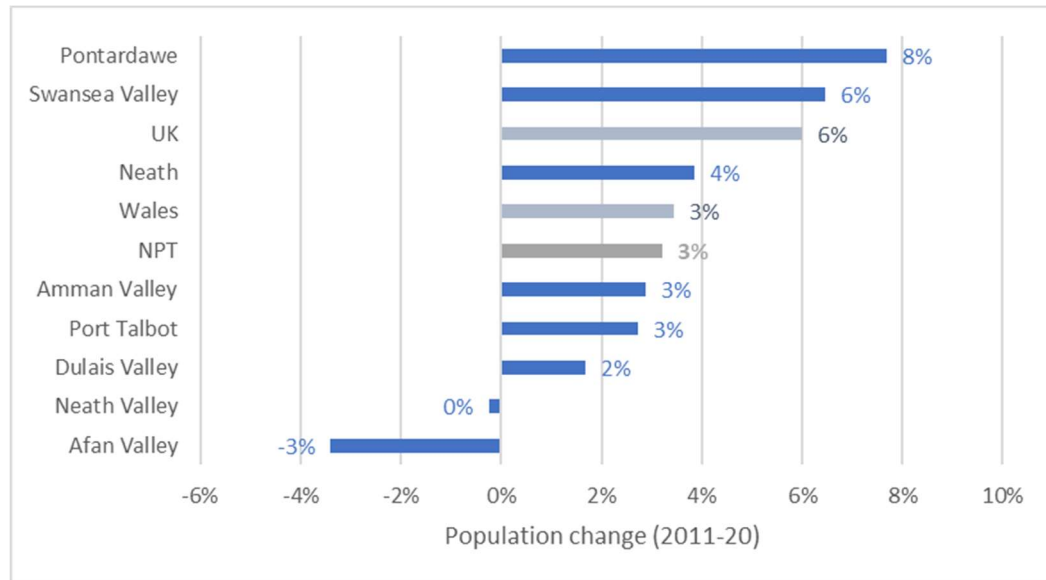
- 3.5 The interim results of the 2021 Census again allow for an up-to-date authority level assessment of population change. This data suggests that the population of NPT has grown by around 1.8% over the decade since 2011, surpassing the population growth recorded across Wales (1.4%) but falling significantly short of the growth seen across England and Wales combined (6.3%). It also represented a marked slowing of the 4.0% growth recorded in NPT over the previous decade (2001-11).
- 3.6 Again, where the Census 2021 data does not break down below an authority level it is currently necessary to revert to the 2020 population estimates when considering change at a the HMA level. For context and as indicated above it is important to note that these estimates appear to have overstated the growth of the population across NPT where they suggested population growth of around 3% since 2011, comparable to the population growth seen across Wales which was also circa 3% and again appears to have been overstated at this larger geographic scale. Two spatial areas can nonetheless be seen to have matched or exceeded the UK rate of growth in this time, which was 6% (and more closely aligned with the 2021 Census implied growth), these being Swansea Valley and Pontardawe which are both to the north of the authority area which have

<sup>22</sup> *Ibid*

<sup>23</sup> ONS (2021) Population estimates – small area based by single year of age, England and Wales

seen new housing developed. Afan Valley was one of only two areas to experience population decline, Neath Valley being the other but seeing only a marginal reduction.

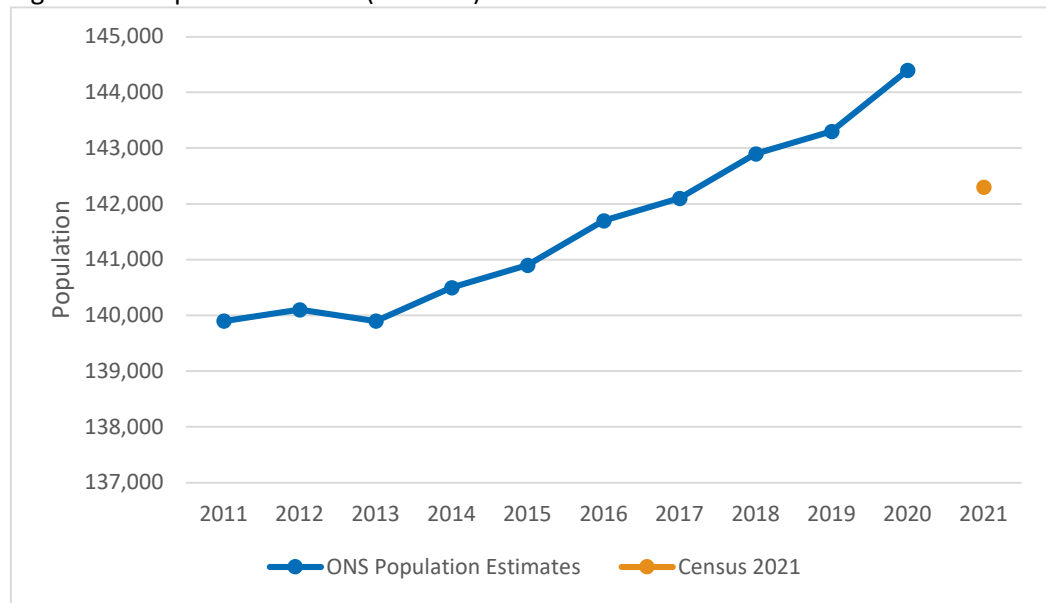
Figure 3.3: Population Change (2011-20)



Source: ONS; Turley analysis

- 3.7 Figure 3.4 shows the evolution of the overall population of NPT from 2011 to 2020. This shows that the population has grown in all but one of these nine years, with 2012/13 the exception when the population slightly declined by 0.1%. The last year notably saw the population grow by 0.8%, the largest annual rate of growth in the period shown. For reference the chart also includes a data point showing the population for NPT according to Census 2021 data. This point falls below the ONS population estimates for 2018 onwards, being circa 1.5% lower than the last reported estimate for 2020, thus indicating that they are likely to have been overestimates. It is, however, of note that the population of Wales was 2.0% lower than estimated by the ONS.

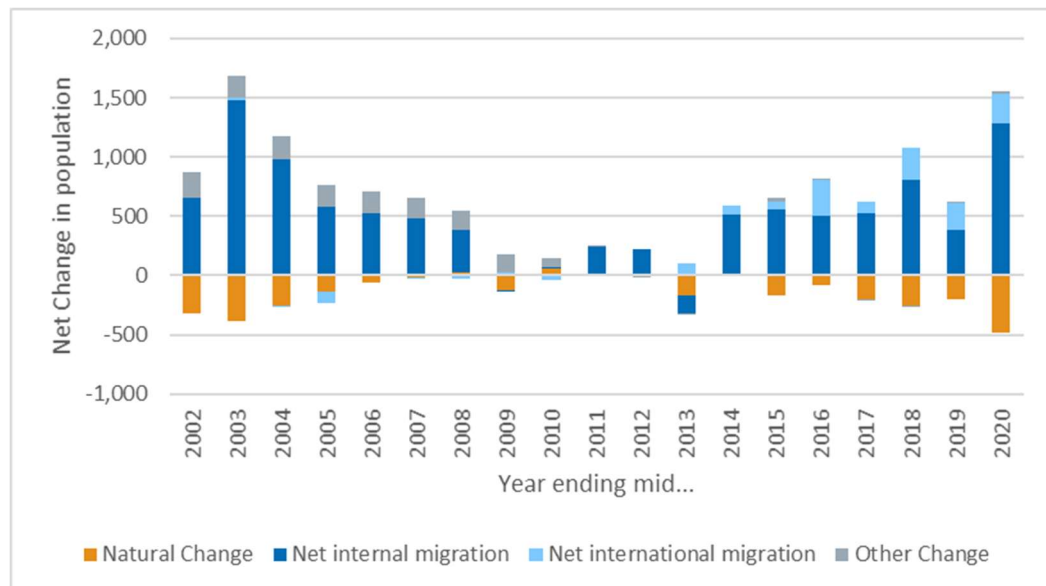
Figure 3.4: Population of NPT (2011-21)



Source: ONS Population Estimates and Census 2021

- 3.8 Consideration of the components of population change, using official ONS data, provides further insight on the factors that have increased the population of NPT. Whilst further data from the Census 2021 is awaited the analysis presented in Figure 3.5 shows the components of population change from 2002 to 2020.

Figure 3.5: Components of Population Change in NPT (2002-20)



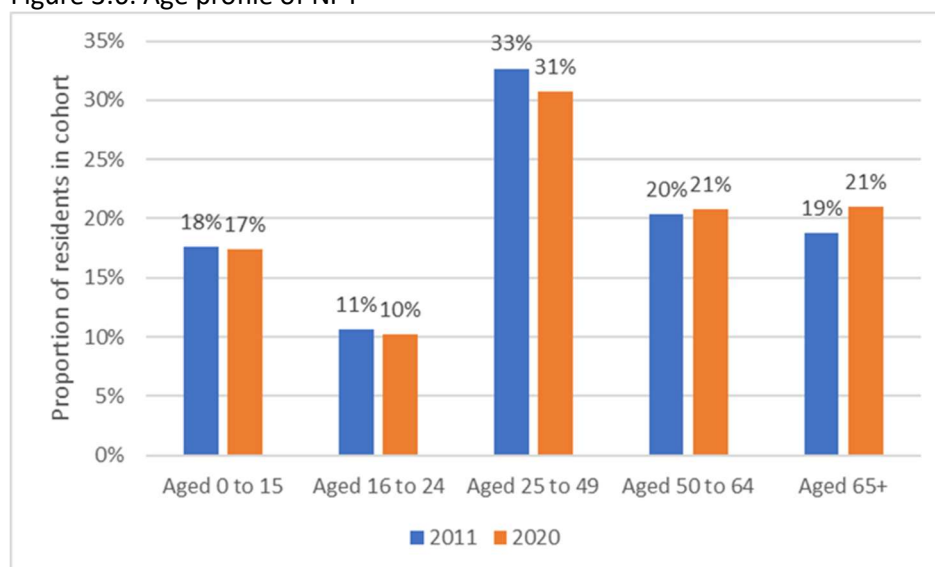
Source: ONS

- 3.9 Between 2011-2020, the major driver of positive population change has been net internal migration from the UK. This net inflow of migrants from elsewhere in the UK tends to be large and positive with the exception of 2013 across this period. There was

a net inflow of some 1,280 people over the year to mid-2020, the largest since 2002/03.

- 3.10 Natural change, the surplus of births over deaths, tends to be negative in this area (other than 2011 and 2014 over this period). This suggests that deaths tend to exceed births in NPT. From 2016 to 2020, there has been a general increase in the size of the negative effect of natural change (with the exception of 2019), thus suggesting that deaths are outnumbering births more strongly than previous years. There were 485 more deaths than births over the year to mid-2020, this being the largest imbalance in the period shown above, and while this could be attributed to excess deaths early in the pandemic further analysis suggests in the case of NPT that there were only slightly more deaths in that year – to June – than in the years prior<sup>24</sup>. The relatively large gap between deaths and births therefore appears to have been predominantly influenced by the relatively small number of the latter, with fewer recorded in 2019/20 than in any year since at least 2001.
- 3.11 The net inflow of international migrants was exceptionally small up to 2013, however the size of the net inflow of international migration has since increased. From 2013, the net inflow of international migration has added an average of 173 people to the population of NPT each year.
- 3.12 Figure 3.6 shows the age profile of the residents of NPT in 2011 and 2020, within broad groupings. Overall, this suggests limited change in the age profile over this period. It suggests that there has been a 1% decrease in the percentage of residents that are aged between 0 and 15 as well as between ages 16 to 24 and 25 and 49. Also, there has been a 1% increase in the percentage of the residents aged between 50 to 64 and a 2% increase in the percentage of residents ages 65+.

Figure 3.6: Age profile of NPT

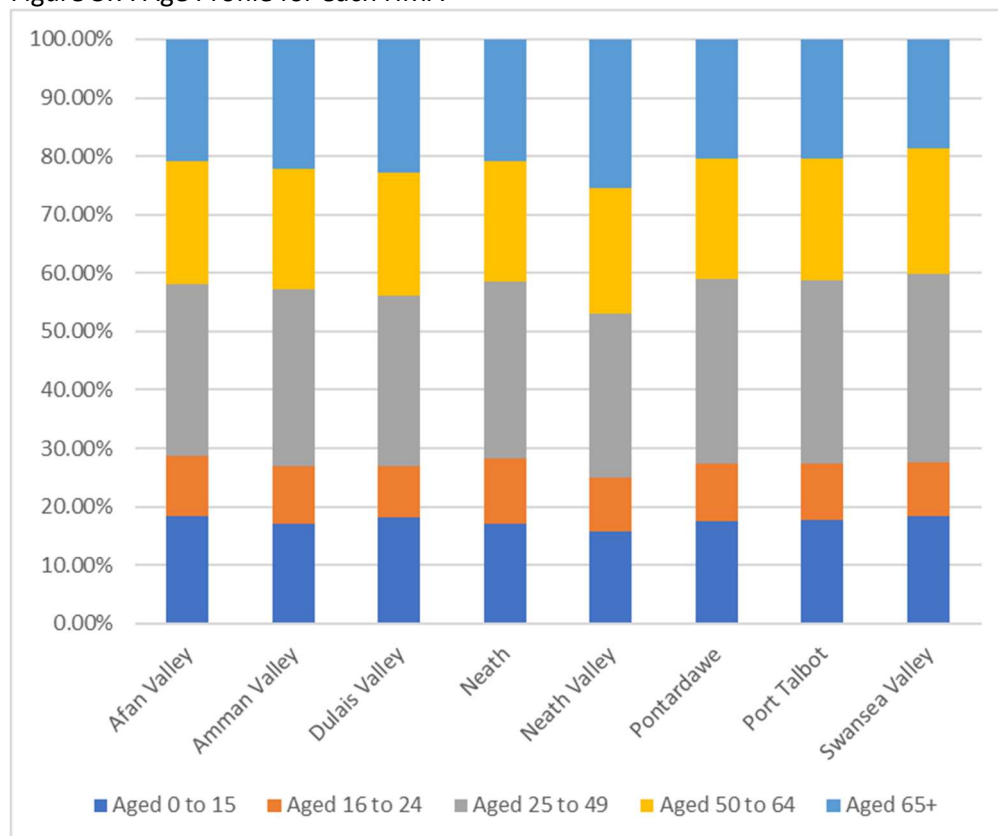


Source: ONS

<sup>24</sup> The data suggests that there were 1,742 deaths in NPT over the year to June 2020, only 22 more than recorded two years prior (2017/18) for example.

- 3.13 Figure 3.7 shows the age profile in 2020 for each HMA. Overall, there does appear to be a degree of similarity between the age profiles across the HMAs. On average, the proportion of the population aged 0-15 is 17.5%, between ages 16 and 24 the average proportion is 9.8%, for the age range 25-49 the average proportion is around 30.4%, 21% for the age range 50-64 and 21.5% for the age range 65+.
- 3.14 The population of Afan Valley has the highest proportion of people aged between 0 and 15 with this figure being 18.4% (Swansea Valley has a similar proportion of 18.3%). Neath has the highest proportion of residents aged between 16 and 24, likely at least partially influenced by its student population, with 11.2% of residents within this age range. Swansea Valley has the largest proportion of residents aged between 25 to 49 (32.2%) and also has the largest proportion of residents aged 50 to 64 (21.6%).
- 3.15 The population of Neath Valley seems to be the most aged of all the HMAs with c. 26% of the population being aged 65+. Likewise, this is reflected in having the lowest proportion of people between ages 0-15 with this age group accounting for c.16% of the population and has the second largest proportion of residents aged between 50-64 (21.5%).

Figure 3.7: Age Profile for each HMA



Source: ONS

### Households

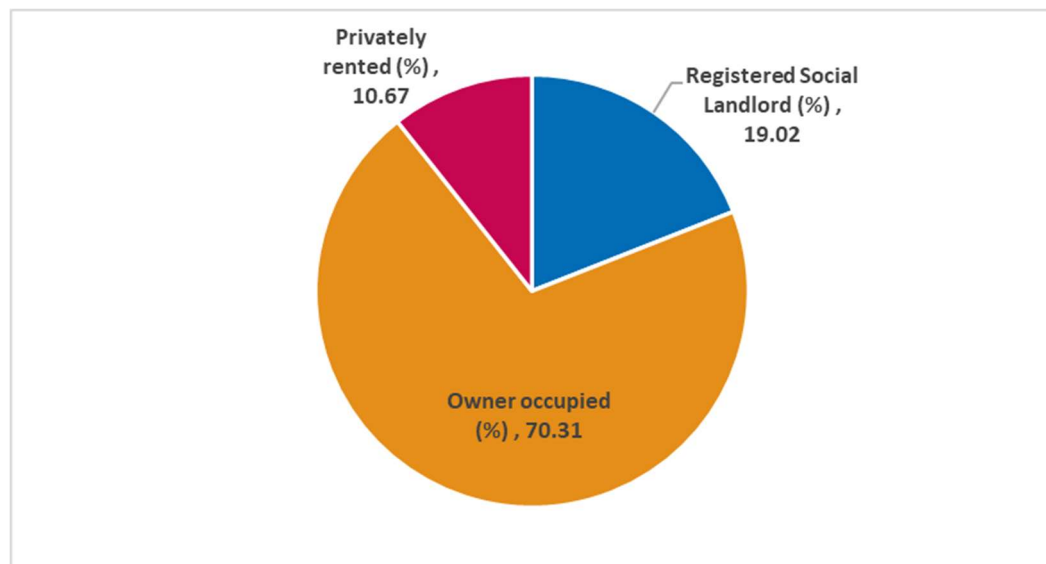
- 3.16 The 2021 Census reported that there were 62,400 households located in NPT, representing an increase of circa 2,000 households from the 2011 Census. This equates to a 3.3% increase in the number of households over this period.

- 3.17 In terms of the rate of change over this period, this is broadly in line with the 3.4% increase seen throughout Wales, with NPT seeing the 12<sup>th</sup> highest rate of growth amongst its 22 local authorities. The highest-ranking local authority for this metric is Newport, adding c. 8% new households between 2011-2021. The lowest- ranking local authority is Gwynedd, which experienced a c. 2.7% decrease in the number of households over this period.

### **Tenure**

- 3.18 Figure 3.8 shows the composition of the dwelling stock in NPT as of 2020, in terms of tenure<sup>25</sup>. The majority of the dwelling stock (70%) can be seen to be owner occupied, with there being an estimated 46,342 households living in this tenure. This is followed by Registered Social Landlords which accommodate circa 12,534 households, accounting for 19% of the overall dwelling stock. The remaining 7,033 households live in the private rented sector which accounts for circa 11% of the overall stock.

