

Strategic Housing Market Assessment 2021

North Tyneside Council

Final Report

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Executive Summary

Introduction

The North Tyneside Strategic Housing Market Assessment (SHMA) 2021 provides North Tyneside Council with up to date evidence on housing need across all sections of the community over the period 2021 to 2039/40. The evidence will inform the update of the Local Plan, other strategies, policies and decisions of the council and its partners.

The SHMA has been prepared in accordance with the National Planning Policy Framework (NPPF) and associated Planning Practice Guidance (PPG).

This report has been prepared during the COVID-19 pandemic. The impact this may have on population projections, the economy and dwelling need will emerge in due course.

Data have been produced at ward and sub-area level where possible.

Dwelling stock

There are an estimated 100,085 dwellings and 96,684 households across North Tyneside in 2021. The vacancy rate is 2.9% which is slightly higher than the rate for England (2.7%). Most dwellings are houses (67.5%), 24.8% are flats and 7.2% are bungalows. 64.8% of households are owner occupiers, 13.3% privately rent and 23.3% live in affordable housing. There are around 374 affordable home ownership properties in North Tyneside.

House prices and rents

In 2020, lower quartile prices were £119,500 (North East £95,000 and England £165,000) and median prices were £170,000 (North East £143,000 and England £259,000).

In 2020, lower quartile private rents were £451 each month (£451 North East and England £724) and median rents were £524 (North East £550 England £1,148).

Future dwelling mix and development priorities

The SHMA has carefully considered the future population and household projections over the period 2021 to 2039, the range of dwellings lived in by different households and their dwelling aspirations (likes) and expectations. This helps to determine an appropriate mix of dwellings to inform future development priorities to better reflect the housing needs of communities across North Tyneside.

The latest standard method calculation establishes a minimum need for 799 dwellings each year. These figures compare with an average net annual delivery of 786 dwellings over the past 5 years.

There is an annual need for 477 affordable homes each year across North Tyneside which justifies the need for a robust affordable housing policy. Planning Practice

Guidance is clear that it expects councils to deliver affordable housing to help meet identified need but as actual delivery is subject to economic viability, not all of this identified need has to be met.

An overall affordable tenure split for new affordable housing is 70% rented and 30% affordable home ownership excluding First Homes. If First Homes are included, the tenure mix adjusts to 58% rented and 42% affordable home ownership including First Homes. The council may need to seek alternative methods to maximise social/affordable rented delivery, for instance through direct council house building.

Given the level of affordable need, a suitable affordable housing policy continues to be required to support the ongoing delivery of affordable housing and diversify the affordable products available to local residents to reflect identified needs. The analysis has shown a specific need for bungalow/level-access affordable rented dwellings which reflects the needs from an ageing population.

The overall dwelling mix recommendations by tenure are set out in Table ES1.

Table ES1 Summary of overall dwelling mix by tenure				
Dwelling type/size	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
1 and 2-bedroom house	15-20%	10-15%	15-20%	15-20%
3-bedroom house	30-35%	15-20%	30-35%	30-35%
4 or more-bedroom house	25-30%	2-5%	10-15%	20-25%
1-bedroom flat	0-2%	15-20%	2-5%	2-5%
2 or more - bedroom flat	5-10%	25-30%	5-10%	10-15%
1-bedroom level-access	0-2%	5-10%	0-2%	2-5%
2 bedroom level-access	5-10%	5-10%	15-20%	5-10%
3 or more bedroom-level-access	5-10%	0-2%	2-5%	2-5%
Dwelling type	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
House	75-80%	35-40%	60-65%	65-70%
Flat	5-10%	45-50%	10-15%	15-20%
Bungalow/level-access	15-20%	15-20%	20-25%	15-20%
Number of bedrooms	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
1	2-5%	25-30%	5-10%	10-15%
2	25-30%	40-45%	40-45%	35-40%
3	35-40%	20-25%	35-40%	35-40%
4	25-30%	2-5%	10-15%	15-20%

Analysis of bids for social/affordable rented properties indicates that a broad range of dwelling sizes are needed. In terms of dwelling type, applicants were much more likely to bid on houses than flats or bungalows/level access properties.

The needs of other groups

Particular needs which have been identified in the SHMA are:

- Increasing and diversifying the supply of specialist housing for older people. There is a need for 2,642 units of accommodation for older people by 2039. This includes sheltered/retirement, Extra Care, co-housing and residential care.
- Based on an assessment of additional needs and longer-term demographics, 3.4% of new dwellings (29 each year) should be built to M4(3) wheelchair accessible standard; and in line with the current Local Plan policy all affordable and 50% of market dwellings should be built to M4(2) accessible and adaptable standard.
- A range of accommodation for people with additional needs.

Note that there is overlap between affordable, specialist older person and M4(3) need, so for instance the development of an older person's level access, wheelchair accessible affordable dwelling would help address three aspects of housing need.

Summary of policy recommendations

Overall housing need	799 each year based on 2021 standard method calculation	Change in need to be noted and policies updated where relevant Compares with annual average completion of 786 over five years to 2020/21
Affordable housing need	Annual imbalance of 477 which justifies need for robust affordable housing policy and delivery	Affordable housing policy to maximise delivery on market sites subject to viability and consider new ways of delivering affordable, particularly social rented housing, through council house building
	Affordable tenure mix of 70% rented and 30% affordable home ownership or 58% rented and 42% affordable home ownership if First Homes included in calculations	Affordable tenure split revised from 75% rented / 25% affordable home ownership in previous SHMA. Impact of First Homes needs careful evaluation and methods to maximise social rented housing to be considered

Needs of different groups	3.4% of new dwellings to be M4(3) wheelchair accessible, all affordable and 50% of market dwellings to be M4(2)	Change in M4(3) need to be noted and ensure delivery of M4(2) and M4(3) housing in line with policy
	2,642 additional units of accommodation for older people by 2039	Diversify range of older persons accommodation including sheltered/retirement, extra care and cohousing. Continue to review need for residential care Strengthen policies to enable people to live in their own homes for longer with appropriate support and adaptation
	Other needs groups	Ongoing review of need for specialist housing and build upon the needs evidence in this SHMA

1. Introduction

Background, aims and objectives

- 1.1 The North Tyneside Strategic Housing Market Assessment (SHMA) 2021 provides the council with up to date evidence on housing need across all sections of the community over the period 2021 to 2039/40. The evidence will inform the update of the Local Plan, other strategies, policies and decisions of the council and its partners.

National Planning Policy Framework

- 1.2 The evidence base needs to take account of the requirements of the National Planning Policy Framework (NPPF). The latest version was published in July 2021 and supported by Planning Practice Guidance (PPG). The NPPF 2021 sets out the government's planning policies for England and how these are expected to be applied. Paragraph 11 of the NPPF states that plans, and decisions should apply a *'presumption in favour of sustainable development'*. As part of this, in relation to plan-making, it sets out that this means *that 'strategic policies should, as a minimum, provide for objectively assessed needs for housing...'*

- 1.3 Paragraph 60 provides an important context to the policy for housing delivery, as follows:

'To support the Government's objective of significantly boosting the supply of homes, it is important that a sufficient amount and variety of land can come forward where it is needed, that the needs of groups with specific housing requirements are addressed and that land with permission is developed without unnecessary delay'

- 1.4 Paragraphs 61 to 63 relate to the evidence base requirements which underpin this study:

Paragraph 61: **'To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance – unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. In addition to the local housing need figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for.'**

Paragraph 62: **'Within this context, the size, type and tenure of housing need for different groups in the community, should be assessed and reflected in planning policies including but not limited to: those who require affordable housing; families with children; older people; students; people with disabilities; service families; travellers; people who rent their homes; and people wishing to commission or build their own homes.'**

- Paragraph 63: **‘where a need for affordable housing is identified, planning policies should specify the type of affordable housing required’.**
- 1.5 Paragraph 65 requires that: **‘strategic policy-making authorities should establish a housing requirement figure for their whole area, which shows the extent to which their identified housing need (and any needs that cannot be met within neighbouring areas) can be met over the plan period. Within this overall requirement, strategic policies should set out a housing requirement for designated neighbourhood areas which reflects the overall strategy for the pattern and scale of development and any relevant allocations.’**
- 1.6 The Localism Act 2010 introduced the ‘Duty to Co-operate’ as a replacement for Regional Spatial Strategy and this requirement is also established in National Planning Policy (NPPF 2019, Paragraphs 24-27). Section 110 requires local authorities and other bodies, including Local Enterprise Partnerships to co-operate in maximising the effectiveness of strategic matters within development plan documents. The provision of housing development is a strategic priority and the council will have to ensure that it is legally compliant with the Localism Act at Local Plan examination.
- 1.7 The NPPF 2021 sets out affordable housing definitions which are presented at Technical Appendix A.

Local policy context

Local Plan

- 1.8 The Local Plan was adopted in July 2017. The housing priorities include:
- Providing enough new homes to meet current and future need and ensuring the borough maintains a rolling five year supply of deliverable housing land to avoid pressure on green belt.
 - Delivering a distribution of new housing that is sustainable, taking account of the economic, social and environmental impacts of development and infrastructure requirements.
 - The delivery of brownfield land, whilst taking into consideration the viability of land for development.
 - Providing accommodation that is affordable for all sectors of the local community.
 - Improving existing residential areas and bringing empty homes back into residential use.
 - Delivering a range and type of housing that is currently under-provided for in the borough, in order to meet identified shortfalls in need.
 - Ensuring the delivery of specialist stock to meet specific needs such as larger housing, and extra care facilities.

- Promoting good management of Houses in Multiple Occupation including encouraging landlords to work with the council through specific improvement schemes and initiatives.
 - Offering opportunities for self-build schemes, including the identification of parcels of land on larger housing sites.
 - Ensuring that there remains a choice and variety of viable housing sites, capable of meeting a range of housing needs.
- 1.9 Over 65s will increase by 56% to 2032 which will generate an extra 4,891 potentially be in need of social care. This dwarfs the 0.6% increase in working population.

Corporate policy

- 1.10 The authority has five key policy themes aimed at creating a North Tyneside that is *thriving*, family-friendly, caring, secure and green. The pledges for housing are:
- We will provide 5000 affordable homes.
 - We will reduce the number of derelict properties across the borough.
 - People will be cared for, protected and supported if they become vulnerable, including if they become homeless.
 - We will secure funding to help low income households to install low-carbon heating.
 - We will publish an action plan of the steps we will take and the national investment we will seek to make North Tyneside carbon net-zero by 2030.

Getting Building Fund and other funding.

- 1.11 Announced in 2021, the Getting Building Fund is to invest more than £5m in North Shields, to create a new North Shields ferry landing in the heart of the Fish Quay. In addition, the council has further been awarded £3.5m to support a number of improvements to the Howard Street and Northumberland Square areas. Work is also being carried out to access the Brownfield Land Fund.

Housing land position

- 1.12 The current five year tranche has an annual requirement of 938 units (4,690 in total). This drops slightly to 908 for the next six years to 2031/32.
- 1.13 76% of development is set to be within the main urban area. Hence over 40% of delivery during the plan period is expected to be on brownfield land. Almost half the next five year's homes are scheduled to be provided on Killingworth Moor and Murton Gap. Only 2% comes from small sites and 8% from windfalls.
- 1.14 Whilst a 5.0 years-worth of housing land was identified in 2020 for the period to 2020/21 to 2024/25. The latest Strategic Housing Land Availability report,

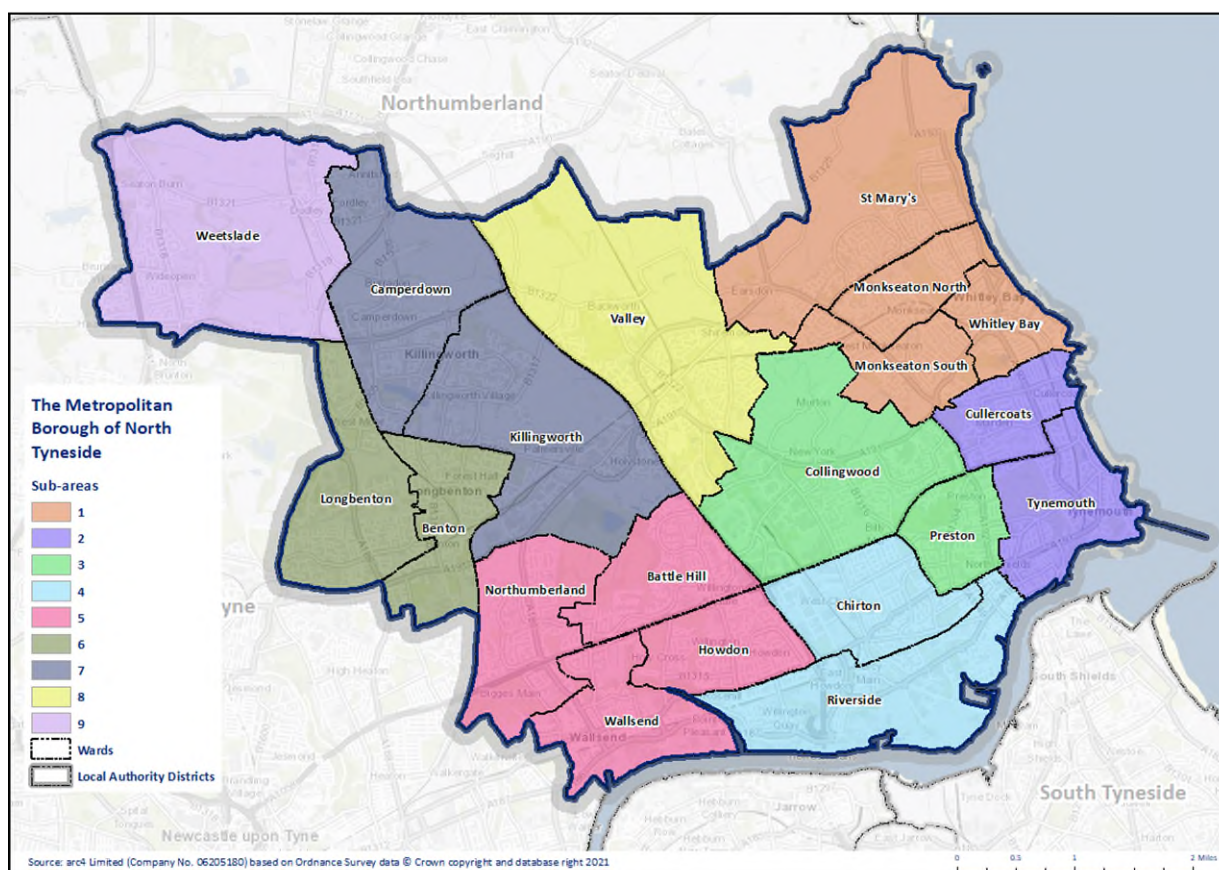
published September 2021 identifies has only 3.96 years-worth of supply, of which only 31% having full planning permissions. Completions have dropped off from their 2016/17-2018/19 peak – before which delivery tended to undershoot as a result of the ongoing recovery from the economic crash commencing in 2007/08.

- 1.15 Progress will depend on delivery coming from 41% of land assigned to Local Plan allocations for the next five years. On the positive side there is a 10% over-provision from the buffer.

Geography

- 1.16 North Tyneside is one of the constituent local authorities of Tyne and Wear and is bounded to the north by Northumberland and to the west by Newcastle. The resident population of North Tyneside was estimated to be **209,709** (source: ONS 2018 based population projections for 2020) in 2021.
- 1.17 For the purposes of the SHMA, North Tyneside has been divided into nine sub-areas as illustrated in Map 1.1. These are consistent with the sub-areas of the 2016 SHMA and devised in consultation with the council and take account of the varying characteristics of neighbourhoods across North Tyneside.
- 1.18 The SHMA also presents some data at ward and Lower Super Output Area (LSOA) to provide a fine-grained analysis of selected household and housing market data.

Map 1.1 North Tyneside wards and sub-areas



Sub-area	Description
1	Whitley Bay / Monkseaton area
2	Cullercoats / Tynemouth area
3	Moor Park / New York / Chirton Grange / Preston Grange / Preston Area
4	North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area
5	Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area
6	Benton / Longbenton / Forest Hall area
7	Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area
8	Shiremoor / Backworth / Northumberland Park / West Allotment area
9	Dudley / Seaton Burn / Wideopen area

Research methodology

1.19 A multi-method approach has been used to prepare the 2021 SHMA comprising:

- An online survey of stakeholders which included five representatives from strategic and local organisations.
 - Interviews with estate and letting agents operating across North Tyneside.
 - A review of relevant secondary data including the 2011 Census, house price trends, ONS sub-national population projections and MHCLG/ONS household projections, CORE lettings data and MHCLG statistics.
 - A comprehensive online household survey. 20,000 households were contacted across North Tyneside and 2,435 useable responses were achieved representing a 12% response rate and a +/-1.96% sample error.
 - A review of particular client groups relevant to NPPF Paragraph 61, including hard to reach and vulnerable groups.
- 1.20 Further information on the research methodology is presented in Technical Appendix A.

Presentation of data

- 1.21 Data are clearly sourced throughout the SHMA report. Where possible, data are 'triangulated' which means several sources are drawn upon to establish a robust output.

COVID-19 impact

- 1.22 Regarding the COVID-19 situation, it is too early to consider the longer-term implication of the pandemic on demography, economy and housing but there are several emerging trends. The pandemic has accelerated trends in home working, retail and office use. There are implications for the housing offer, with a 'race for space' *within* dwellings, the need for larger gardens/outdoor space and better access to public space which may alter the demand/need for larger homes in less dense settings. A redistribution of demand between urban and more rural locations has also been suggested. Repurposing town centres and commercial buildings provides opportunities for new forms of residential occupancy, for instance micro-homes and co-living.

Report structure

- 1.23 The North Tyneside 2021 report is structured as follows:
- Chapter 2 considers the housing market key drivers focusing on dwelling stock, demographic drivers, household characteristics including income, economic drivers and migration.
 - Chapter 3 provides analysis of prices, rents and affordability.
 - Chapter 4 considers overall housing need and affordable housing need.
 - Chapter 5 considers the needs of different groups as referenced in the NPPF.

- Chapter 6 considers overall dwelling type and mix.
 - Chapter 7 concludes the report with a summary of key findings and a consideration of strategic and policy issues.
- 1.24 The main report is accompanied by a separate technical appendix which provides detailed material that underpins the core outputs of the SHMA. The technical appendix material includes:
- Affordable housing tenure definitions (Appendix A).
 - Research methodology (Appendix B).
 - Affordable housing need calculations (Appendix C).
 - Dwelling mix analysis (Appendix D).
 - Estate Agent review (Appendix E).

2. Housing market and key drivers

Introduction

- 2.1 This chapter provides a detailed background to dwelling stock and tenure and the underlying economic, demographic and household drivers across North Tyneside.

Dwelling stock, vacant stock and household estimates

- 2.2 Current estimates of dwelling stock, vacant stock and households from multiple sources are presented in Table 2.1. For the purposes of the 2021 SHMA, the total dwelling stock base is assumed to be **100,085** and the number of households as **96,683**. Around 2.9% of dwellings are vacant compared with the national rate of 2.7% based in MHCLG data. Table 2.2 shows the number of dwellings, long-term vacant dwellings and household estimates for smaller geographies.

Table 2.1 Dwelling stock and household estimates		
Dwelling stock	Dwellings	Source
2020 Valuation Office Agency (all dwellings)	98,630	VOA Table CTSOP3.0
2020 Valuation Office Agency (excluding annex and unknown)	98,630	VOA Table CTSOP3.0
2020 MHCLG Dwelling Stock Estimates	100,048	MHCLG Live Tables
2021 Council Tax data	100,085	Council Tax
Vacant stock	Dwellings	Source
2020 MHCLG Vacancy estimate (all dwellings)	2,914 (2.9%)	MHCLG Table LT_615
2020 MHCLG Long-term vacancy estimate (all dwellings)	1,189 (1.2%)	MHCLG Table LT_615
Households	Households	Source
2014-based DCLG Household Projections 2021 figure	98,189	DCLG (now DLUHC)
2018-based ONS Household Projections 2021 figure	96,683	ONS

Table 2.2 Dwelling stock, long-term vacant dwellings and household estimate by sub-area and ward			
Ward	Dwellings	Long-term vacant dwellings	Households
Battle Hill	4,943	39	4,775
Benton	4,814	32	4,649
Camperdown	4,955	28	4,787
Chirton	5,608	84	5,417
Collingwood	5,089	34	4,915
Cullercoats	4,409	31	4,257
Howdon	5,212	53	5,034
Killingworth	5,348	23	5,165
Longbenton	5,492	41	5,304
Monkseaton North	3,735	16	3,607
Monkseaton South	4,433	30	4,301
Northumberland	4,469	29	4,317
Preston	4,169	44	4,026
Riverside	6,566	137	6,338
St Mary's	3,861	26	3,729
Tynemouth	5,580	100	5,390
Valley	6,148	36	5,938
Wallsend	5,788	151	5,591
Weetslade	5,031	36	4,859
Whitley Bay	4,435	77	4,282
Total	100,085	1047	96,683
Sub-area	Dwellings	Long-term vacant dwellings	Households
1 Whitley Bay / Monkseaton area	16,339	149	15,792
2 Cullercoats / Tynemouth area	9,280	131	8,969
3 Moor Park / New York / Chirton Grange / Preston Grange / Preston Area	9,676	78	9,352
4 North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area	12,688	221	12,263
5 Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area	20,407	272	19,723
6 Benton / Longbenton / Forest Hall area	10,447	73	10,097
7 Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area	9,889	51	9,558
8 Shiremoor / Backworth / Northumberland Park / West Allotment area	6,116	36	5,911
9 Dudley / Seaton Burn / Wideopen area	5,193	36	5,019
TOTAL	100,035	1047	96,683

Sources: Dwellings 2021 Council Tax; households based on 96,683 from ONS 2018-based household projections

Dwelling type and size

- 2.3 The 2020 Valuation Office Agency data provides details on overall dwelling stock by type, number of bedrooms and council tax band. Table 2.3 presents the overall dwelling stock profile of North Tyneside compared with the North East and England. Table 2.4 summarises dwelling type and size data for the city.
- 2.4 In summary, Tables 2.3 to 2.4 show:
- 66.8% of dwellings in North Tyneside are council tax band A or B properties and 33.2% are band C or above;
 - 67.5% of dwellings are houses (24.4% terraced, 33.8% semi-detached and 9.3% detached), 24.8% are flats and 7.7% are bungalows; and
 - 10.2% of dwellings have one bedroom, 32.7% two bedrooms, 44.2% three bedrooms and 12.9% four or more bedrooms.
- 2.5 Map 2.1 illustrates the predominant dwelling type and size by LSOA based on 2020 Valuation Office Agency data.
- 2.6 There are an estimated 148 houses in multiple occupancy (HMO) according to 2019/20 Local Authority Housing Statistics of which 15 are licenced. According to the Government, a property is a HMO if:
- At least 3 tenants live there, forming more than 1 household;
 - You share a toilet, bathroom or kitchen facilities with other tenants.
- 2.7 Your home is a large HMO if at least 5 tenants live there forming more than one household and share facilities.
- 2.8 A HMO must have a licence from the council if there are 5 or more occupants living in the property and 2 or more separate households live in the property.

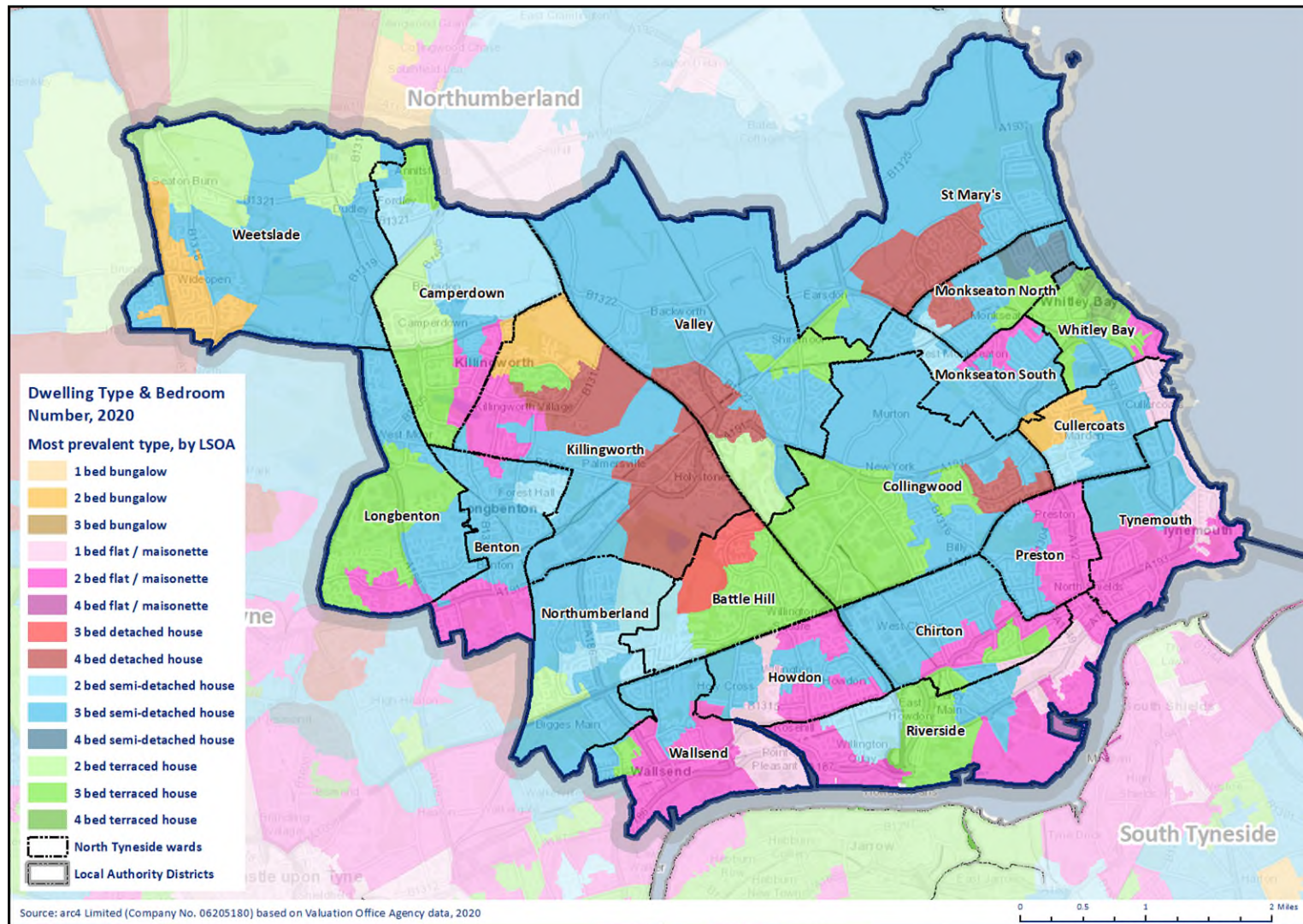
Table 2.3 Dwelling type, number of bedrooms and council tax band for North Tyneside, North East and England							
Dwelling type and number of bedrooms	Council Tax Band				Dwelling stock totals		
	A	B	C-E	F+	North Tyneside Total	North East Total	England Total
Bungalow 1-bedroom	1.6%	0.0%	0.1%	0.0%	1.7%	2.3%	1.1%
Bungalow 2-bedrooms	0.9%	1.7%	2.2%	0.0%	4.7%	6.2%	4.7%
Bungalow 3-bedrooms	0.1%	0.2%	1.0%	0.1%	1.3%	2.4%	3.0%
Bungalow 4 or more - bedrooms	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.6%
Flat 1-bedroom	7.8%	0.3%	0.1%	0.0%	8.2%	6.8%	10.8%
Flat 2-bedrooms	11.6%	1.8%	1.0%	0.0%	14.3%	8.0%	10.6%
Flat 3-bedrooms	1.7%	0.1%	0.2%	0.0%	1.9%	1.3%	1.8%
Flat 4 or more-bedrooms	0.3%	0.0%	0.0%	0.0%	0.3%	0.5%	0.5%
Terraced house 1-bedroom	0.2%	0.0%	0.0%	0.0%	0.2%	0.3%	0.5%
Terraced house 2-bedrooms	4.8%	1.7%	0.1%	0.0%	6.7%	10.9%	8.8%
Terraced house 3-bedrooms	8.7%	3.7%	2.3%	0.0%	14.7%	16.1%	15.0%
Terraced house 4 or more-bedrooms	0.6%	0.4%	1.8%	0.1%	2.8%	2.4%	2.4%
Semi-detached house 1-bedroom	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%
Semi-detached house 2-bedrooms	4.4%	2.2%	0.3%	0.0%	7.0%	6.6%	3.8%
Semi-detached house 3-bedrooms	7.7%	3.6%	11.7%	0.0%	23.0%	20.8%	17.7%
Semi-detached house 4 or more-bedrooms	0.6%	0.1%	2.8%	0.3%	3.7%	2.6%	2.6%
Detached house 1-bedroom	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Detached house 2-bedrooms	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.7%
Detached house 3-bedrooms	0.0%	0.1%	3.1%	0.0%	3.3%	4.3%	5.9%
Detached house 4 or more-bedrooms	0.0%	0.0%	4.9%	1.1%	6.0%	7.5%	9.3%
North Tyneside Total	51.0%	15.8%	31.6%	1.6%	100.0%		
North East Total	53.3%	15.8%	27.8%	3.1%		100.0%	
England Total	23.7%	19.7%	47.4%	9.1%			100.0%

Base: North Tyneside 98,630; North East 1,243,790; England 24,165,880 (excludes annex, other and missing)

Table 2.4 Dwelling type, number of bedrooms and council tax band summary					
Dwelling type	Council Tax Band				North Tyneside Total
	A	B	C-E	F+	
Bungalow	2.6%	1.8%	3.2%	0.1%	7.7%
Flat	21.4%	2.2%	1.2%	0.0%	24.8%
Terraced	14.3%	5.8%	4.3%	0.1%	24.4%
Semi-detached	12.7%	5.9%	14.8%	0.3%	33.8%
Detached	0.0%	0.1%	8.0%	1.1%	9.3%
Total	51.0%	15.8%	31.6%	1.6%	100.0%
Number of bedrooms	A	B	C-E	F+	Northumberland Total
1-bedroom	9.7%	0.4%	0.1%	0.0%	10.2%
2-bedrooms	21.7%	7.3%	3.6%	0.0%	32.7%
3-bedrooms	18.2%	7.6%	18.2%	0.1%	44.2%
4-bedrooms	1.4%	0.5%	9.6%	1.5%	12.9%
Total	51.0%	15.8%	31.6%	1.6%	100.0%

Source: VOA 2020

Map 2.1 Predominant dwelling type and size by built-up areas within LSOAs: North Tyneside



Source: Valuation Office Agency 2020

Property age and condition

The age and condition of North Tyneside's housing

- 2.9 The age profile of the dwelling stock in the borough is summarised in Table 2.5. 37.2% of dwellings were built before 1945, 38.7% between 1945 and 1982 and 24.1% since 1983.

Age of Dwellings	Number	%
pre-1919	16,930	17.0%
1919-44	20,120	20.2%
1945-64	22,450	22.5%
1965-82	16,090	16.1%
1983-99	12,860	12.9%
post 1999	11,200	11.2%
Total	99,650	100.0%
Unknown	30	
Grand Total	99,680	

Source: VOA 2020

- 2.10 The English Housing Survey (EHS) produces national data on dwelling condition. Applying national trends to the stock profile of North Tyneside (Table 2.6) would suggest that around 17.4% of dwelling stock is non-decent, which is lower than the national average of 20.6%. The number of dwellings likely to fail the minimum standard of decent homes criteria is estimated to be 10.3% (compared with 11.9% nationally).
- 2.11 A full definition of what constitutes a decent home is available from MHCLG (source: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/7812/138355.pdf) but in summary a decent home meets the following four criteria:
- it meets the current statutory minimum for housing;
 - it is in a reasonable state of repair;
 - it has reasonably modern facilities and services; and
 - it provides a reasonable degree of thermal comfort.

Table 2.6 Dwelling stock condition in England and North Tyneside estimates								
England								
Dwelling age (ehs)		Fails decent homes criteria (%)					All dwellings (000s)	% dwellings
		Non-decent %	Minimum standard	Repair	Modern facilities and services	Thermal Comfort		
pre-1919		33.5	23.3	7.4	3.9	9.7	4,952	20.5
1919-44		20.1	12.1	5.0	2.2	6.5	3,694	15.3
1945-64		17.2	9.0	4.8	1.9	5.0	4,621	19.1
1965-80		13.7	7.1	1.0	0.9	6.5	4,732	19.6
1981-90		18.0	4.2	.7	3.0	12.3	1,946	8.1
post 1990		2.7	2.5	*	*	*	4,228	17.5
Total		20.6	11.9	4.6	1.9	7.5	24,173	100.0
North Tyneside								
Dwelling age (ehs)	Dwelling age (voa)	Fails decent homes criteria (%)					All dwellings (000s)	% dwellings
		Non-decent %	Minimum standard	Repair	Modern facilities and services	Thermal Comfort		
pre-1919	pre-1919	5,672	3,945	1,253	660	1,642	16,930	17.0%
1919-44	1919-44	4,044	2,435	1,006	443	1,308	20,120	20.2%
1945-64	1945-64	3,861	2,021	1,078	427	1,123	22,450	22.5%
1965-80	1965-82	2,204	1,142	161	145	1,046	16,090	16.1%
1981-90	1983-1992	1,060	247	41	177	724	5,890	5.9%
post 1990	Post 1992	491	454	*	*	*	18,170	18.2%
Total		17,332	10,244	3,539	1,851	5,843	99,650	100.0%
% of all stock		17.4	10.3	3.6	1.9	5.9		
National %		20.6	11.9	4.6	1.9	7.5		

Source: English Housing Survey 2013 data applied to 2020 Valuation Office Agency dwelling stock age

Note ‘*’ indicates sample size too small for reliable estimate

- 2.12 The 2021 household survey provides an indication of household satisfaction with the state of repair of accommodation. Overall 72.5% of respondents expressed satisfaction (35.4% were very satisfied and 37.1% were satisfied); 14% were neither satisfied nor dissatisfied. A total of 13.5% expressed degrees of dissatisfaction, of whom 9.7% were dissatisfied and 3.8% were very dissatisfied. The 2014 SHMA indicated higher levels of satisfaction (78.5%) and 8.5% were dissatisfied.
- 2.13 Table 2.7 considers how dissatisfaction with state of repair varies by tenure, property type, age and location. Dissatisfaction was highest amongst those living in private rented housing, affordable housing (which is more reflective of tenant expectations of landlord responses to repairs rather than the actual state of repair); those in flats/apartments/maisonettes, caravans/park homes and terraced houses; those in properties built before 1919 and also properties built 1965-1984; and dissatisfaction was highest in sub-areas 4 (North Shields area) and 5 (Wallsend area).

Table 2.7a Dissatisfaction with quality of accommodation by tenure, property type and property age			
Tenure	No. dissatisfied	% Dissatisfied	Base (households)
Owner occupier	3,319	5.5%	60,547
Private rented	4,449	29.8%	14,919
Affordable housing	5,264	25.0%	21,079
Total (all responses)	13,032	13.5%	96,545
Missing data on tenure cases			139
Total (all households)			96,684
Property Type	No. dissatisfied	% Dissatisfied	Base (households)
Detached house	420	3.5%	11,980
Semi-detached house	3,411	9.8%	34,806
Terraced house / town house	3,660	16.6%	22,056
Bungalow	511	6.9%	7,406
Maisonette	308	29.1%	1,058
Flat / apartment	4,563	24.1%	18,948
Caravan/part home / other	159	54.6%	291
Total (all responses)	13,032	13.5%	96,545
Missing cases			139
Total (all households)			96,684
Property Age	No. dissatisfied	% Dissatisfied	Base (households)
Pre 1919	1,421	11.9%	11,933
1919 to 1944	1,592	10.5%	15,189
1945 to 1964	1,704	10.7%	15,992
1965 to 1984	1,635	12.3%	13,327
1985 to 2004	732	6.4%	11,401
2005 onwards	172	2.0%	8,515
Don't know	5,776	29.0%	19,942
Total (all responses)	13,032	13.5%	96,299
Missing cases			385
Total (all households)			96,684

Table 2.7b Dissatisfaction with quality of accommodation by sub-area			
Sub-Area	No. dissatisfied	% Dissatisfied	Base (households)
1 Whitley Bay / Monkseaton area	1,582	10.0%	15,792
2 Cullercoats / Tynemouth area	849	9.5%	8,969
3 Moor Park / New York / Chirton Grange / Preston Grange / Preston Area	1,115	11.9%	9,352
4 North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area	2,179	17.8%	12,263
5 Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area	3,637	18.5%	19,691
6 Benton / Longbenton / Forest Hall area	1,557	15.4%	10,097
7 Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area	1,240	13.1%	9,451
8 Shiremoor / Backworth / Northumberland Park / West Allotment area	510	8.6%	5,911
9 Dudley / Seaton Burn / Wideopen area	363	7.2%	5,019
Total (all responses)	13,032	13.5%	96,545
Missing cases			139
Total (all households)			96,684

Source: 2021 household survey

Housing tenure

2.14 The tenure profile by sub-area is presented in Table 2.8. This is based on the 2011 Census. Overall, 64.8% of occupied dwellings are owner-occupied, 13.3% are private rented (including tied accommodation and student housing) and 22% are affordable (including social rented from a council or housing association and shared ownership). There are considerable variations in tenure profile by sub-area.

Table 2.8 Tenure profile by sub-area					
Sub-area	Tenure (%)			Total	Base
	Owner occupied	Private rented	Affordable		
1 Whitley Bay / Monkseaton area	80.6%	12.1%	7.3%	100.0%	15,792
2 Cullercoats / Tynemouth area	71.8%	14.6%	13.6%	100.0%	8,969
3 Moor Park / New York / Chirton Grange / Preston Grange / Preston Area	70.8%	12.4%	16.8%	100.0%	9,352
4 North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area	40.4%	21.1%	38.5%	100.0%	12,263
5 Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area	59.9%	14.3%	25.7%	100.0%	19,723
6 Benton / Longbenton / Forest Hall area	60.9%	9.9%	29.2%	100.0%	10,097
7 Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area	66.1%	8.6%	25.3%	100.0%	9,558
8 Shiremoor / Backworth / Northumberland Park / West Allotment area	61.1%	11.9%	27.0%	100.0%	5,911
9 Dudley / Seaton Burn / Wideopen area	74.3%	9.5%	16.2%	100.0%	5,019
North Tyneside Total	64.8%	13.3%	22.0%	100.0%	96,683

Source: 2011 Census KS402EW and 2021 household estimate

The owner-occupied sector

2.15 An analysis of house prices and trends over time is presented in Chapter 3.

Stakeholder views on the owner-occupied sector

2.16 Key points raised by stakeholders regarding the owner-occupied sector include:

- There is a strong housing market in North Tyneside reflecting the recent regeneration in the town centre and opportunities for economic growth.
- Demand is strong across the market and house prices are rising.
- There is a lot of polarisation between higher and lower value areas.
- Strong demand for homes, with greatest demand for houses with 2,3,4 and 5 bedroom family homes.

- Excellent schools.
 - A desirable place to live.
 - Reasonable range of homes.
 - Most homes have good or excellent access to green space.
 - Good transport links and accessibility to the rest of Tyne & Wear.
 - Easy access to coast and country.
 - There is limited diversity in terms of property type and tenure. The first-time buyer/attainable low cost homes market is currently underrepresented and would provide a valuable intermediary between affordable dwellings and the mainstream market offering.
- 2.17 Technical appendix E sets out a comprehensive estate agent review of markets across North Tyneside.

The private rented sector

- 2.18 The private rented sector has become an important tenure in both meeting people's housing needs and providing flexible housing options for those moving for employment and to respond to changing circumstances. Across North Tyneside, the proportion of households renting increased from 8.1% in 2001 to around 12% in 2018 (ONS tenure estimates). Increasing house prices pre-2007 and the struggling sales market when the downturn came are both factors that have underpinned the growth of the rental market for both 'active choice' renters and 'frustrated would-be' homeowners. Tenure reform and less accessible social rented housing are also likely to be an increasing factor to the growth in the private rented sector and the sector clearly now plays a vital role in meeting housing need, affordable need as well as providing an alternative to homeownership.
- 2.19 Local authorities have an important enabling and regulatory role in ensuring that the private rented sector helps to meet housing need. Balancing good quality supply with demand will help to stabilise rents and encouraging good quality management will improve the reputation of the sector and encourage longer term lets and lower turnover. However, this is a challenging task where existing partners need to be encouraged to participate and new partners and investors need to be identified.

Build to Rent

- 2.20 Build to Rent schemes have a number of benefits. Schemes can quickly increase supply and provide improved quality and wider choice in housing markets; the accommodation and service offer provide better tenure options for households looking to rent longer term compared to what is available in the current PRS. Standards are more professional, tenancies longer and by introducing an affordable offer (minimum 20% below market rents), these schemes can meet an identified and specific need as affordable rental accommodation.

- 2.21 Local authorities already have tools and powers at their disposal to support Build to Rent. For example, as part of their plan making and decision taking processes, authorities can:
- Identify sites in their Strategic Land Availability Assessments which might be well suited to particular types of development.
 - Include policies in their Local Plans on Build to Rent.
- 2.22 Currently, Build to Rent is not a priority for the council and also reflected in the views of stakeholders.

Stakeholder views on the private rented sector

- 2.23 Stakeholders commented that:
- There is not enough affordable accommodation for people under 55 years needing one-bedroom affordable rental accommodation. There are many people residing in 2- and 3-bedroom properties who are being affected by the under-occupation charge and are looking to downsize.
 - There has been in the past a large amount of private rental stock on short term lets, which was previously affordable however we have seen rents increasing steadily over the past five years as demand for one- and two-bedroom properties has increased. The over-reliance on private rented accommodation creates further problems with clients often living in unsuitable properties and suffering anti-social behaviour.
 - A need for enforcement activity to tackle poor quality private rented accommodation.
 - The market remains marginal for Build to Rent products.

Affordable housing

- 2.24 There are 21,113 affordable dwellings across North Tyneside according to the Regulator of Social Housing Statistical Data Return 2020 data, these comprise:
- 17,461 general needs rented units (Council 13,118, Registered Provider (RP) 4,313);
 - 3,278 supported housing/housing for older people units (Council 1,476, RP 1,802) ; and
 - 374 low-cost home ownership units (all RP).

Stakeholder views on affordable housing

- 2.25 Stakeholders commented that:
- Shortage and increasing need for affordable housing.
 - Coordinated action to support the delivery of affordable housing – across all tenures. This includes encouraging developers to engage much earlier with

affordable housing providers on the delivery of planning gain units; the council working more closely with registered providers; earlier engagement between the council and registered providers with house builders would help in agreeing house types, standards and tenure mix.

- Open market housing which would include elements of affordable housing are what most developers would like to see.
- A need for good quality affordable housing need and demand information
- Current reliance on S106 units for supply limits the type of affordable housing that can be delivered and is of varying quality.
- Registered providers said strongest demand was for affordable rent, special needs accommodation, shared ownership units including bungalows.
- Review of the North Tyneside's Allocations Policy is required to ensure those with vulnerabilities are not disadvantaged because of previous tenancies once they have successfully completed a period of tenancy support.

Past trends in housing delivery

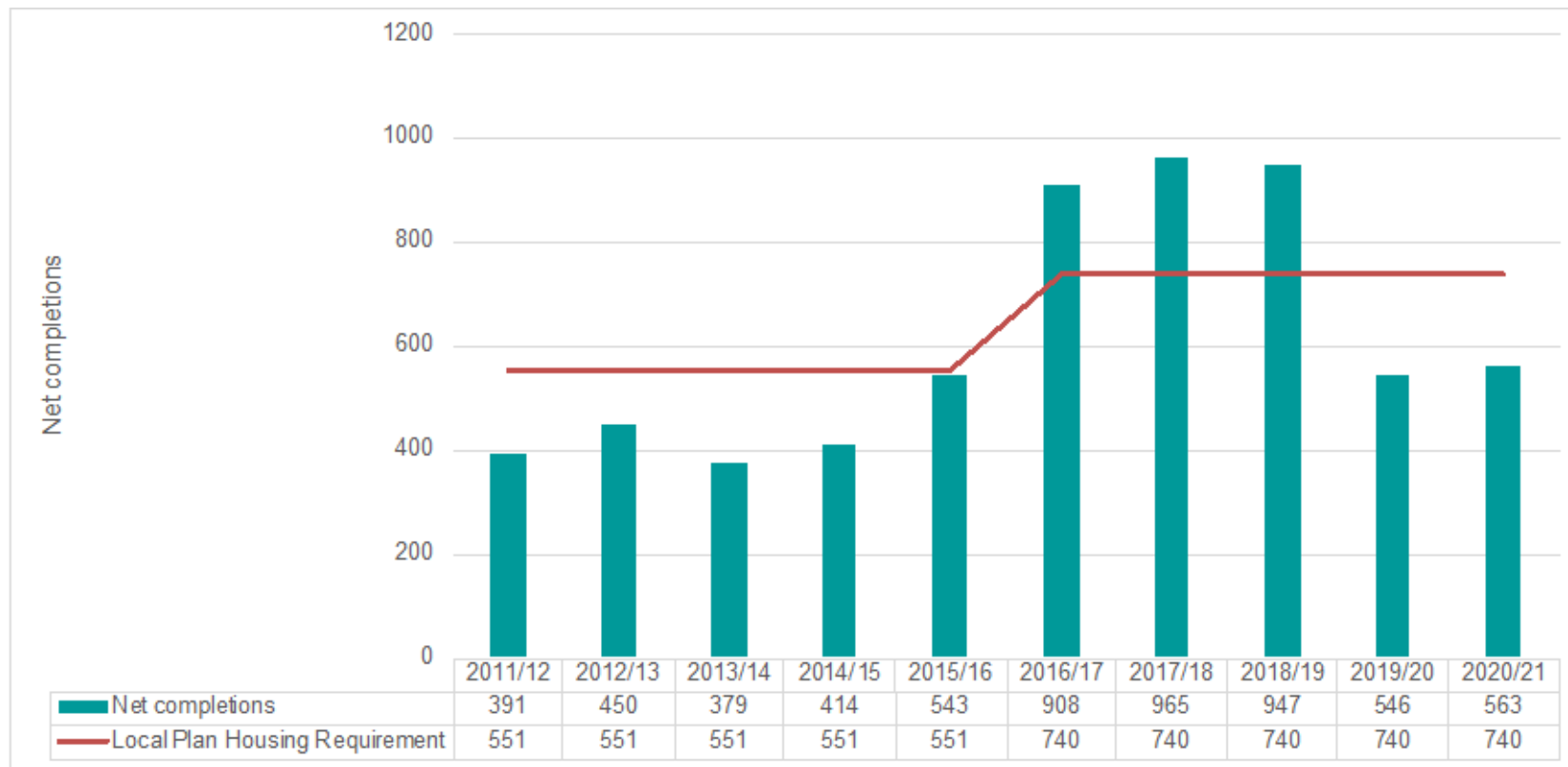
- 2.26 Over the past 10 years (2011/12 to 2020/21) 6,106 net new dwellings have been built across North Tyneside (Table 2.9), with 60% built in the five years to 2020/21. In the past 5 years, an annual average of 786 net completions have been achieved. A comparison of annual completions with the annual housing target is presented in Figure 2.1. The distribution of newbuild activity since 2007 is shown in Map 2.2.

Table 2.9 Dwelling completions 2011/12 to 2020/21

Year	Gross completions	Net completions	Local Plan Housing Requirement	Net completions - Local Plan Housing Requirement
2011/12	455	391	551	-160
2012/13	495	450	551	-101
2013/14	447	379	551	-172
2014/15	568	414	551	-137
2015/16	775	543	551	-8
2016/17	854	908	740	168
2017/18	1042	965	740	225
2018/19	947	947	740	207
2019/20	589	546	740	-194
2020/21	624	563	740	-177
2011-2021 (Total)	6,796	6,106	6,455	-349
Total (past 5 years)	4,056	3,929	3,700	229
Annual average (past 5 years)	811	786	740	46

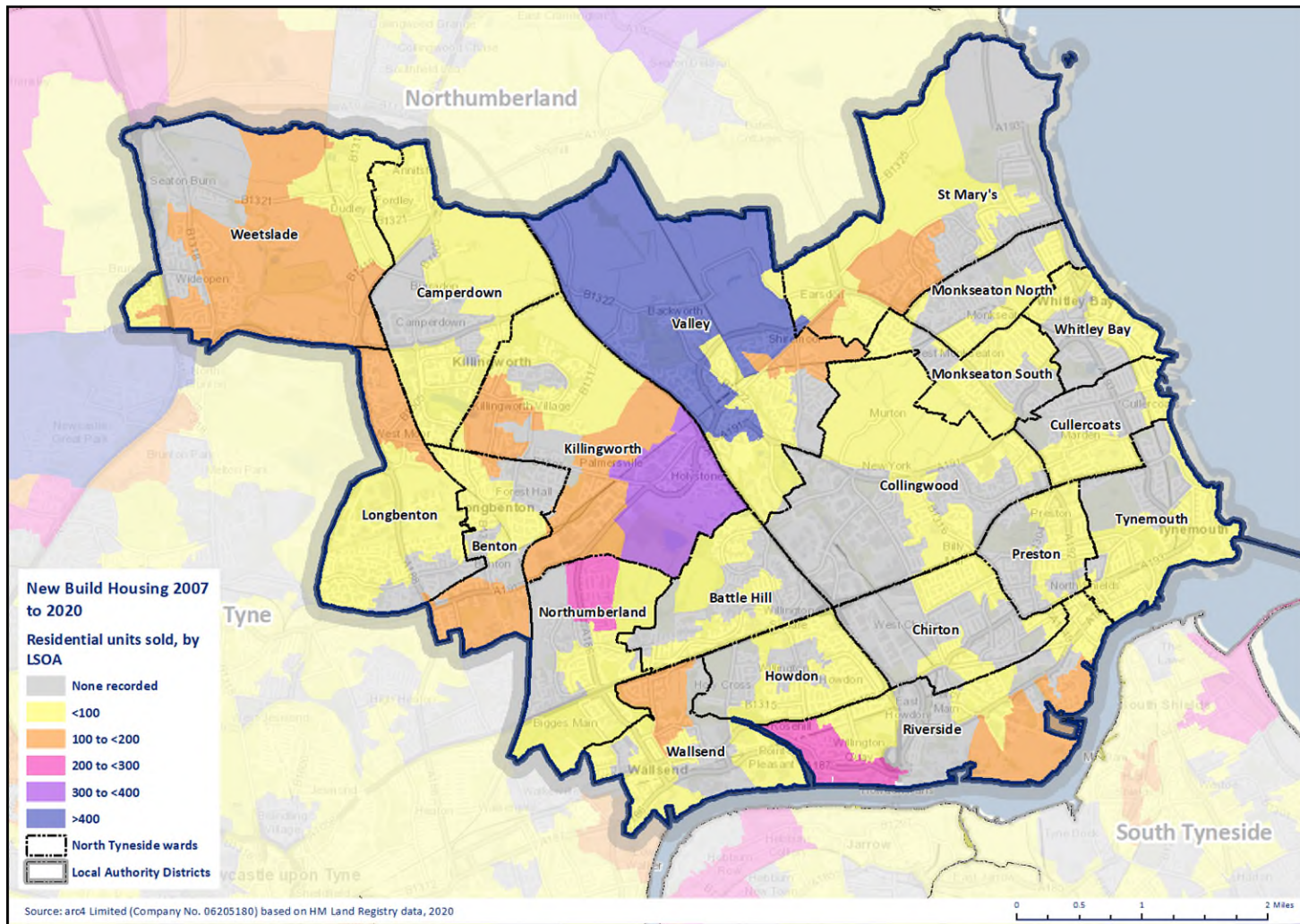
Source: North Tyneside Council

Figure 2.1 Dwelling completions compared with the annual requirement, 2011/12 to 2020/21



Source: North Tyneside Council

Map 2.2 Newbuild dwellings by LSOA over period 2007-2020



Source: Land Registry © Crown copyright 2020

Note There are also newbuild sales in Station Road, Shiremoor, Stevenson Village, Wideopen which are not reported on Land Registry data

Demographic drivers: population and households

Population projections

- 2.27 The ONS produces population projections every two years. The latest 2018-based principal ONS population projections report a 2021 population of 209,709 across the borough which is expected to increase by 15,051 (7.2%) to 224,760 by 2039 (Table 2.10). Older age groups are expected to see the highest level of increase along with the 40-54 age cohort. Table 2.11 also shows the 2014-based ONS population projection totals. These projections underpin the 2014-based MHCLG household projections which inform the standard method to calculate housing need. They show a lower level of population growth compared with the 2018-based projections.

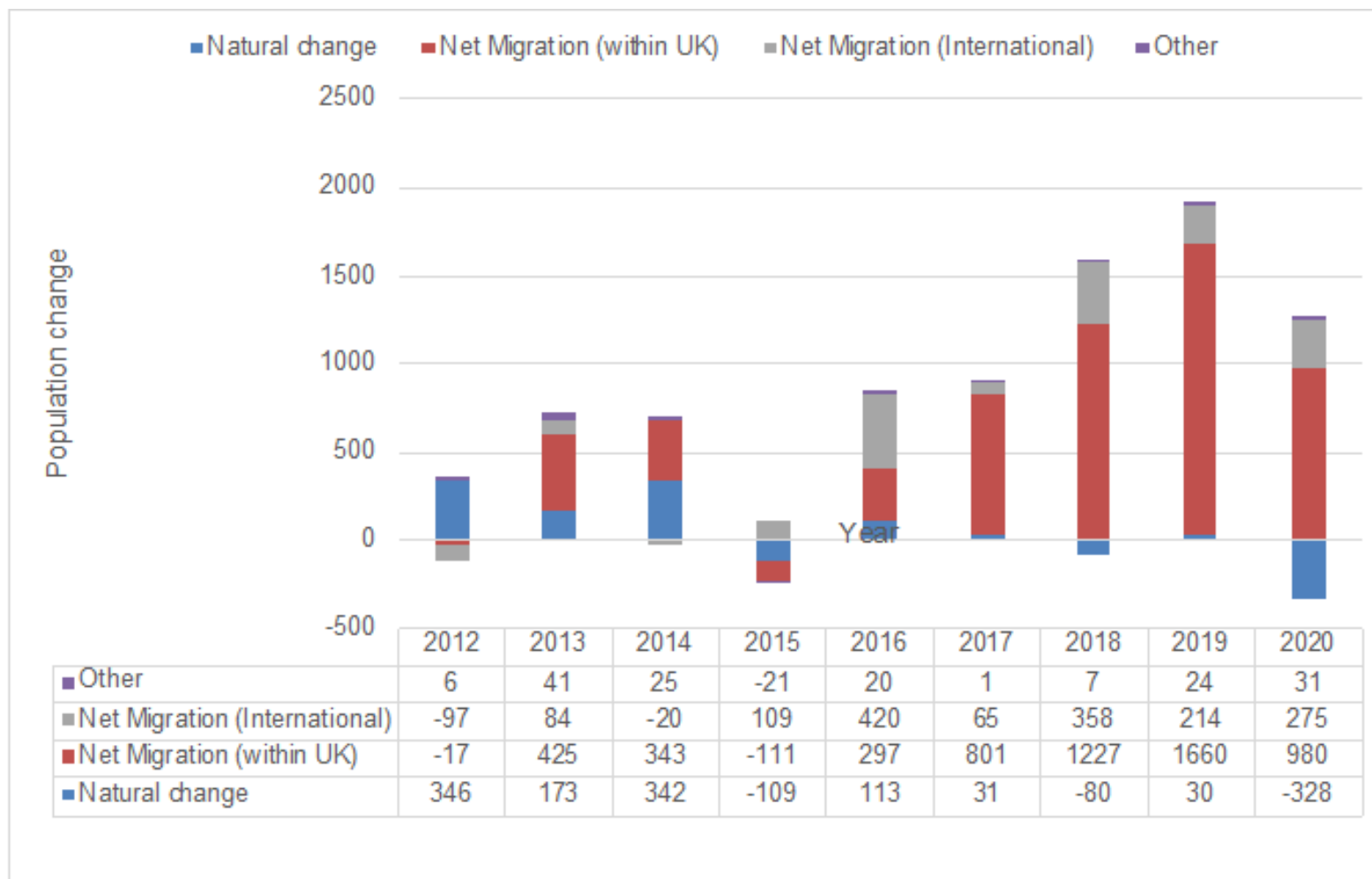
Table 2.10 Change in population 2021-2039 by age group				
2018-based ONS population projections				
Age groups	2021	2039	Number change 2021-2039	% change 2021-2039
0-19	45,725	44,572	-1,153	-2.5%
20-39	49,012	49,306	294	0.6%
40-54	42,244	45,415	3,172	7.5%
55-64	29,286	27,265	-2,021	-6.9%
65-74	24,108	27,806	3,698	15.3%
75-84	13,802	21,541	7,739	56.1%
85+	5,532	8,855	3,323	60.1%
All Ages	209,709	224,760	15,051	7.2%
2014-based ONS population projections				
All Ages	209,300	222,900	13,600	6.5%

Source: 2014-based and 2018-based ONS population projections

Components of population change

- 2.28 The ONS publish mid-year population estimates at local authority level which includes an analysis of components of population change which takes account of natural change (births minus deaths), national migration and international migration. The component analysis also includes 'other' change which can include boundary adjustment and military population moves. The data for North Tyneside 2011-2020 is shown in Figure 2.2. Over the period 2011 to 2020, net in-migration (within the UK) has had the greatest impact on population change followed by net international migration flows.

Figure 2.2 Components of population change 2011 to 2020



Source: ONS Components of Change

Migration trends 2012-2020

- 2.29 Table 2.11 presents a detailed analysis of internal and international migration by year and Table 2.12 summarises the data by broad age and year groups. The base numbers may differ slightly from the ONS components of change analysis due to rounding but provides useful insight into the age group of migrants, their origins and destinations and the relative importance of international migration.
- 2.30 Key trends in migration over the period 2012 to 2020 include:
- The overall annual level of population movement has varied but the trend over the past 5 years has been a higher level of overall net in-migration which peaked in 2019 at +1,894 people.
 - Strongest interactions are with Northumberland (average net outflow of -458) and Newcastle (average net inflow of 846 but peaking in 2019 at 1,340). Smaller net inflows from Gateshead, Sunderland the rest of the North East and net outflows to the rest of UK.
 - Overall, there is a net inflow to North Tyneside from elsewhere in the UK (averaging 623 each year).
 - International migration has generally had a positive impact on population (averaging 156 each year), with net in-flows averaging 282 in the 2018-2020 period.
 - In terms of migration by age group:
 - During 2012-20, the key inflows were people in the under 30 and people aged 30-64 from Newcastle. The magnitude of these flows have been
 -
 - increasing over the period. For under 30s, the overall increase in population has been counteracted with out-migration to the rest of England.
 - There has been an increasing net inflow of people aged 65 and over, notably from Newcastle and elsewhere in the UK.
 - International migration of all age cohorts has been taking place, principally under 30 and 30-64 age groups. The highest level of net international in-migration was in 2018-20.
- 2.31 In summary, an analysis of migration flows indicates strongest interactions with Northumberland (net outflows) and Newcastle (net inflows) and overall in-migration has been a key driver of population growth across North Tyneside.

Table 2.11 National and international migration by year

YEAR	North Tyneside	NORTH EAST REGION							ELSEWHERE UK				TOTAL (UK internal)	International	TOTAL (internal & international)
		County Durham	Northumberland	Gateshead	Newcastle upon Tyne	South Tyneside	Sunderland	Rest of North East	ENGLAND (rest of)	NORTHERN IRELAND	SCOTLAND	WALES			
2012	Migrated OUT to	305	1,473	417	2,071	222	191	140	2,030	40	356	62	7,307	522	7,829
	Migrated IN from	325	1,132	504	2,711	179	228	156	1,705	23	255	77	7,294	425	7,719
	NET	20	-340	86	640	-43	37	16	-326	-16	-101	14	-12	-97	-109
2013	Migrated OUT to	270	1,353	370	2,094	219	210	117	1,893	45	323	51	6,944	361	7,305
	Migrated IN from	326	1,209	468	2,657	172	211	169	1,804	31	276	45	7,369	445	7,814
	NET	56	-144	97	563	-47	1	52	-88	-14	-47	-5	425	84	509
2014	Migrated OUT to	368	1,526	385	2,209	217	217	180	1,789	37	292	44	7,262	470	7,732
	Migrated IN from	309	1,158	494	2,823	194	250	153	1,903	28	235	58	7,605	450	8,055
	NET	-59	-368	109	614	-23	33	-27	114	-9	-57	14	343	-20	323
2015	Migrated OUT to	378	1,561	429	1,983	238	225	136	1,926	36	272	90	7,274	398	7,672
	Migrated IN from	362	1,177	437	2,605	222	208	150	1,716	19	205	62	7,163	507	7,670
	NET	-16	-384	8	622	-16	-17	14	-210	-16	-67	-28	-111	109	-2
2016	Migrated OUT to	337	1,647	367	2,007	272	225	134	1,726	38	268	64	7,084	310	7,394
	Migrated IN from	328	1,053	477	2,865	212	218	137	1,826	18	197	52	7,381	730	8,111
	NET	-9	-594	110	858	-60	-7	2	100	-20	-71	-12	297	420	717
2017	Migrated OUT to	382	1,749	472	2,187	250	253	166	1,895	20	215	47	7,636	415	8,051
	Migrated IN from	365	1,229	530	3,043	231	255	239	2,201	30	240	75	8,437	480	8,917
	NET	-16	-519	58	855	-19	2	72	305	10	25	28	801	65	866
2018	Migrated OUT to	391	1,776	392	2,053	299	202	170	2,038	21	236	59	7,637	221	7,858
	Migrated IN from	339	1,328	537	3,198	232	327	247	2,368	26	221	39	8,864	579	9,443
	NET	-52	-448	145	1,145	-67	125	77	330	6	-15	-20	1,227	358	1,585
2019	Migrated OUT to	408	1,899	439	1,986	274	242	174	1,967	28	223	56	7,696	293	7,989
	Migrated IN from	440	1,261	613	3,326	233	324	259	2,536	28	257	78	9,356	507	9,863
	NET	32	-638	174	1,340	-41	82	84	570	0	35	23	1,660	214	1,874
2020	Migrated OUT to	348	1,622	343	1,683	241	221	144	1,919	26	210	60	6,817	209	7,026
	Migrated IN from	404	940	485	2,653	234	259	212	2,318	28	209	56	7,797	484	8,281
	NET	55	-682	142	971	-7	39	68	398	2	-1	-5	980	275	1,255

Sources:

Internal: ONS detailed estimates of by origin and destination by local authorities age and sex

International: ONS Detailed time series 2001 -2020 (Table: MYEB2)

Table 2.12 Summary of national and international migration by year group and age group

PERIOD	AGE GROUP	Lewisham	NORTH EAST REGION							ELSEWHERE UK			TOTAL (UK internal)	International	TOTAL (internal & international)	
			County Durham	Northumb erland	Gateshead	Newcastle upon Tyne	South Tyneside	Sunderland	Rest of North East	Rest of ENGLAND	NI	SCOTLAND				WALES
2012-2014	<30	Migrated OUT to	458	1,803	547	3,354	306	358	246	3,475	60	515	83	11,203	707	11,910
		Migrated IN from	460	1,555	633	4,187	261	384	266	2,969	43	414	104	11,276	719	11,995
		NET	3	-248	86	834	-46	26	20	-506	-17	-100	22	72	12	84
	30-64	Migrated OUT to	441	2,174	575	2,695	331	245	168	1,937	59	411	66	9,101	613	9,714
		Migrated IN from	455	1,642	767	3,569	259	290	197	2,040	38	305	69	9,632	533	10,165
		NET	13	-532	192	874	-72	45	29	103	-21	-105	3	531	-80	451
	65+	Migrated OUT to	45	112	15	100	63	4	326	267	1	35	8	977	33	1,010
		Migrated IN from	46	303	49	144	38	54	150	392	4	36	5	1,220	68	1,288
		NET	0	191	34	43	-25	50	-176	125	3	0	-3	243	35	278
2015-2017	<30	Migrated OUT to	481	1,928	585	3,108	335	404	236	3,456	45	414	119	11,111	634	11,745
		Migrated IN from	506	1,407	620	4,096	304	347	278	3,017	38	321	98	11,032	980	12,012
		NET	25	-521	34	988	-31	-56	42	-439	-6	-94	-21	-79	346	267
	30-64	Migrated OUT to	547	2,554	614	2,742	385	279	178	1,781	39	316	67	9,503	456	9,959
		Migrated IN from	490	1,635	744	3,920	328	311	217	2,285	25	266	80	10,301	643	10,944
		NET	-57	-919	129	1,178	-57	32	39	504	-14	-50	13	798	187	985
	65+	Migrated OUT to	69	5	0	0	20	0	927	310	10	25	15	1,380	33	1,413
		Migrated IN from	59	417	72	37	0	122	307	416	4	49	4	1,486	94	1,580
		NET	-10	412	72	37	-20	122	-619	106	-6	24	-11	106	61	167
2018-2020	<30	Migrated OUT to	535	2,044	528	3,020	373	353	274	3,708	34	350	93	11,313	390	11,703
		Migrated IN from	565	1,508	702	4,615	333	475	392	3,769	43	331	82	12,814	874	13,688
		NET	30	-536	174	1,594	-41	122	118	61	9	-18	-12	1,501	484	1,985
	30-64	Migrated OUT to	557	2,748	581	2,379	395	292	187	1,932	39	273	69	9,453	309	9,762
		Migrated IN from	553	1,605	842	4,051	337	379	298	2,913	35	298	68	11,380	626	12,006
		NET	-4	-1,144	261	1,672	-58	87	111	982	-5	25	0	1,927	317	2,244
	65+	Migrated OUT to	54	322	41	190	39	18	375	284	1	46	13	1,384	24	1,408
		Migrated IN from	65	416	81	340	19	88	188	540	4	58	23	1,823	70	1,893
		NET	10	94	40	150	-20	70	-187	256	3	12	10	439	46	485

Sources:

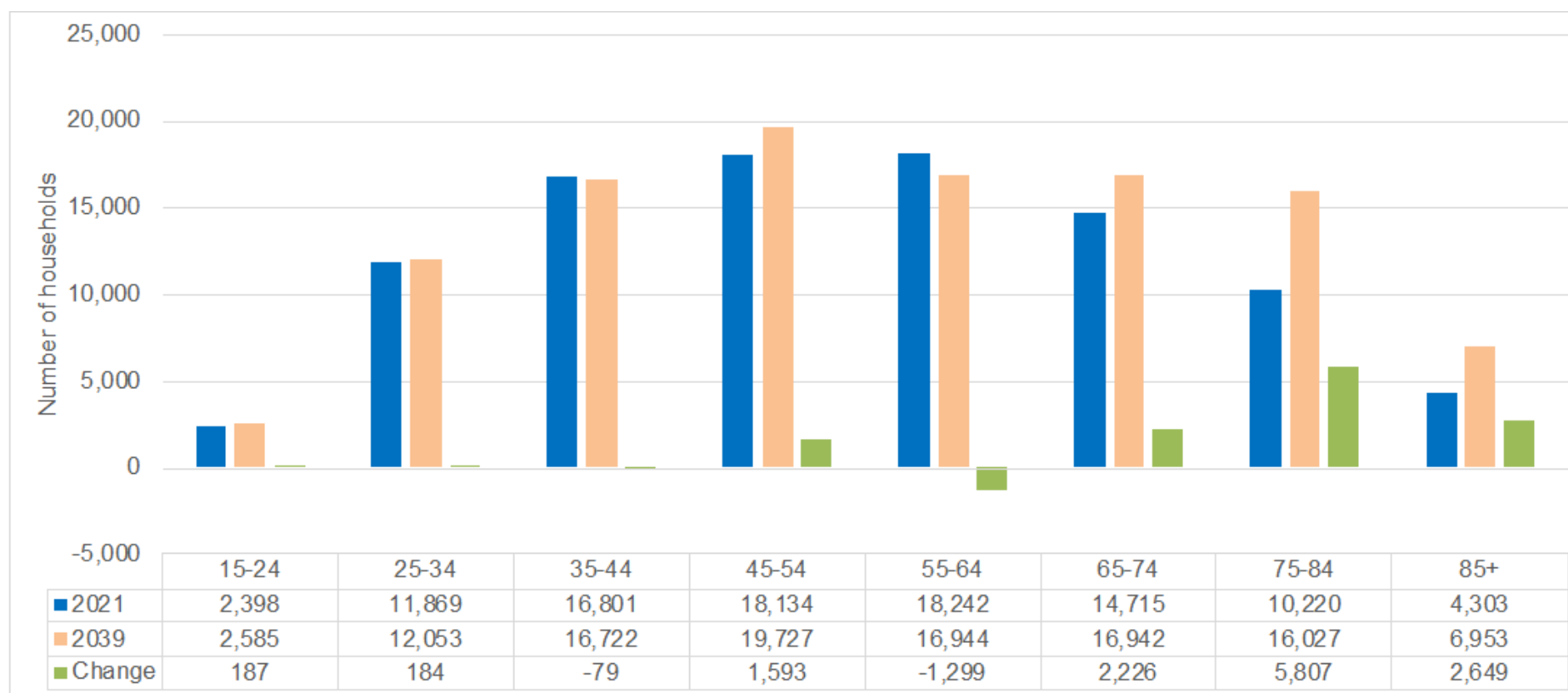
Internal: ONS detailed estimates of by origin and destination by local authorities age and sex

International: ONS Detailed time series 2001 -2019 (Table: MYEB2)

Household projections

- 2.32 The ONS produces household projections which are based on population projections. The ONS estimates the proportions of people who are likely to be household reference people by age, gender and household type based on census data. Variant household projections are also produced.
- 2.33 According to the 2018-based principal ONS household projections there are 96,683 households across North Tyneside in 2021 and this is projected to increase by 11,268 (11.7%) to 107,950 by 2039.
- 2.34 Table 2.13 provides a detailed breakdown of household type by the age of Household Reference Person to 2039. Currently available data shows that the overall household type profile is not expected to change over the 2021 to 2039 period, with the dominant household types being 'other households' with two or more adults and 'one person' households. However, as illustrated in Figure 2.3, there will be a marked increase in the number of households where the Household Reference Person is aged 65 or over which reflects the national trend of an ageing population. Of particular note, the number of households with a HRP aged 75 and over is expected to increase from 14,253 to 22,979, an increase of 8,456 or 58.2%.