Figure 3.8: Household Tenure in NPT (2020)

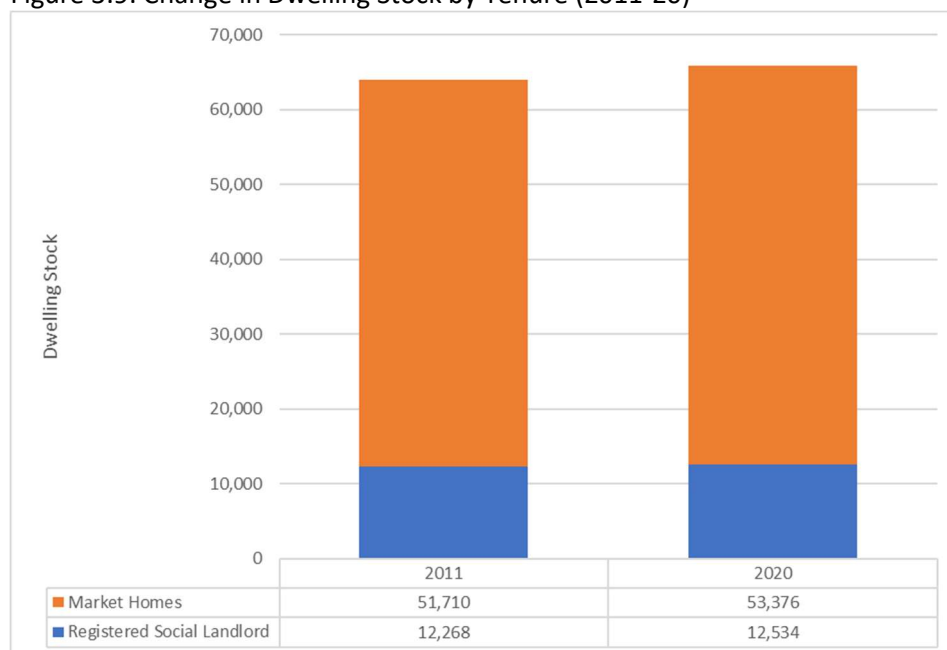


Source: StatsWales (2021)

- 3.19 Figure 3.9 shows the breakdown of the dwelling stock when categorised as market homes (owner occupied and privately rented due to data restrictions). From 2011-2020, it suggests that there has been a small increase in the number of Registered Social Landlord by 266 homes (c.2.2%). The number of market homes increased by 1,666 homes which equates to a 3.2% increase.

<sup>25</sup> StatsWales (2021) Dwelling stock estimates by year and tenure

Figure 3.9: Change in Dwelling Stock by Tenure (2011-20)



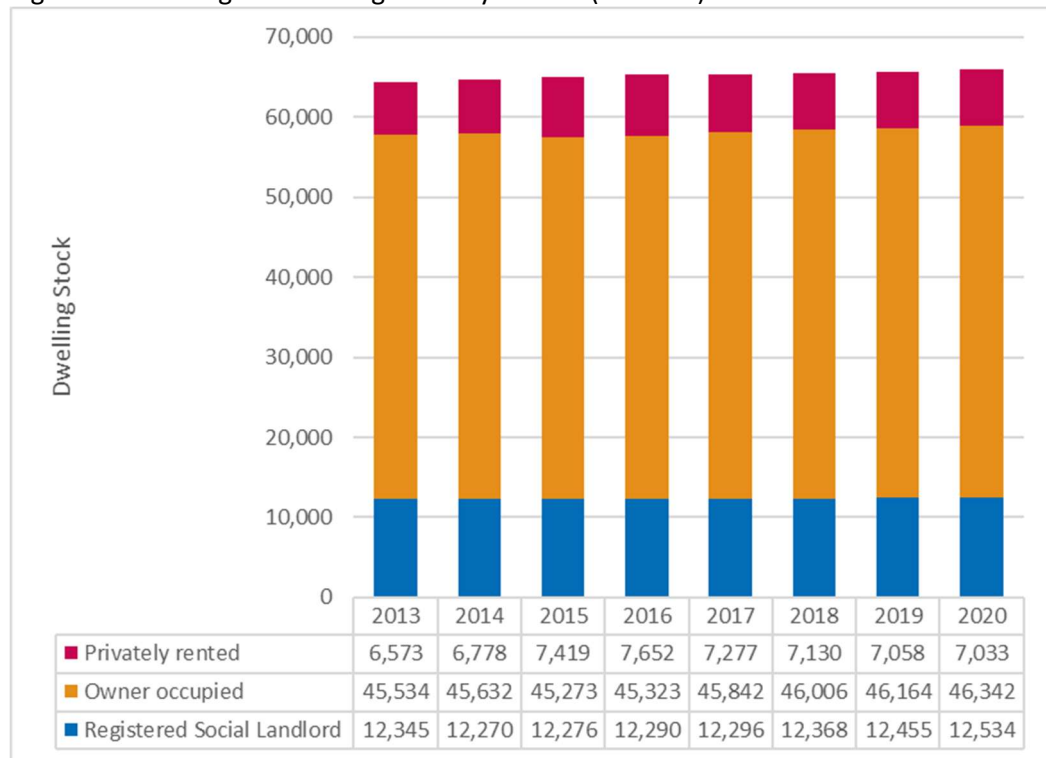
Source: StatsWales (2021)

- 3.20 Figure 3.10 shows how the overall size of the dwelling stock in NPT has changed between 2013 to 2020 (the period where this data breakdown is available)<sup>26</sup>. This indicates that the dwelling stock grew in this time by circa 1,458 homes, also growing in each individual year. This equates to a 2.2% increase in the total number of dwellings in NPT (or a 0.32% increase per year). As discussed above, the majority of dwellings are owner occupied. Owner occupied dwellings have driven the majority of the increase in the number of dwellings with an increase of 808 dwellings from 2013 to 2020. Privately rented dwellings increased by 461 dwellings and RSL dwellings increased by 188 dwellings<sup>27</sup>.

<sup>26</sup> StatsWales (2021) Dwelling stock estimates by year and tenure

<sup>27</sup> Ibid

Figure 3.10: Change in Dwelling Stock by Tenure (2013-20)



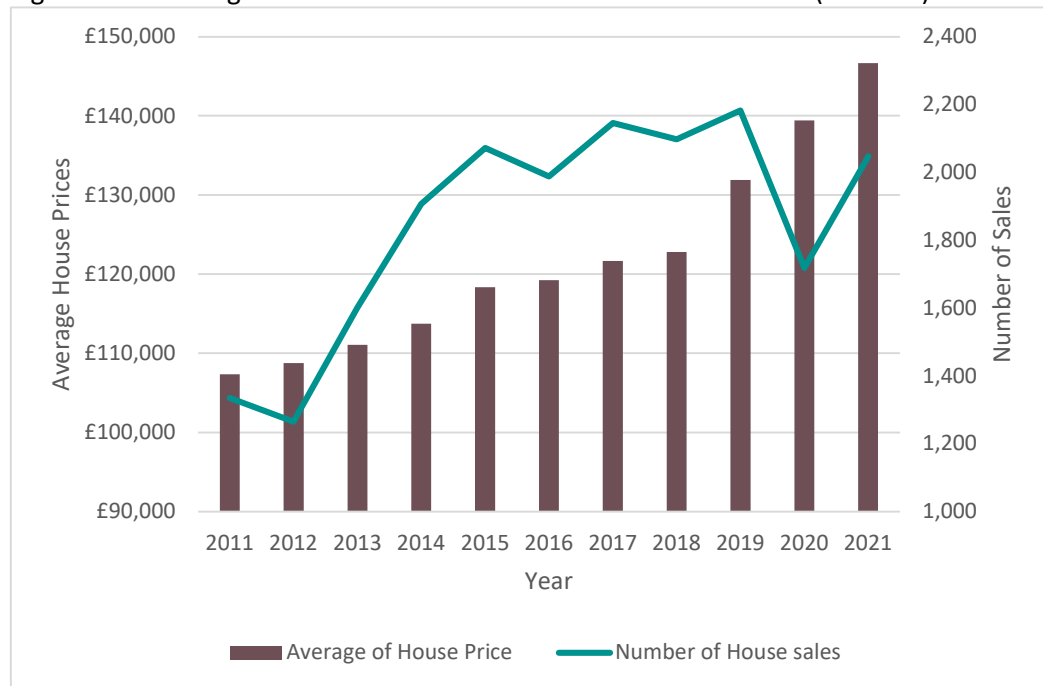
Source: StatsWales (2021)

### Owner occupiers

- 3.21 Figure 3.11 draws upon Land Registry data to show trends in the average price paid and the number of transactions per year from 2011 – 2021. The average price paid has increased in every year over this period, with the most sizable increase being from 2018-2019 when prices rose by some 7%. The average price paid reached its highest level in at least a decade in 2021, at circa £147,000.
- 3.22 The number of transactions per year has been more volatile over the decade than the average price paid. Between 2011 and 2012, there is a small decrease in the number of transactions. From 2012-2015, there was a sharp increase in the number of transactions up to around c.2,100. After 2015, there is a degree of volatility in terms of the direction and the magnitude of change (peaking at 2,145 transactions). There was a particularly large 21% decrease in the number of transactions between 2019 and 2020, likely as a result of the pandemic, but this was largely reversed in the subsequent year (2021) which saw the number of transactions rebound by 19%.



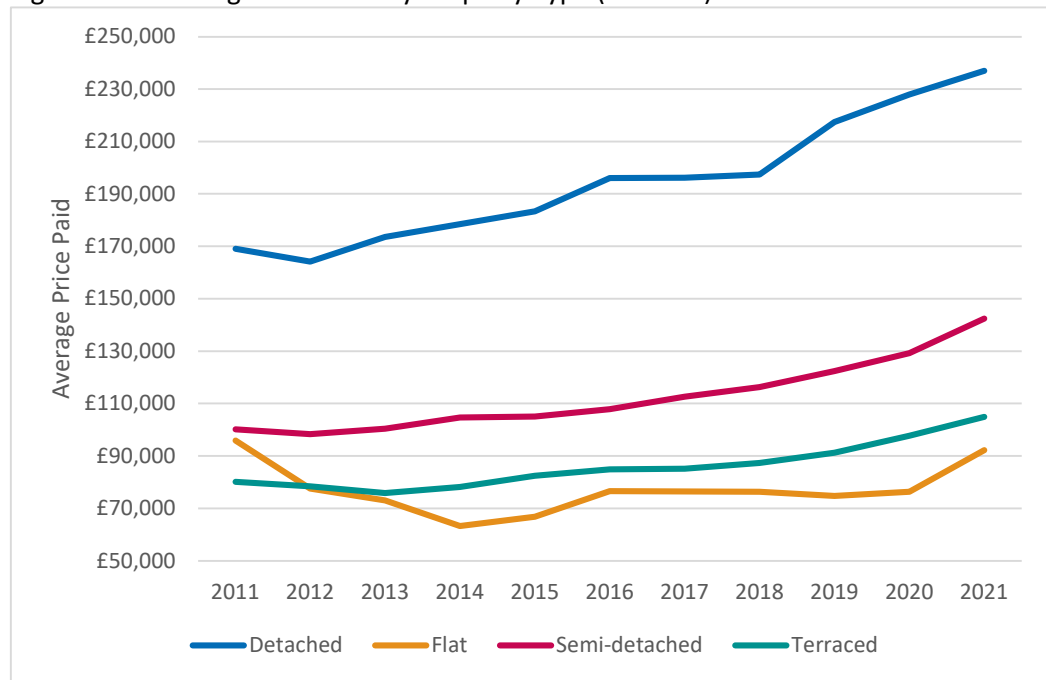
Figure 3.11: Average Price Paid and Number of Transactions in NPT (2011-21)



Source: Land Registry; Turley analysis

- 3.23 Figure 3.12 shows the average price paid for different property types between 2011 and 2021. This confirms that there has been a general increase in prices across detached, semi-detached and terraced properties, with a decrease in the average price paid for flats. Semi-detached properties have experienced the largest increase in average price paid, rising by some 42%. Detached and terraced houses also saw consistent growth, where the average price paid increased by 40% and 31% respectively between 2011 and 2021. The average price paid for flats decreased by around 4% in this time and this notably included a period – between 2011 and 2014 – when the average price paid fell.

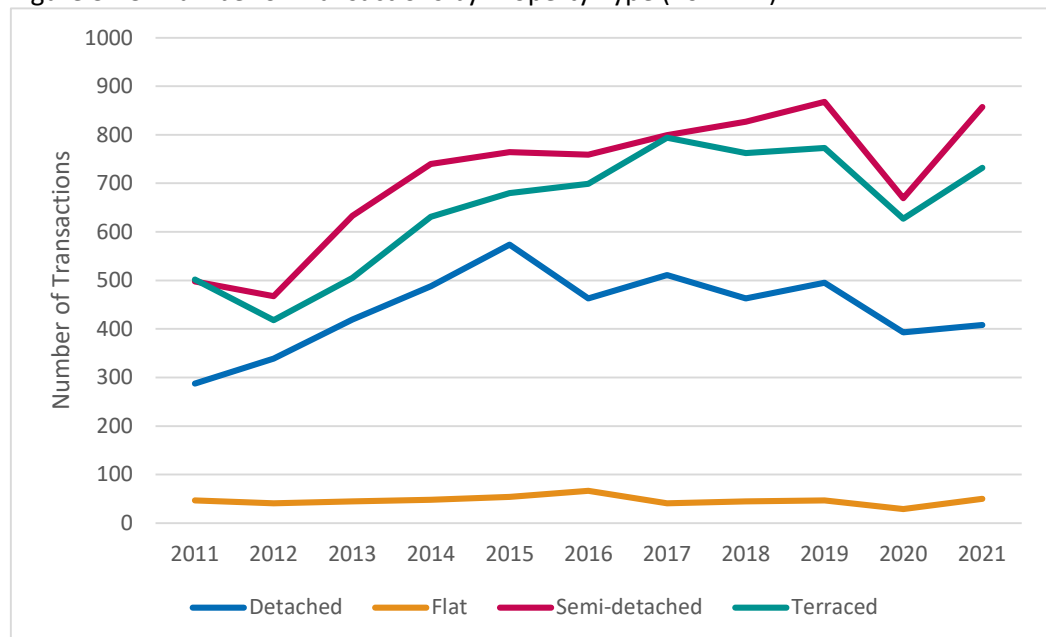
Figure 3.12: Average Price Paid by Property Type (2011-21)



Source: Land Registry; Turley analysis

- 3.24 Figure 3.13 shows the number of transactions for each type of property each year. The property type with the fewest number of transactions was flats, with this trend being consistent throughout the period shown. Semi-detached and terraced houses were in contrast the most frequently purchased. Detached houses were increasingly sold early in the period shown, peaking in 2015, but there has since been a general decline in the number sold and purchased.

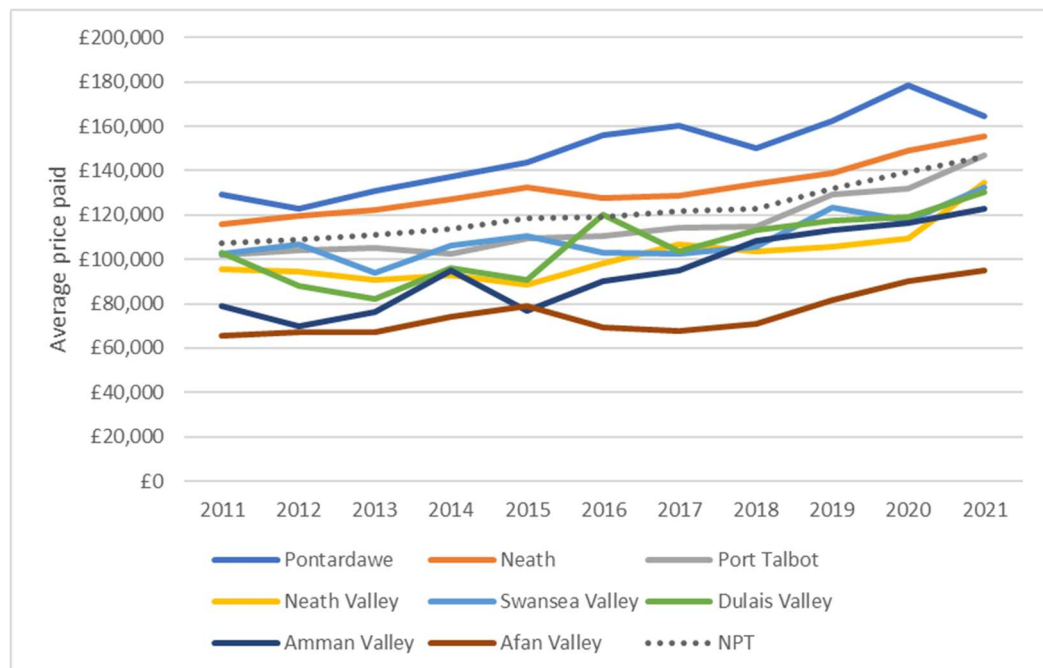
Figure 3.13: Number of Transactions by Property Type (2011-21)



Source: Land Registry; Turley analysis

- 3.25 The earlier Figure 2.3 showed how house prices vary between the different HMAs in NPT, with prices in Pontardawe substantially higher last year than in Afan Valley for example. Figure 3.14 shows that this has been the case for much of the last decade, with Pontardawe consistently having the highest average prices and Afan Valley having the lowest in all but one year, being temporarily displaced in 2015 by Amman Valley which subsequently saw prices rise by some 60%, more than any other area. It is of note that the smallest increases, in proportionate terms, have been seen in Pontardawe and Neath with both areas nonetheless established as having the highest average prices in NPT. This may also have been influenced by the prevalence of newly built properties in these areas, compared to other HMAs.

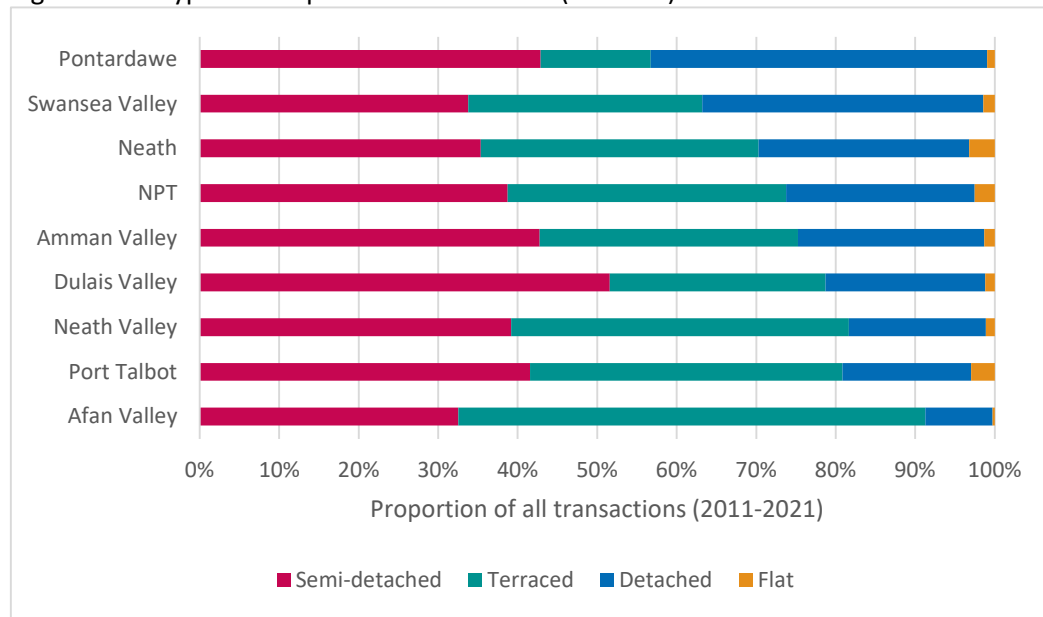
Figure 3.14: Average Price Paid by HMA (2011-21)



Source: Land Registry; Turley analysis

- 3.26 The consistently high prices seen in Pontardawe are likely a reflection of the detached properties that are more frequently sold in that area, to the extent that some 42% of sales recorded over the last decade have involved such a property; the most of any HMA. Afan Valley has in contrast offered few such properties, with 91% of all sales instead involving semi-detached or terraced houses.