Figure 2.3 Profile of households by age of Household Reference Person 2021 and 2039 projections



Source: 2018-based ONS household projections

Table 2.13 Household types and change 2021 to 2039										
Year and household type	Age of household reference person (HRP)									
2021	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	TOTAL	%
One Person	720	3,393	4,482	5,127	6,259	5,898	5,220	3,029	34,129	35.3%
Household with 1 dependent child	685	2,733	4,093	3,741	1,509	267	68	22	13,117	13.6%
Household with 2 dependent children	200	1,743	3,769	2,426	495	29	6	0	8,668	9.0%
Household with 3 or more dependent children	102	706	1,088	627	105	8	0	0	2,637	2.7%
Other households with two or more adults	691	3,294	3,368	6,213	9,873	8,512	4,926	1,252	38,131	39.4%
Total	2,398	11,869	16,801	18,134	18,242	14,715	10,220	4,303	96,683	100.0%
2039	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	TOTAL	%
One Person	774	3,454	4,452	5,553	5,802	6,819	8,122	4,780	39,755	36.8%
Household with 1 dependent child	743	2,770	4,057	4,090	1,387	304	106	35	13,492	12.5%
Household with 2 dependent children	217	1,760	3,759	2,689	448	33	9	0	8,914	8.3%
Household with 3 or more dependent children	111	716	1,083	696	94	9	1	0	2,709	2.5%
Other households with two or more adults	740	3,353	3,371	6,698	9,214	9,777	7,789	2,137	43,079	39.9%
Total	2,585	12,053	16,722	19,727	16,944	16,942	16,027	6,953	107,950	100.0%
Change 2021-2039	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+	TOTAL	%
One Person	53	61	-30	426	-458	921	2,902	1,751	5,626	49.9%
Household with 1 dependent child	58	37	-36	349	-122	37	38	13	375	3.3%
Household with 2 dependent children	17	17	-10	263	-47	3	3	0	247	2.2%
Household with 3 or more dependent children	9	10	-6	70	-12	1	0	0	72	0.6%
Other households with two or more adults	49	59	3	485	-660	1,265	2,863	885	4,948	43.9%
Total	187	184	-79	1,593	-1,299	2,226	5,807	2,649	11,268	100.0%

Source: 2018-based ONS household projections

Defining the Housing Market Area

- 2.35 PPG asks councils to consider the extent to which their local authority area is a self-contained housing market area. This remains an important consideration for the council as the degree of interaction may require policy responses.
- 2.36 Data reported in the 2011 Census provides evidence from which the degree of self-containment of North Tyneside can be derived. PAS guidance recommends that migration data are tested against the PPG criterion for self-containment, that at least 70% of all migration excluding long-distance migration should be contained within the HMA. A suitable test are two migration containment ratios:
- Supply Side (origin):** moves within the area divided by all moves whose origin is in the area, excluding long-distance moves
- Demand site (destination):** moves within the area divided by all moves whose destination is in the area, excluding long-distance migration
- 2.37 Table 2.14 presents relevant data for North Tyneside and Table 2.16 summaries the self-containment ratios derived from the data. Table 2.15 illustrates that 64.7% of all residents moving in the year preceding the census originated from within North Tyneside.
- 2.38 Table 2.15 summaries the containment ratios which apply to the origin and destination of moving residents. In line with PPG guidance, this excludes long-distance migration (which is taken as moves from outside the North East. The origin self-containment ratio is 72% and the destination is 74%. Therefore on the basis of migration, North Tyneside is a self-contained housing market area. That said, there are strong migration interactions with Newcastle and Northumberland.

Table 2.14 Flows of residents (all moves)						
Origin/ Destination	Supply Side (Origin)			Demand Side (Destination)		
	All Moves		Excluding Long Distance Moves	All Moves		Excluding Long Distance Moves
	Number	%	%	Number	%	
North Tyneside	11,586	64.7%	72.0%	11,586	65.4%	74.1%
Gateshead	432	2.4%	2.7%	422	2.4%	2.7%
Newcastle upon Tyne	2,273	12.7%	14.1%	1,609	9.1%	10.3%
South Tyneside	165	0.9%	1.0%	156	0.9%	1.0%
Sunderland	163	0.9%	1.0%	166	0.9%	1.1%
County Durham	256	1.4%	1.6%	254	1.4%	1.6%
Northumberland	1,052	5.9%	6.5%	1,315	7.4%	8.4%
Elsewhere North East	161	0.9%	1.0%	136	0.8%	0.9%
Elsewhere England	1,440	8.0%		1,741	9.8%	
Elsewhere UK	370	2.1%		340	1.9%	
Total	17,898	100%	100%	17,725	100.0%	100%
Base (excluding long-distance moves)			16,088			15,644

Source: 2011 Census

Table 2.15 Containment ratios			
Origin	Moves within the area	Moves originating in the area	Containment Ratio
	11,586	16,088	72.02%
Destination	Moves within the area	Moves whose destination is in the area	Containment Ratio
	11,586	15,644	74.06%

Source: 2011 Census

2.39 The 2011 Census provides an analysis of travel to work patterns and the extent to which residents in North Tyneside travel to other areas, together with details of how many people commute into the district area. Table 2.16 presents this data and indicates that 54% of people who live in North Tyneside work in North Tyneside; and 61.5% of workers in North Tyneside live in the district.

Table 2.16 North Tyneside 2011 Census commuting flows: workers (aged 16-74)			
Where do people who live in North Tyneside work?			
Live	Work	Number	%
North Tyneside	North Tyneside	51,854	54.0
	Newcastle upon Tyne	24,863	25.9
	Northumberland	6,241	6.5
	Other	13,068	13.6
Workers		96,026	100.0
Where to people who work in North Tyneside live?			
Live	Work	Number	%
North Tyneside	North Tyneside	51,854	61.5
Newcastle upon Tyne		10,823	12.8
Northumberland		10,486	12.4
Other		11,138	13.2
Jobs		84,301	100.0

Source 2011 Census and Edge Analytics

2.40 In terms of defining market areas, NPPG does not suggest an appropriate self-containment figure. However, the ONS provides a definition of Travel to Work areas as:

‘The current criterion for defining TTWs is that generally at least 75% of an area’s resident workforce in the area and at least 75% of the people who work in the area also live in the area...however, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted’ (source:

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/commutingtoworkchangestotraveltoworkareas/2001to2011>).

2.41 On this basis, it can be concluded that North Tyneside cannot be considered to be self-contained in terms of travel to work.

2.42 In summary, by reviewing migration and travel to work patterns, the extent to which North Tyneside is a self-contained housing market area can be determined. Other sections of this report consider house prices and comparisons with neighbouring areas. PPG establishes that areas within which a relatively high proportion of household moves (typically 70%) are contained.

2.43 Regarding migration, analysis of the 2011 Census identifies containment ratios of 72% (origin) and 72% (destination). Although this satisfies the criteria set down in PPG for self-containment, strong interactions with Newcastle and Northumberland should be recognised. This is borne out in travel to work data, which indicates that North Tyneside is part of a wider functional economic area,

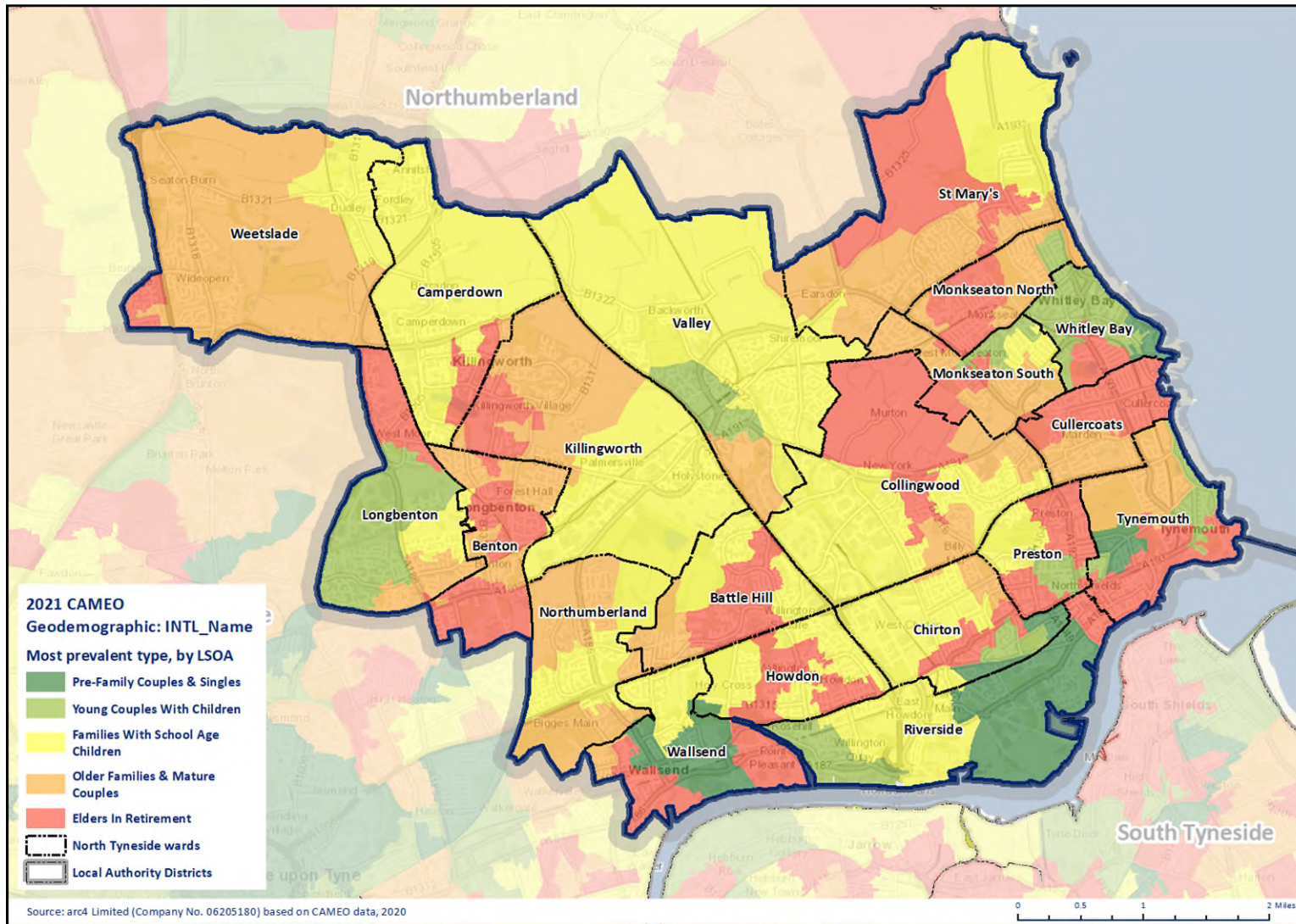
with 54% of workers living and working in North Tyneside (residence based) and 61.5% (workplace based)

- 2.44 Evidence would confirm that on the basis of migration, North Tyneside is a self-contained housing market area, but it is part of wider functional economic area extending into Newcastle and Northumberland. For the purposes of Local Plan policy making, North Tyneside is an appropriate housing market area, whilst recognising its functional interactions with neighbouring districts.

General household characteristics

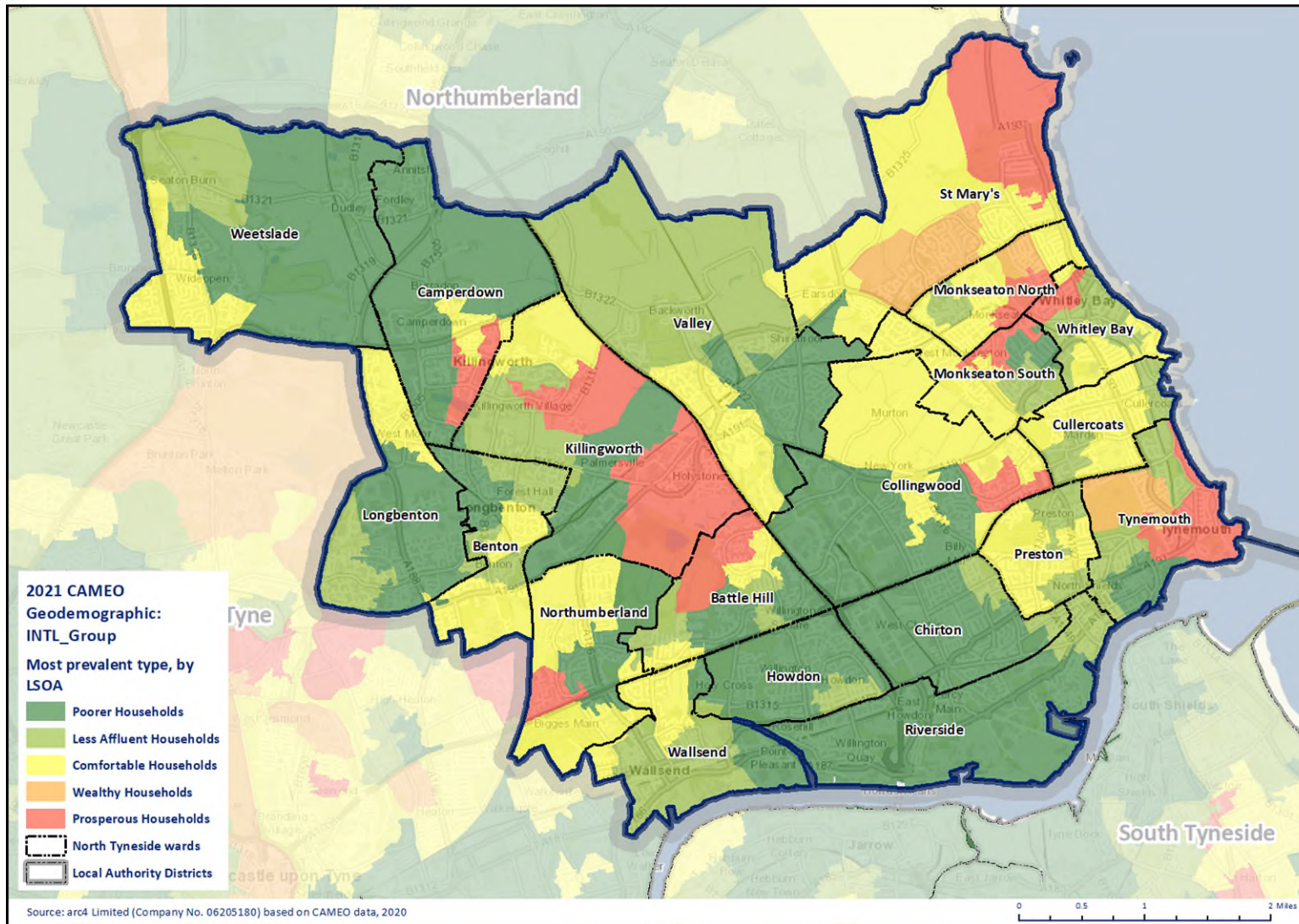
- 2.45 The range of households living in North Tyneside is illustrated in Maps 2.3 and 2.4. Map 2.3 illustrates the distribution of key household typologies. Map 2.4 considers income groups.

Map 2.3 Household characteristics: household type by LSOA, 2021



Source: CAMEO UK

Map 2.4 Household characteristics: income type, by LSOA, 2021



Source: CAMEO UK

Income data

- 2.46 There are a range of income data sources available to inform this study which are now summarised. 2021 CAMEO income data provide range, quartile and average data of gross household income by sub-area. ONS Annual Survey of Hours and Earnings data provides gross earnings of economically active residents at district level.
- 2.47 Table 2.17 summarises gross income by sub-area using 2021 CAMEO UK data and indicates a borough-wide lower quartile household income of £15,000, median of £25,000 and an average of £25,724.
- 2.48 The 2021 Annual Survey of Hours and Earnings resident-based data indicates lower quartile earnings are £22,608, median earnings are £29,026 and average earnings are £34,756 across North Tyneside.

Table 2.17 Gross household income by borough, sub-area and ward

Location	Annual gross household income distribution (£) %							Household income		
	<£10k	£10k to <£20k	£20k - <£30k	£30k - <£40k	£40k - <£50k	£50k - <£75k	£75k or more	Lower Quartile	Median	Average
North Tyneside	5.2%	39.9%	23.3%	16.8%	9.9%	4.6%	0.2%	£15,000	£25,000	£25,724
Sub-area										
1 Whitley Bay / Monkseaton area	0.4%	11.4%	26.4%	29.1%	18.9%	12.8%	1.1%	£25,000	£35,000	£36,754
2 Cullercoats / Tynemouth area	3.5%	17.8%	31.0%	22.2%	16.8%	8.4%	0.4%	£25,000	£25,000	£32,643
3 Moor Park / New York / Chirton Grange / Preston Grange / Preston Area	3.4%	38.2%	29.8%	16.1%	7.4%	5.1%	0.0%	£15,000	£25,000	£25,203
4 North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area	13.9%	69.0%	7.3%	7.7%	1.4%	0.6%	0.0%	£15,000	£15,000	£15,780
5 Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area	7.2%	54.2%	24.8%	10.8%	2.6%	0.4%	0.0%	£15,000	£15,000	£19,487
6 Benton / Longbenton / Forest Hall area	6.8%	46.5%	20.0%	18.6%	7.5%	0.6%	0.0%	£15,000	£25,000	£23,716
7 Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area	3.7%	42.0%	19.9%	14.4%	14.3%	5.6%	0.0%	£15,000	£25,000	£25,192
8 Shiremoor / Backworth / Northumberland Park / West Allotment area	4.3%	48.7%	16.5%	5.9%	20.3%	4.3%	0.0%	£15,000	£15,000	£22,806
9 Dudley / Seaton Burn / Wideopen area	0.6%	31.3%	38.0%	24.4%	5.5%	0.3%	0.0%	£15,000	£25,000	£25,306
Ward										
Battle Hill	4.0%	42.7%	27.8%	18.5%	5.7%	1.2%	0.0%	£15,000	£15,000	£21,924
Benton	0.3%	31.6%	29.7%	22.2%	15.1%	1.2%	0.0%	£20,000	£25,000	£29,243
Camperdown	3.2%	57.6%	15.3%	12.2%	10.4%	1.3%	0.0%	£15,000	£15,000	£21,714
Chirton	8.2%	76.9%	7.8%	7.0%	0.1%	0.0%	0.0%	£15,000	£15,000	£15,402
Collingwood	5.1%	55.8%	17.2%	9.6%	7.2%	5.1%	0.0%	£15,000	£15,000	£22,780
Cullercoats	3.3%	14.0%	37.3%	25.9%	15.5%	4.0%	0.0%	£25,000	£25,000	£31,127
Howdon	9.6%	82.6%	7.8%	0.0%	0.0%	0.0%	0.0%	£15,000	£15,000	£15,000
Killingworth	4.3%	26.0%	24.6%	16.8%	18.4%	9.9%	0.0%	£15,000	£25,000	£28,842
Longbenton	12.6%	59.5%	11.7%	15.4%	0.9%	0.0%	0.0%	£15,000	£15,000	£18,803
Monkseaton North	0.0%	3.1%	16.5%	20.6%	34.3%	22.1%	3.5%	£35,000	£45,000	£46,686
Monkseaton South	1.5%	23.4%	35.0%	30.5%	5.9%	3.8%	0.0%	£25,000	£25,000	£28,910
Northumberland	3.0%	37.6%	38.6%	18.5%	1.7%	0.6%	0.0%	£15,000	£25,000	£23,214
Preston	1.3%	16.8%	45.1%	24.1%	7.6%	5.1%	0.1%	£25,000	£25,000	£28,259
Riverside	19.1%	61.8%	6.9%	8.3%	2.7%	1.2%	0.0%	£15,000	£15,000	£16,133
St Mary's	0.0%	0.1%	10.4%	38.1%	30.5%	21.0%	0.0%	£35,000	£35,000	£41,793
Tynemouth	3.6%	20.8%	25.9%	19.2%	17.9%	11.9%	0.7%	£15,000	£35,000	£33,685
Valley	4.3%	48.7%	16.5%	5.9%	20.3%	4.3%	0.0%	£15,000	£15,000	£22,806
Wallsend	10.5%	49.2%	28.5%	8.7%	3.2%	0.0%	0.0%	£15,000	£15,000	£19,040
Weetslade	0.6%	31.3%	38.0%	24.4%	5.5%	0.3%	0.0%	£15,000	£25,000	£25,306
Whitley Bay	0.0%	15.7%	40.0%	27.3%	9.1%	6.8%	0.8%	£25,000	£25,000	£31,099

Source: CAMEO UK 2021. Note: data is show for broad income bands and sometime lower quartile and median earnings fall within the same band.

Summary

- 2.49 Across North Tyneside there are an estimated 100,085 dwellings and 96,684 households and 2.9% of dwellings are vacant.
- 2.50 In terms of dwelling stock:
- 64.8% of occupied dwellings are owner occupied, 13.3% are private rented and 22% are affordable (including social/affordable renting and shared ownership);
 - 67.5% of dwellings are houses (24.4% terraced, 33.8% semi-detached and 9.3% detached), 24.8% are flats and 7.7% are bungalows; and
 - 10.2% of dwellings have one bedroom, 32.7% two bedrooms, 44.2% three bedrooms and 12.9% four or more bedrooms.
 - 37.2% of dwellings were built before 1945, 38.7% between 1945 and 1982 and 24.1% since 1983. An estimated 17.4% of all dwelling stock is non-decent.
- 2.51 Over the 10 years 2011/12 to 2020/21, 6,106 net new dwellings have been built across North Tyneside. In the past 5 years to 2020/21, an annual net average of 786 dwellings have been built across the borough.
- 2.52 The population in 2021 was 209,709 and this is projected to increase by 15,051 to 224,760 by 2039, with the largest increases across older age groups. Latest 2018-based ONS household projections suggest a total of 96,683 households in 2021 and this is projected to increase by 11,268 (11.7%) to 107,950 by 2039. Largest increases will be one person and other households with two or more adults, and households with a Household Reference Person aged 65 and over.
- 2.53 An analysis of migration flows indicates strongest interactions with Northumberland (net outflows) and Newcastle (net inflows) and overall in-migration has been a key driver of population growth across North Tyneside.
- 2.54 Evidence would confirm that on the basis of migration, North Tyneside is a self-contained housing market area, but it is part of wider functional economic area extending into Newcastle and Northumberland. For the purposes of Local Plan policy making, North Tyneside is an appropriate housing market area, whilst recognising its functional interactions with neighbouring districts.

3. Price, rents and affordability

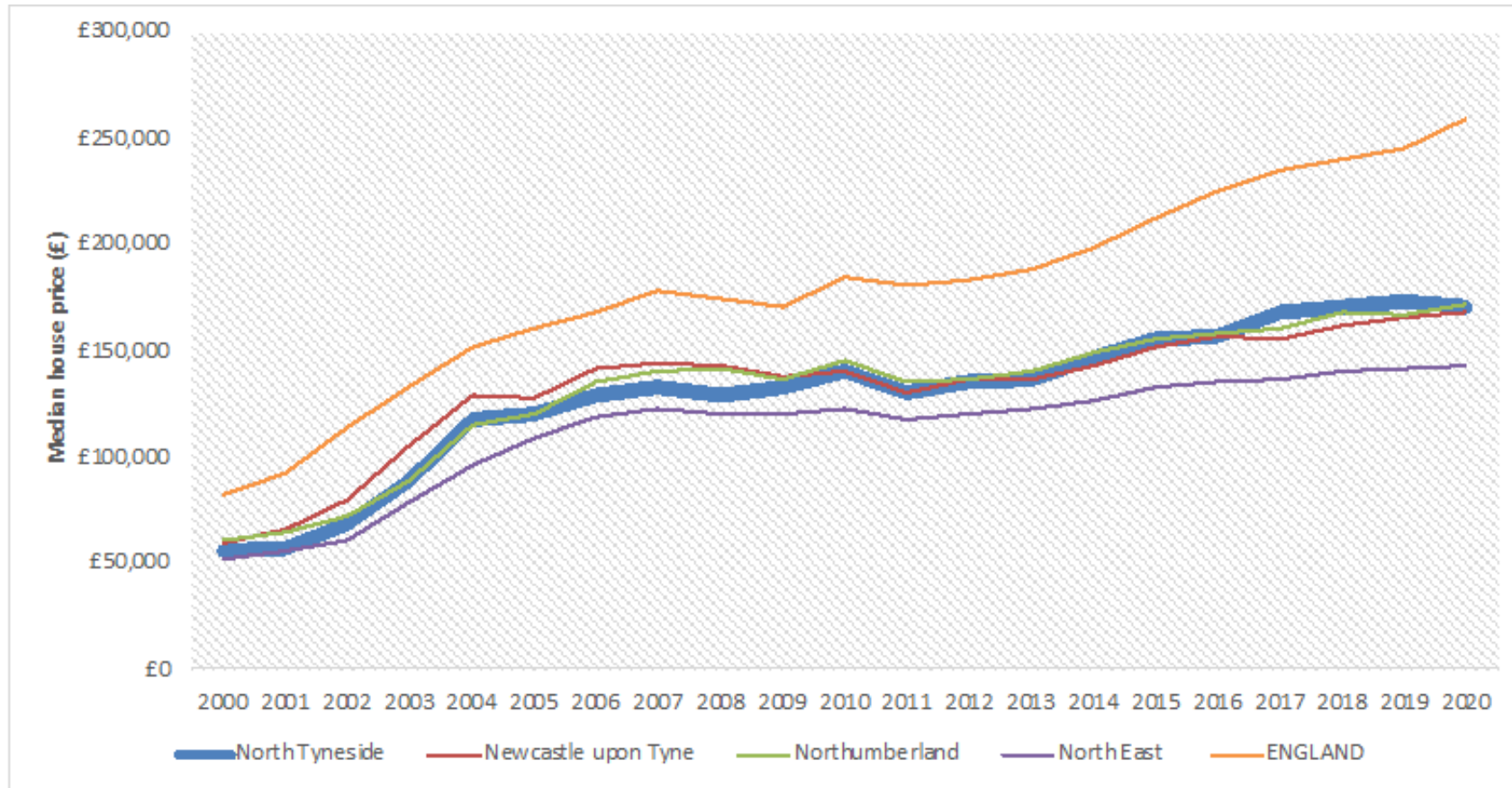
Introduction

- 3.1 This chapter sets out the cost of buying and renting properties across North Tyneside. The affordability of tenure options is then considered with reference to local incomes along with the incomes of key workers and households on minimum/living wages. Data relates to 2020 and therefore does not take into account any market or income changes relating to the COVID-19 pandemic.

House price trends

- 3.2 Figure 3.1 shows how house prices in North Tyneside have changed over the years 2000 to 2020, based on full-year Land Registry price paid data. This is compared with neighbouring authorities, the North East and England.
- 3.3 Median house prices across North Tyneside have been similar to Newcastle upon Tyne and Northumberland. These prices have been consistently higher than the North East and lower than the overall English average price. Overall, median prices have increased from £56,000 in 2000 to £170,000 in 2020, an increase of +204%. LQ prices have increased from £37,000 in 2000 to £119,500 in 2020. Tables 3.1 and 3.2 show how price change in North Tyneside compares with its neighbouring areas, the region and England.

Figure 3.1 Median house price trends 2000 to 2020: North Tyneside, neighbouring local authorities, North East and England



Source: Data produced by Land Registry © Crown copyright 2021

Table 3.1 Comparative median house price change 2000-2020 with neighbouring areas, North East and England

Location	Median price (£)		% Change 2000-2020
	2000	2020	
ENGLAND	£82,000	£259,000	215.9%
North East	£52,000	£143,000	175.0%
Tyne and Wear	£52,000	£150,000	188.5%
North of Tyne	£58,500	£170,000	190.6%
North Tyneside	£56,000	£170,000	203.6%
Gateshead	£47,500	£142,500	200.0%
Newcastle upon Tyne	£59,000	£168,000	184.7%
South Tyneside	£48,500	£137,750	184.0%
Sunderland	£45,950	£125,000	172.0%
County Durham	£48,000	£120,000	150.0%
Northumberland	£59,950	£172,000	186.9%

Source: Data produced by Land Registry © Crown copyright 2021

Table 3.2 Comparative lower quartile (LQ) house price change 2000-2020 with neighbouring areas, North East and England

Location	LQ price (£)		% Change 2000-2020
	2000	2020	
ENGLAND	£54,000	£165,000	205.6%
North East	£34,000	£95,000	179.4%
Tyne and Wear	£34,950	£102,500	193.3%
North of Tyne	£38,000	£118,000	210.5%
North Tyneside	£37,000	£119,500	223.0%
Gateshead	£32,000	£103,000	221.9%
Newcastle upon Tyne	£38,500	£119,500	210.4%
South Tyneside	£33,000	£94,725	187.0%
Sunderland	£31,950	£82,500	158.2%
County Durham	£31,000	£72,250	133.1%
Northumberland	£38,000	£115,500	203.9%

Source: Data produced by Land Registry © Crown copyright 2021

3.4 Table 3.3 sets out the change in house prices by ward and sub-area over the period 2007 to 2020. During this period, median prices increased by +19% overall but varies considerably at ward level. Table 3.3 also sets out LQ data for the same period, with an overall increase of +20.3% and considerable variation within the borough.

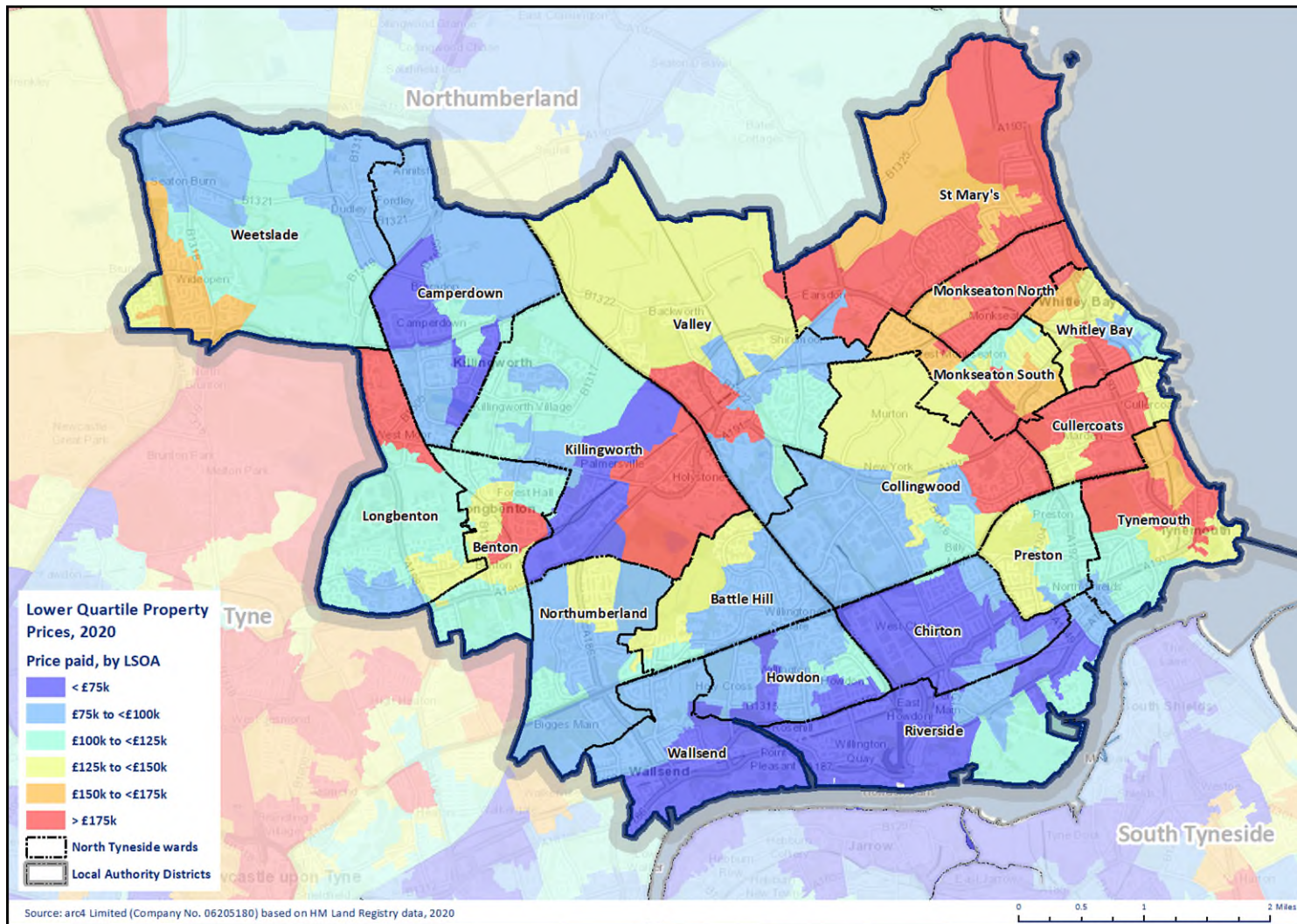
- 3.5 Maps 3.1 and 3.2 provide an illustration of LQ and median prices using Lower Super Output Area. The maps show a range of market prices, with highest prices in eastern coastal areas and lowest in southern and south western suburban areas.

Table 3.3 Comparative lower quartile and median house price change 2007-2020 for wards and sub-areas						
Ward	LQ house price			Median house price		
	2007	2020	% change	2007	2020	% change
Battle Hill	£97,500	£90,000	-7.7%	£119,995	£127,500	6.3%
Benton	£116,000	£120,000	3.4%	£140,000	£152,650	9.0%
Camperdown	£93,000	£87,000	-6.5%	£113,000	£117,500	4.0%
Chirton	£82,000	£68,000	-17.1%	£92,375	£90,000	-2.6%
Collingwood	£100,000	£108,500	8.5%	£141,000	£145,000	2.8%
Cullercoats	£140,000	£189,000	35.0%	£177,750	£237,725	33.7%
Howdon	£83,750	£77,000	-8.1%	£97,000	£109,950	13.4%
Killingworth	£114,000	£115,000	0.9%	£157,550	£190,000	20.6%
Longbenton	£122,250	£130,000	6.3%	£141,552	£167,500	18.3%
Monkseaton North	£164,950	£183,000	10.9%	£205,000	£245,000	19.5%
Monkseaton South	£137,000	£163,750	19.5%	£163,000	£212,500	30.4%
Northumberland	£92,500	£105,000	13.5%	£116,500	£149,950	28.7%
Preston	£106,000	£120,000	13.2%	£120,000	£152,500	27.1%
Riverside	£83,000	£72,500	-12.7%	£115,500	£112,000	-3.0%
St Mary's	£179,000	£240,000	34.1%	£231,000	£320,000	38.5%
Tynemouth	£113,975	£137,000	20.2%	£153,500	£210,000	36.8%
Valley	£109,000	£121,000	11.0%	£165,000	£192,000	16.4%
Wallsend	£82,800	£60,000	-27.5%	£99,000	£89,950	-9.1%
Weetslade	£102,000	£110,000	7.8%	£128,250	£160,000	24.8%
Whitley Bay	£123,750	£139,600	12.8%	£172,500	£235,000	36.2%
North Tyneside	£100,000	£108,000	8.0%	£133,000	£160,000	20.3%

Table 3.3 Comparative lower quartile and median house price change 2007-2020 for wards and sub-areas						
Sub-area	LQ house price			Median house price		
	2007	2020	% change	2007	2020	% change
1 Whitley Bay / Monkseaton area	£143,000	£175,000	22.4%	£180,000	£240,000	33.3%
2 Cullercoats / Tynemouth area	£124,950	£160,000	28.1%	£164,725	£225,000	36.6%
3 Moor Park / New York / Chirton Grange / Preston Grange / Preston area	£105,000	£116,000	10.5%	£130,000	£150,000	15.4%
4 North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area	£82,500	£69,950	-15.2%	£105,000	£100,000	-4.8%
5 Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area	£86,000	£82,000	-4.7%	£109,000	£113,250	3.9%
6 Benton / Longbenton / Forest Hall area	£119,950	£126,000	5.0%	£141,501	£160,000	13.1%
7 Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area	£99,950	£100,950	1.0%	£130,500	£155,000	18.8%
8 Shiremoor / Backworth / Northumberland Park / West Allotment area	£109,000	£121,000	11.0%	£165,000	£192,000	16.4%
9 Dudley / Seaton Burn / Wideopen area	£102,000	£110,000	7.8%	£128,250	£160,000	24.8%

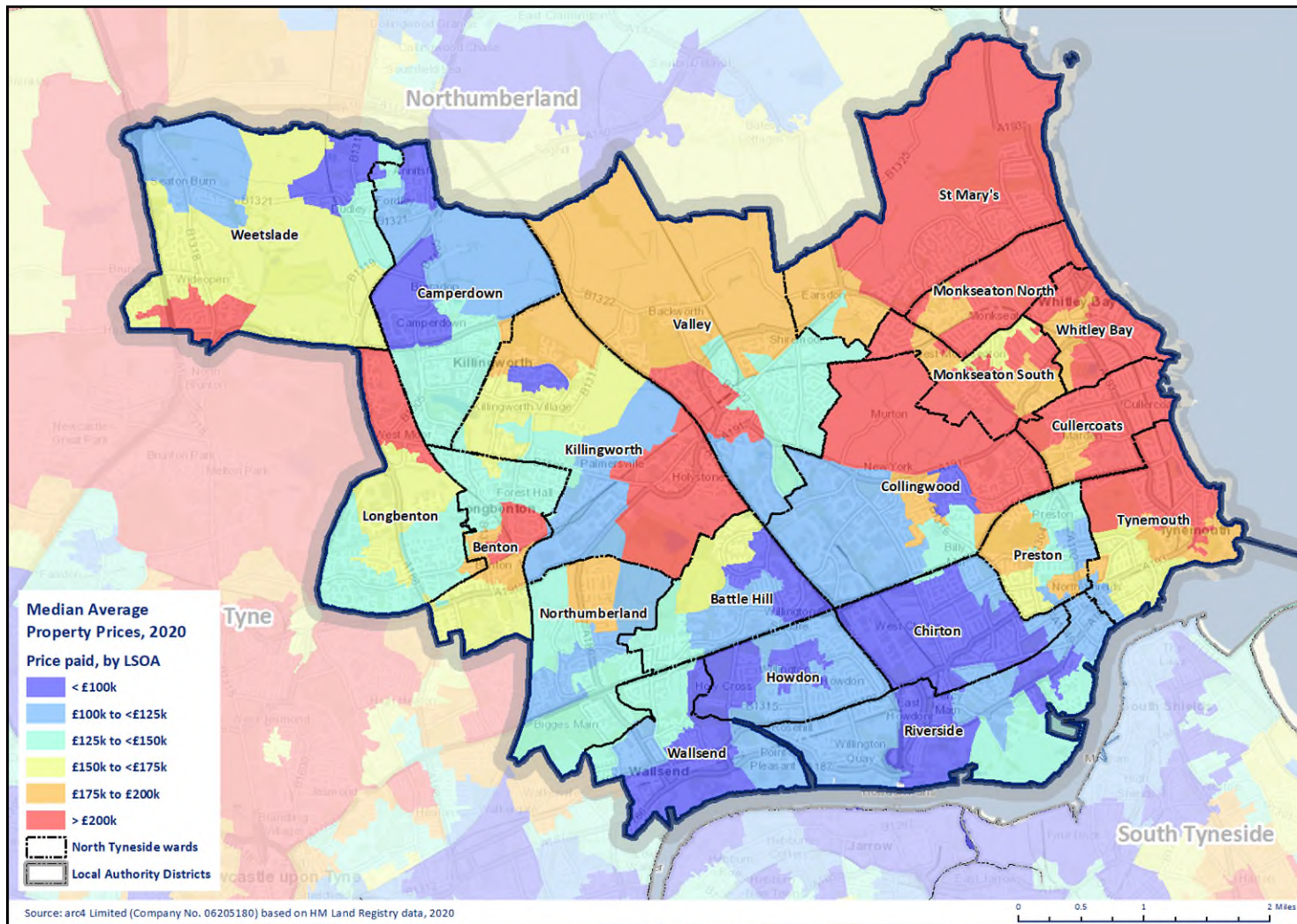
Source: Data produced by Land Registry © Crown copyright 2021.

Map 3.1 Lower quartile house prices 2020 by built-up areas within the LSOAs of North Tyneside



Source: Data produced by Land Registry © Crown copyright 2021

Map 3.2 Median house prices 2020 by built-up areas within the LSOAs of North Tyneside



Source: Data produced by Land Registry © Crown copyright 2021

Private renting

- 3.6 Table 3.4 provides an overview of the cost of renting privately across North Tyneside and compares prices with the North East and England over the period 2010 to 2020. Over this time lower quartile rents have increased by 1.1% and median rents have increased by 6.1%. These increases are below those experienced across the North East and England. Table 3.5 summarises 2020 price data by sub-areas and wards.

Table 3.4 Comparative lower quartile and median rental price 2010-2020			
Location	Lower quartile price by year (£)		% change 2010-2020
	2010	2020	
North Tyneside	£446	£451	1.1%
North East	£425	£451	6.1%
England	£598	£724	21.1%
Location	Median price by year (£)		% change 2010-2020
	2010	2020	
North Tyneside	£494	£524	6.1%
North East	£498	£550	10.4%
England	£893	£1,148	28.6%

Source: Zoopla PPD 2021

Table 3.5 Lower quartile and median rents by sub-area and ward 2020		
Ward	Lower quartile 2020 £ each month	Median 2020 £ each month
Battle Hill	£451	£498
Benton	£494	£561
Camperdown	£485	£524
Chirton	£425	£451
Collingwood	£451	£594
Cullercoats	£622	£754
Howdon	£451	£498
Killingworth	£498	£624
Longbenton	£550	£650
Monkseaton North	£550	£598
Monkseaton South	£498	£550
Northumberland	£425	£498
Preston	£494	£524
Riverside	£399	£451
St Mary's	£477	£550
Tynemouth	£498	£598
Valley	£576	£598
Wallsend	£425	£451
Weetslade	£451	£524
Whitley Bay	£498	£576
North Tyneside	£451	£524
Sub-area	Lower quartile 2020 £ each month	Median 2020 £ each month
1 Whitley Bay / Monkseaton area	£498	£576
2 Cullercoats / Tynemouth area	£524	£650
3 Moor Park / New York / Chirton Grange / Preston Grange / Preston area	£477	£550
4 North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area	£399	£451
5 Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area	£425	£477
6 Benton / Longbenton / Forest Hall area	£524	£598
7 Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area	£494	£550
8 Shiremoor / Backworth / Northumberland Park / West Allotment area	£576	£598
9 Dudley / Seaton Burn / Wideopen area	£451	£524

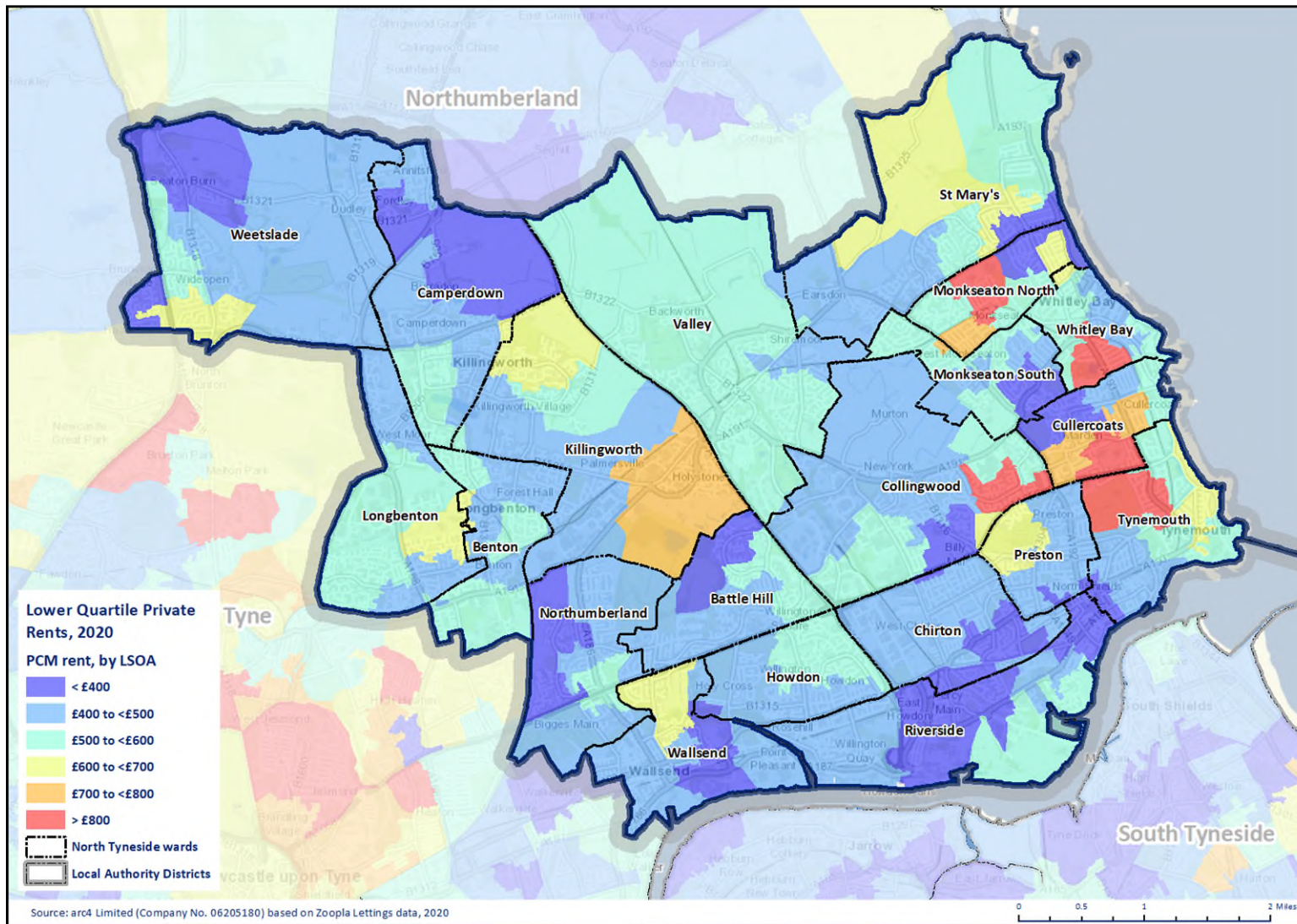
Source: Zoopla PPD 2021

- 3.7 More detailed rental data within built-up areas at a small area level (Lower Super Output Areas) are presented in Map 3.3 (lower quartile) and Map 3.4 (median). This illustrates rents were generally higher in the coastal areas.
- 3.8 The private rented sector accommodates a proportion of low income households that are eligible for assistance with rental costs. Map 3.5 illustrates the proportion of households in receipt of housing benefit assistance across the borough. This shows particular concentrations in southern areas of North Tyneside.
- 3.9 The amount that can be claimed for assistance with rental costs is capped to a local allowance that varies by area. The cap is estimated by the VOA and published in the form of a Local Housing Allowance (LHA) rate for a broad market area (BRMA). North Tyneside is located within the Tyneside BRMA. Table 3.6 summaries the LHA for the borough and the variance between lower quartile rents and the LHA. This shows that LHA is generally meeting the costs of renting properties with the exception of shared accommodation.

No. of Bedrooms	Rate per week (£)	Monthly rate	2020 LQ rent	Variance between LQ rent and LHA
Shared Accommodation	£70.19	£304	£394	(£90)
1 Bedroom	£97.81	£424	£390	£34
2 Bedroom	£109.32	£474	£451	£23
3 Bedroom	£126.58	£549	£550	(£1)
4 Bedroom	£182.96	£793	£713	£80

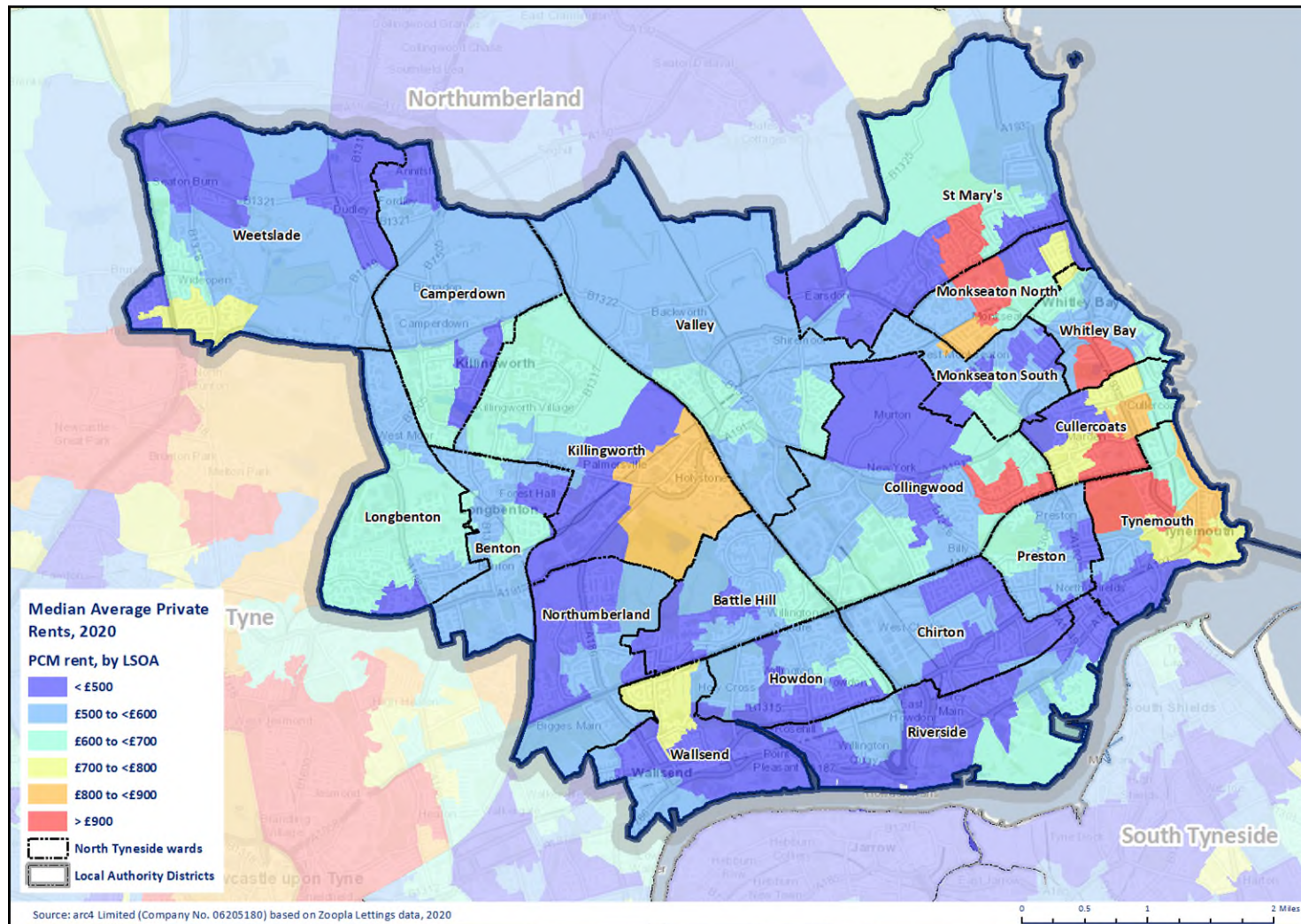
Source: Valuation Office Agency

Map 3.3 2020 lower quartile rents across North Tyneside by built up areas within LSOAs



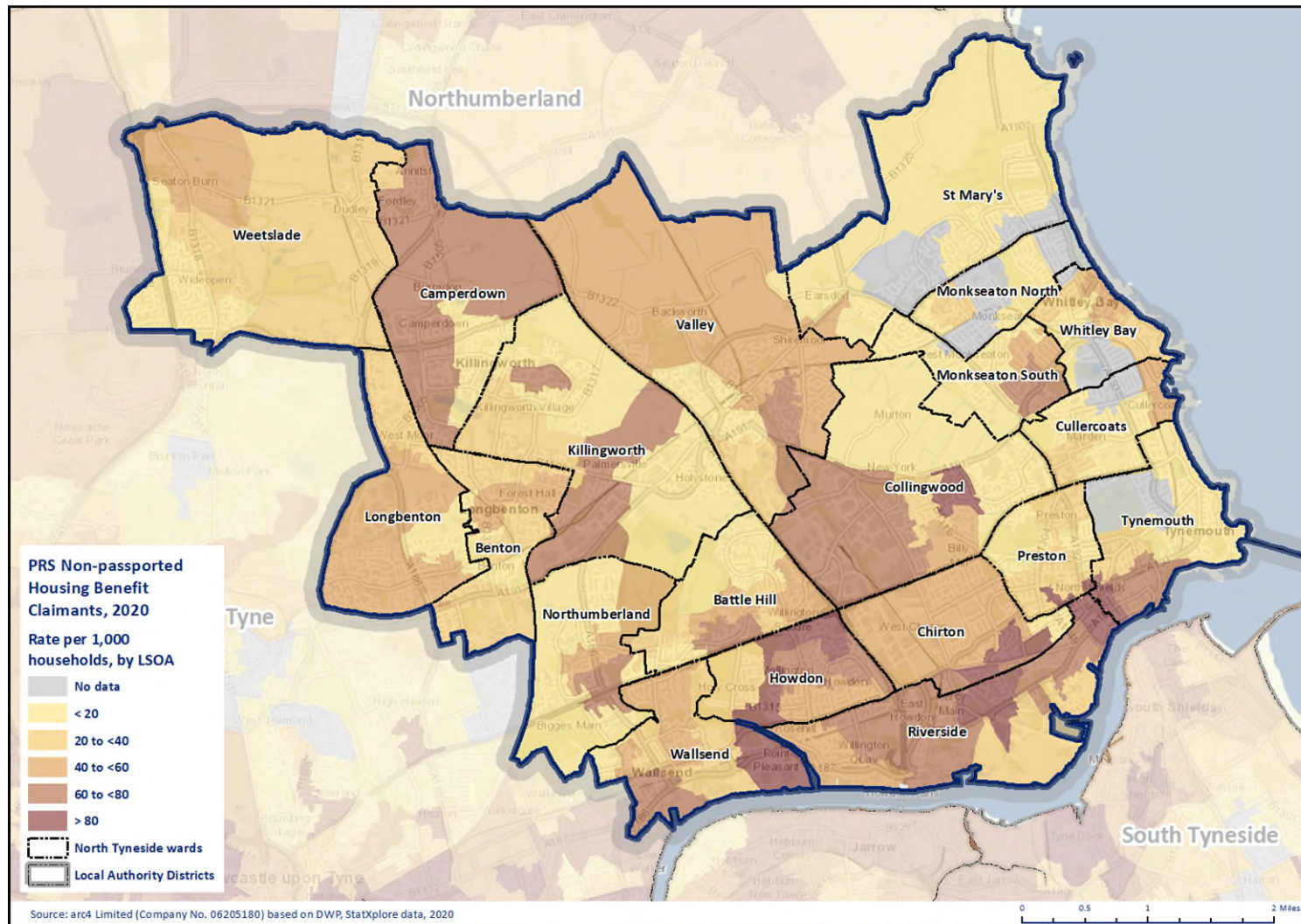
Source: Zoopla PPD 2021

Map 3.4 2020 median rents across North Tyneside by built up areas within LSOAs



Source: Zoopla PPD 2021

Map 3.5 Private rented sector Non-Passported Housing Benefit 2020



Source: 2021 DWP Stat explore

Relative affordability

- 3.10 The ONS produces national data on the ratio of earnings to house prices. Two sets of data are available: workplace-based and resident-based. For each, lower quartile and median ratios are produced. The data are based on Land Registry Price Paid data and ONS Annual Survey of Hours and Earnings data.
- 3.11 Table 3.7 sets out the 2020 lower quartile and median affordability ratios for the North Tyneside and compares these with neighbouring authorities, the North East and England. Using workplace-based median ratios to illustrate the data, prices are 6.3x income in North Tyneside. This ratio is the same as Northumberland and higher than all other comparator areas, the North East and England.

Table 3.7 Relative affordability of lower quartile and median prices by local authority area, North West and England (workplace-based and residence-based)

Locality	2020 Lower Quartile		2020 Median	
	Workplace-based	Residence-based	Workplace-based	Residence-based
North Tyneside	5.4	6.2	6.2	5.9
Gateshead	4.8	5.4	5.4	5.3
Newcastle upon Tyne	5.2	5.5	5.5	5.7
South Tyneside	4.8	4.9	4.9	5.0
Sunderland	3.8	4.4	4.4	4.6
County Durham	3.6	4.4	4.4	4.2
Northumberland	5.6	6.0	6.0	5.6
North East	4.5	5.0	5.0	5.0
ENGLAND	7.2	7.8	7.8	7.8

Source: ONS

Relative affordability of housing tenure options and defining genuinely affordable housing

- 3.12 The relative cost of alternative housing options across the borough and housing market sub-areas has been considered from two perspectives. Firstly, analysis considers prevailing prices at housing market sub-area level across a range of market and affordable tenures and the incomes required to afford these properties. Secondly, analysis considers what is genuinely affordable to households based on local incomes and assumptions around the proportion of income that should be spent on renting and the multiples of income for buying. The analysis of what is genuinely affordable also considers the incomes of selected key workers and those on minimum and living wages.
- 3.13 The thresholds for what is affordable and not affordable are as follows:
- for renting, 25% of gross household income is used as the 'tipping point' for affordability, with properties not affordable if more than 25% of income is

spent on rent. There is no official guidance on what proportion of income should be used. Former CLG SHMA Practice Guidance (2007) recommended 25% and Shelter suggest using 35% of net income; and

- for buying, affordability is based on a 3.5x gross household income multiple. Former CLG SHMA Practice Guidance (2007) recommended a 3.5x multiple for a household with a single earner and 2.9x for a dual earner.
- 3.14 Table 3.8 sets out the range of market and affordable tenures considered in analysis and any assumptions relating to the cost of properties. The cost of alternative affordable and market tenure options by sub-area is set out in Table 3.9. Table 3.9 also shows the gross household incomes needed to afford the tenure based on the 25% rental and 3.5x income multiples. Table 3.10 considers the impact of deposits on sale price.
- 3.15 Analysis of market prices would indicate that some areas have low rents and equity, particularly southern areas of the borough. This has implications for regeneration and approach to these markets

Table 3.8 Summary of tenure (including affordable options), price assumptions and data sources			
Tenure	Tenure price assumptions	Affordability assumptions	Data Source
Social rent	2020 average prices	25% of income	Regulator of Social Housing Statistical Data Return 2020
Affordable Rent	2020 average prices which are based on Local Housing Allowance rates	25% of income	Regulator of Social Housing Statistical Data Return 2020
Market Rent – lower quartile	2020 prices	25% of income	Zoopla 2020
Market Rent – median	2020 prices	25% of income	Zoopla 2020
Market Sale – lower quartile	2020 prices	90% LTV, 3.5x income	Land Registry Price Paid
Market Sale – median	2020 prices	90% LTV, 3.5x income	Land Registry Price Paid
Market Sale – average	2020 prices	90% LTV, 3.5x income	Land Registry Price Paid
Shared ownership (50%)	Total price based on median price and 50% ownership. Mortgage based on 40%. 10% deposit required; annual service charge £395, Annual rent based on 2.75% of remaining equity	90% LTV, 3.5x income for equity and 25% of income for rental element	Assumptions applied to Land Registry Price Paid data
Shared ownership (25%)	Total price based on median price and 25% ownership. Mortgage based on 20%, 5% deposit required, annual service charge £395. Annual rent based on 2.75% of remaining equity	90% LTV, 3.5x income for equity and 25% of income for rental element	Assumptions applied to Land Registry Price Paid data
Help to buy	Total price based on median price. Mortgage based on 75% equity. 20% loan and deposit of 5%. Loan fee of 1.75% in year 6 of outstanding equity loan increasing annually from yr7 at RPI+1%	70% LTV, 3.5x income	Assumptions applied to Land Registry Price Paid data
Discounted home ownership 30%	70% of median price (note this is comparable to the proposed government <u>First Home</u> tenure option). Mortgage based on discounted price, minus 10% deposit on discounted price.	Discounted home ownership 30%	Assumptions applied to Land Registry Price Paid data

Table 3.8 Summary of tenure (including affordable options), price assumptions and data sources			
Tenure	Tenure price assumptions	Affordability assumptions	Data Source
Discounted home ownership 25%	75% of median price mortgage based on discounted price, minus 10% deposit on discounted price.	Discounted home ownership 25%	Assumptions applied to Land Registry Price Paid data
Discounted home ownership 20%	80% of median price mortgage based on discounted price, minus 10% deposit on discounted price.	Discounted home ownership 20%	Assumptions applied to Land Registry Price Paid data

Table 3.10 Impact of alternative deposits on sale price and income required for open market properties					
Market sale price	Amount of deposit				Borough Price
	10%	20%	30%	40%	
Market sale - lower quartile	£97,200	£86,400	£75,600	£64,800	£108,000
Market sale - median	£144,000	£128,000	£112,000	£96,000	£160,000
Market sale - average	£188,080	£167,182	£146,285	£125,387	£208,978
Household income required (3.5x multiple)	10%	20%	30%	40%	
Market sale - lower quartile	£27,771	£24,686	£21,600	£18,514	
Market sale - median	£41,143	£36,571	£32,000	£27,429	
Market sale - average	£53,737	£47,766	£41,796	£35,825	
Household income required (5x multiple)	10%	20%	30%	40%	
Market sale - lower quartile	£19,440	£17,280	£15,120	£12,960	
Market sale - median	£28,800	£25,600	£22,400	£19,200	
Market sale - average	£37,616	£33,436	£29,257	£25,077	

- 3.16 Figure 3.2 summarises in graphical form the relative affordability of alternative tenures at the borough level, setting out the incomes and deposits required for different options set against prevailing lower quartile and median earnings derived from 2021 CAMEO data.
- 3.17 This indicates that households on lower quartile incomes can afford social, affordable and private lower quartile rents. For households on median incomes, lower renting is affordable along with some affordable home ownership options and lower quartile open market prices.

Figure 3.2 North Tyneside household income and housing costs



Source: Data produced by Land Registry © Crown copyright 2020, RSH SDR 2020, Zoopla PPD 2020

What is genuinely affordable housing in the North Tyneside context?