Figure 3.15: Types of Properties Sold in HMAs (2011-21)



Source: Land Registry; Turley analysis

- 3.27 Table 3.1 shows the number of transactions per year from 2011-2021. There has generally been growth in the number of transactions across all of the HMAs over this period, with the exception of Swansea Valley, where the number of transactions remained broadly consistent. The largest increase in the relative terms occurs in Amman Valley (a c. 204% increase in the number of sales). In 2020, there was a sharp decrease in the number of transactions (with the exception of Dulais Valley), which is likely to be a result of the Covid-19 pandemic.

Table 3.1: Number of Transactions by HMA (2011-2021)

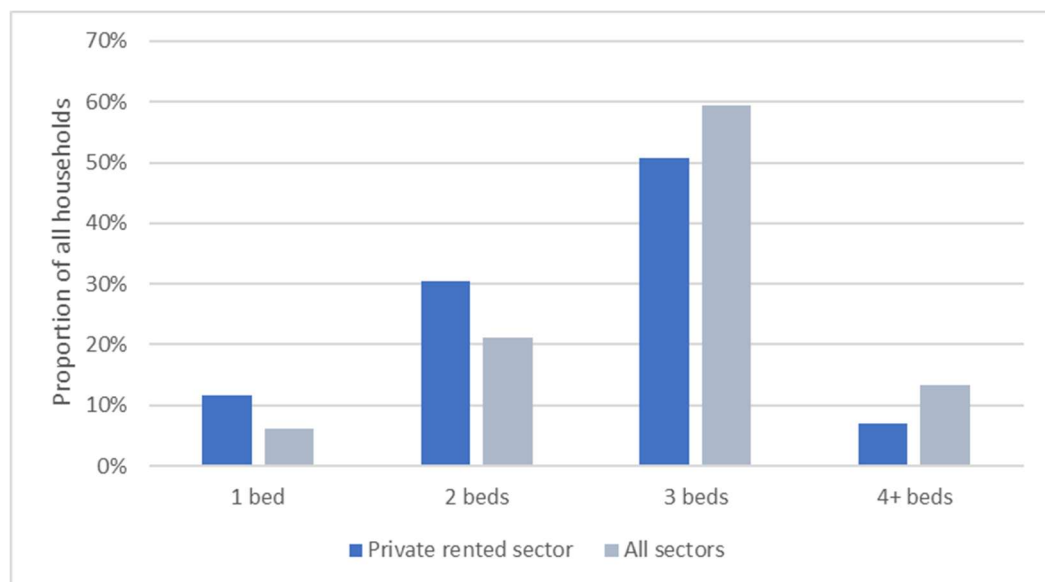
HMA	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Afan Valley	45	39	47	64	87	71	68	82	93	47	79
Amman Valley	24	33	36	57	40	49	53	58	63	47	73
Dulais Valley	46	47	48	62	65	69	85	74	44	58	65
Neath	493	502	665	751	815	814	847	877	862	662	756
Neath Valley	91	67	98	96	99	113	103	123	122	99	140
Pontardawe	101	105	164	165	205	184	225	171	212	181	169
Port Talbot	438	380	480	585	644	593	668	618	698	542	662
Swansea Valley	94	92	60	121	113	86	91	87	81	70	94

Source: Land Registry; Turley analysis

### ***Private rented sector***

- 3.28 The WG estimated that there were around 7,030 households privately renting their home in NPT as of 2020, with this having risen by around 7% since 2013. This was shown by the earlier Figure 3.10.
- 3.29 This dataset offers no further insight into the type of housing available in the private rented sector, and nor can it be broken down into HMAs. As such, it is necessary to revert to the findings of the 2011 Census which continues to provide the most up-to-date information on these aspects.
- 3.30 It found that just over half (51%) of private renters in NPT had three bedrooms, this being slightly less common than it was across all tenures (59%). Only 7% were occupying larger properties whereas some 42% had only one or two bedrooms, the latter far exceeding the equivalent figure across all tenures (27%).

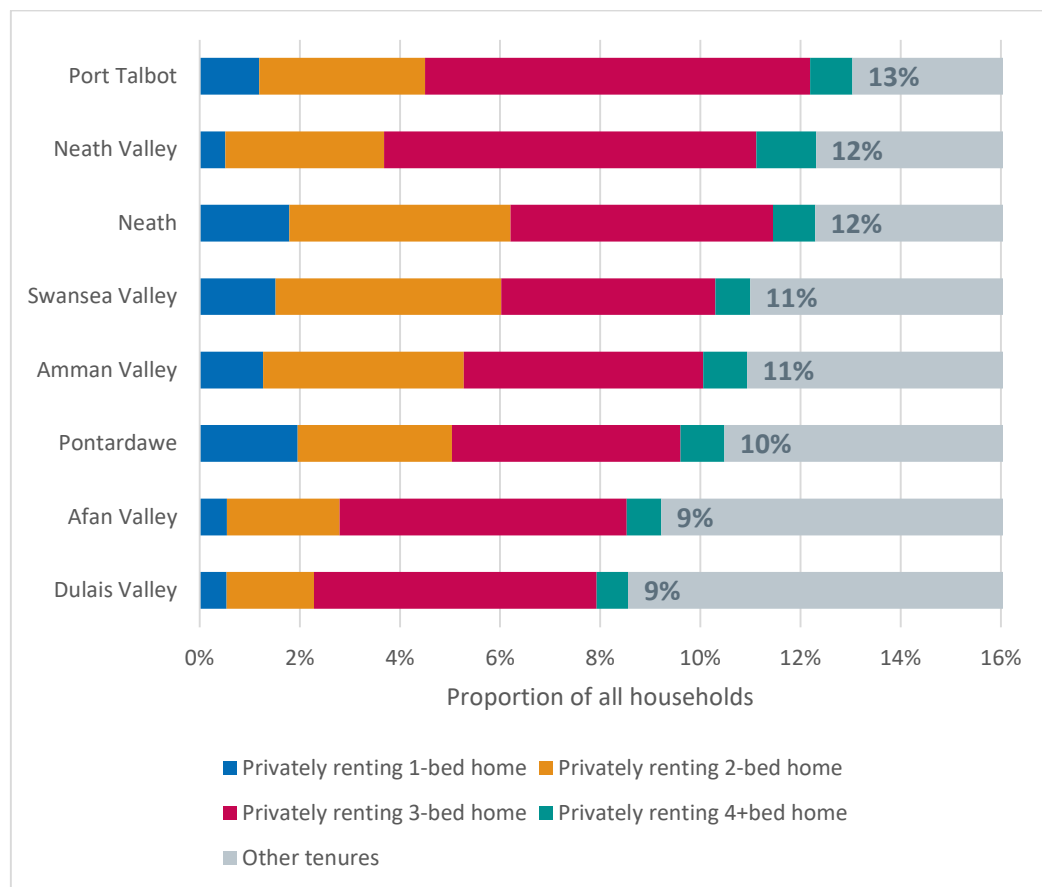
Figure 3.16: Size of Housing Occupied in Private Rented Sector (2011)



Source: Census 2011

- 3.31 Port Talbot had the largest private rented sector in proportionate terms, accommodating 13% of all households and thus surpassing the average for NPT (12%). In contrast, only 9% of households in Afan Valley and Dulais Valley were privately renting their home as of 2011. This is shown at Figure 3.17, which also breaks down the proportion that were privately renting their home to provide an indication of its size. This shows that three bedroom properties were the most common in most areas' private rented sectors, with the sole exception of Swansea Valley where there were slightly more two bedroom properties for rent. Indeed, that area had the greatest skewing towards smaller properties in general, with 55% of privately rented properties having no more than two bedrooms. Neath was the only other area to exceed 50% in this regard.

Figure 3.17: Rate of Private Renting and Size of Property Occupied by HMA<sup>28</sup> (2011)



Source: Census 2011

- 3.32 Rent Officers Wales (ROW) have analysed circa 1,511 rentals throughout NPT, over the year to April 2022, and confirmed that over half (53%) had three bedrooms with such properties costing around £524 per month at the midpoint of the market. This was around 15% more than the median rent for a two bedroom property, which itself was 17% higher than the median rent for a one bedroom property. Rents at the 30<sup>th</sup> percentile, also supplied by ROW, were unsurprisingly lower.

Table 3.2: Cost of Privately Renting in NPT (2021/22)

	1 bed	2 beds	3 beds	4+ beds
Number of rentals	133	518	799	61
30 <sup>th</sup> percentile	£337	£425	£477	£550
50 <sup>th</sup> percentile (median)	£390	£455	£524	£625

Source: Rent Officers Wales

<sup>28</sup> Households in "other tenures" are not privately renting, so may be owner occupiers or in social rented housing for example

- 3.33 This data was also broken down to HMAs, albeit this naturally reduced sample sizes to the point where average rents could not be reliably reported by ROW<sup>29</sup>. This nonetheless suggests that rents are highest in Neath and Pontardawe, in line with these areas' relatively high house prices which was highlighted at the earlier Figure 3.13.

Table 3.3: Cost of Privately Renting by HMA (2021/22)

		1 bed	2 beds	3 beds	4+ beds	Total
Port Talbot	No. rentals	52	187	411	26	<b>676</b>
Port Talbot	30 <sup>th</sup> percentile	£327	£412	£477	£498	–
Port Talbot	Median	£359	£450	£500	£550	–
Neath	No. rentals	43	220	250	18	<b>531</b>
Neath	30 <sup>th</sup> percentile	£372	£450	£495	£677	–
Neath	Median	£400	£495	£548	£793	–
Neath Valley	No. rentals	8	22	45	4	<b>79</b>
Neath Valley	30 <sup>th</sup> percentile	£326	£363	£450	•	–
Neath Valley	Median	£393	£413	£525	•	–
Swansea Valley	No. rentals	14	43	19	3	<b>79</b>
Swansea Valley	30 <sup>th</sup> percentile	£350	£420	£488	•	–
Swansea Valley	Median	£390	£430	£525	•	–
Pontardawe	No. rentals	4	24	37	6	<b>71</b>
Pontardawe	30 <sup>th</sup> percentile	•	£495	£520	£638	–
Pontardawe	Median	•	£540	£575	£663	–
Afan Valley	No. rentals	12	17	24	0	<b>53</b>
Afan Valley	30 <sup>th</sup> percentile	£325	£400	£411	•	–
Afan Valley	Median	£325	£430	£430	•	–
Dulais Valley	No. rentals	0	2	11	3	<b>16</b>
Dulais Valley	30 <sup>th</sup> percentile	•	•	£450	•	–
Dulais Valley	Median	•	•	£525	•	–
Amman Valley	No. rentals	0	3	2	1	<b>6</b>
Amman Valley	30 <sup>th</sup> percentile	•	•	•	•	–
Amman Valley	Median	•	•	•	•	–

Source: Rent Officers Wales

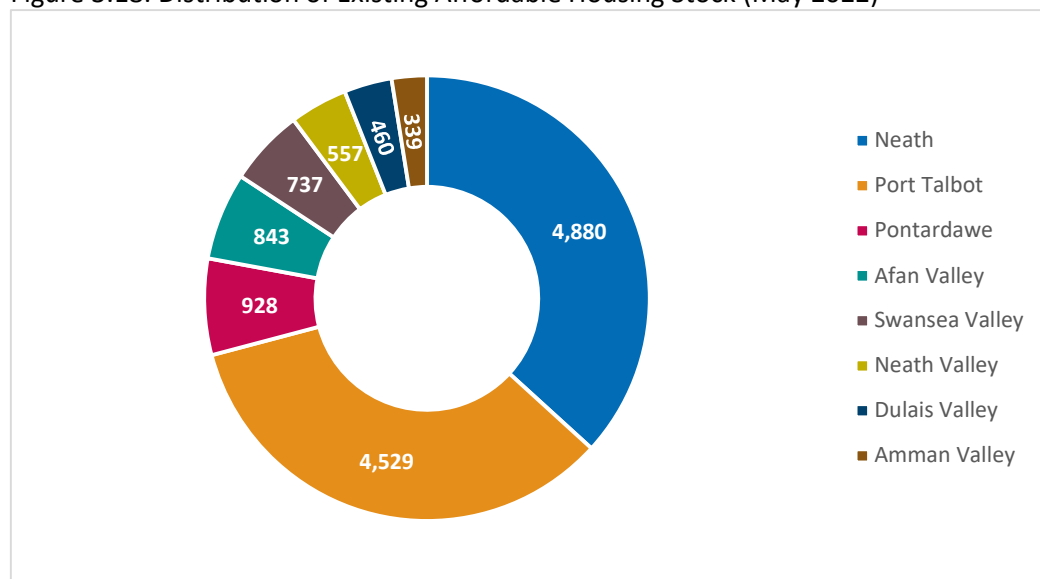
• insufficient data

<sup>29</sup> ROW opted not to calculate percentile figures for HMAs that recorded fewer than 5 rentals

### ***Affordable housing sector***

- 3.34 The Council surveyed a number of RSLs in February 2022 to establish the stock of affordable housing throughout NPT, to inform the production of its Social Housing Grant Prospectus. It subsequently undertook further work to inform the RRTP, which was prepared in April-May 2022 when there were reportedly circa 13,273 affordable homes throughout NPT<sup>30</sup>. Neath and Port Talbot were each responsible for more than a third of the county borough's affordable homes at that point. Pontardawe had the next largest number, followed by Afan Valley and Swansea Valley.

Figure 3.18: Distribution of Existing Affordable Housing Stock (May 2022)



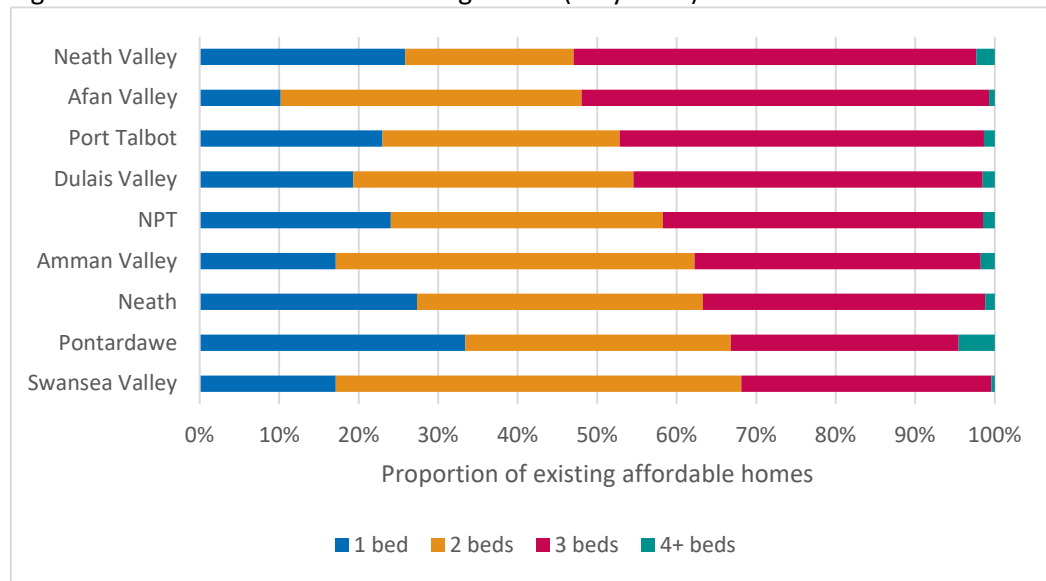
Source: Council survey

- 3.35 Around 40% of the existing affordable housing stock in NPT is reported to contain three bedrooms, such homes accounting for the largest share of the overall stock. This notably rises as high as 51% in Afan Valley but is as low as 29% in Pontardawe, this HMA containing a relatively large number of affordable homes with at least four bedrooms and also being distinctive for its offer of one-bed homes which account for a third of its affordable housing stock. This is evidently much higher than the equivalent figure of 24% for the whole of NPT.

<sup>30</sup> This slightly differs from the figure of 13,259 reported at Table 13 of the RRTP, having been reviewed to reflect more detailed data from Linc Cymru which is now available



Figure 3.19: Size of Affordable Housing in NPT (May 2022)



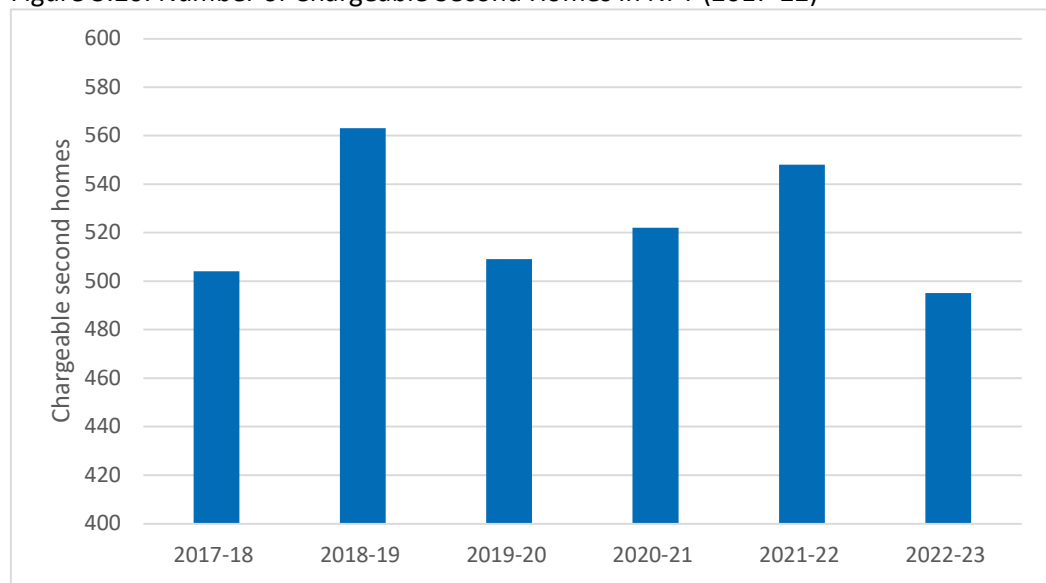
Source: Council survey

### Second homes

- 3.36 Council Tax data published by the WG indicates that there are currently 495 second homes throughout NPT, albeit it is important to recognise that not all will be holiday homes with some properties categorised as such if their owner moves in with relatives or is in the process of selling<sup>31</sup>. Circa 0.8% of all dwellings in NPT are second homes, with this being less than half the rate recorded for Wales as a whole (1.7%).
- 3.37 The number of second homes in NPT has fluctuated in recent years, peaking when 563 were recorded in 2018/19 but reducing by around 10% in the subsequent year. While this was followed by another rise of 8% over two years, there appears to have again been another fall of 10% ahead of the current year (2022/23).