- 3.18 Having considered what a household needs to earn to afford alternative tenures, consideration is now given to the actual incomes of households across the borough and how this relates to prevailing prices. This analysis helps to establish what is genuinely affordable based on reasonable income multipliers for renting and buying. The analysis takes into account:
- lower quartile and median household incomes from the 2020 CAMEO data;
 - 2020 entry-level incomes from a range of key worker occupations;
 - incomes associated with 2020 minimum and living wages (using single, dual income and 1.5x income measures);
 - the proportion of income a household would need to spend on rent;
 - the extent to which affordable rental options are genuinely affordable to households; and
 - the extent to which households could afford home ownership based on multiples of household income, with up to 3.5x being affordable.

Genuinely affordable rents

- 3.19 Having considered what a household needs to earn to afford alternative tenures, consideration is now given to the actual incomes of households across North Tyneside and how this relates to current market prices and rents. The analysis helps to establish the extent to which different tenures are affordable and what are genuinely affordable prices and rents based on local incomes.
- 3.20 Table 3.11 focuses on the affordability of market renting and shows the cost of renting a lower quartile and median priced property by sub-area and ward; how this compares with incomes; and what would be genuinely affordable based on local incomes. For example, lower quartile rents are £451 across North Tyneside where the lower quartile income is £1,250. This means that a household is spending 36.1% of income on rent. To be genuinely affordable, that is, costing no more than 25% of gross income, a lower quartile rent should be £313 each month and median rent should be £521 each month. However, there are affordability issues in several sub-areas, particularly 6 (Benton/Longbenton/Forest Hall areas) and 8 (Shiremoor / Backworth / Northumberland Park / West Allotment area areas).
- 3.21 Table 3.12 focuses on the affordability of home ownership and shows the cost of buying a lower quartile and median-priced property. This shows that prices are in excess of 3.5x household incomes across all areas and borough-wide a property should cost no more than £52,500 to be affordable to households on lower quartile incomes and £87,500 to households on median incomes.

Table 3.11 Affordability of private rents by sub-area and ward

Geography		LQ Rent and Income				Median rent and income			
		Actual LQ rent 2020	LQ Gross household income 2021 (Monthly £)	% LQ income required to be spent on LQ rent	What would be an affordable rent based on actual LQ income	Actual Median rent 2020	Median Gross household income 2021 (Monthly £)	% median income required to be spent on median rent	What would be an affordable rent based on actual median income
Borough	North Tyneside	£451	£1,250	36.1	£313	£524	£2,083	25.2	£521
Sub-area	1	£498	£2,083	23.9	£521	£576	£2,917	19.7	£729
	2	£524	£2,083	25.2	£521	£650	£2,083	31.2	£521
	3	£477	£1,250	38.2	£313	£550	£2,083	26.4	£521
	4	£399	£1,250	31.9	£313	£451	£1,250	36.1	£313
	5	£425	£1,250	34.0	£313	£477	£1,250	38.2	£313
	6	£524	£1,250	41.9	£313	£598	£2,083	28.7	£521
	7	£494	£1,250	39.5	£313	£550	£2,083	26.4	£521
	8	£576	£1,250	46.1	£313	£598	£1,250	47.8	£313
	9	£451	£1,250	36.1	£313	£524	£2,083	25.2	£521
Ward	Battle Hill	£451	£1,250	36.1	£313	£498	£1,250	39.8	£313
	Benton	£494	£1,667	29.6	£417	£561	£2,083	26.9	£521
	Camperdown	£485	£1,250	38.8	£313	£524	£1,250	41.9	£313
	Chirton	£425	£1,250	34.0	£313	£451	£1,250	36.1	£313
	Collingwood	£451	£1,250	36.1	£313	£594	£1,250	47.5	£313
	Cullercoats	£622	£2,083	29.9	£521	£754	£2,083	36.2	£521
	Howdon	£451	£1,250	36.1	£313	£498	£1,250	39.8	£313
	Killingworth	£498	£1,250	39.8	£313	£624	£2,083	30.0	£521
	Longbenton	£550	£1,250	44.0	£313	£650	£1,250	52.0	£313
	Monkseaton North	£550	£2,917	18.9	£729	£598	£3,750	15.9	£938
	Monkseaton South	£498	£2,083	23.9	£521	£550	£2,083	26.4	£521
	Northumberland	£425	£1,250	34.0	£313	£498	£2,083	23.9	£521
	Preston	£494	£2,083	23.7	£521	£524	£2,083	25.2	£521
	Riverside	£399	£1,250	31.9	£313	£451	£1,250	36.1	£313
	St Mary's	£477	£2,917	16.4	£729	£550	£2,917	18.9	£729
	Tynemouth	£498	£1,250	39.8	£313	£598	£2,917	20.5	£729
	Valley	£576	£1,250	46.1	£313	£598	£1,250	47.8	£313
	Wallsend	£425	£1,250	34.0	£313	£451	£1,250	36.1	£313
Weetslade	£451	£1,250	36.1	£313	£524	£2,083	25.2	£521	
Whitley Bay	£498	£2,083	23.9	£521	£576	£2,083	27.6	£521	

Key

Up to and including 25%	24
Between 25% and 35%	32
35% or more	40

Sub-area	Description
1	Whitley Bay / Monkseaton area
2	Cullercoats / Tynemouth area
3	Moor Park / New York / Chirton Grange / Preston Grange / Preston Area
4	North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area
5	Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area
6	Benton / Longbenton / Forest Hall area
7	Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area
8	Shiremoor / Backworth / Northumberland Park / West Allotment area
9	Dudley / Seaton Burn / Wideopen area

Sources: Zoopla PPD 2020,
household income from 2021 CAMEO

Table 3.12 Affordability of owner occupation by sub-area and ward

Geography		Actual LQ price 2020	LQ Gross household income 2021 (Annual £)	Income multiple required (assumes 10% deposit)	What would be an affordable property based on a 3.5x income multiple	Actual median price 2020	Median Gross household income 2021 (Annual £)	Income multiple required (assumes 10% deposit)	What would be an affordable property based on a 3.5x income multiple
Borough	North Tyneside	£108,000	£15,000	6.5	£52,500	£160,000	£25,000	5.8	£87,500
Sub-area	1	£175,000	£25,000	6.3	£87,500	£240,000	£35,000	6.2	£122,500
	2	£160,000	£25,000	5.8	£87,500	£225,000	£25,000	8.1	£87,500
	3	£116,000	£15,000	7.0	£52,500	£150,000	£25,000	5.4	£87,500
	4	£89,950	£15,000	4.2	£52,500	£100,000	£15,000	6.0	£52,500
	5	£82,000	£15,000	4.9	£52,500	£113,250	£15,000	6.8	£52,500
	6	£126,000	£15,000	7.6	£52,500	£160,000	£25,000	5.8	£87,500
	7	£100,950	£15,000	6.1	£52,500	£155,000	£25,000	5.6	£87,500
	8	£121,000	£15,000	7.3	£52,500	£192,000	£15,000	11.5	£52,500
	9	£110,000	£15,000	6.6	£52,500	£160,000	£25,000	5.8	£87,500
Ward	Battle Hill	£90,000	£15,000	5.4	£52,500	£127,500	£15,000	7.7	£52,500
	Benton	£120,000	£20,000	5.4	£70,000	£152,650	£25,000	5.5	£87,500
	Camperdown	£87,000	£15,000	5.2	£52,500	£117,500	£15,000	7.1	£52,500
	Chirton	£68,000	£15,000	4.1	£52,500	£90,000	£15,000	5.4	£52,500
	Collingwood	£108,500	£15,000	6.5	£52,500	£145,000	£15,000	8.7	£52,500
	Cullercoats	£189,000	£25,000	6.8	£87,500	£237,725	£25,000	8.6	£87,500
	Howdon	£77,000	£15,000	4.6	£52,500	£109,950	£15,000	6.6	£52,500
	Killingworth	£115,000	£15,000	6.9	£52,500	£190,000	£25,000	6.8	£87,500
	Longbenton	£130,000	£15,000	7.8	£52,500	£167,500	£15,000	10.1	£52,500
	Monkseaton North	£183,000	£35,000	4.7	£122,500	£245,000	£45,000	4.9	£157,500
	Monkseaton South	£163,750	£25,000	5.9	£87,500	£212,500	£25,000	7.7	£87,500
	Northumberland	£105,000	£15,000	6.3	£52,500	£149,950	£25,000	5.4	£87,500
	Preston	£120,000	£25,000	4.3	£87,500	£152,500	£25,000	5.5	£87,500
	Riverside	£72,500	£15,000	4.4	£52,500	£112,000	£15,000	6.7	£52,500
	St Mary's	£240,000	£35,000	6.2	£122,500	£320,000	£35,000	8.2	£122,500
	Tynemouth	£137,000	£15,000	8.2	£52,500	£210,000	£35,000	5.4	£122,500
	Valley	£121,000	£15,000	7.3	£52,500	£192,000	£15,000	11.5	£52,500
	Wallsend	£60,000	£15,000	3.6	£52,500	£89,950	£15,000	5.4	£52,500
Weetslade	£110,000	£15,000	6.6	£52,500	£160,000	£25,000	5.8	£87,500	
Whitley Bay	£139,600	£25,000	5.0	£87,500	£235,000	£25,000	8.5	£87,500	

Key:

Up to 3.5x	2.9
Between 3.5x and 5x	4.2
5x or more	6.5

Sub-area	Description
1	Whitley Bay / Monkseaton area
2	Cullercoats / Tynemouth area
3	Moor Park / New York / Chirton Grange / Preston Grange / Preston Area
4	North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area
5	Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area
6	Benton / Longbenton / Forest Hall area
7	Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area
8	Shiremoor / Backworth / Northumberland Park / West Allotment area
9	Dudley / Seaton Burn / Wideopen area

Sources: Land Registry © Crown
copyright 2020, household income from
2021 CAMEO

Affordability of prices and rents to selected key workers and households on minimum/living wages

- 3.22 The extent to which borough-wide open market rents are affordable to selected keyworkers and households on minimum and living wages are explored in Table 3.13. Key workers on entry-level grades are generally having to spend more than 25% of their income on rent although for several occupations and grades properties are affordable.
- 3.23 Table 3.14 considers the income multiples needed to buy a property based on the incomes of selected key workers and households on minimum/living wages. Analysis assumed that a 10% deposit was available and indicates that multiples in excess of 3.5x were generally needed when buying a property.

Table 3.13 Incomes of key workers and households on minimum/living wage and rental affordability

Income/Occupation/ Wage	Gross household income 2021 (Annual £)	Gross household income 2021 (Monthly £)	%LQ Income for LQ rent	% Median income for median rent	LQ Rent	Median Rent
Police officer						
Pay Point 0	£21,402	£1,784	25.3	29.4	£451	£524
Pay Point 2	£25,902	£2,159	20.9	24.3	£451	£524
Pay Point 4	£28,158	£2,347	19.2	22.3	£451	£524
Nurse						
Band 1	£18,546	£1,546	29.2	33.9	£451	£524
Band 3	£20,330	£1,694	26.6	30.9	£451	£524
Band 5	£25,655	£2,138	21.1	24.5	£451	£524
Fire officer						
Trainee	£24,191	£2,016	22.4	26.0	£451	£524
Competent	£32,244	£2,687	16.8	19.5	£451	£524
Teacher						
Unqualified (min)	£18,169	£1,514	29.8	34.6	£451	£524
Main pay range (min)	£25,714	£2,143	21.0	24.5	£451	£524
Minimum/Living Wage						
Age 23 and over						
Single household	£16,038	£1,337	33.7	39.2	£451	£524
1xFull-time, 1xPart-time	£24,057	£2,005	22.5	26.1	£451	£524
Two working adults	£32,076	£2,673	16.9	19.6	£451	£524
Age 21 and 22						
Single household	£15,048	£1,254	36.0	41.8	£451	£524
1xFull-time, 1xPart-time	£22,572	£1,881	24.0	27.9	£451	£524
Two working adults	£30,096	£2,508	18.0	20.9	£451	£524

Key

	More than 35% of income spent on rent
	Between 25% and 35% of income spent on rent
	Less than 25% of income spent on rent

Table 3.14 Incomes of households, selected key workers and households on minimum/living wage and open market prices

			Property Prices							
			LQ	Median	Shared ownership (50%)	Shared ownership (25%)	Help to buy	Discounted Home Ownership (30%)	Discounted Home Ownership (25%)	Discounted Home Ownership (20%)
			Price>> £108,000	£160,000	£80,000	£40,000	£160,000	£112,000	£120,000	£128,000
Price after deposit/loan>>			£97,200	£144,000	£72,000	£38,000	£112,000	£106,400	£114,000	£121,600
Gross household income 2020 (Annual £)			Ratio of house price to income							
CAMEO UK Household Income	LQ income	£15,000	6.5	9.6	4.8	2.5	7.5	7.1	7.6	8.1
	Median income	£25,000	3.9	5.8	2.9	1.5	4.5	4.3	4.6	4.9
	Average income	£25,724	3.8	5.6	2.8	1.5	4.4	4.1	4.4	4.7
ONS Annual Survey of Hours and Earnings	ASHE LQ	£22,609	4.3	6.4	3.2	1.7	5.0	4.7	5.0	5.4
	ASHE Median	£29,029	3.3	5.0	2.5	1.3	3.9	3.7	3.9	4.2
	ASHE Average	£34,756	2.8	4.1	2.1	1.1	3.2	3.1	3.3	3.5
Occupation	Wage	Ratio of house price to income								
Police officer										
Pay Point 0	£20,880	4.7	6.9	3.4	1.8	5.4	5.1	5.5	5.8	
Pay Point 2	£25,269	3.8	5.7	2.8	1.5	4.4	4.2	4.5	4.8	
Pay Point 4	£27,471	3.5	5.2	2.6	1.4	4.1	3.9	4.1	4.4	
Nurse										
Band 1	£18,005	5.4	8.0	4.0	2.1	6.2	5.9	6.3	6.8	
Band 3	£19,337	5.0	7.4	3.7	2.0	5.8	5.5	5.9	6.3	
Band 5	£24,907	3.9	5.8	2.9	1.5	4.5	4.3	4.6	4.9	
Fire officer										
Trainee	£23,366	4.2	6.2	3.1	1.6	4.8	4.6	4.9	5.2	
Competent	£31,144	3.1	4.6	2.3	1.2	3.6	3.4	3.7	3.9	
Teacher										
Unqualified (min)	£17,687	5.5	8.1	4.1	2.1	6.3	6.0	6.4	6.9	
Main pay range (min)	£24,373	4.0	5.9	3.0	1.6	4.6	4.4	4.7	5.0	
Minimum/Living Wage										
Single household (23 and over)	£15,696	6.2	9.2	4.6	2.4	7.1	6.8	7.3	7.7	
1xFull-time, 1xPart-time	£23,544	4.1	6.1	3.1	1.6	4.8	4.5	4.8	5.2	
Two working adults	£31,392	3.1	4.6	2.3	1.2	3.6	3.4	3.6	3.9	
Single household (21-22)	£14,760	6.6	9.8	4.9	2.6	7.6	7.2	7.7	8.2	
1xFull-time, 1xPart-time	£22,140	4.4	6.5	3.3	1.7	5.1	4.8	5.1	5.5	
Two working adults	£29,520	3.3	4.9	2.4	1.3	3.8	3.6	3.9	4.1	

Key

	More than 4.5x income multiple required
	Between 3.5x and 4.5x income multiple required
	Less than 3.5x income multiple required

Concluding comments

- 3.24 In 2020, lower quartile house prices were £119,500 and median prices were £170,000 across North Tyneside. These prices are higher than the North East prices but lower than English prices. Lower quartile private rents in 2020 were £451 and median rents were £524.
- 3.25 The relative affordability of dwellings to buy or rent was explored at sub-area and ward level. Across North Tyneside, the minimum income required for entry-level/lower quartile renting was £21,648. For buying an entry-level/lower quartile property, the minimum income required was £27,771. These calculations assumed that a rent is affordable if no more than 25% of household income is spent on rent and if buying a property should cost no more than 3.5x household income.
- 3.26 Analysis considered the affordability of rents and prices at sub-area, ward and borough level. Overall, households had to spend 36.1% of lower quartile income on a lower quartile rent and 25.2% of median income for median rents. There were notable affordability pressures in some sub-areas.. The overall affordability picture is mixed, but the greatest affordability pressures are in Valley, Longbenton and Tynemouth wards.
- 3.27 For open market purchase, the ratio of lower quartile income to price across North Tyneside was 6.5x and for median income to median price it was 5.8x. Both ratios are above the benchmark of 3.5x income and ratio. Ratios were highest in Longbenton, Valley and Tynemouth wards. Without substantial deposits the ability to buy is a challenge to many households.
- 3.28 Specific analysis of the affordability of renting and buying for key worker incomes and those on minimum/living wages was carried out. Key workers on entry-level grades are generally having to spend more than 25% of their income on rent although for several occupations and grades properties are affordable.
- 3.29 Private renting was generally affordable to households who had multiple earners on minimum/living wage. However, single earners on minimum/living wage had to spend upwards of 30% of income on lower quartile rents.
- 3.30 For buying, analysis assumed that a 10% deposit was available but indicated that income multiples in excess of 3.5x were needed to buy on the open market.
- 3.31 Using the evidence presented in this chapter, it is possible to establish what would be a genuinely affordable rent and purchase price North Tyneside (Table 3.15). This is based on local incomes and assumes that no more than 25% of income is spent on rent and a household income multiple of 3.5x is applied to local household incomes when testing the affordability of buying.

Geography		LQ rents (25% of income)	Median rents (25% of income)	LQ purchase (3.5x income multiple)	Median purchase (3.5x income multiple)
Borough	North Tyneside	£313	£521	£52,500	£87,500
Sub-area	1	£521	£729	£87,500	£122,500
	2	£521	£521	£87,500	£87,500
	3	£313	£521	£52,500	£87,500
	4	£313	£313	£52,500	£52,500
	5	£313	£313	£52,500	£52,500
	6	£313	£521	£52,500	£87,500
	7	£313	£521	£52,500	£87,500
	8	£313	£313	£52,500	£52,500
	9	£313	£521	£52,500	£87,500
Ward	Battle Hill	£313	£313	£52,500	£52,500
	Benton	£417	£521	£70,000	£87,500
	Camperdown	£313	£313	£52,500	£52,500
	Chirton	£313	£313	£52,500	£52,500
	Collingwood	£313	£313	£52,500	£52,500
	Cullercoats	£521	£521	£87,500	£87,500
	Howdon	£313	£313	£52,500	£52,500
	Killingworth	£313	£521	£52,500	£87,500
	Longbenton	£313	£313	£52,500	£52,500
	Monkseaton North	£729	£938	£122,500	£157,500
	Monkseaton South	£521	£521	£87,500	£87,500
	Northumberland	£313	£521	£52,500	£87,500
	Preston	£521	£521	£87,500	£87,500
	Riverside	£313	£313	£52,500	£52,500
	St Mary's	£729	£729	£122,500	£122,500
	Tynemouth	£313	£729	£52,500	£122,500
	Valley	£313	£313	£52,500	£52,500
	Wallsend	£313	£313	£52,500	£52,500
	Weetslade	£313	£521	£52,500	£87,500
	North Tyneside	£521	£521	£87,500	£87,500

Sources: Household income from 2021 CAMEO

Sub-area	Description		
		5	Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area
1	Whitley Bay / Monkseaton area	6	Benton / Longbenton / Forest Hall area
2	Cullercoats / Tynemouth area	7	Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area
3	Moor Park / New York / Chirton Grange / Preston Grange / Preston Area	8	Shiremoor / Backworth / Northumberland Park / West Allotment area
4	North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area	9	Dudley / Seaton Burn / Wideopen area

4. Overall housing need and affordable housing need

Introduction

- 4.1 This chapter considers the future number of dwellings needed across North Tyneside.

Establishing housing need using the 'standard method'

- 4.2 The 2021 National Planning Policy Framework (NPPF) (Paragraph 61) states **'to determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance - unless exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. In addition to the local housing figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for'**.
- 4.3 PPG defines housing need as 'an unconstrained assessment of the number of homes needed in an area' (PPG 2019 Paragraph: 001 Reference ID: 2a-001-20190220).
- 4.4 PPG comments that 'the standard method uses a formula to identify the minimum number of homes expected to be planned for, in a way which addresses projected household growth and historic under-supply. It identifies a minimum annual housing need figure. It does not produce a housing requirement figure.'(PPG Paragraph: 002 Reference ID: 2a-002-20190220).
- 4.5 In December 2020, Planning Practice Guidance updated the standard methodology for assessing overall housing need which involves: setting a baseline; adjusting for affordability; capping increases where necessary and applying uplifts in some urban areas; and considering if it is appropriate to plan for a higher housing need figure.

Step 1: Setting the baseline

- 4.6 Planning Practice Guidance states that a baseline should be set using 2014-based national household projections for the local authority area. The projections are used to calculate the average annual household growth over a 10-year consecutive period. (PPG Paragraph 004 Reference ID: 2a-004-20201216).
- 4.7 As 2021 is the first year of the plan period, the period 2021 to 2031 has been chosen to set the baseline for this SHMA. Over the period, the total number of households under the 2014-based household projections is set to increase by 7,020 or 702 each year (Table 4.1).

Table 4.1 Household change under 2014-based household projections				
Projection	2021 households	2031 households	2021-31 household change	Annual Change
MHCLG 2014-based	98,189	105,209	7,020	702

Step 2: An adjustment to take account of affordability

- 4.8 The average annual projected household figure from Step 1 is the adjusted based on the affordability of the area using median workplace-based affordability ratios published by the ONS.

$$\text{Adjustment factor} = 1 + ((\text{Local Affordability Ratio} - 4)/4) * 0.25$$

- 4.9 The latest affordability ratio (2020) and associated affordability uplift is set out in Table 4.2.

Table 4.2 Affordability ratios and affordability uplift			
Year	Median price to income affordability ratio	Adjustment factor*	Affordability uplift to be added to Step 1
2020	6.22	1.1388	97

* Adjustment factor is $1 + ((\text{Local Affordability Ratio} - 4)/4) * 0.25$

Source: ONS Ratio of house price to workplace-based earnings

- 4.10 The reason for the affordability adjustment is set out in PPG:

‘An affordability adjustment is applied as household growth on its own is insufficient as an indicator of housing demand because:

- household formation is constrained to the supply of available properties – new households cannot form if there is nowhere for them to live; and
- people may want to live in an area in which they do not reside currently, for example to be near to work, but be unable to find appropriate accommodation that they can afford.

The affordability adjustment is applied in order to ensure that the standard method for assessing local housing need responds to price signals and is consistent with the policy objective of significantly boosting the supply of homes. The specific adjustment in this guidance is set at a level to ensure that

minimum annual housing need starts to address the affordability of homes.’ (PPG Paragraph 006 Reference ID: 2a-006-20190220).

- 4.11 Table 4.3 sets out the components of the dwelling need calculation using 2021 as a base year and 2020 affordability ratios. The basic demographic need under the 2014-based DCLG household projections are presented along with the affordability adjustment to establish the total annual dwelling need using the standard methodology.

Time period	Baseline annual demographic need	Affordability Adjustment	Adjustment factor	Total dwelling need under standard methodology
2021-2031	702	2020 data	97	799

- 4.12 This establishes an annual minimum need for 799 dwellings.

Step 3: Capping the level of any increase

- 4.13 PPG states that ‘the standard methodology may identify a minimum local housing need figure that is significantly higher than the number of homes currently being planned for. The cap is applied to help ensure that the minimum local housing need figure calculated using the standard methodology is as deliverable as possible’ (PPG Paragraph 007 Reference ID: 2a-007-20190220). The PPG continues ‘the cap reduces the minimum number generated by the standard method but does not reduce housing need itself. Therefore, strategic policies adopted with a cap applied may require an early review and updating to ensure that any housing need above the capped level is planned for as soon as is reasonably possible’ (PPG Paragraph 007 Reference ID: 2a-007-20190220).
- 4.14 How the cap is calculated ‘depends on the current status of relevant strategic policies for housing’ (PPG Paragraph 004 Reference ID: 2a-004-20201216).
- 4.15 The last officially endorsed dwelling target was set out in the North Tyneside Local Plan which was adopted in July 2017. The PPG states ‘where the relevant strategic policies for housing were adopted within the last 5 years (at the point of making the calculation), the local housing need figure is capped at 40% above the average annual housing requirement set out in the existing policies. This is 790 dwellings each year so the cap would be **1,106 dwellings each year**.
- 4.16 Under the parameters set out in the PPG no cap on delivery needs to be applied.

Step 4: Cities and urban centres uplift

- 4.17 A 35% uplift is then applied for those urban local authorities in the top 20 cities and urban areas list devised by ONS (PPG Paragraph 004 Reference ID: 2a-004-20190220). This does not apply to North Tyneside.

Housing need using the standard methodology

- 4.18 Based on the December 2020 PPG standard methodology and 2020 affordability ratios, the minimum local housing need for North Tyneside, from 2021, is **799** dwellings each year.

Potential adjustments to the standard method

Overview

- 4.19 Having identified the minimum housing need under the standard model, further demographic analysis considers alternative demographic scenarios. A review of alternative demographic scenarios provides the evidence to confirm if the standard method provides an appropriate base for the assessment of need or whether any there are exceptional circumstances that would justify an alternative approach.

- 4.20 There is also provision in PPG to adjust the minimum housing need:

‘The standard method for assessing local housing need provides the minimum starting point in determining the number of homes needed in an area. It does not attempt to predict the impact that future government policies, changing economic circumstances or other factors might have on demographic behaviour. Therefore, there will be circumstances where it is appropriate to consider whether actual housing need is higher than the standard method indicates.

This will need to be assessed prior to, and separate from, considering how much of the overall need can be accommodated (and then translated into a housing requirement figure for the strategic policies in the plan).

Circumstances where this may be appropriate include, but are not limited to situations where increases in housing need are likely to exceed past trends because of:

- growth strategies for the area that are likely to be deliverable, for example where funding is in place to promote and facilitate additional growth (e.g. Housing Deals);
- strategic infrastructure improvements that are likely to drive an increase in the homes needed locally; or
- an authority agreeing to take on unmet need from neighbouring authorities, as set out in a statement of common ground.

There may, occasionally, also be situations where previous levels of housing delivery in an area, or previous assessments of need (such as a recently produced Strategic Housing Market Assessment) are significantly greater than the outcome from the standard method. Authorities will need to take this into account when considering whether it is appropriate to plan for a higher level of need than the standard model suggests. '(PPG Paragraph 010 Reference ID: 2a-010-20201216).

- 4.21 The current North Tyneside Local Plan is based on an average annual housing requirement of 790 dwellings per annum. This level of housing growth, confirmed in 2016 was based greater than the baseline household growth arising from the 2014 Sub-national population projection of 707 dwellings per annum. The uplift identified for the current Local Plan took in to account the additional implications of longer term migration trends, anticipated job growth and the evolution of the Borough into an are offering additional job opportunities for residents. The additional growth priorities for the neighbouring Authorities of Newcastle and Northumberland also informed considerations at that time.
- 4.22 Application of the standard methodology calculation has identified a current annual housing requirement of 799 dwellings per annum. This is a marginal uplift over the current Local Plan housing requirement.
- 4.23 The broad alignment of estimated housing need arising from the standard method with the Borough's current housing requirement, and absence of key structural changes in investment and growth indicated that there is no requirement to undertake further detailed analysis to identify an alternative level of housing need for North Tyneside. This is supported by analysis of key indicators the influence the standard method calculation since adoption of the Local Plan. The ratio of median house prices to workplace based earnings has varied from 6.30 at the point of adoption of the Local Plan in 2017 to 6.04 in 2019.

Regeneration Strategies and strategic infrastructure improvements

- 4.24 Planned key infrastructure improvements such as delivery of the Northumberland Line (formerly Ashington Blyth and Tyne) have continued. The Council has further advanced its plans to deliver regeneration of its town centres. However, such improvements are considered key to enhancing prosperity and well-being for existing residents and business, whilst improving the overall housing offer. New housing development would also form a key element of these regeneration strategies, which would substantially deliver the targets for brownfield development encompassed within the existing Local Plan. There is no evidence to suggest such regeneration initiatives would lead to growth over and above those already anticipated.
- 4.25 As a result, no further uplifts to the housing number are necessary as regeneration strategies and infrastructure improvements are to address existing local need.

Meeting unmet need from other local authorities

- 4.26 North Tyneside Council currently does not have any arrangements for unmet housing need from neighbouring authorities. Of Authorities currently progressing Local Plan production:
- Northumberland have recently completed consultation on Main Modifications and are expected to adopt its Local Plan in the first half of 2022. No unmet need has been identified.
 - Newcastle determined in 2020 that the current Core Strategy remains appropriate and up to date. Newcastle has not yet confirmed a programme for preparation of a new strategic plan. As an urban core Authority Newcastle is currently required through the standard method to apply a 35% uplift to housing needs. To date no discussions have taken place with North Tyneside regarding Newcastle's capacity to accommodate the level of housing potentially arising from the latest standard method.
 - South Tyneside is also currently progressing preparation of its first Local Plan, following adoption of its Core Strategy in 2008. As a Borough heavily constrained by Green Belt, meeting its housing needs has been identified as a challenge. However, discussions with South Tyneside have not progressed to consideration of potential unmet need arising in North Tyneside. The South Tyneside Local Plan remains at a relatively early stage.

Affordable housing need

- 4.27 A detailed analysis of affordable housing need in accordance with PPG is presented at Technical Appendix C. This establishes an overall gross affordable need of 1,867 and after taking into account affordable lettings and newbuild the net shortfall is 477 each year based on backlog need being cleared over 10 years. This justifies the need for a robust affordable housing policy. The council does not need to meet this in full as PPG says 'the total affordable housing need can then be considered in the context of its likely delivery as a proportion of mixed market and affordable housing developments, taking into account the probable percentage of affordable housing to be delivered by eligible market housing led developments. An increase in the total housing figures included in the plan may need to be considered where it could help deliver the required number of affordable homes (PPG Paragraph 024 Reference ID: 2a-024-20190202).
- 4.28 The recommended tenure split is 70% social/affordable rented and 30% affordable home ownership (excluding First Homes) or 58% rented and 42% affordable home ownership (including First Homes.)
- 4.29 Given that the standard method includes an affordability uplift, a further upwards adjustment to accommodate more affordable housing is not suggested.

Housing to support economic growth

- 4.30 Since adoption of the Local Plan there have been no fundamental changes in the drivers of growth in North Tyneside. The expansion and growth of office based

employment at Cobalt Business Park and Quorum Business Park has continued (with the effects of the Coronavirus Pandemic yet to emerge) the River Tyne North Bank remains a key location for high tech, renewable and off-shore innovation.

- 4.31 No adjustment to the housing need figure is required to support economic growth

Older and specialist housing need

- 4.32 The SHMA in Chapter 5 evidences a need for around 2,642 additional units of older persons accommodation to 2039 which includes 1,820 C3 planning use class units such as Extra Care and sheltered/retirement housing and 822 C2 planning use class such as residential care. This translates to an annual need for around 96 units of older person C3 accommodation and 43 units of C2 accommodation. It is anticipated that the C3 need will be delivered as part of the housing need figure and no further adjustments to this figure is necessary. There is also likely to be an ongoing need for a small number of specialist housing units for people with additional needs which is expected to be accommodated within the housing need figure.

Previous delivery levels

- 4.33 Table 2.10 set out annual dwelling completions over the period 2011/12 to 2020/21 and compared this with annual housing requirements. Over this period, the cumulative shortfall of net completions compared with housing targets has been 329 dwellings. However, PPG notes that **‘the affordability adjustment is applied to take account of past under-delivery. The standard method identifies the minimum uplift that will be required and therefore it is not a requirement to specifically address under-delivery separately.’** As the standard method is being followed, no adjustment for previous delivery levels is required.

Alternative approaches to the standard method

- 4.34 Within PPG (Paragraph: 001 Reference ID: 2a-001-20190220) there is provision to use an alternative to the standard method where exceptional circumstances justify an alternative approach which also reflects current and future demographic trends and market signals. This chapter has carefully reviewed the relevant aspects of the standard method which would warrant an alternative approach to housing numbers to be considered. No exceptional circumstances have been identified.

Concluding comments

- 4.35 The 2020 standard method calculation establishes a baseline minimum annual need for 799 dwellings based on demographics and an adjustment to take account of affordability. This standard method baseline provides an appropriate base for the assessment of need.

- 4.36 No further upward adjustments to the 799 figure are necessary as this provides sufficient housing to meet local demographic, affordable and specialist need and sufficiently supports future jobs growth. The 799 figure compares with an average net delivery of 611 dwellings over the ten years to 2011/12 to 2020/21.