<sup>31</sup> WG (2022) Council tax dwellings, by local authority (number of dwellings) 2022/23

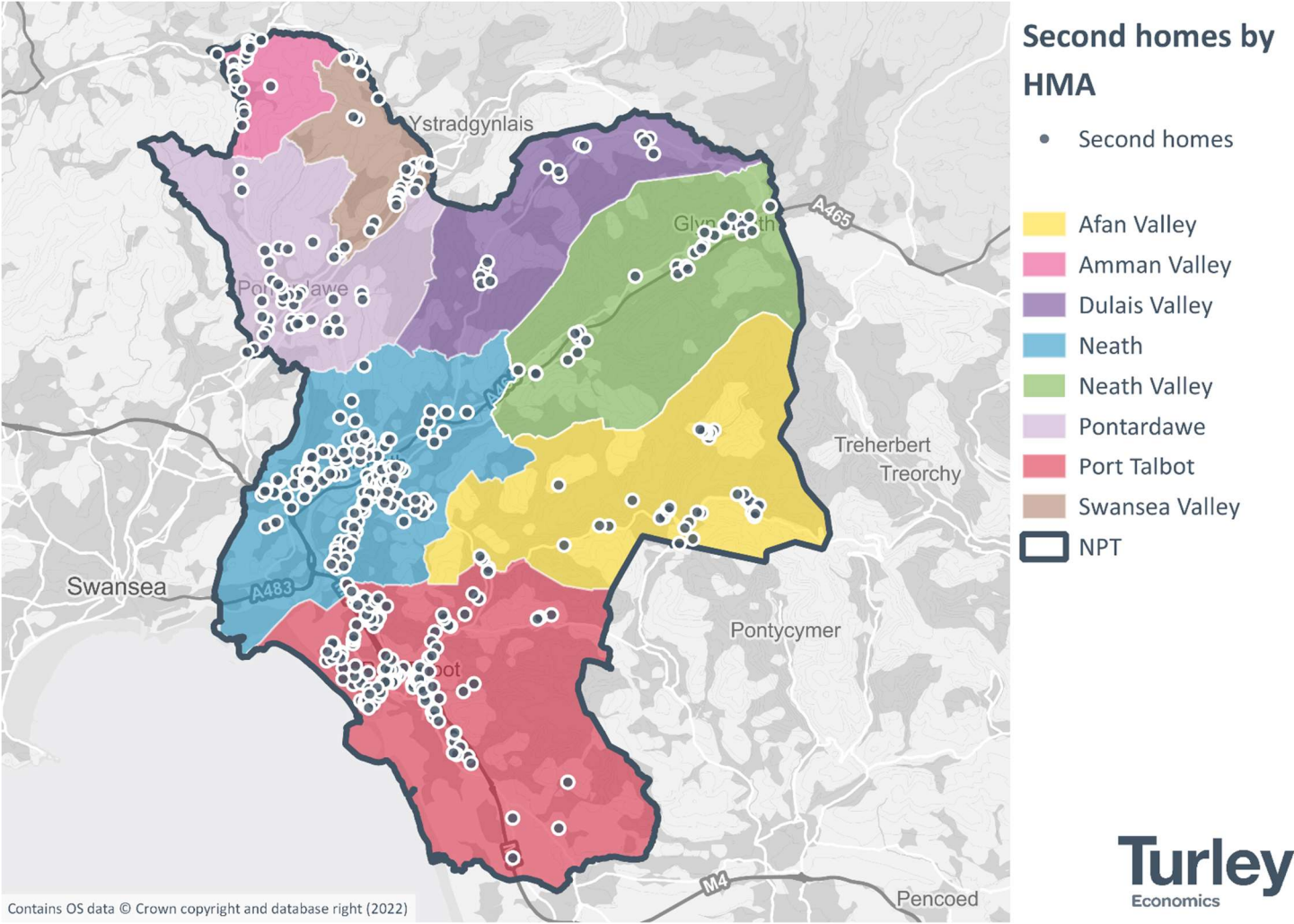
Figure 3.20: Number of Chargeable Second Homes in NPT (2017-22)



Source: WG

- 3.38 The Council has supplied further data showing the precise location of the 508 second homes that it recorded in June 2022. This is illustrated at Figure 3.21 overleaf, and shows that second homes are spread throughout every HMA, with grouping around transport corridors and the greatest number in Port Talbot and Neath.

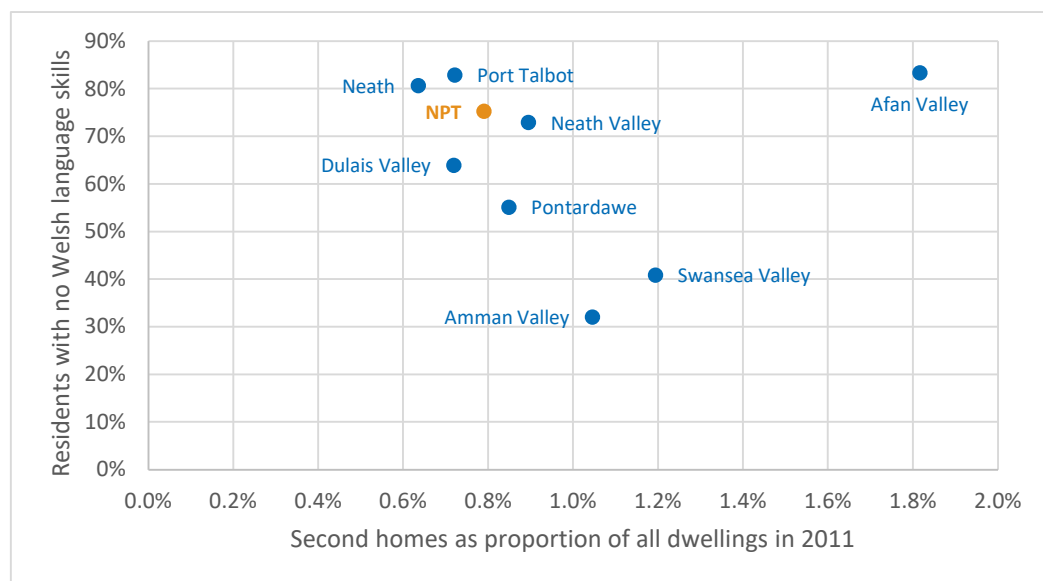
Figure 3.21: Location of Second Homes by HMA (June 2022)



Source: Council monitoring

- 3.39 Afan Valley is reported to have the most second homes relative to the size of its dwelling stock, as recorded by the 2011 Census which continues to provide the most up-to-date dwelling counts for the HMAs at the time of writing. With the guidance requiring the implications of second homes for the Welsh language to be considered – even if, as noted above, they are not necessarily holiday homes – it can be observed that Afan Valley also had the highest proportion of residents with no skills in Welsh as of the 2011 Census. It can, however, equally be noted that Port Talbot and Neath had the next-most residents with no skills in Welsh while having amongst the *lowest* number of second homes. This suggests that there is not necessarily a direct relationship between these two indicators as indeed is clear from Figure 3.22.

Figure 3.22: Relationship between Second Homes and Welsh Language



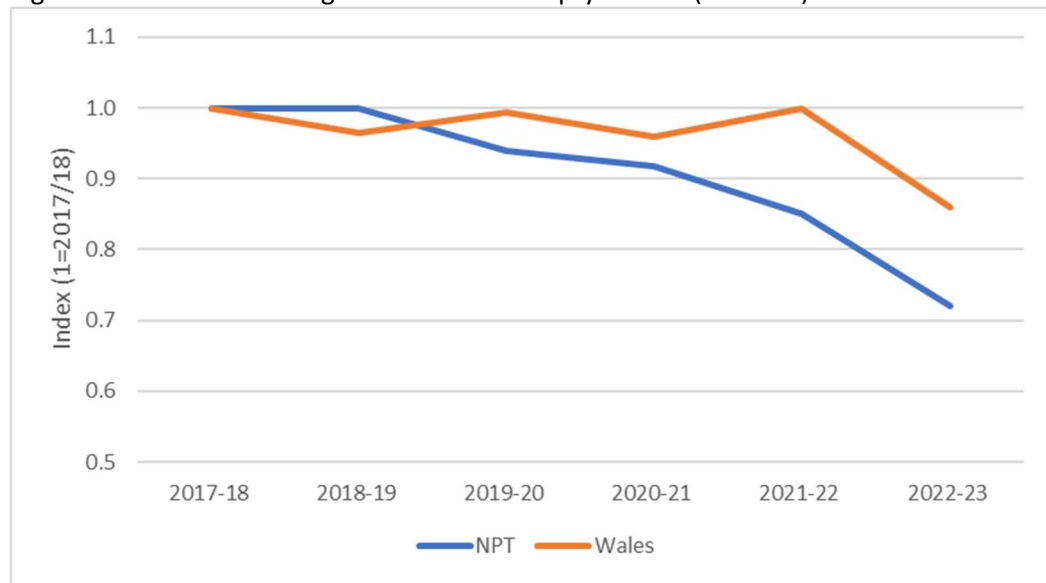
Source: Council monitoring; Census 2011; Turley analysis

### Empty homes

- 3.40 Council Tax data published by the WG indicates that there are currently 1,060 long-term empty properties in NPT<sup>32</sup> as of 2022. This roughly equates to one in every sixty homes (1.6%) and closely aligns with the average for Wales as a whole.
- 3.41 There can be many reasons for a property to be empty, for instance if its owner has moved into a care home while wishing to retain their family home, or if it is being substantially renovated. The Council is nonetheless understood to have been focusing on returning empty properties to use over recent years, and in this context it is notable that the number of long-term empty properties has declined in each of the last five years with a particularly sharp fall of 15% over the last year alone. While Wales also saw a relatively pronounced fall last year, it has also seen increases in the number of long-term empty properties in two of the past five years.

<sup>32</sup> WG (2022) Council tax dwellings by local authority (number of dwellings)

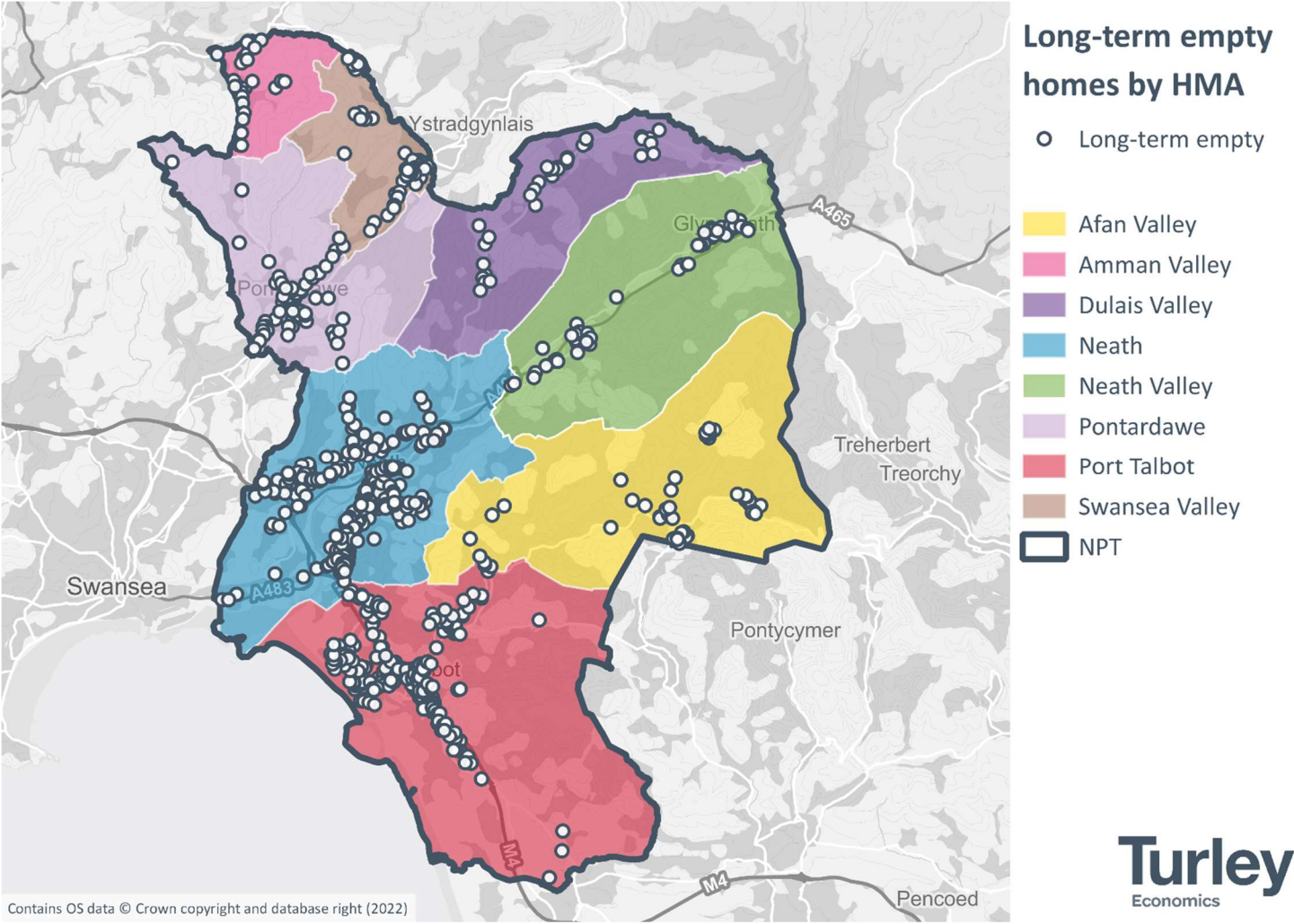
Figure 3.23: Indexed Change in Number of Empty Homes (2017-22)



Source: Welsh Government

- 3.42 The Council has again supplied further data showing the precise location of the 1,131 long-term empty properties that it recorded in June 2022, demonstrating – at Figure 3.24 overleaf – how they are distributed between all eight HMAs and clustered around the road network.

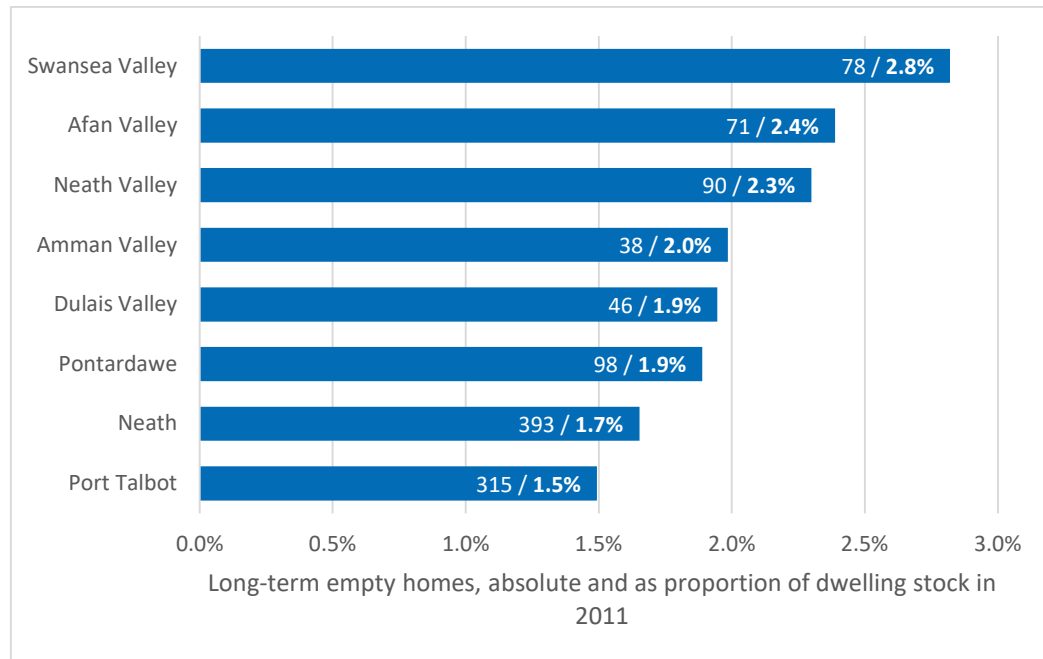
Figure 3.24: Location of Long-term Empty Homes by HMA (June 2022)



Source: Council monitoring

- 3.43 Neath and Port Talbot reportedly have the most long-term empty homes, in absolute terms, but it is of note that these areas also have the *fewest* when measured as a proportion of their dwelling stock in 2011. Swansea Valley is implied to have the most long-term vacant homes when measuring in this way, followed by Afan Valley.

Figure 3.25: Number and Proportion of Long-term Empty Homes by HMA



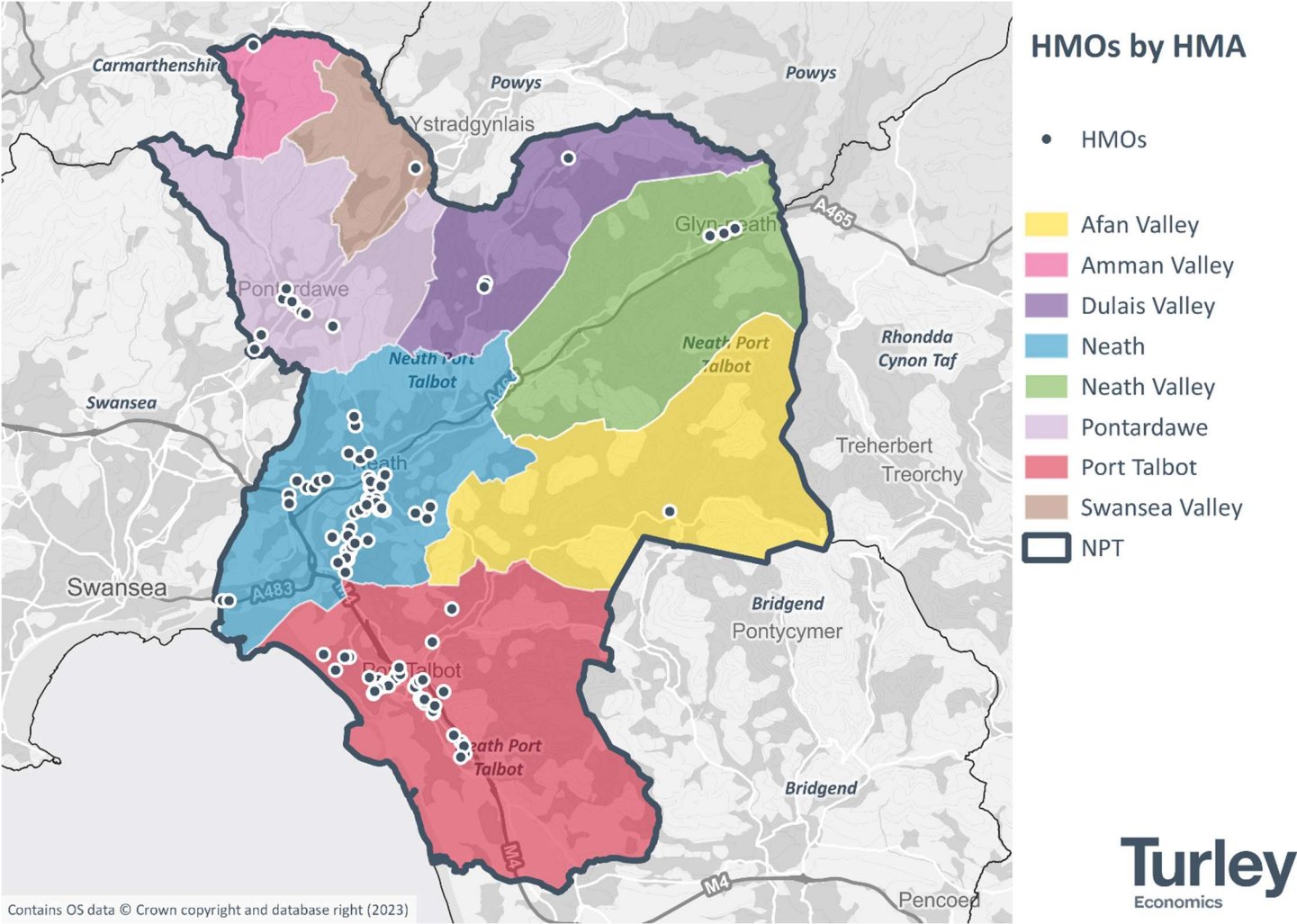
Source: Council monitoring; Census 2011; Turley analysis

#### ***Houses in Multiple Occupation (HMOs)***

- 3.44 The Council maintains a record of the Houses in Multiple Occupation (HMOs) that are located in NPT. This suggests that there are currently around 131 such properties, more than half of which (52%) are in Neath with a further third being in Port Talbot. Pontardawe has the next most, with nine, but no other HMA is reported to have more than three HMOs as can be seen from Figure 3.26 overleaf.



Figure 3.26: Location of HMOs by HMA



Source: Council monitoring

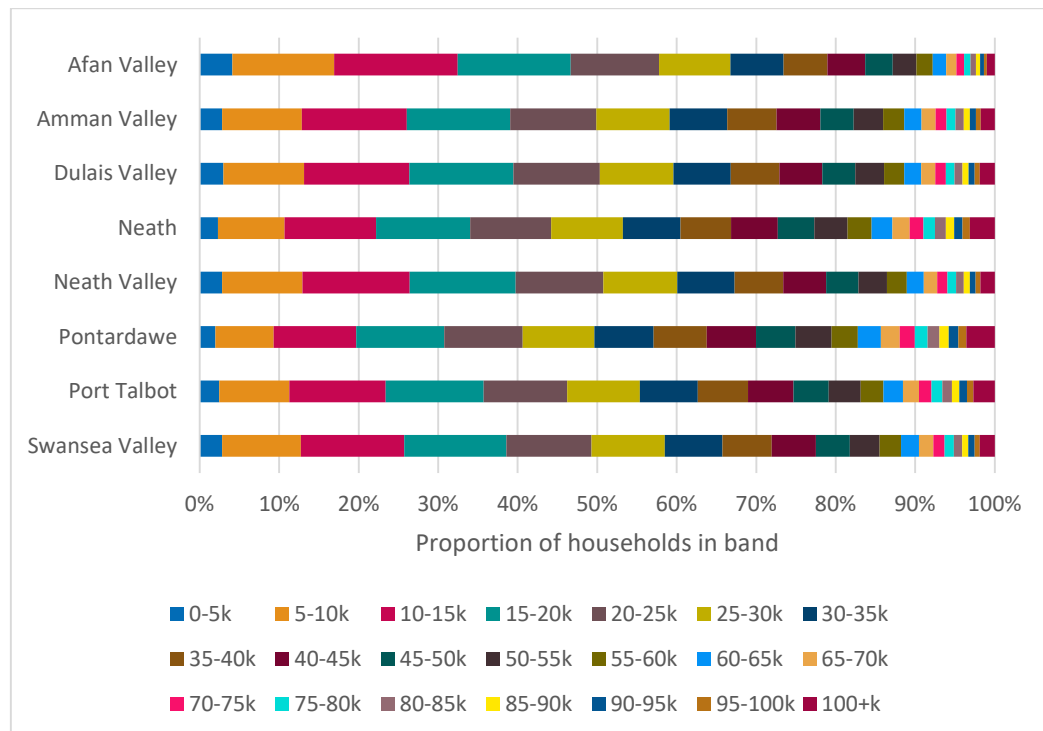


## Socio-economic and demographic trends

### Household income

- 3.45 Paycheck data, produced by CACI, provides an indication of the variation in household income between the different HMAs. It estimates the proportion of households whose gross income – which can include benefits or pensions – falls within different bands, and thus enables distinctions to be made between different areas using Figure 3.27.
- 3.46 Afan Valley can be seen to have the most households in lower income bands, with almost half of its households (47%) having an income of less than £20,000 per annum. No other HMA has an equivalent figure of more than 40%, that being recorded in Neath Valley. Only 31% of households in Pontardawe have an income of less than £20,000, and indeed one in four – more than any other HMA – earn over £50,000 per annum. Neath and Port Talbot have the next-most households in these higher income bands (23/21% respectively).

Figure 3.27: Household Income by Band (2022)



Source: CACI

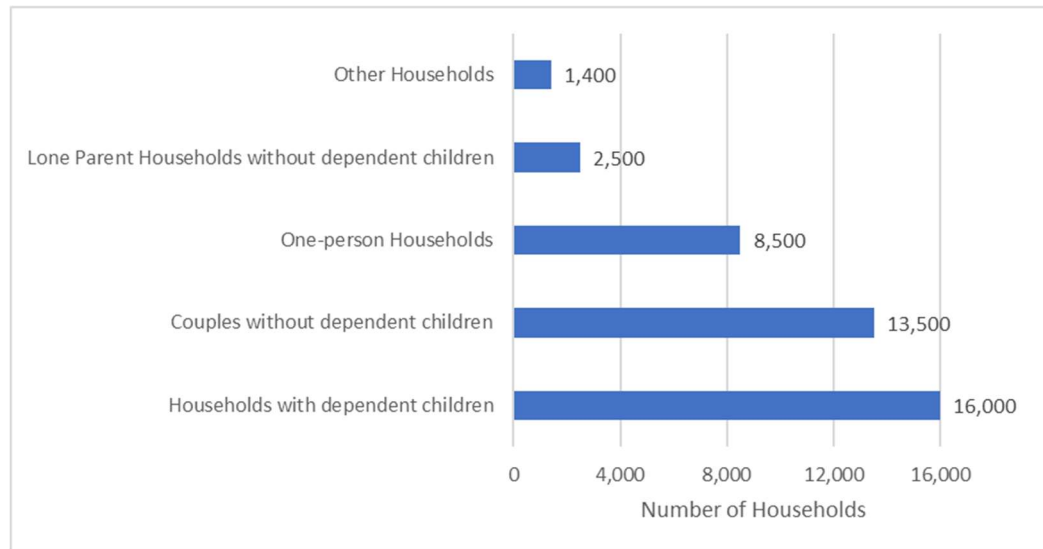
### Household composition

- 3.47 Figure 3.28 shows the breakdown of each household type in 2020 in NPT according to the most recent published findings from the APS<sup>33</sup>. The largest household type is households with dependent children which accounts for 16,000 households (around 38% of households). The second largest household category is couples without dependent children which accounts for 13,500 households. Around 8,500 households within NPT in 2020 are one-person households and 2,500 are lone parent households

<sup>33</sup> ONS via Nomis (2022) APS- households with dependent children and type

without dependent children. Finally, there are around 1,400 households that do not fall within these categories, being multiple unrelated adults living together for example.

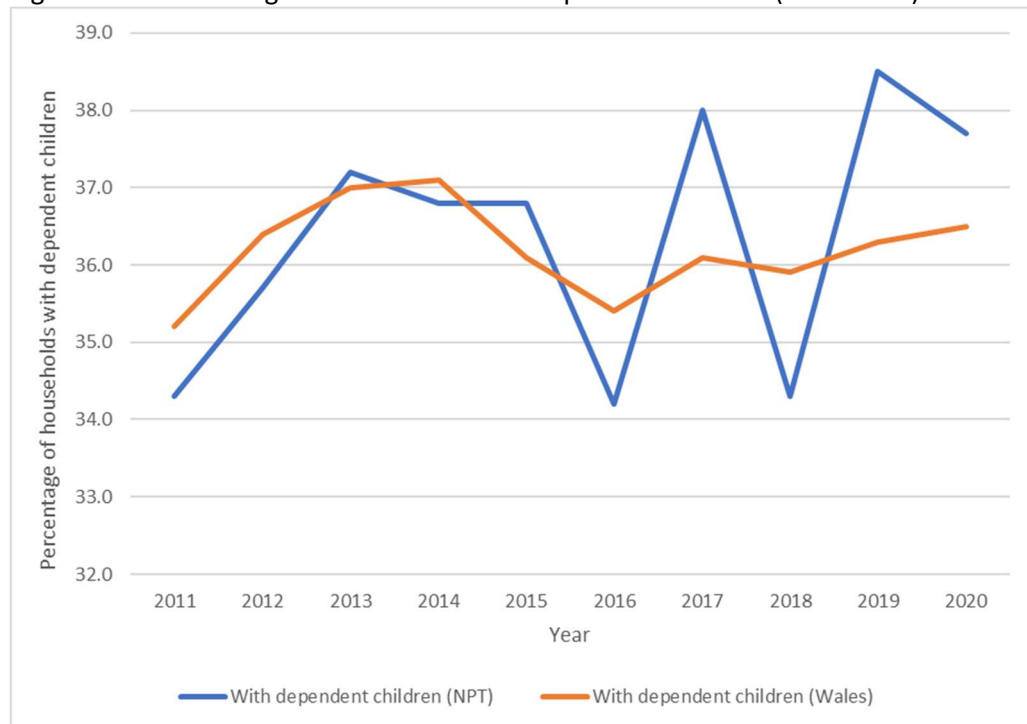
Figure 3.28: Households profile for NPT in 2020



Source: ONS, APS (2020)

- 3.48 Figure 3.29 draws upon the same dataset and shows how the percentage of households with dependent children has changed between 2011-2020 for both NPT and Wales, where this is the largest household group. Over this period, the direction of change of this percentage is somewhat volatile in terms of magnitude and direction for NPT and Wales. The volatility of NPT is more pronounced than in Wales, which is expected due to the population size reducing the sensitivity of the Welsh estimates to the number of dependent children.
- 3.49 As of the latest data (2020), there are 37.7% of households with dependent children, which is higher than the Wales percentage (36.5%). Since 2018, there has been an increase in the percentage of households with dependent children in both NPT and Wales, however the percentage marginally decreased in NPT from 2019-2020.

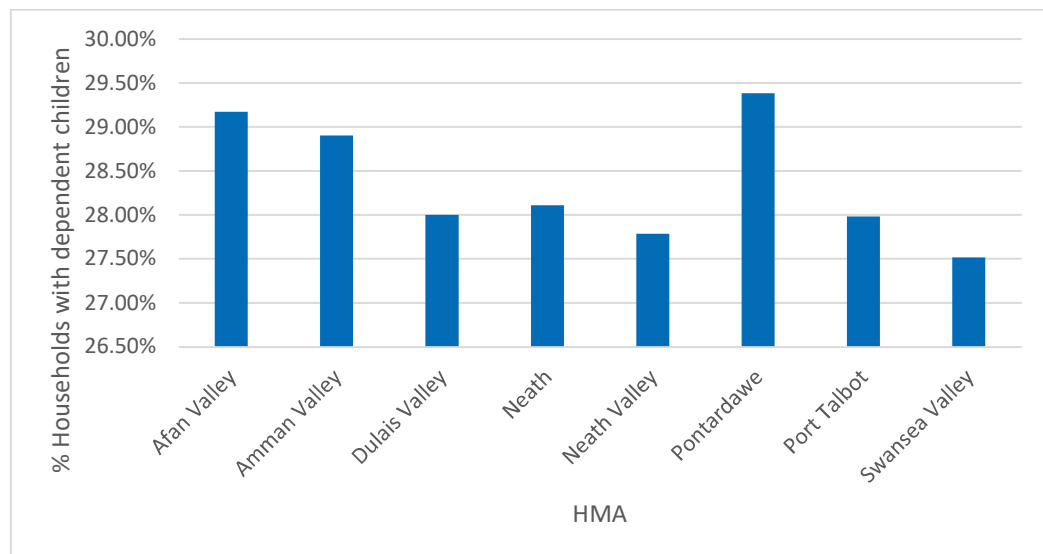
Figure 3.29: Percentage of households with dependent children (2011-2020)



Source: ONS, APS (2020)

- 3.50 Figure 3.30 shows the percentage of households with dependent children within each HMA using data from the 2011 Census. The HMA with the highest percentage is Pontardawe (c. 29.4%). In contrast, the HMA with the lowest percentage of households with dependent children is in Swansea Valley (c. 27.5%).

Figure 3.30: Percentage of households with dependent children (2011)

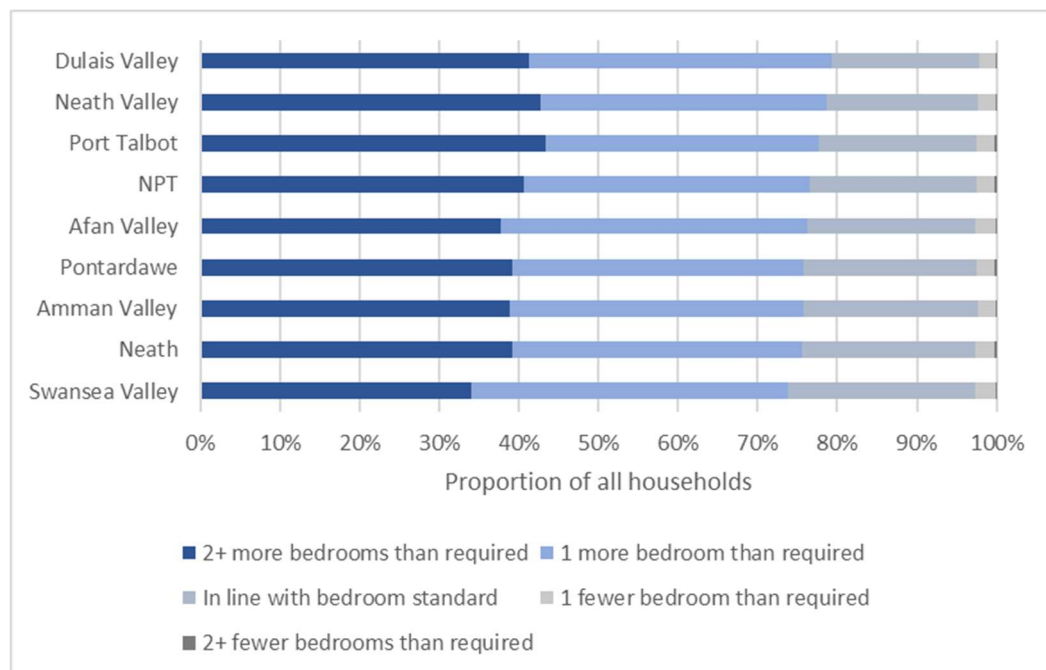


Source: Census 2011

### Occupancy ratings

- 3.51 As of the last reported Census for which occupancy data is currently available, in 2011, over three quarters (77%) of households in NPT lived in properties with at least one more bedroom than were technically required, according to the official bedroom standard which accounts for relationships between occupiers. Circa 2.6% – or 1,551 households in total – had fewer bedrooms than were required, albeit further interrogation shows that this more than doubled to circa 5.3% in the social rented sector where only 51% of households had a spare bedroom. Some 86% of owner occupiers had at least one, having been free to exercise choice in the market.
- 3.52 The rate of overcrowding was relatively consistent throughout the various HMAs. Swansea Valley had the highest rate of overcrowding, at 2.7%, but this only modestly exceeded the lowest rate of 2.2% recorded in Dulais Valley. The latter consequently had the highest proportion of households with more bedrooms than are technically required, slightly ahead of Neath Valley and Port Talbot which all exceeded the authority average.

Figure 3.31: Occupancy Rating by HMA (2011)



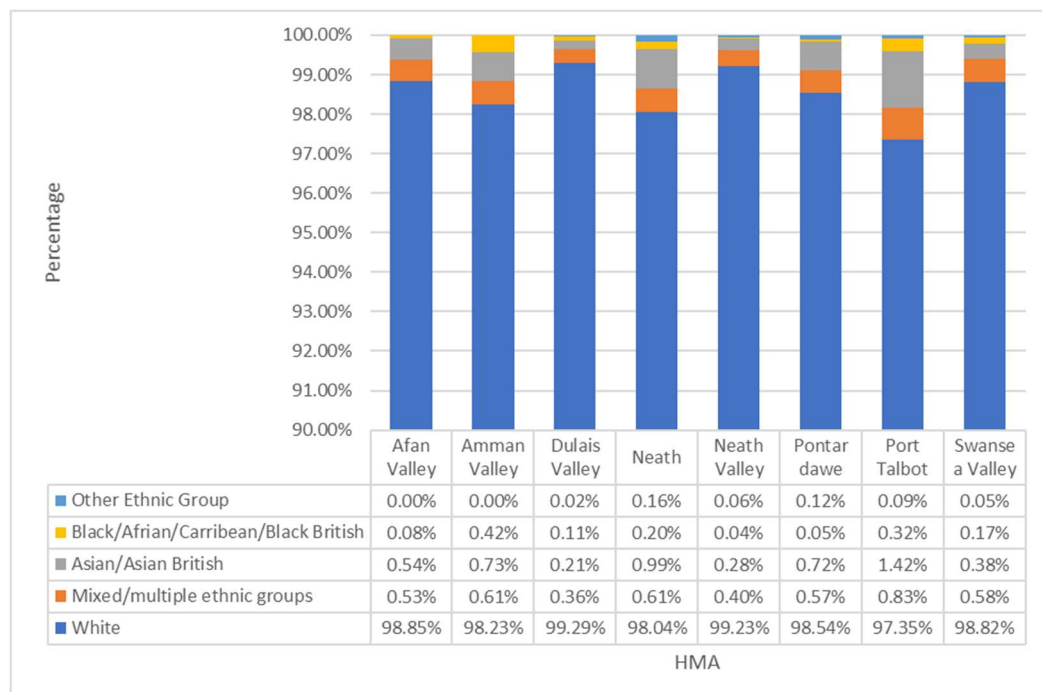
Source: Census 2011

### Ethnicity

- 3.53 Across NPT, 98% of the population identify themselves as being white. The second largest ethnicity within NPT is Asian/Asian British which represents 0.98% of the population. The third largest ethnic group is mixed/multiple ethnic groups which is 0.65%. Black/African/Caribbean/Black British people account for 0.21% of the NPT population with the remaining percentage being accounted for by other ethnic groups.
- 3.54 The majority of the HMAs have a profile that closely compares to NPT as a whole. Port Talbot has the highest proportion of its population identifying as non-white and Dulais Valley the lowest, with this shown in Figure 3.27.