5. The needs of different groups

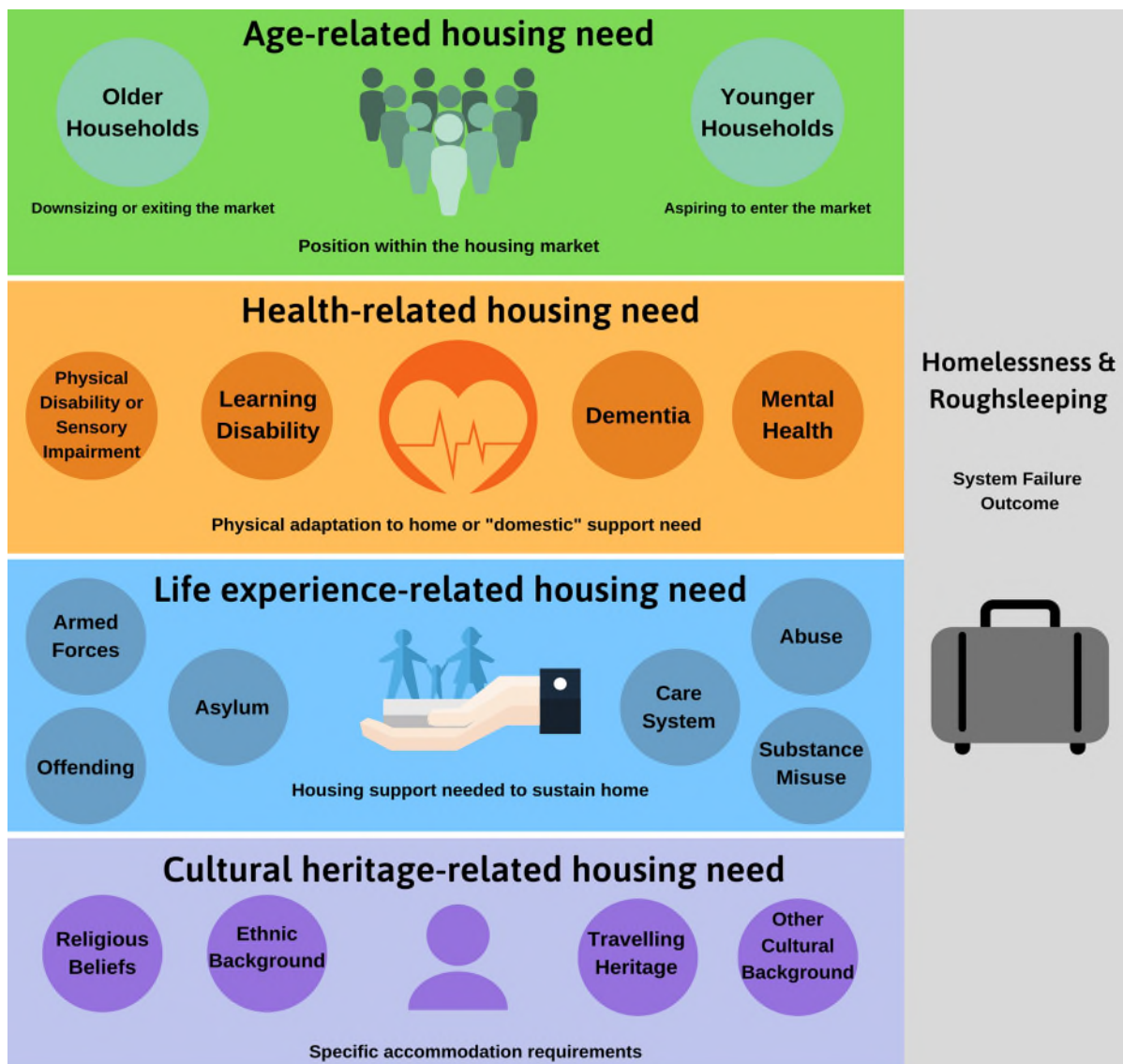
Introduction

5.1 Paragraph 62 of the NPPF refers to housing needs for different groups in the community and these fall into two broad groups: housing for people with additional needs and housing for specific household types.

Housing for people with additional needs

5.2 These groups include older people and accommodation for people with disabilities which are further sub-divided into those with health-related and life-experience related needs as summarised in Figure 5.1.

Figure 5.1 Establishing need associated with age, health and life experience



- 5.3 The evidence base relating to additional needs groups has been established based around these broad principles:
- people with additional needs are generally accommodated in mainstream housing and provided with care and support when needed;
 - some people will have complex and multiple needs and therefore may fall into several different categories of need;
 - some people require long-term accommodation to provide support for ongoing needs; and some require short-term supported housing which aims to support people for a period of time before moving on/back into mainstream housing; and
 - most people with additional needs will not need specialist supported housing but they may need adaptations to their homes and/or care and support provided in other ways.
- 5.4 The council has produced an Adult Social Care Market Position statement 2016, 2021 Joint Strategic Needs Assessment and 2021 Domestic Abuse Needs Assessment and relevant information is presented in this chapter. The chapter is also informed by an excellent range of information obtained through the stakeholder survey.

Age-related housing need

- 5.5 Age-related housing need relates to the needs of specific age groups in the housing market due to life events and the impact this has on the need for dwellings of particular sizes/types and affordability. For older households this includes 'rightsizing' and adaptation of existing dwellings. For younger households, affordability is a particular concern and this has been considered elsewhere in the report. For this section we therefore focus upon the needs of older persons for particular unit types.

Housing for older people

- 5.6 The NPPF Annex 2 defines older people as '**people over or approaching retirement age, including the active, newly-retired through to the very frail elderly; and whose housing can encompass accessible, adaptable general needs housing through to the full range of retirement and specialist housing for those with care and support needs.**'
- 5.7 PPG recommends the following are considered in an assessment of older persons need:
- The future need for specialist accommodation (including but not restricted to age-restricted general market housing, retirement living or sheltered accommodation, Extra Care or housing with care), broken down by type and tenure.
 - The need for care in residential care and nursing homes (C2).
 - The need for co-housing communities.

- The role of general housing and in particular bungalows and homes that can be adapted to meet a change in needs.
- 5.8 PPG notes that ‘**plan-making authorities will need to count housing provided for older people against their housing requirement**’ (source: PPG June 2019 Paragraph: 016 Reference ID: 63-016-20190626).
- 5.9 Over the period 2021 to 2039, the number of people aged 65 and over is expected to increase by 34% and by 2039 there will be an additional 14,759 residents aged 65 and over. The number of households headed by someone aged 65 or over is expected to increase by 10,682 (36.5%) by 2039.
- 5.10 The 2021 household survey indicates that 47.9% of older people want to remain in their current home with help and support when needed (Table 5.1). There is also interest in a range of options including open market, renting from a housing association/council, sheltered and co-housing.

Housing option	65-74 (%)	75-84 (%)	85+ (%)	All 65+ (%)
Continue to live in current home with support when needed	39.7%	65.7%	65.5%	47.9%
Buying a dwelling on the open market	10.6%	8.7%	1.9%	9.5%
Rent a dwelling from a private landlord	0.8%	1.4%	1.9%	1.1%
Rent from housing association	7.8%	2.7%	1.9%	6.0%
Rent from the council	13.7%	3.3%	5.2%	10.3%
Sheltered accommodation - To rent	12.4%	10.1%	9.8%	11.6%
Sheltered accommodation - To buy	5.1%	7.8%	2.9%	5.7%
Sheltered accommodation - Part rent/buy (shared ownership)	2.2%	0.9%	0.0%	1.7%
Extra Care housing - To rent	3.6%	3.5%	4.0%	3.6%
Extra Care housing - To buy	1.8%	2.8%	1.9%	2.1%
Extra Care housing - Part rent/buy (shared ownership)	0.4%	0.5%	0.0%	0.4%
Supported housing for people with learning disabilities and autism	0.0%	0.0%	0.0%	0.0%
Supported housing for mental health conditions	0.0%	0.0%	0.0%	0.0%
Residential nursing/care home	1.6%	3.2%	7.4%	2.4%
Co-housing - your own home in a small community which shares facilities (e.g. laundry) and activities	3.9%	4.7%	2.9%	4.0%
Go to live with children or other relatives/friends	1.5%	2.2%	3.6%	1.9%
Other	1.4%	2.1%	0.0%	1.5%
<i>Base (total households responding)</i>	13,471	4,753	1,426	19,650

Source: 2021 household survey

- 5.11 The 2021 household survey indicates 43.1% of older people planning to move would like to move to a property with fewer bedrooms, 43.5% would like to

move to a property with the same number of bedrooms and 13.4% would like a larger property (Table 5.2). The general conclusion is that smaller dwellings are needed to accommodate older movers but there are households who would require the same or even an increase in the number of bedrooms in their properties.

Housing choice	Aspiration (%)	Expectation (%)
Downsizing (moving to a smaller property)	43.1%	47.1%
Staying same	43.5%	40.4%
Upsizing (moving to larger property)	13.4%	12.5%
Total	100.0%	100.0%
Base (households responding)	3,954	3,980

Source: 2021 household survey

Future need for specialist older person accommodation and residential care provision

- 5.12 Across North Tyneside there are around 4,618 units of specialist older persons accommodation comprising 3,182 specialist older accommodation (C3 planning use class) and 1,436 units of residential care (C2 use class). Map 5.1 and Table 5.3 shows the current number of older persons units of accommodation across the borough using data provided by the Elderly Accommodation Counsel.

Category (and planning use category)	Current number of units	Description
Age-exclusive housing (C3)	419	<p>EAC definition: Schemes or developments that cater exclusively for older people, usually incorporate design features helpful to older people and may have communal facilities such as a residents' lounge, guest suite and shared garden, but do not provide any regular on-site support to residents.</p> <p>PPG definition: This type of housing is generally for people aged 55 and over and the active elderly. It may include some shared amenities such as communal gardens but does not include support or care services.</p>
Care homes (C2)	596	<p>EAC definition: A residential setting where a number of older people live, usually in single rooms, and have access to on-site care services. Since April 2002 all</p>

Table 5.3 Categories of older person accommodation		
Category (and planning use category)	Current number of units	Description
		homes in England, Scotland and Wales are known as 'care homes', but are registered to provide different levels of care. A home registered simply as a care home will provide personal care only - help with washing, dressing and giving medication. PPG definition: These have individual rooms within a residential building and provide a high level of care meeting all activities of daily living. They do not usually include support services for independent living. This type of housing can also include dementia care homes.
Care home with nursing (C2)	840	A home registered as a care home with nursing will provide the same personal care but also have a qualified nurse on duty twenty-four hours a day to carry out nursing tasks. These homes are for people who are physically or mentally frail or people who need regular attention from a nurse.
Enhanced sheltered/close case (C3)	12	Sheltered housing that provides more in facilities and services than traditional sheltered housing but does not offer the full range of provision that is found in an Extra Care housing scheme
Retirement/Sheltered housing (C3) Sheltered bungalows for older people	1,003 R 996 S 207 S	EAC definition: Sheltered housing (S) means having your own flat or bungalow in a block, or on a small estate, where all the other residents are older people (usually over 55). With a few exceptions, all developments (or 'schemes') provide independent, self-contained homes with their own front doors. Retirement housing (R) means housing developments of a similar type to sheltered housing, but built for sale, usually on a leasehold basis. The term sheltered housing is now largely superseded by retirement housing. PPG definition: This usually consists of purpose-built flats or bungalows with limited communal facilities such as a lounge, laundry room and guest room. It does not generally provide care services but provides some support to enable residents to live independently. This can include 24-hour on-site assistance (alarm) and a warden or house manager.
Extra Care housing (C3) Extra Care dementia specific housing (C3)	451 94	EAC definition: Extra Care Housing is housing designed with the needs of frailer older people in mind and with varying levels of care and support available on site. People who live in Extra Care Housing have their own self-contained homes, their own front doors and a legal right to occupy the property. Extra Care Housing is also

Table 5.3 Categories of older person accommodation		
Category (and planning use category)	Current number of units	Description
		<p>known as very sheltered housing, assisted living, or simply as 'housing with care'. It comes in many built forms, including blocks of flats, bungalow estates and retirement villages. It is a popular choice among older people because it can sometimes provide an alternative to a care home.</p> <p>PPG definition: This usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required, through an onsite care agency registered through the Care Quality Commission (CQC). Residents are able to live independently with 24-hour access to support services and staff, and meals are also available. There are often extensive communal areas, such as space to socialise or a wellbeing centre. In some cases, these developments are known as retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.</p> <p>Note Extra Care can also provide accommodation for people with additional needs who are not older people</p>
Total	4,618	

Source: EAC data 2021

- 5.13 Given the ageing of the population, the need for specialist older person accommodation is expected to increase. Based on population projections there is an need for 2,675 additional units of specialist older persons' accommodation by 2039 (Table 5.4)
- 5.14 The council's DM4.8 specialist housing policy says:
The council will support proposals for specialist housing, including Extra Care and supported housing, where the development:
- Is integrated into the local residential community;
 - Is located where local traffic and connectivity are not detrimental to the local community; and,
 - Is considered acceptable against other policies in this Local Plan.
 - Accommodation should seek to deliver and promote independent living and will include extensions and adaptations to existing homes as well as new build properties
- 5.15 The total additional need for specialist older person (C3) dwellings is projected to be 1,828 by 2039 (96 each year). C3 housing is part of the overall annual

housing need to be delivered across the borough. There is an additional need for 847 residential care units (45 each year).

Table 5.4 Analysis of future need for specialist older person accommodation 2021-2039

Current provision (and planning use class)	Number of units 2021	Number aged 75 and over 2021	Number aged 75 and over 2039 (projected)	Change in need
		19,334	30,395	
		Ratio of population to current provision	Ratio applied to 2039 population	
Specialist older person (C3)	3,182	0.16458	5,002	1,820
Residential Care (C2)	1,436	0.07427	2,258	822
Total	4,618		7,260	2,642

Source: EAC data, 2018-based population projections

5.16 This analysis is based on an assumption that the proportion of households in residential care remains the same by 2039. The council however is concerned there is currently an oversupply and at this time are not seeking to develop further residential care units. The council needs to use the MPS and housing strategy to put in place a range of alternative mechanisms to support people to live at home longer, which is also referenced in the Adult Social Care White Paper December 2021.

Stakeholder views on Extra Care housing

5.17 Stakeholders make specific reference to the role of Extra Care housing.

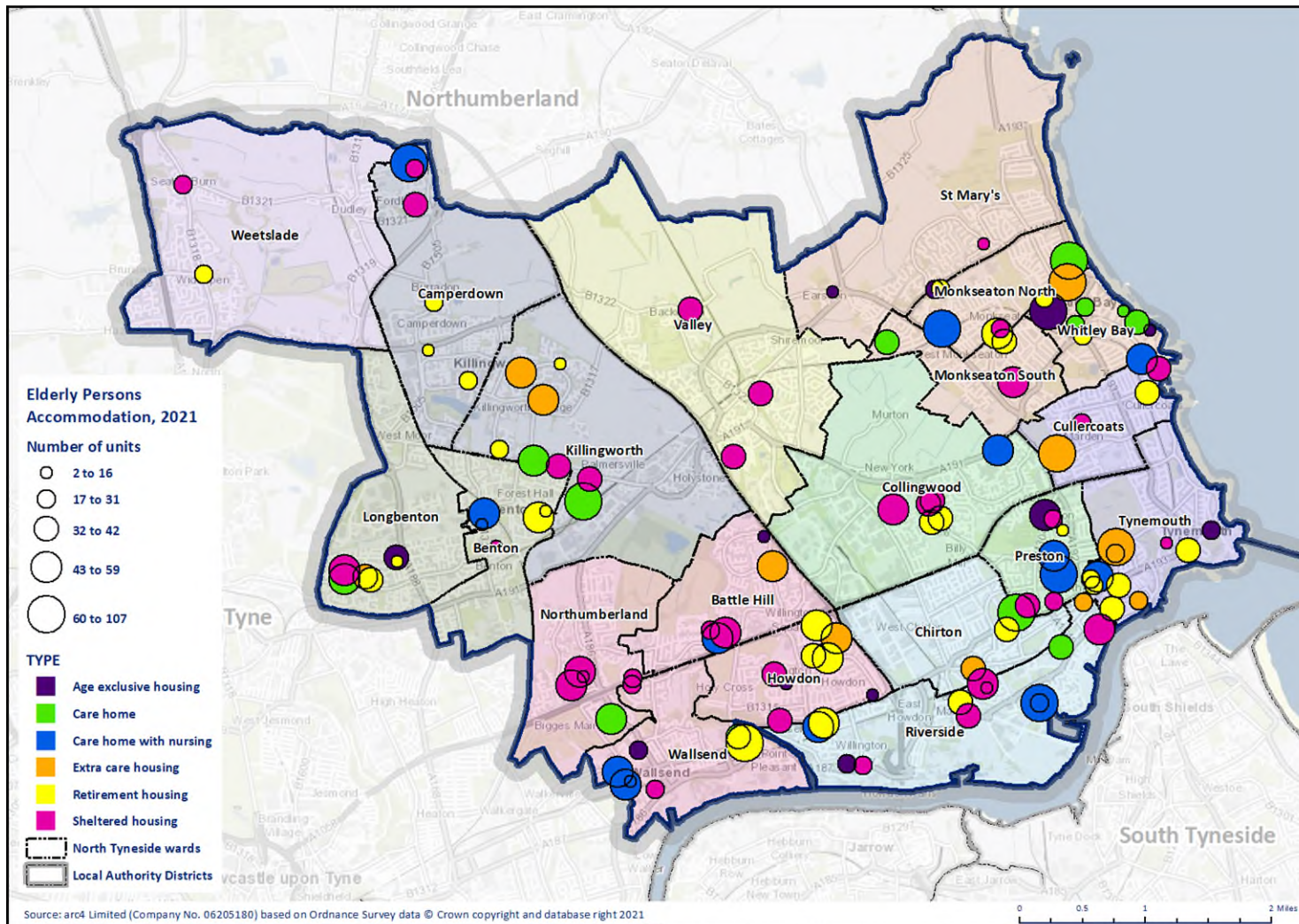
- One new build Extra Care scheme, with a focus on those with dementia – which will be the first for the borough, is due to open in 2021.
- One new build Extra Care scheme due to open in 2022.
- Care village planned at Backworth Park.
- There isn't sufficient Extra Care housing in the borough, however there are voids across the borough which can be explained by:
 - People not really understanding what Extra Care is and what it offers.
 - The need to marketing Extra Care options to encourage people to have more interest and to see it as a potential positive move.
 - Some buildings being older and require more investment.
 - No Extra Care delivery in Whitley Bay area, where there is limited land availability and high land cost make it difficult to develop and finance.
- For Extra Care, assume 50 or more units with 2 lifts.

- Internet connection must be of high quality throughout whole building – assistive technology will be required to support individuals and much of this will be reliant on internet access.
- Mobile phone connectivity must be of high quality throughout whole building as this will be required by individuals using handsets and family members visiting etc.
- Mix of 1 and 2 bedrooms. (Depending on the development, it would be helpful to have a mix of property styles, particularly if a village style development).
- Staff space must be available.
- Building must be structurally flexible to meet care needs e.g. the building must easily enable ceiling track hoists.
- Kitchens should include washing machines, dryers and fridge freezers (and therefore a large communal laundry facility not required).
- Good quality bin storage (recognising there may be high demand for e.g. incontinence pads – enough space / correct calculation of requirements / recycling).

Senior cohousing communities

- 5.18 Senior cohousing is specifically mentioned in PPG as a housing option for older people: ‘Senior co-housing communities are created and run by residents, based on the intention to live with a group of people of a similar age. The sites often consist of self-contained private homes as well as shared community space. Some communities offer an additional option for informal care.
- 5.19 This option should be considered by the council as part of a diverse range of accommodation for older people. The household survey identified a total of 1,828 households interested in co-housing, with a particular interest in 1 and 2-bedroom dwellings and a range of dwelling types with a particular focus on flats and bungalows. It is recommended the council encourages the development of cohousing schemes within North Tyneside.

Map 5.1 Current older persons accommodation across North Tyneside



Source: Elderly Accommodation Counsel 2021

People with dementia and early onset dementia

- 5.20 The PPG makes specific reference to dementia and that **‘there should be a range of housing options and tenures available to people with dementia, including mainstream and specialist housing. Innovative and diverse housing models should be considered where appropriate’** (source: June 2019 PPG Paragraph: 019 Reference ID: 63-019-20190626).
- 5.21 The PPG also outlines the characteristics of dementia- friendly communities:
- easy to navigate physical environment;
 - appropriate transport;
 - communities shaped around the views of people with dementia and their carers;
 - good orientation and familiarity;
 - reduction in unnecessary clutter; and
 - reduction in disorienting visual and auditory stimuli.
- 5.22 2020 POPPI/PANSI data estimates there are 59 people with early onset dementia and 2,952 people aged 65 and over with dementia (Table 5.5). By 2039, the number of people aged 65 and over with dementia is projected to increase by 58%, The number with early onset dementia is expected to reduce slightly.

Dementia	2020	2039	% Change 2020-2039
Early onset dementia (30-64)	59	59	-0.3%
Dementia (65-74)	557	672	20.7%
Dementia (75-84)	1,102	1,861	68.9%
Dementia (85 and over)	1,293	2,130	64.7%
Dementia (total 65+)	2,952	4,663	58.0%

Source: POPPI/PANSI applied to 2018-based population projections

- 5.23 A report by the All Party Parliamentary Group (APPT) on Housing and Care for Older People published a report on Housing for People with Dementia in July 2021
[https://www.housinglin.org.uk/assets/Resources/Housing/Support materials/Reports/HCOP_APPG_Dementia_Housing_and_Care_Inquiry-LowRes.pdf](https://www.housinglin.org.uk/assets/Resources/Housing/Support_materials/Reports/HCOP_APPG_Dementia_Housing_and_Care_Inquiry-LowRes.pdf)
- 5.24 This set out 23 recommendations which included:
- Recognise potential future loneliness and how we can maintain our family connections and wider social networks in the communities we live in before or after diagnosis.

- Consider whether to move whilst we are able: rightsizing and moving to the right place and environment whilst able to still develop new routes and make new friends.
- Make preventive changes, incrementally, to the home environment; such as when upgrading property or installing new technology, or where we require additional personal care and support to help us to live independently.

5.25 Regarding housing and planning, the report recommended:

- Support increased provision of Extra Care housing / assisted living accommodation and retirement housing that is dementia-ready, with top-sliced grant-aid through Homes England.
- Strengthen MHCLG guidance to local planning authorities. LPAs should respond to demographic change and the need for more homes designed for older people, including those with dementia, through Local Plans specifying requirements for age-friendly housing.

The role of general housing and in particular bungalows and homes that can be adapted to meet a change in needs

5.26 The profile of dwellings occupied by households aged 65 and over by age group, based on the 2021 household survey, is summarised in Table 5.6. This shows that 47% live in houses (particularly 3 or more bedrooms), 32% in flats and 21% in bungalows/level access dwellings.

Dwelling type and size	65 to 74 (%)	75 to 84 (%)	85+ (%)	Total (%)
1 or 2-bedroom house	0.6	1.1	0.0	0.7
3 bedroom house	11.7	7.0	6.7	10.3
4 or-more bedroom house	37.6	32.5	30.0	36.0
1-bedroom flat	16.3	16.8	10.4	16.1
2 or more-bedroom flat	16.1	12.1	27.0	15.9
1-bedroom bungalow/level access/other	1.1	1.1	0.0	1.1
2 or more-bedroom bungalow/level access/other	16.5	29.3	25.9	19.9
Total	100.0	100.0	100.0	100.0
Base	17,451	5,577	1,458	24,486

Source: 2021 household survey

5.27 The provision of appropriate adaptations to existing dwelling stock can help people lead independent lives. PPG also asks councils to consider the extent to which existing dwelling stock can help meet the needs of older people (source: PPG 2019 Paragraph: 017 Reference ID: 2a-017-20190220).

- 5.28 Given that the majority of older people want to remain in their own homes with help and support when needed, the 2021 household survey provides a useful insight into the proportion of households who need care and support and the extent to which properties are adapted (Table 5.7).
- 5.29 Table 5.7 shows that 60.3% of households have sufficient space for a carer to stay overnight if needed. Owner occupiers were most likely to have space available, but private and in particular social renters were less likely. Around 32% of respondents in affordable housing had sufficient space for a carer. The Adult Social Care White Paper December 2021 makes specific reference to the role of mainstream housing as a solution to need which may require the increased use of DFGs.
- 5.30 8.4% of all households require care and support to enable them to stay in their home. Of households with a household reference person aged 85 and over, 37.1% required help and support to enable them to stay in their own home. Table 5.8 presents this data at ward level.
- 5.31 Around 7.3% of all dwellings had been adapted or purpose-built for a person with a long-term illness, health problem or disability. This was highest amongst affordable housing occupants (17.6%) and lowest amongst owner occupiers (4.3%). Older people were more likely to live in an adapted home, with 12.1% of households with a Household Reference Person aged 75-84 and 37.1% with a HRP aged 85+ living in adapted homes.
- 5.32 Around 13.6% of households need facilities on one floor (living room, kitchen, bathroom and bedroom) and this increases to 59.4% of households with a HRP aged 85+.

Table 5.7 Adaptations, support needs and space for carer by tenure and age group				
	Is there sufficient space in your home for a carer to stay overnight, if this was needed?	Do you, or any other members of your household, require care or support to enable you/them to stay in this home?	Has your current home been adapted or purpose-built for a person with a long-term illness, health problem or disability?	Do you or someone in your household need all facilities on one floor (living room, bathroom, kitchen, bedroom)?
Tenure	Yes (%)	Yes (%)	Yes (%)	Yes (%)
Owner Occupied	74.7%	5.6%	4.3%	7.1%
Private Rented	37.5%	10.2%	5.7%	14.7%
Affordable	32.1%	16.0%	17.6%	33.3%
All tenures	60.3%	8.4%	7.3%	13.6%
Age of household reference person	Yes (%)	Yes (%)	Yes (%)	Yes (%)
Under 65	55.8%	7.0%	4.8%	8.5%
65 to 74	72.0%	10.0%	13.9%	22.1%
75 to 84	74.1%	12.0%	12.1%	34.7%
85 and over	72.4%	37.1%	21.7%	59.4%
All age groups	60.3%	8.4%	7.3%	13.6%

Source: 2021 household survey

	Is there sufficient space in your home for a carer to stay overnight, if this was needed? (%)	Do you, or any other members of your household, require care or support to enable you/them to stay in this home? (%)	Has your current home been adapted or purpose-built for a person with a long-term illness, health problem or disability? (%)	Do you or someone in your household need all facilities on one floor (living room, bathroom, kitchen, bedroom)? (%)
1	70.2%	4.8%	3.9%	8.9%
2	71.4%	7.3%	7.4%	9.4%
3	60.1%	9.7%	7.2%	12.9%
4	45.6%	11.1%	9.0%	18.3%
5	56.1%	11.2%	9.0%	16.2%
6	60.3%	8.0%	9.4%	13.5%
7	60.7%	7.1%	6.8%	13.9%
8	63.6%	7.3%	6.1%	12.5%
9	56.9%	6.6%	5.5%	17.4%
Total	60.3%	8.4%	7.3%	13.6%
Total responses	87,790	88,204	88,951	13.4
Missing cases	8,894	8,480	7,733	15.0
All households	96,684	96,684	96,684	7.0

Source: 2021 household survey

Estimating future need for adaptations and home improvement

- 5.33 The 2021 household survey provides evidence of the range of adaptations and home improvements needs based on the age group of the household reference person (Table 5.9).
- 5.34 Better heating, more insulation and double glazing were most frequently mentioned improvements needed.
- 5.35 Regarding adaptations, these were mainly mentioned by older households and most frequently mentioned were bathroom and kitchen adaptations and internal and external handrails/grabrails. The need for adaptations was generally highest amongst the 75+ age group.
- 5.36 These requirements are self-determined by residents responding to the household survey and may not necessarily reflect actual requirements following an independent assessment in the home.

Adaptation/improvement required	Age group (% of households)			Total
	Under 65	65-74	75+	
Home improvement				
More insulation (loft, wall cavities)	17.7%	15.6%	7.1%	16.5%
Community alarm service	2.4%	4.4%	11.6%	3.5%
Better heating	18.6%	17.0%	11.0%	17.7%
Double glazing	13.7%	8.3%	6.0%	12.1%
Improved ventilation	6.7%	5.3%	2.0%	6.1%
Downstairs WC	7.8%	9.2%	10.5%	8.3%
Increase the size of property (e.g. extension, loft conversion)	10.4%	3.8%	1.1%	8.4%
Adaptations				
Adaptations to bathroom	9.9%	13.1%	16.2%	11.0%
Adaptations to kitchen	6.5%	13.0%	15.4%	8.4%
External handrails /grab rails	8.5%	6.4%	6.2%	7.9%
Internal handrails /grab rails	4.5%	7.7%	12.1%	5.7%
Stair lift / vertical lift	3.8%	9.4%	11.5%	5.5%
Adaptations relating to sensory needs	3.8%	1.9%	4.0%	3.5%
Improvements to access (e.g. level access in and around home)	4.6%	7.1%	6.2%	5.2%
Wheelchair adaptations (including door widening and ramps)	3.1%	3.0%	6.4%	3.3%
Lever door handles	2.4%	2.0%	2.3%	2.3%
Room for a carer	2.5%	2.2%	2.8%	2.5%
Base (all households)	71,082	18,142	7,460	96,684

Source: 2021 household survey

- 5.37 Resources for aids and adaptations remain limited, particularly for households in the private sector (owner occupation or privately rented accommodation). However, the provision of appropriate adaptations is essential to older households in maintaining independent living. Alternative sources of funding, such as equity loans, could be considered to finance remedial measures required by older person households. It should be pointed out that whilst local authorities will assess anyone's needs, assistance is currently means tested and some older person households will self-fund.

Assistance in the home

- 5.38 The 2021 household survey also provides information on a range of practical assistance required from households by age group (Table 5.10). Overall, the highest level of need is for help with repair and maintenance of home. For all types of assistance, the level of need increases with age.

Type of help needed now or in next 5 years	% households needing help by age group of HRP			
	Under 65	65-74	75+	All
Help with repair and maintenance of home	24.2%	35.2%	50.7%	28.3%
Help with gardening	12.8%	32.8%	51.4%	19.5%
Help with cleaning home	11.4%	27.2%	49.3%	17.3%
Help with other practical tasks	9.9%	21.4%	39.1%	14.3%
Help with personal care	8.3%	14.6%	28.7%	11.1%
Want company / friendship	7.1%	9.0%	10.8%	7.7%
Base (all households)	71,082	18,142	7,460	96,684

Source: 2021 household survey

Health-related housing need

- 5.39 A range of sources can be drawn upon to establish the overall scale of disability/support needs across North Tyneside. In summary:
- The 2011 Census reported that across the borough 78.7% were in very good or good health, 14.7% were in fair health and 6.6% in bad/very bad health (particularly across older age groups). A total of 42,441 residents (21.3%) were in fair/bad/very bad health which compares with 18.3% across England.
 - 9.6% of residents reported that their daily activities were limited 'a lot' and 10.5% 'a little' which compares with 8.3% and 9.3% respectively across England. This is mainly associated with older age groups.
 - The ONS Family Resources Survey 2018/19 estimates that around 21% of the population nationally has a disability and provides estimates by age

group. Applying these estimates to North Tyneside's population, this translates to around 47,100 across the borough in 2021 and is projected to increase to around 54,600 by 2039.

- 5.40 The 2021 household survey data considered illness/disability and 30.1% of people were found to have a long-standing illness or health condition. Most frequently mentioned conditions were mental health issues (17.6% of the population) and physical/mobility impairment (17.1%).

Physical disability

- 5.41 POPPI and PANSI (Projecting Older People Population Information/Projecting Adult Needs and Service Information, Oxford Brookes University/Institute of Public Care) provides data on the likely prevalence in 2020 of a range of physical disabilities and how this is expected to change by 2039 (Table 5.11). In 2020, there were an estimated 14,935 people with mobility issues across all age groups which is projected to increase to 18,402 by 2039 mainly due to an increase in the number of people aged 65 with mobility issues.

Disability (age group)	2020	2039	% change 2020-2039
Impaired mobility (18-64)	7,239	7,138	-1.4%
Mobility (unable to manage at least one activity on own) (65+)	7,696	11,264	46.4%
Moderate or serious personal care disability (18-64)	6,309	6,286	-0.4%
Serious visual impairment (18-64)	82	83	1.5%
Moderate or severe visual impairment (65+)	3,664	4,995	36.3%
Severe hearing loss (18-64)	797	788	-1.1%
Severe hearing loss (65+)	3,285	4,982	51.6%
All with mobility issues (impaired mobility 18-64 and mobility 65+)	14,935	18,402	23.2%

Source: POPPI/PANSI; 2018-based ONS population projections

Learning disability and autism

- 5.42 The number of people across all age groups with moderate or severe learning disabilities is estimated to be around 806 in 2020 rising to 854 by 2039 (Table 5.12). There is a notable growth in the number of people aged 65 and over with learning disabilities. Around 1,600 people have autistic spectrum disorders in 2020 and this is expected to increase to 1,754 by 2039.

Table 5.12 Learning disability and autism			
Learning disability (age group)	2020	2039	% change 2020-2039
Total (18-64)	3,002	3,050	1.6%
Total (65+)	893	1217	36.3%
Moderate or severe (18-64)	685	696	1.6%
Moderate or severe (65+)	121	158	30.6%
Moderate or severe (all ages)	806	854	6.0%
People with LD living with a parent (18-64)	240	246	2.7%
Downs syndrome (18+)	79	81	2.4%
Challenging behaviour (18-64)	55	56	1.5%
Autistic spectrum disorders (18-64)	1,211	1,229	1.5%
Autistic spectrum disorders (65+)	389	525	34.9%
Autistic spectrum disorders (all ages)	1,600	1,754	9.6%

Source: POPPI/PANSI and 2018-based ONS population projections

Mental health

- 5.43 2020 POPPI/PANSI data estimates there are around 23,610 residents with a common mental health disorder (Table 5.14). The number of people aged 18-64 with a common mental health disorder is expected to increase by 1.5% over the period to 2039. However, depression amongst people aged 65 or over is expected to increase considerably.