- 3.55 Amman Valley has the largest percentage of Black/African/Caribbean/Black British people out of all the HMAs, with circa. 0.42% of its residents identifying as such. This is twice as large as the NPT proportion.
- 3.56 Port Talbot has the largest proportion of people who identify as Asian/Asian British in the population. This group accounts for 1.42% of the population of Port Talbot. This is significantly higher than the majority of the HMAs and is also higher than the 0.98% for NPT as a whole.
- 3.57 Port Talbot also has the highest proportion of the population that lies in the mixed/multiple ethnic groups category (0.83%). This is slightly larger than the level across the whole of NPT which is 0.65%.

Figure 3.32: Ethnicity of residents in each HMA



Source: Census 2011

### **Commuting patterns**

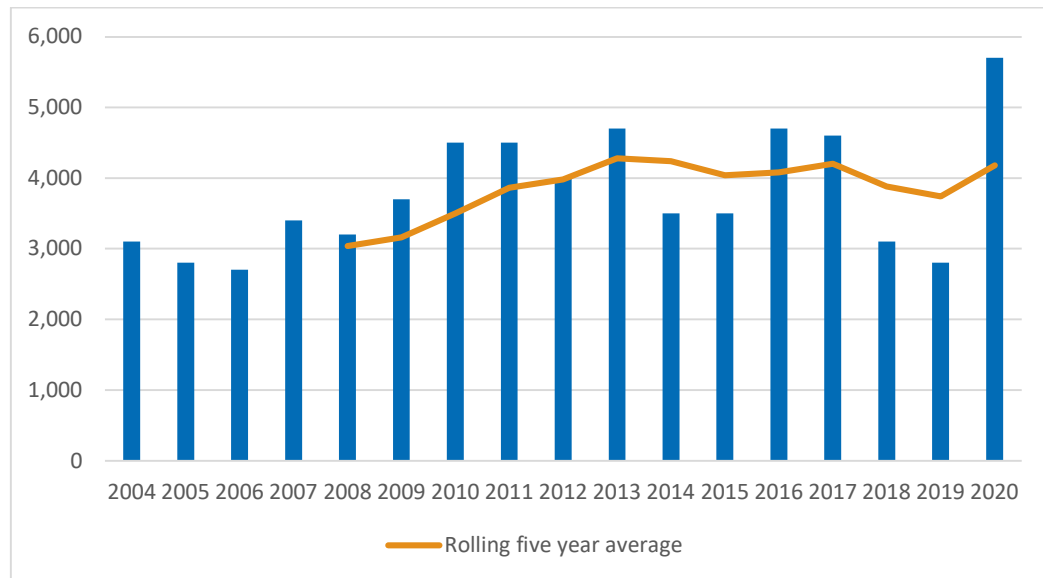
- 3.58 The earlier Figure 2.2 provided an overview of commuting patterns in each HMA, confirming that residents of Neath Valley and Amman Valley generally travelled further for work. This cannot be progressed further, to understand variation in the main places of work for example, on the basis that such data is not published for the wards that form the basis for these definitions. The main places of work for the entire population of NPT are considered separately in the Economic and Housing Growth Assessment (EHGA) which highlights a particularly strong functional relationship with Swansea and notes linkages with other neighbouring authorities.

### **Students**

- 3.59 It is challenging to estimate the precise number of students living in NPT, outside of the decennial Census the last of which – in 2021 – is yet to have reported in detail at the

time of writing. The APS does though record the number of adults who are economically inactive because they are students. While this is relatively volatile, as is often the case with the APS – due to the size of its sample – it does suggest that there has been a broad increase in the number of students living in NPT. An average of circa 4,180 economically inactive students have been recorded in each of the five years to 2020, for example.

Figure 3.33: Number of Students in NPT (2004-2020)



Source: APS

- 3.60 **Swansea University** officially opened its Bay campus, on Fabian Way in NPT, in 2016. It offers some 2,500 bedspaces in total, more than twice the 1,100 beds available at the university's other Singleton Park campus which is located in Swansea. Consultation with two representatives from the university<sup>34</sup> indicated that the majority of students nonetheless study at Singleton Park rather than at the Bay campus, which is home only to the School of Management and the Faculty of Science and Engineering.
- 3.61 Students are believed to have generally preferred to live at Singleton Park following the opening of the Bay campus, which is perceived to be relatively isolated and in need of better connections into Swansea where many more amenities and work opportunities are available. Some did though choose to locate at the Bay, and travel slightly further to study, in order to benefit from the en-suite accommodation which is not currently offered at Singleton Park. The latter continues to be popular, however, to the extent that it now has a shortage of bedspaces leading the university to restrict the number of second-year students living there. The Bay campus is contrastingly *promoted* to such students because it has the capacity to accommodate them, with around 400 second year students believed to be accommodated on campus and the remainder living either at home, in HMOs or elsewhere.

<sup>34</sup> Director of Estates and Campus Services; and the Head of Residential Services

- 3.62 The university has observed the development of new purpose-built student accommodation (PBSA) in recent years, predominantly in Swansea city centre, and believes this to be a reflection of market trends and a desire for better quality accommodation amongst students in this area. It has recently signed a three-year contract to accommodate 800 students in the PBSA of one provider, again in the city centre, as a way of growing its presence there and recovering the capacity that will be lost with the impending sale of the existing student village in Swansea with 600 bedspaces. This is believed to represent a trial that will be monitored over the coming years, as the first phase of a broader student accommodation strategy which is likely to involve the redevelopment and enhancement of Singleton Park towards the end of this decade, albeit plans are at a very early stage. The university believes that such an increase would be validated by forecast growth in student numbers, notwithstanding the difficulties in predicting how students' behaviour and preferences may change. It has no immediate plans to develop further accommodation at the Bay campus.
- 3.63 At present, the majority of first-year students are understood to request accommodation from the university, which it guarantees. This reflects a desire to live "the university experience", even amongst the relatively large number of students drawn from the local area who often forego the opportunity to live at home. The university accepts that its accommodation offers less than some PBSA, but its research has indicated that the extras seen in such accommodation are not always considered essential by students. The university is, however, aware of the need to be competitive in its pricing of on-campus accommodation.
- 3.64 The university is currently facing a particular challenge related to accommodating international students, some of whom have tended to bring families thus putting pressure on the limited stock that can accommodate them. The university has sought to discourage such students from bringing their families, and has no plans to develop new family accommodation due to the associated need for safeguarding and an awareness that the situation can rapidly change.
- 3.65 A similar consultation with the Executive Head of Property and Development at the **UWTSD** – where circa 14,795 students were enrolled in the last reported year (2020/21) with the number having increased by almost half over the previous five years<sup>35</sup> – revealed that the majority of its students are local and therefore commute rather than live in student accommodation. The majority of student accommodation is located in Swansea and is distributed over two campuses, totalling 250 units. Within the university provided accommodation, the recently built Llys Glas has provided 84 en-suite units. The consultation indicated that there are multiple areas of student accommodation across the Swansea area for students attending the university, but none were reported to be in NPT. These include university provided accommodation, Seren CRM, Oldway Centre- Fresh, Coppergate- Prime Student, True Student Living, the Student Roost, Crown Place CRM and SA1 Campus.
- 3.66 The consultation revealed an expectation that the number of students at UWTSD will increase in future, although no documentation was provided or referenced to quantify the scale of this anticipated growth. The Executive Head of Property and Development

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<sup>35</sup> Higher Education Statistics Agency (2022) HE student enrolments by HE provider

was preparing a new Estate Strategy at the time of the discussion. However, it was suggested that there were no plans to develop further university owned accommodation in NPT, or indeed in Swansea, with the university understanding that private market developers were considering providing new PBSA in Swansea and identifying new sites on which to do so.

### ***Homelessness***

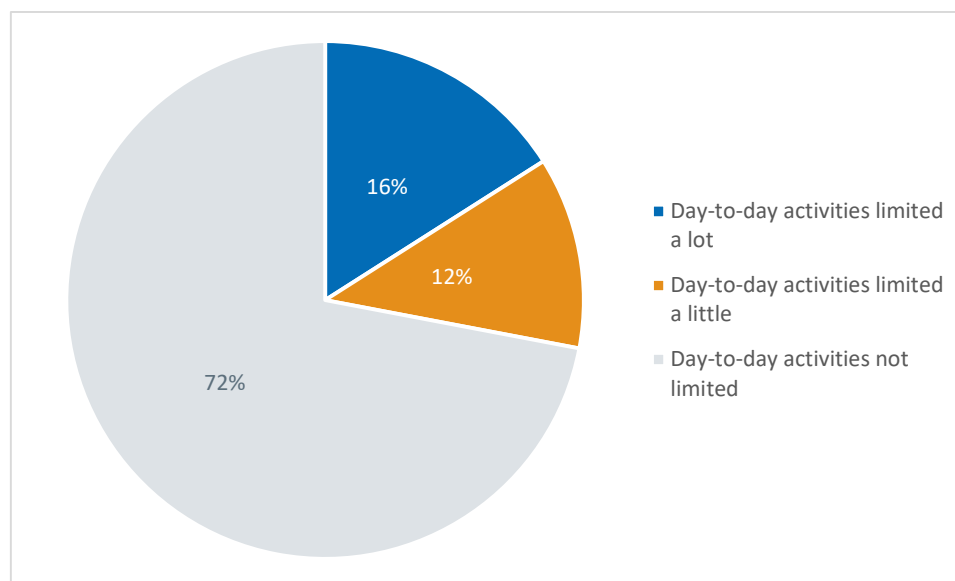
- 3.67 A consultation with the Principal Officer for Housing and Homelessness at the Council revealed the extent to which tackling homelessness is a key issue. Before the Covid-19 pandemic, there were approximately 35-40 people in emergency accommodation at once, however this has since increased to 170-180 people. This increased demand is believed to have created problems even in accessing hotel rooms, which were previously used as a last resort.
- 3.68 The Principal Officer indicated that one-bed flats were a key priority for development since single men account for the majority of people that require accommodation.
- 3.69 The RRTP, introduced in section 1 of this report, is a strategy to deal with homelessness. The Principal Officer indicated that the aim of the plan is to end the use of bed and breakfasts and hotels to address homelessness and rebuild the Council's accommodation. The Principal Officer also stated that this would include the opening of a triage centre which will act as a short-term 'evaluation' centre to ensure people can receive the support required.
- 3.70 An additional consultation with an independent consultant for the Council revealed that changes implemented by the WG mean that every applicant is now owed a duty to house. This is reported to have drastically increased the demand for accommodation, as noted in the introduction to this report.
- 3.71 A consultation with the Homelessness and Housing Options Manager for the Council reiterated that approximately 40-45 people stayed in temporary accommodation at any one time prior to the pandemic. Following the criteria change by the WG, there are now approximately 170 people in temporary accommodation. The Homelessness and Housing Options Manager expected this demand to remain at this elevated level.
- 3.72 Reinforcing the consultations with the Principal Officer for Housing and Homelessness at the Council and its independent consultant, the main reported issue in the demand for accommodation was that the majority of people are single people, requiring one-bed accommodation. There was reported to be insufficient accommodation to satisfy this need within NPT. Concerns were also raised regarding accommodating single people together in bed and breakfast accommodation because it often causes anti-social behaviour, exacerbating the problem.
- 3.73 In addition, the Homelessness and Housing Options Manager noted that NPT has experienced a dramatic increase in the proportion of homeless families (from 2-4% to 15-20%). This is anticipated to increase further as a result of the cost of living crisis and lack of private accommodation options. Currently, the Council addresses these problems on a demand and supply basis, however there is optimism that the RRTP will address this.



### **Disability**

- 3.74 Figure 3.34 shows the breakdown of the extent that NPT residents have had their activity limited, using Census 2011 data which remains the most up-to-date source of such data at the time of writing. This shows that 72% of residents in NPT are not limited in their daily activities, with 12% reporting that their day-to-day activity was limited a little – compared to 11% throughout Wales – and 16% reporting that their activity was limited a lot, compared to 12% throughout Wales.

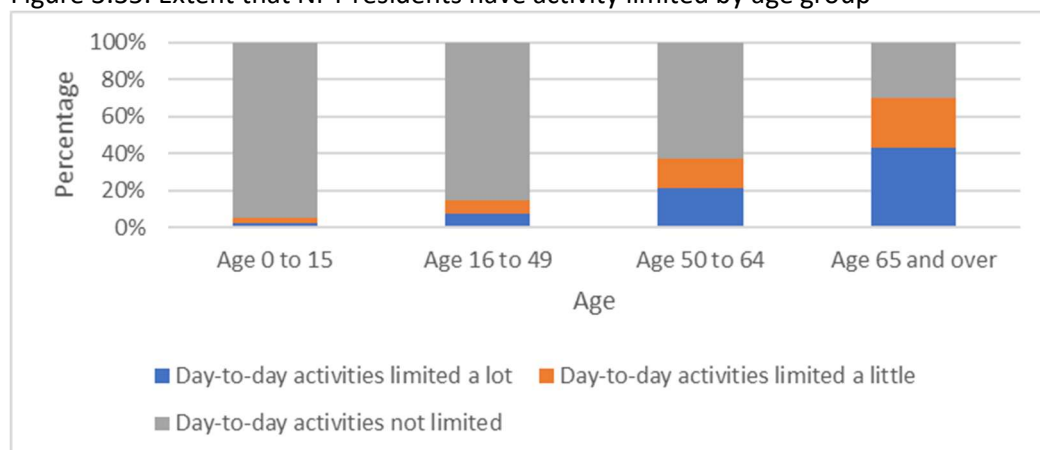
Figure 3.34: Extent that NPT residents have activity limited



Source: Census 2011

- 3.75 Figure 3.35 shows the extent that NPT residents have had their activity limited by age group. Circa 95% of people aged 0-15 are not limited in their daily activities. This is higher than the 85% for residents aged 16-49, 62% for residents aged 50-64. These are significantly higher than the percentage of residents aged 65 and over for the proportion of residents aged which equates to 30%.
- 3.76 The age group 65 and over has the largest percentage of people in NPT that have their activity limited (c.27%) which is significantly larger than the 16% for people aged 50-64, 7% for people aged between 16-49 and just 3% of people aged 0-15.
- 3.77 Likewise, the age group of 65 and over have a significantly larger proportion of people whose activity is limited a lot (c. 43%) compared to the other age groups. Circa 22% of people aged 50-64 are limited a lot in their daily activities, 7% of people aged 16-49 have their activity limited a lot and only 2% of those aged between 0 and 15.

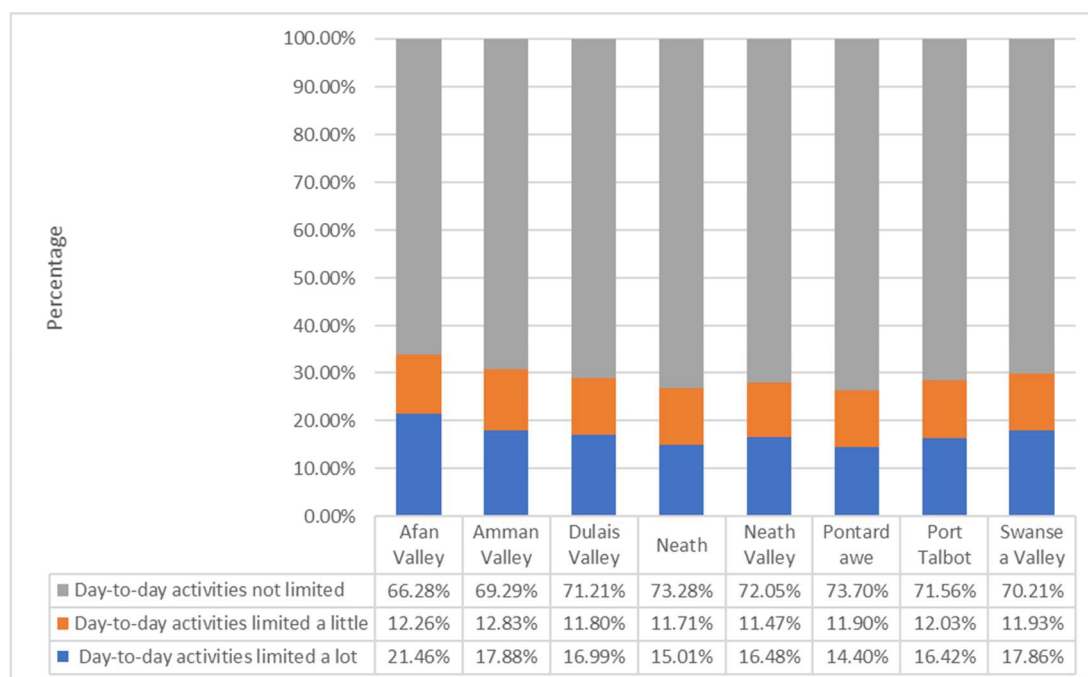
Figure 3.35: Extent that NPT residents have activity limited by age group



Source: Census 2011

- 3.78 Figure 3.36 shows the breakdown of the extent that day-to-day activities were limited for the population in each HMA. The highest percentage of the population whose day-to-day activities are not limited is c. 74% in Pontardawe with the lowest being in Afan Valley which is c.66%. This is reflected in the percentage of the population in Afan Valley whose daily activities are limited a lot, since Afan Valley is the highest in this category (c. 21%). Similarly, Pontardawe has the lowest percentage of the population that are limited a lot (14%). The percentage of the population that has their day-to-day activity limited a little is exceptionally similar across all HMAs, at around 12%.

Figure 3.36: Breakdown of day-to-day activity capabilities at HMA level



Source: Census 2011

- 3.79 A consultation with the Council's Principal Officer for Housing and Homelessness revealed that the current approach to accessible and adapted housing is to adapt existing properties rather than develop new accessible homes. This is because the majority of clients are elderly and do not want to move accommodation so actions such as shower conversions and stair lifts account for the majority of the works done, followed by bedroom and shower room extensions.
- 3.80 As of March 2021, the WG is understood to have removed means testing for lower level grants which account for c. 75% of applicants in NPT. On average, these grants cost c. £10,000 so the Principal Officer suggested that this change could cost the Council as much as £900,000 in the future.

### **Specific housing needs requirements**

- 3.81 This section adheres to the guidance by introducing specific housing needs and requirements, in a series of tables that combine available data with published strategies and policies.

Table 3.4: Accessible and Adapted Housing Provision

Heading	Summary
Local policies/strategies	The current LDP does not set any specific requirements regarding the provision of accessible or adapted housing, nor does it acknowledge a need for such accommodation.
Property needs	This housing needs to be suitable for people with limited mobility, ensuring for instance that the homes are wheelchair accessible.
Suitable for	The property needs to be suitable to accommodate people with disabilities. This includes ensuring properties are wheelchair accessible and where necessary there is low-level care.
Evidence including data sources	<p>Data from the WG outlines the number of grants awarded in each local authority for disability facilities to be installed in homes. The number of dwellings improved is reported to have substantially reduced from 313 in 2018/19 to 105 in 2020/21. The reasons for this trend are unclear, as it could either signify a reducing need or – more likely – a reduced number of grants being issued, potentially due to the difficulties of accessing properties during the Covid-19 pandemic.</p> <p>Data analysis undertaken for this report (Appendix 2) suggests that there could be as many as 4,724 more residents aged 75 or above in NPT by the end of the new Plan period in 2036, compared to 2021. Such a level of growth could, according to the Housing LIN SHOP@ toolkit generate an additional need for communal accommodation (sheltered housing, enhanced sheltered and extra care). Some of this additional need may however be met through adaptations to properties enabling residents to stay in their own homes for longer.</p>
External stakeholder consultation and engagement	A consultation with the Council's Principal Officer for Housing and Homelessness revealed a longstanding preference to adapt applicants' homes rather than provide new accessible accommodation, to which applicants were sometimes were reluctant to move.
Key issues identified	There is currently a lack of data on the number of homes that are accessible or adapted in some way, which serves to restrict the depth of any analysis.

Table 3.5: Multi-Generational and/or Larger Families Requiring Larger Properties

Heading	Summary
Local policies/strategies	There are believed to be no local policies or strategies that specifically target this group.
Property needs	Properties are required to be large enough to accommodate multiple households, if multiple generations are living together. This may be for cultural reasons or to provide care for elderly relatives, or even to accommodate a young adult child who is unable to afford the costs associated with forming an independent household. Properties may need to be adaptable to individual circumstances, as some larger households may share communal areas but others may prefer distinct spaces (e.g. annex with own lounge, bathroom and cooking facilities)
Suitable for	Larger households, whose specific needs can be expected to vary.
Evidence including data sources	<p>There is a general lack of data on the number of multi-generational households, and the extent to which their current housing is sufficient.</p> <p>Demographic modelling, including official WG projections, make assumptions on the size of households which could be interrogated to identify the number of larger families.</p> <p>The Census provides an indication of the number of households with insufficient bedrooms, taking account of the relationships between those living in an individual household. Circa 1,405 households were reported to have at least one less bedroom than they required as of 2011, and 146 had at least two fewer than were needed.</p>
External stakeholder consultation and engagement	Stakeholders had no specific views on multi-generational households or larger families. The Council's Homelessness and Housing Options Manager did note a dramatic increase in the proportion of homeless families, which was expected to increase further as a result of the cost of living crisis and lack of private accommodation options. The Council currently addresses these problems on a demand and supply basis, however it is hoped that the RRP will address this.
Key issues identified	There is currently a lack of reliable data on the number of multi-generational households and the extent to which their current housing is sufficient. It is also unclear how many large homes with discrete living areas, potentially suited to multi-generational households, exist in NPT.

Table 3.6: Non-Permanent Housing

Heading	Summary
Local policies/strategies	Policies and strategies for accommodating refugees and asylum seekers are generally developed at the national level, and as such there are no specific local policies of relevance.
Property needs	<p>Varied, depending on the profile of the household or the individual (c.60-70% of asylum seekers being single males, who can sometimes be accommodated in HMOs). While expected to receive a specific number of asylum seekers, it is important to note that the Council is not responsible for finding their accommodation as this is arranged by another organisation on behalf of the Home Office, with the Council simply consulted to establish its suitability. Only one property is believed to have been found at the time of the consultation, in late February 2023, but further discussions had taken place regarding other properties which were generally privately rented terraced houses or apartments.</p> <p>Social housing is also considered to house some refugees, on the basis that it is generally more affordable and better managed.</p> <p>A number of the Ukrainian families living in the county borough's welcome centre are known to be relatively large in terms of household size, and consequently require larger housing that will be difficult to find in the social or private rented sector, at an affordable rate. While some can express an aspiration to stay in NPT – to be close to extended family, for example – there is still a prospect that some will be housed elsewhere in Wales.</p>
Suitable for	Asylum seekers, refugees from settlement programmes, Ukrainian families under the WG's "super sponsor" scheme and up to 68 people living with 30 hosts through the "Homes for Ukraine" scheme if the current arrangement lapses
Evidence including data sources	<p>Temporary accommodation in the form of a welcome centre, which has subsequently closed, and a hotel which actually accommodates more people and is no-longer used for that purpose. Move-on accommodation is needed but is not always the responsibility of the Council, and is occasionally found by the individuals themselves before leaving the welcome centre.</p> <p>The Council is advised of the number of asylum seekers that are to be dispersed in NPT, and it also has records of the number of Ukrainian families needing to move on from temporary accommodation. Some can also be expected to have applied for social housing by joining a waiting list.</p>
External stakeholder consultation and engagement	Consultation with relevant Council officers has informed the analysis summarised above in this table.
Key issues identified	<p>Continued inflow of refugees from various settlement programmes, as well as Ukrainian families from the welcome centre located in the county borough even though the Council itself is only responsible for providing support, rather than necessarily housing. Not all of those leaving the welcome centre will need to stay in NPT, but it is known to accommodate families some of whom are now settled in the area in terms of employment and schools for example.</p> <p>The Council is aware of the risk that people leaving temporary accommodation will become homeless, and aims to avoid such outcomes even if it is not always responsible for finding suitable housing.</p>

Table 3.7: Housing, care and support needs

Heading	Summary
Local policies/strategies	Local policies of relevance to this broad category have already been summarised elsewhere in this LHMA, as relevant.
Property needs	Property needs will be extremely diverse amongst this group, which WG indicates should capture those in need of extra care, contemporary sheltered housing, supported living for people with a learning disability and/or ASD and temporary supported housing of the kind discussed in the previous summary table. The breadth of this group makes it challenging to generalise about the particular types of housing required, beyond the comments already made.
Suitable for	Properties should be suitable and equipped for the specific demands associated with those that require care and support. This includes accommodation for young people coming out of care, people with a learning disability and refugees.
Evidence including data sources	<p>While Census data provides an indication of individuals' health and mobility, there is no single data source showing the number who are explicitly in need of care and support. Some will be referred to the Council, via social services for example, who are consequently able to build a picture of the accommodation needs arising from residents with mental health conditions or learning disabilities for instance<sup>36</sup>.</p> <p>Some individuals can also be expected to register their need for supported accommodation with an RSL. It is, however, of note from the data compiled for the Social Housing Grant Prospectus that no individuals were categorised as being in need of "supported housing", which either signals a lack of need or – more likely – a sign of the difficulties with consistently monitoring its size.</p> <p>This data does suggest that around 405 households were in need of specialist housing for older people, and – unlike for other groups – there are trusted methods of indicatively estimating the scale of need for such accommodation in future, by drawing upon available tools introduced at <b>Appendix 2</b>. While these tools assume that most people will stay in their home, they also suggest that circa 43-54 bedspaces per annum could be needed throughout NPT between 2021 and 2036, the majority being sheltered housing (C2 or C3 use class), while a further 16-21 bedspaces in communal accommodation like care homes (C2 use class) could also be needed each year.</p> <p>The Council can consider this need for bedspaces in care homes in the context of its weekly monitoring of vacancy levels within such accommodation, which offers timely and detailed insight into the current balance between supply and demand. The Council should also take account of the Market Stability Report produced to cover adult and children's social care, which last year indicated that there was a sufficient number of residential and dual registered beds in NPT.</p>
External stakeholder consultation and engagement	Stakeholders had no specific views on the needs of this broadly defined category, beyond those summarised elsewhere in relation to more specific needs.

<sup>36</sup> The Council has shared an example of a "mapping" exercise in February 2023 which identified 19 individuals with mental health conditions in need of supported housing, a further 12 requiring extra care and another 8 requiring either. Two would need forensic settings of the kind that do not currently exist in NPT

Heading	Summary
Key issues identified	An extremely wide range of households, with varied housing requirements, will be captured by such a broadly defined group making it difficult to neatly summarise the needs of the full range of households with care and support needs.

Table 3.8: Locational Needs for Student Accommodation

Heading	Summary
Local policies/strategies	Policy CCUC1 of the LDP ('Coastal Corridor University Campus') referenced the granting of outline planning permission for Swansea University's Science and Innovation Campus, now commonly known as the Bay Campus which was subsequently delivered and completed in 2016. The LDP makes no other reference to students or their housing needs.
Property needs	<p>Students from Swansea University are believed to have generally favoured the older accommodation at the Singleton Park Campus in Swansea, as the units on offer at the Bay Campus in NPT – while newer – are perceived as being more isolated and distant from the unrivalled amenities of Swansea city centre.</p> <p>While some students live in HMOs close to the Bay Campus, these are in the minority as other locations – closer to, or within, Swansea city centre – are generally preferred.</p>
Suitable for	Undergraduates and postgraduates, who may differ in terms of age and life experience. Some may be older having studied at undergraduate level elsewhere, whereas others will be younger and living away from home for the first time so may want to live in accommodation that helps them to form new social networks. This is believed to particularly be the case amongst students enrolled at Swansea University, a large proportion of whom tend to request accommodation even if they are from the local area.
Evidence including data sources	<p>Both UWTSD and Swansea University annually report on their student numbers, which are published – after a slight delay – by the Higher Education Statistics Agency (HESA). This is split between undergraduates and postgraduates, and between full and part time students, and can also be tracked over time. There is more limited publicly available data on the number of students living on campus, in other student accommodation or at home, albeit Council Tax data can be used to monitor the number of all-student households who are exempt. The Council also maintains a record of HMOs, as summarised earlier in this section.</p> <p>Forecasts of future growth in student numbers are not publicly available, and the Council should therefore continue to liaise with both universities to build an understanding of the scale of future growth and determine the implications for NPT. At present, neither expressed a belief that further accommodation was needed in the county borough, but this could evidently change in time.</p>
External stakeholder consultation and engagement	Representatives from both Swansea University and UWTSD were engaged to inform this LHMA, the views of whom are summarised in this table and earlier in this chapter.
Key issues identified	It is challenging to predict how the growth plans of both universities could affect NPT in the future, albeit it appears that UWTSD currently has a relatively limited effect on the county borough aside from any students living at home with their families. Swansea University does have a presence in NPT, following the opening of its Bay Campus, but its impact appears to be largely contained therein, due to its ample supply of bedspaces. Some students are known to be living in HMOs close to the campus but they are believed to generally prefer living close to,



Heading	Summary
	or within, Swansea city centre, such that the scale of demand in NPT is likely to remain limited based on current evidence. The Council will need to maintain a dialogue with Swansea University as it develops its new student accommodation strategy, but can reasonably assume that no further bedspaces are needed to meet the demand that exists – in at least a quantitative sense – at present.

Table 3.9: Locational Needs for People with Physical or Cultural Needs

Heading	Summary
Local policies/strategies	There are believed to be no local policies or strategies that specifically address the locational needs of people with physical or cultural needs.
Property needs	Properties may need to be located close to shops, places of worship and services, as suggested by the WG's guidance.
Suitable for	Households who need to live in a specific location for some form physical or cultural reason
Evidence including data sources	There is no evidence to suggest that a substantial number of households in NPT have specific physical or cultural needs that mean they need to live in a certain location. Such insight could only be realistically obtained via a survey, which has not been part of this LHMA but has been separately undertaken to establish the needs of Gypsy and Travellers for example <sup>37</sup> .
External stakeholder consultation and engagement	Stakeholders had no specific comments on the locational needs of people with physical or cultural needs.
Key issues identified	There is generally a lack of data, or stakeholder perspectives, on the locational needs of people with physical or cultural needs.

<sup>37</sup> NPTC (February 2022) Gypsy and Traveller Accommodation Assessment

## 4. Range of Additional Housing Need Estimates

- 4.1 In accordance with the LHMA template, this section presents a series of summary tables that have been drawn from the LHMA Tool. These initially relate to **each of the latest WG projections**, in line with the guidance, but a further scenario is also presented given that the Tool allows up to two user-defined projections to be run. The Council has reviewed the range of projections that have been developed by Edge Analytics as part of the EHGA and opted to use the **supplementary adjusted employment-led scenario**, which incorporates newer demographic evidence and also allows for improvements to younger household membership rates. The EHGA explains how the latter adjustment is intended to positively address one consequence of past undersupply that has seen younger adults living in increasingly large households, being assumed to carry on doing so by the official projections. The adjustment therefore, in contrast to the official projections, allows for a partial return to the more positive trend anticipated by earlier iterations of the official projections. This results in the same population forming more households thus increasing the number of new households.
- 4.2 The four scenarios can be seen to suggest a net need for between **151 to 204 affordable homes per annum** for the first five years throughout NPT, with supply appearing insufficient to meet the gross need under any scenario. Section 5 explains which scenario has been chosen by the Council as the basis for its additional housing need estimates.

SUMMARY TABLES TO BE ADDED

## 5. LHMA Additional Housing Need Estimates

- 5.1 The Council has reviewed the four scenarios summarised in the previous section and decided to use the **supplementary adjusted employment-led scenario** as the basis for its additional housing need estimates. It considers this scenario to both support economic growth and address the issue of concealed households, having adjusted household membership rates as the EHGA explains.
- 5.2 Although this is not one of the official WG projections, it does envisage a level of population growth that lies within the wide range that they create for NPT, being closest to the principal 2018-based projection. This is confirmed at Table 8.2 of the EHGA which is partially replicated below.

Table 5.1: Population growth in different scenarios

Scenario	Additional residents
High 2018-based	8,900
Principal 2018-based	5,313
<b>Employment-led supplementary adjusted</b>	<b>4,424</b>
Low 2018-based	245

Source: WG; Edge Analytics

- 5.3 It also envisages a comparable level of household formation over the 15-year period covered by the Tool, on this measure slightly surpassing the principal projection as shown at Table 5.2 below<sup>38</sup>.

- 5.4 Table 5.2: Household growth in different scenarios

Scenario	Additional households
High 2018-based	4,220
<b>Employment-led supplementary adjusted</b>	<b>3,389</b>
Principal 2018-based	2,915
Low 2018-based	1,188

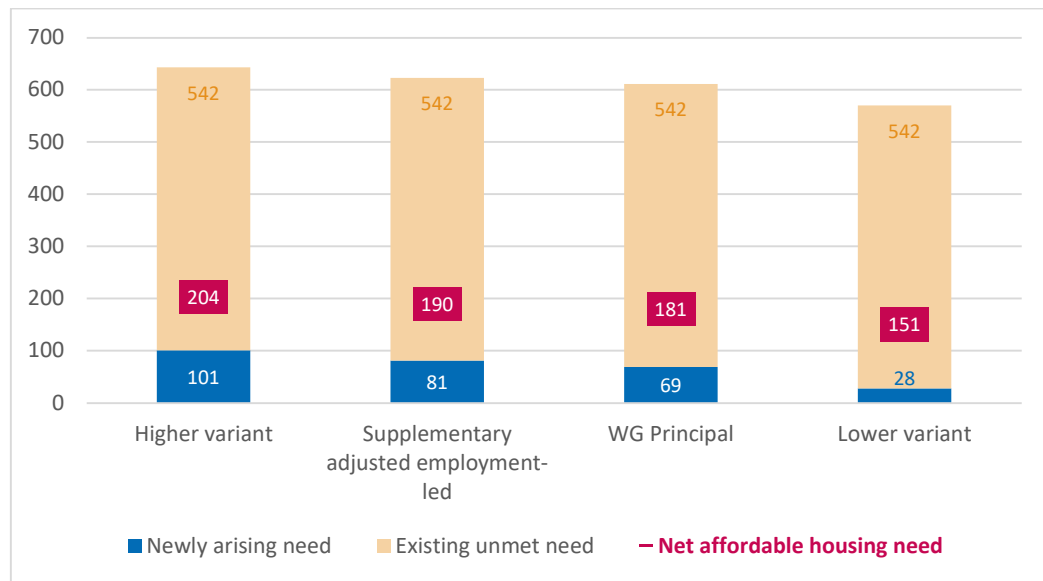
Source: WG; Edge Analytics

- 5.5 More households would form in the higher variant, leading that scenario to suggest a greater need for affordable housing than the one favoured by the Council, which itself does exceed what is generated by the WG principal 2018-based projection. This is shown at Figure 5.1 overleaf.

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<sup>38</sup> The version of the Tool that is currently available is preconfigured to cover the period from 2022 to 2037, whereas modelling has been developed for a slightly later period from 2023 to 2038. The Council has had no choice but to fit this modelling into the Tool, resulting in years being slightly misaligned

Figure 5.1: Comparing affordable housing need to official projections



Source: WG; Edge Analytics

- 5.6 The scenario favoured by the Council therefore suggests that there will be a net need for **190 affordable homes per annum** throughout NPT over the 1<sup>st</sup> 5 years. This results from the supply appearing insufficient to meet a gross annual need for 623 such homes, which is predominantly driven by an existing unmet need that is assumed to be cleared within five years leaving only the newly arising need for 81 homes per annum to be met thereafter. While the latter is not converted into a directly comparable net figure, this implies that there will be a need for **1,760 affordable homes in total** – or **117 affordable homes per annum** – over the full 15-year period from 2023 to 2038<sup>39</sup>.
- 5.7 While there are limitations to the Tool – described at **Appendix 1** – it implies that some 88% of the net need over the first five years is for social rented housing, and of that social rented need only, some 92% is for properties with one bedroom. Table 5.3 overleaf does though show how this reduces to circa 53% when focusing on the *gross* need, before allowing for turnover and supply, with 28% needing two bedrooms and 18% needing three bedrooms.

<sup>39</sup> With modelling having been developed for this period and input into the Tool, despite the latter still being configured for the slightly earlier period from 2022 to 2037. This reflected the importance of using the best available data and covering the entire RLDP period, allowing this LHMA to be used as a key piece of evidence

Table 5.3: Household growth in different scenarios

	Net annual need for social housing		Gross annual need for social housing	
	No.	%	No.	%
<b>Total</b>	<b>167</b>	<b>100%</b>	<b>599</b>	<b>100%</b>
1 bed	153	92%	319	53%
2 bed	0	0%	155	26%
3 beds	1	1%	107	18%
4+ beds	13	8%	17	3%

Source: WG; Edge Analytics

- 5.8 The Tool also produces an estimate of the need for market housing, which it assumes will arise each year from households able to afford it. The Council has requested consideration of the size of housing that could be required by these households, and while acknowledged to fall beyond the scope of an LHMA – according to guidance from the WG – this has nonetheless been briefly explored in **Appendix 3**.

## 6. Quality Assurance Statement

- 6.1 This LHMA has been proofread and checked, both by Turley and the Council, before being submitted to the WG for approval. Quoted figures match tables throughout and all figures are both arithmetically correct and consistently rounded, explaining why **some may initially appear not to sum**. Data is fully sourced and all figures and charts are consistently labelled.