Table 5.13 Mental health prevalence			
Mental health 18-64	2020	2036	% change 2020-2036
Common mental disorder	23,610	23,961	1.5%
Borderline personality disorder	2,997	3,042	1.5%
Antisocial personality disorder	4,100	4,161	1.5%
Psychotic disorder	869	882	1.5%
Psychotic disorders (2 or more)	8,946	9,079	1.5%
Older people with depression	2020	2036	% change 2020-2036
Depression 65+	3,673	5,032	37%
Severe depression (65+)	1,145	1,627	42%

Source: POPPI/PANSI and 2018-based ONS population projections

- 5.44 Regarding learning mental health and autism, stakeholders commented:
- There is no Extra Care or enablement service for those young people transitioning with Autism only aged 16-25 years.

- Limited supply for those with forensic background / need or discharge from secure hospital or from specialist residential – causing a serious backlog. Need a minimum of a mixed supply of 10 beds for forensic need now and over the next 5 years.
- Further need for supported self-contained accommodation for younger people coming out of care.
- There is a lack of services for young people with Mental Health difficulties. It is extremely difficult to get support for people who have substance misuse issues alongside Mental Health. This has an impact on their risk levels and on their Housing Needs.
- It is extremely difficult to get support for people who have substance misuse issues alongside Mental Health. This has an impact on their risk levels and on their Housing Needs. We often end up working with young people who we are not funded to support simply because there is nowhere else for them to go.

General stakeholder views on supported accommodation.

5.45 The following views reflect a range of issues and illustrate the complexity of accommodation for people with additional needs.

- 315 clients in 117 independent Supporting Living (ISL) with a focus on learning disability, Mental health and Complex Health care .
- £500k funding received by one provider to build a bespoke solo service as a discharge from hospital which will be the first through transforming care – heavily adapted bungalow.
- Strong and varied offer from registered providers (RPs) who provide supported tenancies alongside general needs tenancies.
- Firm relationship between RPs and local authority based on long-term contractual relationships.
- Large number of vacancies because it can be difficult to match people to properties
- Limited supply of ISL's for those with mental health or substance misuse issues.
- There is an ageing population in ISL's with limited access to bungalows.
- Developing Independence or use of Assistive Technology / AI is still an issue in ISL's limited ability with retro build / fit.
- Over concentration of 'supported accommodation' in urban deprived areas such as North Shields/Wallsend and to a lesser extent some parts of Whitley Bay.
- There is a lack of one bedroom properties and a difficulty in planning for new properties with the redevelopment of town centres.

- There is a shortage of under 35 year old's accommodation, single dwelling rental units.
- There is not enough affordable accommodation for people under 55 years needing one-bedroom affordable rental accommodation. There are many people residing in 2- and 3-bedroom properties who are being affected by the under-occupation charge and are looking to downsize. The new properties being offered in North Shields are far outside of the price range of many of the current residents.
- Lack of people with skills to work with people and provide care for those with forensic or substance misuse or mental health issues.
- Financial assessment undertaken when a resident applies for a home on Homefinder means that a lot of people will not qualify for a social rent house, as the levels of Universal Credit are too low for them to be able to afford their flats on paper. There is nowhere else for these people to live, therefore they become homeless or have to remain in supported accommodation, which prevents new clients moving into properties.
- One/two-bedroom rental ground floor accommodation needed for older people (over 55 years) so they can downsize from their current larger properties freeing them from the burden of the under-occupation charge.
- People need homes not just accommodation. The move towards studio flats and bedsits are not a long-term solution for the housing needs of the area and is not supporting people to thrive.
- There needs to be more suitable housing which supports people's mental and physical health. This means enough light and space to live in. The homes also need to be energy efficient and have good sound insulation.
- A specification detailing minimum standards of unit sizes, number of fully accessible units needed would be helpful.
- Many of the young people stakeholders encounter who are experiencing rough sleeping have been refused accommodation due to their needs and risks being too high. There needs to be a provision for these young people either through higher funding of the under 25s Pathway, with a review of how the money is distributed between providers; or through the provision of a new service for high need people.

Role of the private rented sector in providing accommodation for vulnerable people

- There has been in the past a large amount of private rental stock on short-term lets, which was previously affordable for clients however we have seen rents increasing steadily over the past five years as demand for one- and two-bedroom properties has increased. Affordable properties in the borough, often Tyneside flats, are being purchased by 'Buy to Let Landlords'. This removes affordable housing for younger people and drives up the rents in the private sector.

- When considering supported accommodation units for vulnerable clients, stakeholders have also noticed a particular problem with clients' increasingly needing assistance obtaining furnished privately rented properties after leaving care.
- A young person with mental health issues and UC-only income was assisted by the local authority to obtain a privately rented property with no furniture, no white goods, cooker, or furnishings. As a young single man, the client was extremely limited in the kind of charitable support that we could access. A budgeting advance could not cover much of the furnishing required. Due to LHA there are limited options for furnished private rentals available. Furniture pack schemes extended to clients other than NTC tenants would help but are not available.
- Consider producing a strategy to work with private landlords to assist tenants sustain their tenancies and offering support intervention if rental payments are missed from the first month.
- The over-reliance on private rented accommodation creates further problems with clients often living in unsuitable properties and suffering anti-social behaviour.

Specific accommodation needs identified by stakeholders

5.46 The SHMA has provided an opportunity for stakeholders to identify specific specialist housing needs across the borough:

5.47 **For independent supporting living:**

- 10 units for forensic and mixed offer, bungalows, housing, adapted, flats across the borough but away from schools – with gardens next to open spaces and good transport links.
- 10 units for hospital discharge again a mixed offer, adapted properties, autism friendly, wheelchair friendly, but also for able bodied in a core and cluster arrangement to reduce costs – maximum of 4 bed properties for 3 clients, but some for 2 and 1 clients.
- 10 for young people 16+ that are dual registered (mixed property offer – but not a hostel) but homes with good transport links and accessible and autism friendly
- 3 bed Extra Care scheme for young people – for Autism or Mental Health only to do enablement with linked dispersed flats
- 5/10 bed regular ISL beds in core and cluster models

5.48 **For children needing supported accommodation:**

- The need for a children's home property. This would need to be a large family home, minimum of 4 bedrooms. Located outside of the North Shields, Howdon, Battle Hill areas (due to proximity to existing children's homes/supported accommodation).

- Great strides have been made over the last 5 years in using the HRA to create bespoke new build for children and young people although the constraints around HRA limits what can be built. This is probably best evidenced through our strengthened Leaving Care and Staying Close offer but our weaker Children's Homes offer.

5.49 **For Transitions:**

- Sharing in a house of multiple occupancy (HMO) is outdated and unpopular, much more in demand is the door behind a door model, where people have their own self-contained flat within a block.

5.50 Stakeholders also noted the following barriers to delivering supported accommodation:

- There are still barriers to young people accessing safe and appropriate tenancies and homes where they can stay long-term.
- There needs to be a review of how the under 25s Pathway system is working to allow residents to move through the Pathway and build better skills towards independence. The 2 year limit on this support is not realistic, especially when many young people arrive at the age of 16 and are moving out not long after their 18th birthday. They require further support when moving into a tenancy which is not funded.
- More funding is needed for high and very high levels of support for young people. There are a number of young people whose needs are too high for shared accommodation, but cannot be, lone worked in the community due to their risks. They are not able to be supported under the current under 25s Pathway contract. They end up, street homeless and require high levels of services and support. These young people are often experiencing mental health difficulties, alongside substance addictions and may have a criminal record. They are incredibly vulnerable. This could be addressed within the current contract by giving more money to provide for these bed spaces, or a separate service needs to be looked at.
- There is a need for more 1 bedroom properties for long-term affordable rent.
- Lifeways advised that they had worked with the council to deliver two flat scheme services, the first one was in Dudley and in hindsight a little out of the way. Lifeways have struggled to fill this despite it being developed 5 years ago, it has 13 beds and currently has three vacancies. They have found that people want to be nearer good transport (metro) links, not far from supermarkets and feel as though they are close to community amenities. Lifeways' other flat scheme is in Shiremoor and ticks all these 'desirable' boxes, it has 16 beds, full and is operating a waiting list.
- One of the biggest barriers is sourcing land and accommodation at a competitive price to enable rents to be delivered within the tolerances of housing benefit. This applies to all local authority areas and is not specific to North Tyneside.
- Facilitating links between local authority and health property services to re-purpose any unused buildings would be helpful.

Accessible and wheelchair standard housing

5.51 PPG states that **'where an identified need exists, plans are expected to make use of the optional technical housing standards (footnote 46 of the NPPF). To help bring forward an adequate supply of accessible housing. In doing so planning policies for housing can set out the proportion of new housing that will be delivered to the following standards:**

- **M4(1) Category 1: Visitable dwellings (the minimum standard that applies where no planning condition is given unless a plan sets a higher minimum requirement);**
- **M4(2) Category 2: Accessible and adaptable dwellings; and**
- **M4(3) Category 3: Wheelchair user dwellings**

'Planning policies for accessible housing need to be based on evidence of need, viability and a consideration of site-specific factors ' (source: PPG June 2019 Paragraph: 009 Reference ID: 63-009-20190626).

- **M4(1) Category 1: Visitable dwellings (the minimum standard that applies where no planning condition is given unless a plan sets a higher minimum requirement);**
- **M4(2) Category 2: Accessible and adaptable dwellings; and**
- **M4(3) Category 3: Wheelchair user dwellings**

'Planning policies for accessible housing need to be based on evidence of need, viability and a consideration of site-specific factors ' (source: PPG Paragraphs: 008 Reference ID: 56-008-20160519 & 009 Reference ID: 56-009-20150327).

5.52 Regarding evidencing the need for accessible housing, PPG states:

'Based on their housing needs assessment and other available datasets it will be for local planning authorities to set out how they intend to approach demonstrating the need for Requirement M4(2) (accessible and adaptable dwellings), and/or M4(3) (wheelchair user dwellings), of the Building Regulations. There is a wide range of published official statistics and factors which local planning authorities can consider and take into account, including:

- **the likely future need for housing for older and disabled people (including wheelchair user dwellings).**
- **size, location, type and quality of dwellings needed to meet specifically evidenced needs (for example retirement homes, sheltered homes or care homes).**
- **the accessibility and adaptability of existing housing stock.**
- **how needs vary across different housing tenures.**

- **the overall impact on viability.**’ (source: Para: 007 Reference ID: 56-007-20150327).

5.53 Optional accessibility standards for dwellings were introduced by the government in 2015 to provide a mechanism for improving accessibility of housing for those with additional needs. National standards have been established and contained within Part M Volume 1 of the Building Regulations (source: https://www.planningportal.co.uk/info/200135/approved_documents/80/part_m_-_access_to_and_use_of_buildings as set out in Table 5.14. Only one accessible housing standard can apply to any dwelling. The M4(2) accessible and adaptable dwelling standard is based on, and in 2015 effectively replaced, the ‘Lifetime Homes’ standard.

Standard Label	Standard title	Level of accessibility provided	Mandatory or optional
M4(1)	Visitable dwellings	Level access not necessarily provided into the dwellings – few accessibility features	Mandatory
M4(2)	Accessible and adaptable dwellings	Level access is provided into the dwelling – easy to adapt to make more accessible – not suitable for most wheelchair users	Optional
M4(3)	Wheelchair user dwellings	Dwellings suitable for wheelchair users: either wheelchair adaptable (a) or wheelchair accessible (b)	Optional

- 5.54 It should be noted that Part M of the Building Regulations sets a distinction between wheelchair accessible (a home readily useable by a wheelchair user at the point of completion) and wheelchair adaptable (a home that can be easily adapted to meet the needs of a household including wheelchair users) dwellings (source: PPG Paragraph: 009 Reference ID: 56-009-20150327).
- 5.55 In order to establish an appropriate target for M4(3) dwellings, Table 5.15 sets out a series of assumptions regarding wheelchair use from the English Housing Survey, the 2021 household survey and a report by Aspire Housing Association. Applying these assumptions would suggest a target of 3.4% of newbuild to meet M4(3) wheelchair accessible standard is required.
- 5.56 According to PPG (source: PPG Paragraph: 009 Reference ID: 56-009-20150327), ‘Local Plan policies for wheelchair accessible homes should be applied only to those dwellings where the local authority is responsible for allocating or nominating a person to live in that dwelling.’ This would imply that the onus on wheelchair accessible housing delivery is with the local authority/registered providers, but private developers should also be encouraged to build to M4(3) wheelchair accessible or adaptable homes where appropriate. Any final targets should be set within the context of likely levels of delivery.

Table 5.15 Wheelchair use assumptions and resulting annual need		
Assumption	% requirement	Number each year (based on net annual target of 799 new dwellings)
Wheelchair use from the English Housing Survey 2018/19 – households using wheelchair all the time	0.6%	5
Wheelchair use from the English Housing Survey 2018/19 – households using wheelchair either indoors or outdoors	3.0%	24
North Tyneside has 1,461 current users of wheelchairs inside the home based on 2021 household survey. This equates to 1.51% of households.	1.5%	12
North Tyneside 314 additional need over plan period (divided by 19 years) based on demographic analysis assuming all met through newbuild based on 2021 household survey	2.1%	17
Aspire report on wheelchair accessible housing (*)	10%	79
Average of indicators	3.4%	27

(*) Wheelchair Accessible Housing: Waiting for appropriate housing in England, Aspire October 2014 recommends that the national government should set a minimum requirement of 10% of all new build properties across all tenures to be wheelchair accessible.

5.57 Table 5.16 considers the profile of wheelchair accessible or adaptable dwellings needed by number of bedrooms and age group of the Household Reference Person.

Table 5.16 Wheelchair dwellings needed by age group and number of bedrooms				
Age group	Number of bedrooms (Table %)			Total
	1	2	3	
Under 65	21.7	21.2	13.4	56.4
65 and over	38.9	2.3	2.4	43.6
Total	60.6	23.5	15.8	100.0
Age group	Number of bedrooms (needed each year by age group)			Total
	1	2	3	
Under 65	6	6	4	15
65 and over	11	1	1	12
Total	16	6	4	27

Source: 2021 household survey

Note: The annualised figure of 27 is based on the average of indicators in Table 5.16 but figures subject to rounding

- 5.58 Given the ageing demographic of North Tyneside and the identified levels of disability amongst the population, it is recommended that a policy to provide new homes built to accessibility standards is included in the Local Plan. On the basis of available evidence which takes into account the requirements of PPG, it is recommended that:
- 3.4% of new dwellings are built to M4(3) wheelchair accessible standard (this would imply an average target of around 9 each year); and
 - In line with current Local Plan policy, all affordable and 50% of market dwellings are built to M4(2) accessible and adaptable standards to take account of the ageing demographics of the borough. This will ensure that new dwellings can be occupied and also visited by people needing accessible/adaptable dwellings.
- 5.59 It should be noted however that any percentage requirements for accessible housing are subject to cumulative viability testing. It is also recommended that needs are monitored closely given the ageing population over the plan period.

Life experience-related housing need

Armed forces

- 5.60 The council is a signatory to the Armed Forces Covenant which seeks to provide support in a range of areas including housing to in-service and ex-service personnel.
- 5.61 The Government's First Homes policy identifies people connected with the Armed Forces as an eligible group for First Homes.
- 5.62 Comments received from stakeholders include:
- The veteran community is so diverse that their needs are relatively similar to the general population, albeit with a slightly higher level of mental health issues (particularly PTSD), a potentially higher proportion of the community needing adaptations for physical disabilities and a higher than average level of relationship breakdowns which does impact on the supply needs overall.
 - There is a need for intense supported accommodation where veterans can be provided with the level of support required to help them to cope with and ideally overcome highly complex and challenging levels of need. A high proportion of veterans presenting with such complex needs, including mental health, issues, PTSD, drug and alcohol dependency and self-harm, are invariably also exhibiting associated challenging and often criminal behaviour that make them unsuitable for most supported accommodation placements available in the borough. There are currently 2 supported accommodation facilities, specifically for veterans, that we refer to; Launchpad, which is based outside of the borough in Avondale House, Byker (Newcastle) and My Space in North Shields. Although these 2 facilities do offer support, there are often a high number of very vulnerable veterans with extremely complex needs who are asked to leave, as their support needs are too complex for these facilities to support.

- The veterans who require the more intense support are often early service leavers, who tend to offend potentially as a result of mental health issues which have not been addressed and in some cases existed before their military service. Veterans who fall into this category have often tried and failed to secure previous tenancies making it difficult to find housing due to previous rent arrears or unable to obtain suitable landlord references. There is not a huge demand for such intensive support services for veterans within North Tyneside, but we know from experience that those who would benefit from this level of support provision are both extremely vulnerable and also present the Authority with a disproportionate call on the limited resources we have to deal with the veterans' community as a whole. We also know that there would not be a high turnover of cases if a facility of this type was to be available in the borough because the timescale for achieving the level of stability, individual responsibility and self-esteem to be able to move on effectively is several months at minimum. We estimate that there is a need for around 8 intensive support units in the borough.
- Should a more intensive support facility exist locally, this could help resolve a lot of issues and prevent the same veterans re-presenting repeatedly to the same services.

Emergency accommodation

5.63 Stakeholders provided the following insights into households using emergency accommodation.

- Often clients who have been placed into emergency accommodation such as guest houses/HMO's experience a significant burden on their finances and health due to not having access to proper cooking facilities, instead having to rely on takeaways. Several clients have received food parcels when staying in temporary accommodation but been extremely limited by the food they can receive or cook when placed into accommodation with no or little cooking facilities.
- Extended stays in emergency accommodation can be very difficult and affect our client already often fragile mental health, so purpose-built accommodation with access to a communal or private kitchen with cooking facilities would alleviate this significantly. This would be a particular benefit for single people without dependents, often those with mental health issues and ex-offenders.
- A specific weakness in the housing market in North Tyneside is the lack of appropriate commissioned services providing temporary accommodation to homeless persons and those with multiple complex needs. Many clients are not able to sustain general needs accommodation. Shelter have found that there are few specialist providers in North Tyneside who can appropriately support people with these types of issues. In a number of cases we have come across clients who have been told they are too high needs to access available accommodation and there is a lack of clarity as to how these individuals are to be supported within the current North Tyneside.

Domestic abuse

5.64 Stakeholders reported:

- There is a need for a purpose-built homeless unit for families and domestic violence victims.
- We find there is better support for young women fleeing domestic violence than there is for young men.
- Often a client fleeing domestic violence can't move out and access the limited number of beds available through other support service (e.g., Harbour).

Cultural heritage related housing need

- 5.65 For those from a minority ethnic background there may be cultural heritage or religion related determined needs which impact on the type of accommodation required. This would include the specific needs of particular Black, Asian and Minority ethnic (BAME – households not identifying as 'White British') households as well as those from Travelling communities.

BAME population and households

5.66 Around 5.5% of households in the 2021 household survey stated they identified as BAME. The distribution of BAME people by sub-area is shown in Table 5.17.

Sub Area	BAME households	% of households in sub area that are BAME	% of BAME households in each sub-area	All households
1 - Whitley Bay / Monkseaton area	1,119	7.1%	21.3%	15,661
2 - Cullercoats / Tynemouth area	461	5.2%	8.8%	8,938
3 - Moor Park / New York / Chirton Grange / Preston Grange / Preston Area	289	3.1%	5.5%	9,211
4 - North Shields Town Centre / Meadowell / East Howdon / West Chirton / Willington Quay / Percy Main area	686	5.7%	13.0%	11,931
5 - Wallsend Town Centre / High Farm / Battle Hill / Holy Cross / Howdon area	1,154	5.9%	21.9%	19,534
6 - Benton / Longbenton / Forest Hall area	599	6.0%	11.4%	10,031
7 - Killingworth / Annitsford / Burradon / Camperdown / Holystone / Palmersville area	458	4.9%	8.7%	9,284
8 - Shiremoor / Backworth / Northumberland Park / West Allotment area	212	3.6%	4.0%	5,911
9 - Dudley / Seaton Burn / Wideopen area	285	5.7%	5.4%	5,019
Total	5,264	5.5%	100.0%	95,520
			<i>Missing</i>	1,164
			Total	96,684

5.67 Overall, 15.4% of BAME households were in some form of housing need compared with 13.7% of all households.

5.68 Further analysis of BAME need indicates that 26.5% of households would consider moving to a market property, 18.3% an affordable rented and 17% an affordable home ownership property. The overall range of dwellings being considered is summarised in Table 5.18 which shows a strong demand for 3 and 4 or more bedroom houses.

Gypsy, Traveller and Travelling Showperson need

- 5.69 The 2014 Gypsy and Traveller Accommodation Assessment identified no need for Gypsy and Traveller residential pitches or transit pitches; and no need for Travelling Showperson plots.

	Like %	Expect %	Blend of like/expect %
1 bedroom house	2.7	0.0	1.3
2 bedroom house	9.2	17.6	13.3
3 bedroom house	44.9	42.0	43.0
4+ bedroom house	28.0	24.9	26.3
1 bedroom flat	0.0	4.0	2.0
2 bedroom flat	1.6	1.6	1.5
3+ bedroom flat	0.0	2.3	1.1
1 bedroom bungalow	2.2	2.2	2.1
2 bedroom bungalow	9.7	5.5	7.5
3+ bedroom bungalow	1.7	0.0	1.7
Total	100.0	100.0	100.0
Base	1,990	1,990	1,990

Source: 2021 household survey

Other groups with particular housing requirements

- 5.70 This chapter concludes with a summary of the other household groups who have particular housing requirements in North Tyneside.

People who rent their homes

- 5.71 Chapter 3 presented a range of data on private renting.

Self-build and custom housebuilding

- 5.72 The NPPF 2021 set out that the government wants to enable more people to build their own homes and wants to make this form of housing a mainstream housing option.
- 5.73 Over the period 2016 to 2019/20, a total of 106 households have been registered for a self-/custom built property. Since 2016, a total of 24 have received planning permission. By July 2021, there were 124 households on the register of whom 61 lived in North Tyneside. The vast majority were looking to build 3 bedroom detached (30.3%) and 4 bedroom detached properties (47.2%). Most (75.2%) did not state a location preference and of those who did, a variety of places were mentioned across the borough.

Conclusion

- 5.74 In accordance with PPG, this housing need and demand study has considered the future need for specialist accommodation, the need for residential care and considered the role of general housing in meeting needs, in particular bungalows and homes that can be adapted to meet a change in needs.
- 5.75 The number of households headed by someone aged 65 or over is expected to increase by 10,682 (36.9%) by 2036. According to the 2021 household survey, 47.9% of older people want to remain in their current home with help and support when needed, such as help with repair and maintenance. There is also interest in a range of options including open market, rented from a housing association/council, sheltered and co-housing. There is a need to deliver a range of smaller dwellings (particularly level-access accommodation) for older people across all tenures and specialist older persons housing provision.
- 5.76 Across North Tyneside there are around 4,618 units of specialist older persons accommodation comprising 3,182 specialist older accommodation (C3 planning use class) and 1,436 units of residential care (C2 use class)
- 5.77 Based on population projections, there is a need for 2,642 additional units of specialist older persons' accommodation by 2039.
- 5.78 The SHMA does not specify the precise nature of specialist older person dwellings to be built. This is to allow flexibility in delivery and PPG states that 'any single development may contain a range of different types of specialist housing' (source: PPG June 2019 Paragraph: 010 Reference ID: 63-010-20190626).
- 5.79 A key conclusion is that there needs to be a broader housing offer for older people across the borough and the SHMA has provided evidence of the scale and range of dwellings needed.
- 5.80 A wealth of information has been assembled from various sources which helps to scope out the likely level of disability across the borough's population. Although it is a challenge to quantify the precise accommodation and support requirements, the SHMA has helped to scope out where needs are arising and has provided indicators of specific needs across various needs groups.
- 5.81 It is estimated there are around 45,512 people with a disability across North Tyneside based on ONS disability estimates. Regarding housing for people with disabilities, the 2021 household survey suggests around 7.3% of households live in properties which have either been purpose-built or adapted for someone with an illness or disability. 13.6% of households need all facilities (living room, bathroom, kitchen and bedroom) to be on one floor.
- 5.82 Given the ageing population of the borough and the identified levels of disability amongst the population, it is recommended that 3.4% of new dwellings are built to wheelchair accessible M4(3) standard. in line with the current Local Plan policy all affordable and 50% of market dwellings should be built to M4(2) accessible and adaptable standard to take account of the ageing demographics of North Tyneside.
- 5.83 There is an on-going need for self-build plots.

6. Overall dwelling type and mix

Introduction

- 6.1 This chapter considers overall housing need, affordable need and establishes an overall dwelling type, size and tenure mix for North Tyneside. The detailed analysis underpinning this chapter is presented in Technical Appendix D.

Overall housing need

- 6.2 The standard method identifies a minimum need for 799 dwellings each year over ten-year period 2021 to 2031 using 2020 affordability ratios.

Affordable housing need

- 6.3 A detailed analysis of affordable housing need in accordance with PPG is presented at Technical Appendix C. This establishes an overall gross affordable need of 1,867 and after taking into account affordable lettings and newbuild the net shortfall is 477 each year.
- 6.4 An overall affordable tenure split for new affordable housing is 70% rented and 30% affordable home ownership excluding First Homes. If First Homes are included, the tenure mix adjusts to 58% rented and 42% affordable home ownership including First Homes.

Dwelling type and mix

- 6.5 Dwelling mix analysis is underpinned by a demographic scenario model which takes into account projected household change to 2039 using 2018-based ONS household projections. To support flexibility in delivery, dwelling type and mix by tenure is presented as a broad range.
- 6.6 Further detail of the modelling along with analysis of dwelling mix by ward is presented in Tables D6 to D8 in Technical Appendix D. On the basis of modelling carried out, Table 6.1 sets out the overall annual dwelling type/size recommendation by different tenures.

Table 6.1 Summary of overall dwelling mix by tenure				
Dwelling type/size	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
1 and 2-bedroom house	15-20%	10-15%	15-20%	15-20%
3-bedroom house	30-35%	15-20%	30-35%	30-35%
4 or more-bedroom house	25-30%	2-5%	10-15%	20-25%
1-bedroom flat	0-2%	15-20%	2-5%	2-5%
2 or more -bedroom flat	5-10%	25-30%	5-10%	10-15%
1-bedroom bungalow/level-access	0-2%	5-10%	0-2%	2-5%
2-bedroom bungalow/level-access	5-10%	5-10%	15-20%	5-10%
3 or more-bedroom bungalow/level-access	5-10%	0-2%	2-5%	2-5%
Dwelling type	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
House	75-80%	35-40%	60-65%	65-70%
Flat	5-10%	45-50%	10-15%	15-20%
Bungalow/level-access	15-20%	15-20%	20-25%	15-20%
Number of bedrooms	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
1	2-5%	25-30%	5-10%	10-15%
2	25-30%	40-45%	40-45%	35-40%
3	35-40%	20-25%	35-40%	35-40%
4	25-30%	2-5%	10-15%	15-20%

Social/affordable rented need comparison with choice-based lettings data

- 6.7 Table 6.2 summarises the average number of bids per property advertised on the choice-based lettings system in February 2022. This indicates a range of dwellings by bedroom size are being considered, broadly in line with the proportions set out in Table 6.1. In terms of dwelling type, applicants were much more likely to bid on houses than flats or bungalows/level access properties.

Table 6.2 Choice-based lettings bidding data					
Dwelling type	Number of bedrooms %				
	1	2	3	4	Total
House	23.1	23.1	21.6	12.5	80.2
Flat	6.4	2.4	2.7	0.0	11.6
Bungalow	2.4	5.5	0.3	0.0	8.2
Total	31.9	31.0	24.6	12.5	100.0

Source: Council choice-based lettings data

Impact of COVID-19 on housing choices

- 6.8 The household survey asked if housing choices considered by households had been influenced by COVID-19. Of households planning to move (21,932), 25% said COVID had influenced their choices:
- 7.1% said they were looking for a more affordable property due to changing financial circumstances;
 - 14.4% were looking for a property with more space (for instance for home working); and
 - 12.6% were looking for a property with a larger garden/outdoor space.

Conclusions

- 6.9 The standard method establishes a minimum housing need of 799 dwellings each year. The relationship between households, future household change and dwellings occupied has been considered to provide an indication of an appropriate dwelling mix for North Tyneside over the period 2021 to 2039. Having established future household change and the implications this has for dwelling type, size and tenure mix, the council can make an informed strategic decision on the range and size of dwellings that will need to be built to meet need and aspiration over the period to 2039.
- 6.10 Given the level of affordable need, the Local Plan needs to maintain a robust affordable housing policy setting out targets and tenure split. An affordable policy should therefore continue to support the ongoing delivery of affordable housing and diversify the affordable products available to local residents to reflect identified needs.

7. Conclusion: policy and strategic issues

- 7.1 This document has been prepared to equip the council and their partners with robust, defensible and transparent information to help inform strategic decision-making and the formulation of appropriate housing and planning policies. The work also takes account of existing and emerging government policy and guidance.
- 7.2 This SHMA will help the council plan for a mix of housing based on current and future demographic trends, market trends and the needs of different groups in the community. Specifically, the SHMA identifies the size, type and tenure of housing required by considering current market demand relative to supply; and also identifies a continued affordable housing imbalance across the borough.
- 7.3 This concluding chapter summarises key messages from the research findings, structured around a commentary on the current and future housing markets and key local strategic issues.

Overall Housing need

- 7.4 The latest standard method calculation results in a minimum need of 799 dwellings each year. This compares with delivery of an annual average of 786 over the 5 years to 2020/21. No further adjustments to this number are recommended.

Dwelling type, tenure and mix

- 7.5 The relationship between household change and dwelling type/size and tenure requirements have been fully explored. The evidence will help the council deliver an appropriate range of dwelling stock for residents over the plan period. The overall dwelling mix is summarised in Table 7.1.

Table 7.1 Summary of overall dwelling mix by tenure				
Dwelling type/size	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
1 and 2-bedroom house	15-20%	10-15%	15-20%	15-20%
3-bedroom house	30-35%	15-20%	30-35%	30-35%
4 or more-bedroom house	25-30%	2-5%	10-15%	20-25%
1-bedroom flat	0-2%	15-20%	2-5%	2-5%
2 or more -bedroom flat	5-10%	25-30%	5-10%	10-15%
1-bedroom bungalow/level-access	0-2%	5-10%	0-2%	2-5%
2-bedroom bungalow/level-access	5-10%	5-10%	15-20%	5-10%
3 or more-bedroom bungalow/level-access	5-10%	0-2%	2-5%	2-5%
Dwelling type	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
House	75-80%	35-40%	60-65%	65-70%
Flat	5-10%	45-50%	10-15%	15-20%
Bungalow/level-access	15-20%	15-20%	20-25%	15-20%
Number of bedrooms	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
1	2-5%	25-30%	5-10%	10-15%
2	25-30%	40-45%	40-45%	35-40%
3	35-40%	20-25%	35-40%	35-40%
4	25-30%	2-5%	10-15%	15-20%

- 7.6 Regarding affordable need, there is an annual net shortfall of 477 dwellings. However, delivery of affordable housing is subject to economic viability and the council does not need to plan to meet this number in full. The current target of 25% of new dwellings to be affordable remains appropriate.
- 7.7 An overall affordable tenure split for new affordable housing is 70% rented and 30% affordable home ownership excluding First Homes. If First Homes are included, the tenure mix adjusts to 58% rented and 42% affordable home ownership including First Homes.

Meeting the needs of older people and those with disabilities

- 7.8 There is evidence to support a programme of accommodation delivery to help meet the needs of older people and those with disabilities. Although the majority of older people want to remain in their own home with support when needed, there is a need to diversify options available to older people wanting to move to more appropriate accommodation.

- 7.9 Currently there are around 4,618 units of specialist older person accommodation comprising 1,436 units of residential care (C2 use class) dwellings and 3,182 units of specialist older person dwellings (C3 use class) such as sheltered and Extra Care. Analysis of demographic change would suggest a need for an additional 2,642 units comprising 822 residential (C2) units and 1,820 older person (C3) dwelling units by 2039. This translates to an annual need (over 19 years 2021 to 2039) for 43 C2 and 96 C3 dwellings.
- 7.10 The C3 units should be included in the overall housing figure of 799 each year, so 96 or 12% of new dwellings built each year should be specialist older persons accommodation. Delivery of C2 units would be in addition to this figure.
- 7.11 A key conclusion is that there needs to be a broader housing offer for older people across North Tyneside and this SHMA has provided evidence of scale and range of dwellings needed.
- 7.12 A range of information has been assembled from various sources and included stakeholder engagement. This helps to scope out the likely level of disability across North Tyneside's population.
- 7.13 Given the ageing population of the borough and the identified levels of disability amongst the population, it is recommended that 3.4% of new dwellings are built to M4(3) wheelchair accessible and adaptable standard and in line with the current Local Plan policy all affordable and 50% of market dwellings should be built to M4(2) accessible and adaptable standard to take account of the ageing demographics of North Tyneside.
- 7.14 It is expected that some of this need will be met through the development of C3 accommodation and there is overlap between affordable, specialist older person and M4(3) need. For instance the development of an older person's level access, wheelchair accessible affordable dwelling would help address these aspects of housing need.
- 7.15 It is also assumed that there will be ongoing adaptation of existing dwellings to support those with additional needs.

Final comments

- 7.16 The evidence presented in this SHMA suggests that there are three main policy areas that require particular attention from both a planning policy and social policy perspective:
- the challenge of enabling the quantity and mix of housing that needs to be delivered, including an appropriate level of affordable housing;
 - the challenge of ensuring that the housing and support needs of older people are met going forward; and
 - the challenge of ensuring that the needs of people with disabilities is appropriately addressed.