## Appendix 1: Key Issues Tables

Table 1 Key Issues: Key Data Inputs

Key data inputs	Key issues identified with the data inputs
Housing Market Areas (HMAs)	1. Recent <b>changes to ward geographies</b> that have been aggregated to form HMAs, which will consequently need to be reconsidered once data starts being reported for new wards only and the Tool becomes compatible with the new geographies
Household data	<p>1. It has been necessary for the Council to select from the <b>range of household projections</b> developed as part of the Economic and Housing Growth Assessment, for reporting purposes, albeit it does have the option of running the Tool with further scenarios itself</p> <p>2. Household projections relate to the entirety of NPT, rather than having been developed for individual HMAs. It has therefore been necessary to make <b>broad assumptions on the future distribution of household growth</b>, which have been based on the distribution of the existing population<sup>40</sup>. An assumption could have alternatively been based on the planned distribution of new housing, according to the adopted LDP, but this will evidently be reviewed as part of its replacement so is considered to be a less reliable measure at the present time</p> <p>3. User projections were developed to cover the proposed plan period from <b>2023 to 2038</b>, rather than the slightly earlier period currently covered by the Tool (2022-37). The Council was therefore unable to achieve perfect alignment of timescales when it loaded its chosen projection into the Tool. This is believed to have had a very minimal effect on the need results generated by the Tool and is still considered to be robust evidence.</p>
Rent data	1. The <b>sample of rental properties</b> in some HMAs is understood to have been prohibitively small, leaving Rent Officers Wales unable to calculate percentile figures for these areas. Equivalent figures for the whole of NPT have been used in such instances
Income data	1. This LHMA has been completed at a time when <b>pay has generally been rising</b> , albeit while not keeping pace with inflation. This will not be fully reflected in Paycheck data that

<sup>40</sup> As estimated by the ONS through its small area population estimates for mid-2020, introduced in section 2



Key data inputs	Key issues identified with the data inputs
	was purchased by the Council in July 2022, so this may need to be reviewed at an appropriate time
House price paid data	1. The Tool is preloaded with data from the Land Registry, understood to relate to 2021, but this arguably could have been <b>more up-to-date</b> and reflective of more recent trends in the market. Indeed, Land Registry data always has a lag time of circa three months.
Existing unmet need	<p>1. <b>NPT does not have a single/common housing register</b>, and while some RSLs do operate their own there is no way of confirming the level of double counting (if a single household registers with more than one RSL, for example). It has therefore been necessary to use only the housing register of Tai Tarian, as the only one to offer the more detailed breakdown needed to populate the Tool. This is considered to be appropriate in the circumstances given that Tai Tarian were responsible for 98% of all live applications on RSLs' housing registers when combined by the Council<sup>41</sup>.</p> <p>2. Data supplied by Tai Tarian provides <b>no indication of whether households are able to access intermediate rent or LCHO</b>, making it impossible to isolate those in need of such accommodation from others on the housing register as encouraged by the Tool. The lack of detail on household income also restricts any independent evaluation. It has therefore been necessary to assume, as a worst-case scenario, that all households on the housing register need social rented accommodation.</p>
Existing stock and planned supply	1. RSLs have been unable to provide data on <b>re-lets in each HMA</b> . An assumption was initially made based on WG data <sup>42</sup> which indicated that there had been an average of 797 lettings to new tenants in each of the last three reported years. This equated to c.6% of the 13,273 affordable homes that the Council recorded throughout the county borough via the survey that informed its RRTP. Subsequent discussions with housing sector representatives did though suggest that this turnover rate was too high, with the actual rates varying depending on unit size. Tai Tarian evidenced this by providing detail on stock turnover rates over a 7-year period. This data was then used to calculate turnover rates for stock of different sizes – based on an average over the three most recent years (2021/22; 2022/23; and 2023/24) – which were

<sup>41</sup> According to data collected by the Council to inform its prospectus, in February 2022

<sup>42</sup> Welsh Government via Stats Wales (2022) Number of lettings during the financial year by local authority and type of letting

Key data inputs	Key issues identified with the data inputs				
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subsequently applied to the stock that the Council had recorded in each HMA.

Beds in property	1	2	3	4+	All
Turnover rate	4.1%	5.2%	2.3%	1.4%	3.6%

2. RSLs have also been unable to provide detail on **planned removals**, such that none have been allowed for in the Tool.

3. While the Tool allows users to estimate the **committed supply and expected turnover of properties available for intermediate rent and LCHO**, there is a lack of reliable data with which to do so. It has therefore been assumed that no such properties become available.

Table 2 Key issues: Input Assumptions

Key input assumptions	Key issues identified with the input assumptions
Affordability criteria	1. <b>Lack of local data</b> with which to consider whether it would be justified to depart from the default assumptions, which have consequently been applied across all HMAs.
First time buyer (FTB ) assumptions	1. <b>Lack of local data</b> with which to consider whether it would be justified to depart from the default assumptions, for one HMA or all. A suggestion of the working group (25 <sup>th</sup> percentile) has therefore been consistently used across all HMAs.
Percentage of households eligible for owner occupier tenure that decide to go on and buy	1. <b>Lack of local data</b> with which to make such an assumption, as the guidance suggests was the case even at the national level <sup>43</sup> . It confirms that the technical working group considered an assumption in the range of 40-60% to be reasonable, and the midpoint of this range (50%) has therefore been used.
Five-year financial forecast for key variables – income, rent and house prices	1. <b>Lack of local data</b> with which to consider whether it would be justified to depart from the default assumptions, which have consequently been applied across all HMAs.
Calculation of intermediate housing (IR and LCHO)	1. <b>Lack of local data</b> on which to base any split between intermediate rent and LCHO within the Tool, or even outside where the guidance indicates that this would need to take account of ' <i>savings/deposits and credit ratings</i> ' but no such insight is available <sup>44</sup> .

<sup>43</sup> Welsh Government (March 2022) Undertaking Local Housing Market Assessments (LHMAs) – Guidance, version 1.0, p24

<sup>44</sup> *Ibid*, p25

Table 3 Key Issues: Calculations and Outputs

Calculations / outputs	Key issues identified with the calculations / outputs
Market housing need covering owner occupier and private rented sector	1. Affected by issues discussed above
Affordable housing need covering social rent and immediate housing	1. Lack of information regarding <b>households' ability to access intermediate housing</b> means that this is likely to have been underestimated, with the need for social housing consequently overstated within the Tool.
Scenario testing tables	n/a
Five year outputs / 10 year outputs	1. Affected by issues discussed above

## Appendix 2: Estimating the Need for Specialist Older Persons' Accommodation

Official WG projections themselves make assumptions about the number of people living not in private households but in communal establishments, such as care homes<sup>45</sup>. They are understood to assume that:

- The number of people aged 74 or under who are not in private households does not change from the position recorded by the 2011 Census; and
- The *proportion* of all aged 75 and over who are not in private households does not change from what was recorded by the 2011 Census, with the absolute number therefore changing to reflect the size of this cohort.

This approach means that any projected growth in the number of people living in communal establishments is entirely attributable to growth in the number of older residents aged 75 or above. This implies an additional need for bedspaces in communal establishments such as care and nursing homes.

Table 2.1 shows that the communal population of NPT is projected to grow over the new plan period under in each scenario, by a broadly comparable amount. Circa 243 more individuals would live in such accommodation under the lower variant of the official 2018-based projections, while 320 are assumed to do so in the higher variant.

Table 2.1: Projected Change in Communal Population of NPT (2021-36)

	Additional residents in communal establishments	Additional residents per annum
Higher variant	320	21
WG Principal	279	19
Lower variant	243	16

Source: WG

As these individuals are not assumed to live in private dwellings, the implied need for bedspaces in communal establishments – shown at Table 2.1 – is **excluded from and additional to** any reported need for dwellings.

While the above provides an indication of the need for additional bedspaces in care homes, consideration can also be given to the need for other types of specialist housing for older people. The Strategic Housing for Older People Analysis (SHOP@) toolkit – produced by Housing LIN – is widely used for this purpose, drawing upon national data to estimate the rate

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<sup>45</sup> A communal establishment provides managed residential accommodation. It is defined to include sheltered accommodation units where fewer than half of units have their own cooking facilities, or similar accommodation where residents have their own rooms but the main meal is provided. If half or more possess their own facilities for cooking, regardless of use, all units in the whole establishment are treated as separate households

at which those aged 75 and over could require different forms of specialist housing. While no longer freely available, it has generally suggested that there could be demand for:

- **125 sheltered housing units** per thousand residents aged 75 or above;
- **20 enhanced sheltered housing units** per thousand residents aged 75 or above; and
- **25 extra care units** with 24/7 support per thousand residents aged 75 or above.

Table 2.2 suggests that there could be as many as 4,724 more residents aged 75 or above in NPT by the end of the new plan period in 2036, compared to 2021. Such a level of growth could, according to the SHOP@ toolkit, generate demand for circa 803 additional bedspaces over that period, at an average rate of around 54 per annum. The latter reduces to 43 per annum in the lower variant of the 2018-based projections.

Table 2.2: Projected Demand for Specialist Housing (2021-36)

	Extra 75+	Sheltered housing	Enhanced sheltered	Extra care	Total	Annual
Higher variant	<b>+4,724</b>	591	94	118	<b>803</b>	54
WG Principal	<b>+4,253</b>	532	85	106	<b>723</b>	48
Lower variant	<b>+3,764</b>	470	75	94	<b>640</b>	43

*Source: WG; Housing LIN; Turley analysis*

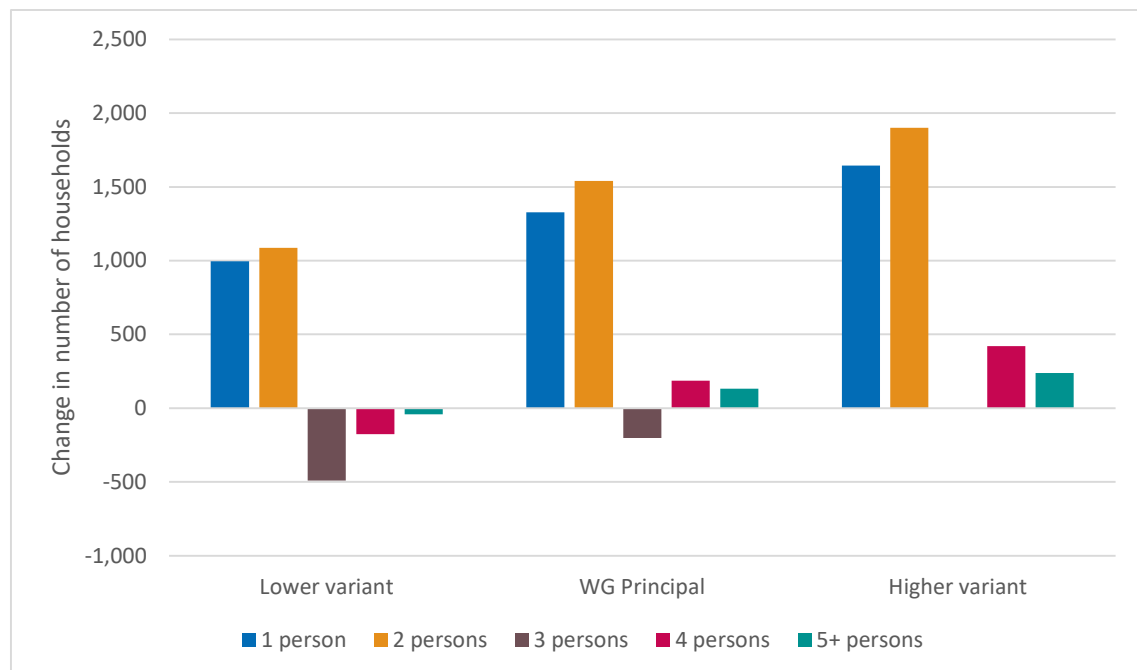
Unlike the distinct need estimated at Table 2.1, those who may occupy these types of specialist accommodation *are* otherwise assumed to live in private households. This means that such individuals are **included** in any reported need for dwellings.

## Appendix 3: Estimating the Size of Market Housing Required

The Council has requested further consideration of the size of market housing that may be required in NPT.

The official WG projections make assumptions on the size of all additional households, albeit these are only available for NPT as a whole preventing similar analysis for individual HMAs. The projections are broadly consistent in suggesting that most additional households will contain only one or two people, with the latter assumed to grow by a slightly greater amount in each of the official projections.

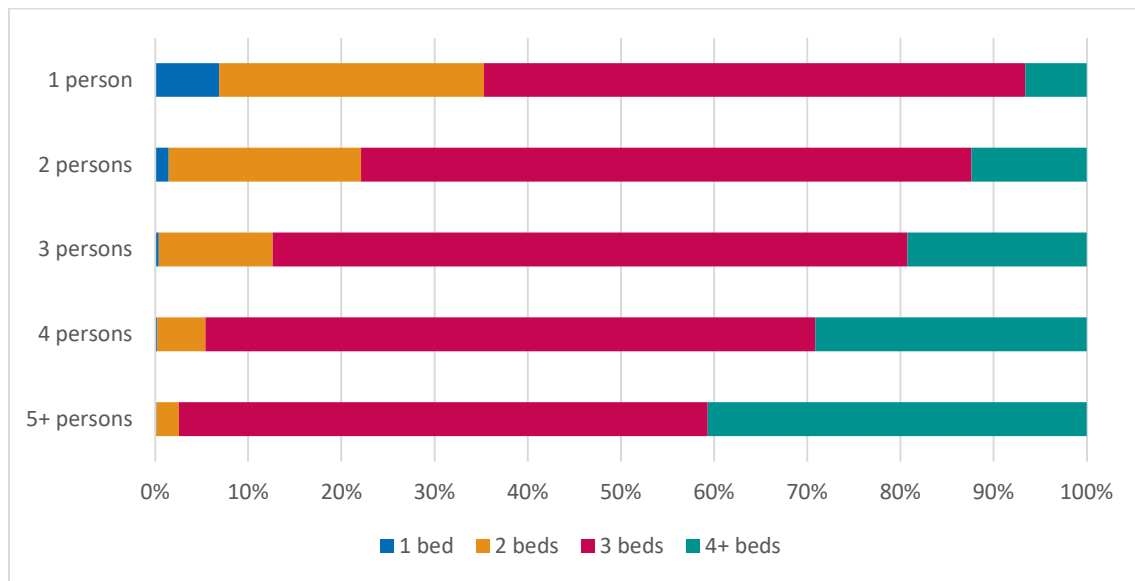
Figure 3.1 Size of Additional Households in NPT (2021-36)



Source: WG

While the above provides an indication of the number of people in additional households, it cannot be simply assumed that people living alone will require one bedroom, nor that households containing two people will need two bedrooms for example. The 2011 Census – which continues to offer an unrivalled level of local detail at the time of writing – shows that many of the people living alone in market housing in NPT actually occupied larger housing, with around two thirds (65%) having at least three bedrooms. Only 7% had one bedroom, albeit this did make these households the most likely to occupy such smaller housing with the tendency to do so reducing amongst larger households. Households containing four people, for example, overwhelmingly had three or more bedrooms, and some 41% of those containing five had at least four bedrooms.

Figure 3.2 Size of Market Housing Occupied by Number of Residents in Household (2011)



Source: Census 2011

If these evidenced local tendencies persist, and households of different sizes continue to occupy the size of market housing chosen by their predecessors, then 59-62% of the additional households envisaged by the official projections could need three bedrooms. Circa 21-32% could need two bedrooms and no more than 6% could need one, while up to 13% of all households could need four or more bedrooms. Table 3.1 shows variation between the official projections, but all are consistent in suggesting that the prevailing need will be for market housing with three bedrooms.

Table 3.1: Estimating the Size of Market Housing Needed in NPT (2021-36)

	1 bed	2 beds	3 beds	4+ beds	Total
Lower variant	6%	32%	59%	3%	100%
WG Principal	4%	23%	62%	12%	100%
Higher variant	3%	21%	62%	13%	100%

Source: WG; Census 2011; Turley analysis



## Appendix 4: Analysis of Change in the Additional Housing Need Estimates

Annual additional housing need estimates	Column index	Current LHMA	Previous LHMA
		Over the first five years of the LHMA period	
Total housing need estimate	(a)	768	263 <sup>46</sup>
Market housing	(b)	145	111
Affordable housing	(c)	623	152
Percentage split of additional housing need by market and affordable housing	(b)/(a): (c)/(a)	19/81%	42/58%
Annual planned supply and turnover of existing stock for affordable housing	(e)	433	–
Affordable housing need – net of planned supply and turnover of existing stock	(f) = (c) – (e)	190	152
Annual additional housing need estimate split by tenure:			
Owner occupier	(g)	66	–
Private rented sector	(h)	79	–
LCHO – net basis	(i)	0	–
Intermediate rent – net basis	(j)	23	–
Social rent – net basis	(k)	167	–
One bedroom social rent	(l)	153	–
Two bedrooms social rent	(m)	0	–
Three bedrooms social rent	(n)	1	–
Four+ bedrooms social rent	(o)	13	–
Market housing percentage split:		46/54%	–
Owner occupier estimate	(g)/(b)		
Private rented sector estimate	(h)/(b)		
Affordable housing need percentage split:		0/12/88%	–
LCHO	(i)/(f)		
Intermediate rent	(j)/(f)		
Social rent	(k)/(f)		

<sup>46</sup> Net figure, based on Figure 25 of the Housing Market Summary prepared in October 2020

Annual additional housing need estimates	Column index	Current LHMA	Previous LHMA
Social housing need percentage split by number of bedrooms <sup>47</sup>			
1 bed	(l)/(k)	53%	36%
2 beds	(m)/(k)	26%	40%
3 beds	(n)/(k)	18%	22%
4+ beds	(o)/(k)	3%	2%

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<sup>47</sup> Percentages from the current LHMA based on gross need for social housing

Data Input and Key assumptions	Current LHMA	Previous LHMA
	Over the first five years of the LHMA period	
Number of HMAs and basis of defining HMAs (ward, MSOA, LSOA)	Eight HMAs based on wards	Eight HMAs based on wards
Selected household projection basis	Employment-led scenario allowing for job losses at Tata as well as growth associated with the Celtic Freeport proposition and other likely investments	10-year variant of the WG 2014-based projection
Annual newly arising need	81	–
Rent data – state default or source used	Default	VOA
House price paid data – state default or source used	Default	ONS House Price Statistics, VOA and Land Registry Price Paid data
Income data – state source used	CACI Paycheck	–
Annual existing unmet housing need	542	–
Market housing affordability criteria	30%	–
Social rent affordability criteria	35%	–
Percentage of those considered appropriate for owner occupier that go onto buy	50%	–
Average FTB property price for the LA	£64,423 - £124,824	–
FTB property value to income ratio for the LA	3.8	–
Five-year financial forecast – OBR or alternative source	OBR	–
Split of intermediate housing need – method 1, 2 or 3	1	–

**Turley**  
Level 5  
Transmission  
6 Atherton Street  
Manchester  
M3 3GS

T 0161 233 7676