Technical Appendix A: Research methodology

Overall approach

A.1 A multi-method approach was adopted in order to prepare a robust and credible SHMA for North Tyneside:

- a comprehensive household survey, with 20,000 households contacted, 3,174 responses of which 2,435 included location and tenure information and used in analysis. This represents a response rate of 12% and a sample error of +/-1.96%. Table A1 sets out the achieved responses and sample errors at ward and sub-area level.
- a survey of key stakeholders including representatives from the council, neighbouring local authorities, housing associations, specialist housing providers, estate agents, adult social care and developers;
- interviews with estate and letting agents operating within the city;
- a review of relevant secondary data including the 2011 Census, house price trends, CORE lettings data and MHCLG Statistics.

Ward	Occupied Households	Households contacted	Total Response	Response rate	Sample error
Battle Hill	4,775	1,000	133	0.13	8.38%
Benton	4,649	1,000	131	0.13	8.44%
Camperdown	4,787	1,000	109	0.11	9.28%
Chirton	5,417	1,000	116	0.12	9.00%
Collingwood	4,915	1,000	123	0.12	8.72%
Cullercoats	4,257	1,000	134	0.13	8.33%
Howdon	5,034	1,000	122	0.12	8.76%
Killingworth	5,165	1,000	135	0.14	8.32%
Longbenton	5,304	1,000	141	0.14	8.14%
Monkseaton North	3,607	1,000	129	0.13	8.47%
Monkseaton South	4,301	1,000	120	0.12	8.82%
Northumberland	4,317	1,000	90	0.09	10.22%
Preston	4,026	1,000	100	0.10	9.68%
Riverside	6,338	1,000	148	0.15	7.96%
St Mary's	3,729	1,000	144	0.14	8.01%
Tynemouth	5,390	1,000	99	0.10	9.76%
Valley	5,938	1,000	129	0.13	8.53%
Wallsend	5,591	1,000	97	0.10	9.86%
Weetslade	4,859	1,000	114	0.11	9.07%
Whitley Bay	4,282	1,000	121	0.12	8.78%
Total	96,683	20,000	2,435	0.12	1.96%

Table A1 Achieved household survey responses and sample errors					
Sub-area	Occupied Households	Households contacted	Actual response response	Response rate	Sample error
1	15,792	4,000	514	0.13	4.25%
2	8,969	2,000	233	0.12	6.33%
3	9,352	2,000	223	0.11	6.48%
4	12,263	2,000	264	0.13	5.96%
5	19,723	4,000	442	0.11	4.61%
6	10,097	2,000	272	0.14	5.86%
7	9,558	2,000	244	0.12	6.19%
8	5,911	1,000	129	0.13	8.53%
9	5,019	1,000	114	0.11	9.07%
Total	96,683	20,000	2,435	0.12	1.96%

Technical Appendix B: Affordable housing definitions

Affordable housing definitions

Definitions relating to affordable housing are presented in the NPPF 2021 (Annex 2):

Affordable housing: housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions:

- a) **Affordable housing for rent:** meets all of the following conditions: (a) the rent is set in accordance with the government's rent policy for social rent or affordable rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes, affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).
- b) **Starter homes:** is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute and any such secondary legislation at the time of plan-preparation or decision-making. Where secondary legislation has the effect of limiting a household's eligibility to purchase a starter home to those with a particular maximum level of household income, those restrictions should be used.
- c) **Discounted market sales housing:** is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.
- d) **Other affordable routes to home ownership:** is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low-cost homes for sale (at a price equivalent to at least 20% below local market value) and Rent to Buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision or refunded to government or the relevant authority specified in the funding agreement.

Technical Appendix C: Housing need calculations

Introduction

- C.1 Identifying the scale of affordable housing need is a key consideration of planning practice guidance. This is a separate calculation to the overall housing need figure derived using the standard model and set out in PPG paragraphs 18 (Reference ID: 2a-018-20190220) to 24 (Reference ID: 2a-024-20190220). The affordable housing need analysis helps to establish the overall scale of affordable housing need by location, type, size and tenure and whether the council should plan for more dwellings to help meet the need for affordable housing.
- C.2 PPG states that ‘all households whose needs are not met by the market can be considered in affordable housing need (PPG Paragraph: 018 Reference ID: 2a-018-20190220). PPG then considers how affordable housing need should be calculated:
- ‘Strategic policy-makers will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market. This should involve working with colleagues in their relevant authority (e.g. housing, health and social care departments).’** (PPG Paragraph: 019 Reference ID: 2a-019-20190220).
- C.3 The PPG focuses on the use of existing (secondary data) but does not preclude the use of primary survey evidence.
- C.4 There are four broad components to the needs assessment method. These have remained relatively unchanged through the different guidance issued by government and focus on:
- Step A. Existing households in need (current unmet gross need).
 - Step B. Future households in need.
 - Step C. Affordable supply.
 - Step D. Annual need for affordable housing.

Affordability assumptions

- C.5 As part of the affordable needs assessment, the extent to which households in need cannot afford open market prices or rents is considered. PPG does not specify what household income should be spent for a property to be affordable although does state the ‘need to identify the minimum household income required to access lower quartile (entry level) market housing’ PPG 2019 Paragraph 021 Reference ID 2a-021-20190220. The last guidance to consider affordable prices/rents was published in the 2007 DCLG Strategic Housing Market Assessments Practice Guidance Version 2 August 2007, which stated that gross household incomes should be used to assess affordability and:
- a household can be considered able to afford to buy a home if it costs 3.5x the gross income of a single earner or 2.9x the gross income for dual-income households; and

- a household can be considered able to afford market renting where the rent payable was up to 25% of gross household income.
- C.6 The former guidance did note that local circumstances could justify higher figures being used for affordable renting and that allowances should be made for access to capital that could be used towards the cost of home ownership.
- C.7 Mortgage lending practices would suggest that 4.75x a single or joint income could be considered This is the maximum single or joint household income multiple offered by First Direct July 2020.
- C.8 Based on this data, the principle assumption considered by arc4 with reference to affordability is:
- for buying up to 3.5x gross household income; and
 - for renting up to 25% gross household income.
- C.9 Affordable housing need has been analysed at ward level and data have also been presented at sub-area level.

Step A: Current unmet gross need

- C.10 PPG Paragraph: 020 Reference ID: 2a-021-20190220 states that 'strategic policy-making authorities can establish the unmet (gross) need for affordable housing by assessing past trends and current estimates of:
- the number of homeless households;
 - the number of those in priority need who are currently housed in temporary accommodation;
 - the number of households in over-crowded housing;
 - the number of concealed households;
 - the number of existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and
 - the number of households from other tenures in need and those that cannot afford their own homes, either to rent or to own if that is their aspiration.'
- C.11 PPG notes that care should be taken to avoid double-counting and to only include those households who cannot afford to access suitable housing in the market. Table C1. Sets out the overall scale of current need before affordability of market housing is considered.

Table C1 Current gross unmet need (before affordability testing)			
Reason for need	Total in need	Comment	Source
A1 Homeless households	348	Number of households identified as homeless 2020/21	DLUHC Live tables
A2 Priority need / temporary accommodation	462	Households identified as threatened with homelessness in 2020/21 plus households living in temporary accommodation (based on quarterly average) in 2020/21	DLUHC Live tables
A3 Overcrowded	2,015	2011 Census data households	2011 Census LC4108EW
	1,277		2021 household survey
A4 Concealed household	613	Census definition refers to couples and lone parents living within another family unit.	2011 Census LC1110EW
	727		2021 household survey
A5 Existing affordable tenants in need	4,395		2021 household survey
A6 Other tenures in need	7,551		2021 household survey
A7 Sum of households in A3 to A6 with one or more needs	14,688	Sum of A3 to A6 BOLD figures	
A8 Total in A7 adjusted to remove any double counting	13,263	This is the total number of households with one or more needs	
A9. All households in need (A1+A2+A8) rounded	14,073	Represents 14.6% of all households.	

Note table subject to rounding

Further Notes to Table C1:

A3. Overcrowding

The extent to which households are overcrowded is measured using the 'bedroom standard'. This allocates a standard number of bedrooms to each household in accordance with its age/sex/marital status composition. A separate bedroom is allocated to each married couple, any other person aged 21 or over, each pair of adolescents aged 10-20 of the same sex and each pair of children under 10. Any unpaired person aged 10-20 is paired if possible, with a child under 10 of the same sex, or, if that is not possible, is given a separate bedroom, as is any unpaired child under

10. This standard is then compared with the actual number of bedrooms (including bedsits) available for the sole use of the household.

The higher figure from the 2011 Census and 2021 survey is used in analysis.

A4. Concealed households

The number of couples and lone parents living within a household.

The higher figure from the 2011 Census and 2021 survey is used in analysis.

A5. Existing affordable tenants in need and A6. Other tenures in need

Households in need based on the numbers who have one or more of the following needs: under notice, real threat of notice or lease coming to an end; too expensive; too difficult to maintain; sharing facilities; unsuitable due to age/mobility impairment; lacking facilities; major disrepair; harassment/threat of harassment from neighbours.

A7 and A8. Sum of households

A7 is the sum of households who are overcrowded, concealed, are existing tenants in need or other tenures in need. A8 adjusts this total to remove double counting to give a figure for the total number of households with one or more housing need. This final figure takes account of any duplicates (so if the household is overcrowded and has another need, it is only counted once as a household in need).

Affordability of open market options

C.12 Table C2 sets out ward-level lower quartile prices and rents.

Table C2 Lower quartile house prices and rents by ward		
Ward	Lower Quartile Price 2020	Lower Quartile private rent 2020
Battle Hill	£90,000	£451
Benton	£120,000	£494
Camperdown	£87,000	£485
Chirton	£68,000	£425
Collingwood	£108,500	£451
Cullercoats	£189,000	£622
Howdon	£77,000	£451
Killingworth	£115,000	£498
Longbenton	£130,000	£550
Monkseaton North	£183,000	£550
Monkseaton South	£163,750	£498
Northumberland	£105,000	£425
Preston	£120,000	£494
Riverside	£72,500	£399
St Mary's	£240,000	£477
Tynemouth	£137,000	£498
Valley	£121,000	£576
Wallsend	£60,000	£425
Weetslade	£110,000	£451
Whitley Bay	£139,600	£498
North Tyneside	£108,000	£451

Source: Data produced by Land Registry © Crown copyright 2020, Zoopla 2020

- C.13 Table C3 sets out the proportion of households in need who could not afford open market prices or rents. Where no prices/rents are available, city-wide average prices/rents have been used. The affordability analysis uses data on ward-level lower quartile prices and rents and assumes that a property is affordable if up to 25% of household income is spent on rent and buying costs up to 3.5x household income.
- C.14 It is reasonably assumed that all households in A1 (homeless) and A2 (priority need/in temporary accommodation) cannot afford open market prices or rents given their housing circumstances (and income information is not available from secondary data source).
- C.15 The affordability of open market options is tested on the remaining households in need (rows A3 to A6 in Table C1) based on 2021 household survey data.
- C.16 Analysis concludes that 9,078 households across North Tyneside are in housing need and cannot afford to buy or rent at lower quartile market prices.

Table C3 Affordability of open market housing for households in need			
Needs groups	Number of households	% cannot afford to buy or rent	Number cannot afford to buy or rent
Sum of A1 and A2 households	810	100%	810
Sum of households in A3 to A6 with one or more needs	13,263	62.3%	8,268
Total cannot afford to buy or rent			9,078

Step B: Future households in need

- C.17 **PPG Paragraph 021 Reference ID: 2a-021029190220** states that ‘projections of affordable housing need will have to reflect new household formation, the proportion of newly-forming households unable to buy or rent in the market area, and an estimate of the number of existing households falling into need. The process will need to identify the minimum household income required to access lower quartile (entry level) market housing. It can then assess what proportion of newly-forming households will be unable to access market housing.’

New household formation

- C.18 The most useful data sources for assessing the level of new household formation are:
- DLUHC/ONS household projections, from which an annual net increase in households can be derived; and
 - the English Housing Survey, from which a national gross household formation rate can be derived and referenced as a data source in the PPG.
- C.19 Based on the requirements of PPG, the gross annual formation rate used in analysis is 1,444. This is the household formation rate derived from a range of projections set out in Table C4. Through the standard method of calculating need, allowance is made for increasing the level of housing delivery to support household formation through the affordability adjustment.

Table C4 Net and gross household formation 2021-2031			
	Annual household formation	Notes	Source
A. MHCLG 2014-based household projections	702	7,020 NET increase between 2021 and 2031	MHCLG 2014-based household projections
B. ONS 2018-based household projections	680	6,799 NET increase between 2021 and 2031	ONS 2018-based household projections
C. Average gross household formation rate based on applying national rate to total households over the period 2021-2031 (2014-based projections)	1,455	Gross household formation rate of 1.435%	English Housing Survey 3- year average 2017/18 to 2019/20
D. Average gross household formation rate based on applying national rate to total households over the period 2021-2031 (2018-based projections)	1,432	Gross household formation rate of 1.439%	English Housing Survey 3 year average 2017/18 to 2019/120
E. Blended rate of gross household formation (C, D)	1,444		

New households likely to be in affordable housing need

- C.20 Analysis of the incomes of households who have formed in the past 5 years using the 2021 household survey concludes that 24.5% could not afford buying or renting lower quartile (entry level) properties. Based on a gross formation rate of **1,444**, 354 households are estimated to be in affordable housing need.

Existing households expected to fall into need

- C.21 The 2021 household survey identifies 3,025 households who have fallen into need in the past 5 years and require affordable housing or 605 each year.

Total newly arising affordable housing need (gross per year)

- C.22 Total newly arising need is therefore 959 each year as summarised in Table C5.

Table C5 Total newly-arising affordable housing need		
A. Number of newly-forming households		1,444
B. Proportion unable to afford market housing	24.50%	354
C. Existing households falling into need		605
Total newly arising affordable need (B+C)		959

Step C: Affordable housing supply

C.23 PPG Paragraph 022 Reference ID: 2a-022-20190220 notes that ‘there will be a current supply of housing stock that can be used to accommodate households in affordable housing need as well as future supply. There are five aspects to affordable supply to be considered as set out in Table C6.

Table C6 Affordable housing supply		
Source of supply/stock loss	Data source	Data
The number of affordable dwellings that are going to be vacated by occupiers that are fit for use by other households in need	RP lettings data over most recent 3-year period	4,056 affordable dwellings let over the period Jan 2018 to May 2021 or annual average of 1,186 lettings.
Suitable surplus stock (vacant properties)	MHCLG vacant dwelling statistics	253 vacant affordable (council and housing association excluding not available for letting) dwellings reported as vacant in 2020 or 1.21% of total affordable stock. This is below transactional rate of around 2% to allow movement in stock so no suitable surplus stock available.
The committed supply of new net affordable homes at the point of assessment (number and size)	Council data	Total of 554 affordable dwellings built/came into use over 3 year period 2018/19, 2019/20 and 2020/21. pipeline affordable dwelling, An annual supply of 185 used in supply calculation as proxy for committed supply
Supply of affordable home ownership through <u>resale</u>	English Housing Survey Table FA4131	EHS indicates 5.9% of owner occupiers with a mortgage moved to their accommodation in the past year. This is used as a basis for estimating the number of resales of affordable home ownership products at 5% each year. Based on 349 dwellings there are an estimated 19 resales each year
Units taken out of management	Local authority data	None identified
Total annual supply	Calculation	1,186 lettings + 0 vacant + 185 newbuild + 19 AHO resales – 0 units taken out of management = 1,390 each year

Note: stock losses through right to buy are not referenced in PPG and not included in this table. Any losses through right to buy would increase the shortfall.

- C.24 Overall, the model assumes a total annual affordable housing stock supply of **1,390** dwellings.

Step D: Total annual need and breakdown by size and tenure

- C.25 Table C7 summarises the total annual need for affordable housing across North Tyneside which establishes a gross annual need of 1,867 and after taking into account supply, a net need of 477 affordable dwellings each year assuming a clearance of gross unmet need over 10 years. Table C8 presents the data for wards.

	Factor	Number	Data source/assumption
A1	Current gross unmet need (before affordability test)	14,073	Table C1 row A9
A2	Current gross unmet need (after affordability test)	9,078	Table C3 Housing register – assumes all of this need should be met
A3	Annualised need	908	Assume unmet need is cleared over a 10-year period to reflect the standard method 10 year time period
B	Newly-arising annual need	959	Table C5
TGN	Total gross need	1,867	A3+B
C	Affordable annual housing supply	1,390	Table C6
	Total annual net need	477	TGN – C

Notes: Table subject to rounding errors

Table C8 Gross and net annual affordable need by ward							
Factor	A1	A2	A3	B	TGN	C	
	Current gross unmet need (before affordability test)	Current gross unmet need (after affordability test)	Annualised need	Newly-arising annual need	Total gross need	Affordable annual housing supply	Total annual net need
Number	14,071	9,078	908	959	1,867	1,390	477
Ward	Table C1 row A9	Table C3	5 year clearance	Table C5	A3+B	Table C6	Total gross need - C
Battle Hill	895	600	60	56	116	95	21
Benton	411	327	33	25	58	65	-7
Camperdown	628	518	52	38	90	83	7
Chirton	1,621	960	96	113	209	102	107
Collingwood	754	359	36	37	73	74	-1
Cullercoats	829	581	58	31	89	23	66
Howdon	1,092	728	73	83	156	120	36
Killingworth	611	333	33	18	52	77	-25
Longbenton	735	676	68	39	106	121	-15
Monkseaton North	230	166	17	13	30	11	19
Monkseaton South	375	315	32	42	74	37	37
Northumberland	424	356	36	52	88	94	-6
Preston	384	330	33	44	77	18	59
Riverside	1,386	779	78	73	151	170	-18
St Mary's	138	102	10	14	24	1	23
Tynemouth	572	222	22	54	76	19	57
Valley	813	496	50	75	124	127	-3
Wallsend	1,141	611	61	86	147	79	68
Weetslade	530	283	28	29	57	65	-8
Whitley Bay	503	337	34	36	69	9	60
TOTAL	14,071	9,078	908	959	1,867	1,390	477

Notes: Table subject to rounding errors

- C.26 According to MHCLG statistics, there are 2,505 households on the housing register for North Tyneside. Table C9 summaries the number of bedrooms needed.

Table C9 Affordable need based on the housing register					
Location	Number of bedrooms needed (%)				
	1	2	3	4 or more	Base
North Tyneside	59.0	28.7	11.5	0.8	2,505

Source: MHCLG Local Authority Housing Statistics 2019/20

Number of bedrooms needed

- C.27 Table C10 sets out affordable need by the number of bedrooms. This is based on the number of bedrooms a household needs using the bedroom standard model.

Table C10 Affordable need based on the housing register						
Ward	Number of bedrooms					Gross annual need
	1	2	3	4	Total	
Battle Hill	16.5	46.3	32.4	4.8	100.0	116
Benton	41.5	35.2	17.7	5.6	100.0	58
Camperdown	35.6	45.5	13.0	5.9	100.0	90
Chirton	26.0	44.5	27.1	2.4	100.0	209
Collingwood	19.0	38.3	38.5	4.2	100.0	73
Cullercoats	47.4	30.3	10.7	11.6	100.0	89
Howdon	30.8	50.2	17.6	1.4	100.0	156
Killingworth	45.4	31.5	22.2	1.0	100.0	52
Longbenton	31.6	43.8	23.6	1.0	100.0	106
Monkseaton North	40.1	45.1	13.6	1.2	100.0	30
Monkseaton South	21.0	60.0	17.5	1.5	100.0	74
Northumberland	27.6	46.7	24.1	1.6	100.0	88
Preston	14.1	52.8	31.6	1.5	100.0	77
Riverside	34.8	37.8	21.5	5.8	100.0	151
St Mary's	44.9	35.8	17.7	1.5	100.0	24
Tynemouth	20.3	47.7	28.0	4.0	100.0	76
Valley	23.3	49.4	25.7	1.6	100.0	124
Wallsend	20.9	50.9	22.3	5.9	100.0	147
Weetslade	22.1	48.1	28.5	1.4	100.0	57
Whitley Bay	35.4	40.3	22.9	1.4	100.0	69
Total	28.1	44.4	23.8	3.6	100.0	1,867

Source: Housing Register

Comparison of current housing stock and current/future needs

- C.28 PPG states that ‘strategic policy-making authorities will need to look at the current stock of houses of different sizes and assess whether these match current and future need (PPG Paragraph 023 Reference ID: 2a-023-20190220). Table C11 sets out this comparison and shows there is a particular shortfall of 2 and 4 or more bedroom affordable dwellings.

Number of bedrooms	Current supply %	Annual gross need %	Variance %
1-bedroom	29.4	28.1	-1.3
2-bedroom	33.8	44.4	10.7
3-bedroom	33.5	23.8	-9.7
4 or more-bedroom	3.3	3.6	0.3
Total	100.0	100.0	

Source: 2020 SDR; 2021 household survey

Comparison with 2016 SHMA

- C.29 The 2016 SHMA identified a need for 490 affordable dwellings, so the overall scale of need has slightly reduced.

Tenure mix and First Homes

- C.30 Analysis needs to consider the range of affordable tenures as set out in Annex 2 of the NPPF that may be appropriate for existing households in need and newly-forming households.
- C.31 For need arising from homeless households and those in temporary accommodation, it is assumed they all require social rented accommodation. For newly-forming households and existing households in need, a split between affordable rented and affordable home ownership should be considered. This is based on the tenure preference stated by existing households in need and newly-formed households. The household survey data has also been used to establish the proportions of households who could afford social rent, affordable rent and affordable home ownership options.
- C.32 A minimum of 25% of all affordable housing units secured through developer contributions should be First Homes (**Paragraph 013 Reference ID: 70-013-20210425**). Then, PPG says ‘once a minimum of 25% of First Homes has been accounted for, social rent should be delivered in the same percentage as set out in the Local Plan. The remainder of the affordable housing tenures should be delivered in line with the proportions set out in the Local Plan policy (**Paragraph 15 reference ID: 70-015-20210524**).
- C.33 Analysis has carefully considered the range of affordable tenures that may be appropriate for existing households in need and newly-forming households. Table C12 summarises the overall tenure split between affordable rented options

(social and affordable rent) and affordable home ownership solutions (including shared ownership, discounted for sale and other tenures as set out in Annex 2 of the NPPF).

Table C12 Affordable tenure split recommendations by ward			
Ward	Social Rented (%)	Affordable Rented (%)	Affordable Home Ownership (%)
Battle Hill	37.6	27.9	34.6
Benton	38.6	28.6	32.8
Camperdown	41.6	30.9	27.5
Chirton	39.9	29.6	30.5
Collingwood	42.5	31.5	26.0
Cullercoats	35.3	26.2	38.5
Howdon	43.0	31.9	25.1
Killingworth	44.0	32.7	23.3
Longbenton	44.0	32.6	23.4
Monkseaton North	48.1	35.6	16.3
Monkseaton South	42.7	31.7	25.6
Northumberland	44.8	33.3	21.9
Preston	41.9	31.1	27.0
Riverside	44.4	32.9	22.7
St Mary's	45.2	33.5	21.2
Tynemouth	35.0	25.9	39.1
Valley	39.1	29.0	31.9
Wallsend	37.7	27.9	34.4
Weetslade	40.2	29.9	29.9
Whitley Bay	38.7	28.7	32.7
TOTAL	40.4	29.9	29.7

Source: 2021 household survey

- C.34 Analysis would suggest an overall tenure split of 70% social/affordable rented and 30% affordable home ownership across North Tyneside.
- C.35 In terms of the split between social and affordable rented, the incomes of existing and newly-forming households have been considered against the costs of social and affordable renting. This results in a split of 60% social rented and 40% affordable rented.
- C.36 Table C13 sets out the steps to derive a final tenure split which takes into First Homes. The final affordable tenure split for North Tyneside is set out in Table C14.

Table C13 Detailed calculation of tenure split including First Homes

Step 1	Total affordable %	Overall affordable	100.0				
Step 2			Affordable tenure split			First Homes	
	This splits the 100% into 75% affordable tenures and 25% First Homes	Affordable/First Homes Split	75.0			25.0	
Step 3		Suggested policy breakdown	Social Rent	Affordable Rent	Affordable Home Ownership	AR + AHO	
	The recommended tenure split is set out here. This is total split by SR, AR and AHO EXCLUDING FH		40.4	29.9	29.7	59.6	
	At this point, need to recognise that SR need and FH is ringfenced		RINGFENCED			RINGFENCED	
	RINGFENCED % Split		40.4			25.0	
Step 4	This step calculates how the AR and AHO units are apportioned.			17.4	17.2	34.6	
Step 5	Final affordable split is now set out		Social Rent	Affordable Rent	Affordable Home Ownership	First Homes	
		Final position	40.4	17.4	17.2	25.0	
	And then rounded to nearest whole number	Rounded %	40	18	17	25	

Table C14 Affordable tenure split for North Tyneside

Social Rent	Affordable rent	Affordable home ownership	First Homes
40%	18%	17%	25%
58% Rented options		42% Affordable Home Ownership options	

C.37 The final split of affordable tenures is 40% social rented, 18% affordable rented and 42% affordable home ownership (25% first homes and 17% other affordable home ownership options).

Affordable dwelling mix

C.38 The 2021 household survey has provided information on the number of bedrooms needed by households in affordable need and dwelling type aspirations and expectations. This is shown in Table C15.

Table C15 Summary of affordable dwelling need by bedroom size and dwelling type by ward

Ward	Social/affordable rented										
	1- bedroom house	2- bedroom house	3- bedroom house	4 or more - bedroom house	1- bedroom flat	2- bedroom flat	3 or more- bedroom flat	1- bedroom bungalow	2- bedroom bungalow	3 or more- bedroom bungalow	Total
Battle Hill	0.0	14.8	29.5	4.8	11.2	22.9	2.9	5.3	8.6	0.0	100.0
Benton	0.0	6.8	15.1	5.6	33.9	23.5	2.6	7.6	4.9	0.0	100.0
Camperdown	5.7	17.2	10.4	5.9	21.5	20.4	2.6	8.3	7.9	0.0	100.0
Chirton	0.0	10.9	22.4	2.4	13.2	28.0	3.3	12.8	5.6	1.5	100.0
Collingwood	0.0	8.4	29.7	4.2	14.1	24.8	5.2	4.9	5.1	3.6	100.0
Cullercoats	0.0	6.9	8.6	11.6	34.6	17.3	2.1	12.8	6.1	0.0	100.0
Howdon	0.0	11.2	14.2	1.4	25.1	26.3	3.2	5.7	12.7	0.2	100.0
Killingworth	0.0	6.8	12.9	1.0	22.2	18.0	2.1	23.2	6.7	7.1	100.0
Longbenton	0.0	10.1	19.8	1.0	28.2	17.9	2.2	3.4	15.8	1.6	100.0
Monkseaton North	0.0	7.3	10.9	1.2	32.8	26.2	2.7	7.2	11.6	0.0	100.0
Monkseaton South	0.0	16.3	14.1	1.5	17.8	29.5	3.5	3.2	14.1	0.0	100.0
Northumberland	0.0	13.2	20.5	1.6	24.4	28.0	3.6	3.2	5.5	0.0	100.0
Preston	0.0	11.5	21.4	1.5	12.3	26.1	3.5	1.8	15.2	6.7	100.0
Riverside	3.3	10.1	18.1	5.8	19.6	23.7	2.9	12.0	4.0	0.5	100.0
St Mary's	0.0	9.0	14.2	1.5	37.0	26.8	3.5	7.9	0.0	0.0	100.0
Tynemouth	0.0	14.7	23.7	4.0	18.5	33.1	4.3	1.8	0.0	0.0	100.0
Valley	0.0	15.0	20.7	1.6	12.8	27.0	3.6	10.6	7.4	1.4	100.0
Wallsend	2.3	16.7	17.3	5.9	13.9	30.0	4.5	4.6	4.1	0.4	100.0
Weetslade	0.0	15.2	21.4	1.4	18.6	25.5	3.1	3.5	7.4	4.0	100.0
Whitley Bay	0.0	9.7	19.0	1.4	20.4	27.2	3.9	15.0	3.4	0.0	100.0
Total	0.7	12.1	19.2	3.6	19.3	25.4	3.3	8.1	6.9	1.2	100.0

Technical Appendix D: Dwelling mix and modelling

Introduction

- D.1 This technical appendix describes the method used by arc4 to establish future dwelling type and size mix across the borough. It presents the baseline data used as a starting point for the analysis and how data are interpreted to establish a reasonable view on dwelling type and mix.

Starting points

- D.2 There are four main data sources which underpin the analysis:
- household projections;
 - dwelling stock information;
 - data identifying the relationships between households and dwellings derived from the 2021 household survey; and
 - data derived from affordable housing need analysis.

Household projections

- D.3 These are used to establish the number of households by Household Reference Persons (HRP) and household type using the 2018-based data, and how this is expected to change over the period 2021 to 2039.
- D.4 The change in the number of households over this period can be established and, assuming that the dwelling needs of these households do not change significantly over the plan period, the potential impact on type and number of bedrooms of future dwellings can be determined.

Relationship between households and dwellings

- D.5 The relationship between the age of Household Reference Person, household type and dwellings occupied by type and size can be derived from the 2021 household survey.
- D.6 The data available is summarised in Table D1. For each age group, the proportion of Household Reference Persons (HRPs) by household type living in different type/size and size of dwelling has been estimated.
- D.7 The 2021 household survey also provides data on household aspirations and what households would expect to move to. This data can also be broken down by HRP age group and household type.
- D.8 By combining this range of data, it is possible to model the likely change in dwelling type/size requirements with reference to:
- the current relationship between HRP/household type and dwelling type/size and this remains constant over the plan period (demographic baseline);

- household aspirations by HRP/household type (aspirations); and
- what households would expect by HRP/household type (expect).

Age group of Household Reference Person	Household type	Dwelling type and number of bedrooms
15 to 24	One-person household	1-bedroom house
25 to 34	Household with 1 dependent child	2-bedroom house
35 to 44	Household with 2 dependent children	3-bedroom house
45 to 54	Household with 3 dependent children	4 or more-bedroom house
55 to 64	Other households with two or more adults	1-bedroom flat
65 to 74	All	2-bedroom flat
75 to 84		3 or more-bedroom flat
85+		1-bedroom bungalow
All		2-bedroom bungalow
		3 or more-bedroom bungalow
	All	

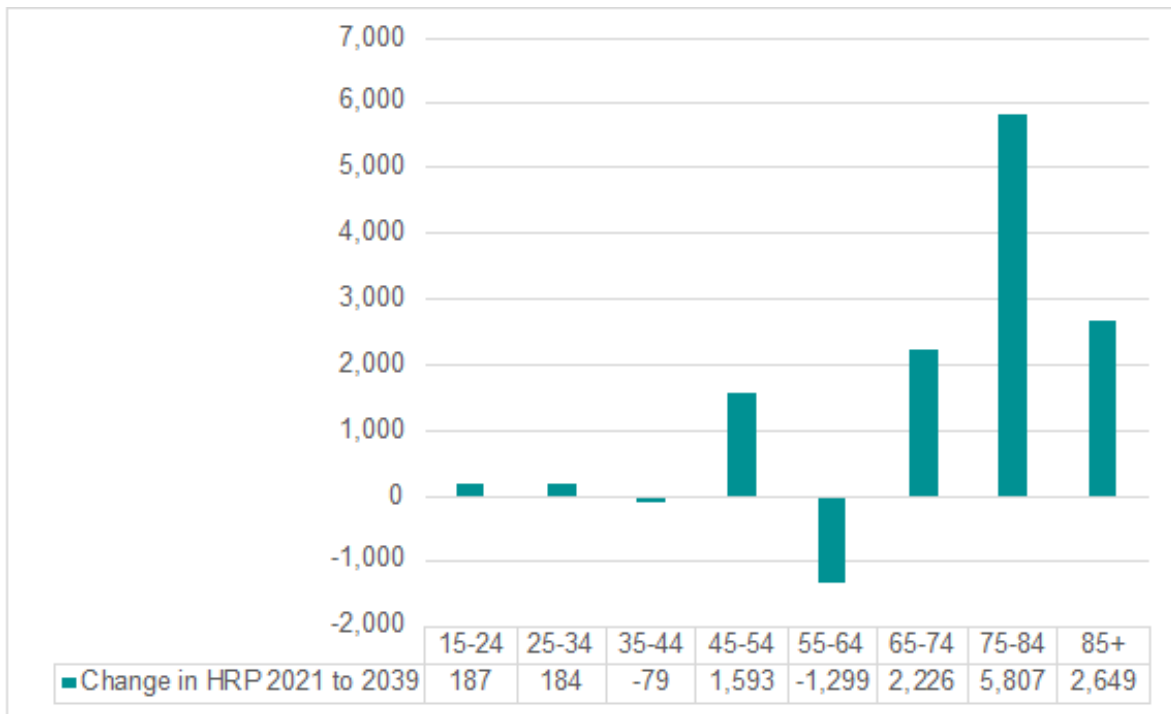
Applying the data at authority level

- D.9 Applying the data at authority level is done in a systematic way. Firstly, the change in the number of households by age group and household type is established from household projections. Assuming that the dwelling needs of these households do not change over the plan period, the overall impact on type/size of dwellings can be determined.
- D.10 Table D2 presents the baseline demographic data for North Tyneside. The total number of households is expected to increase by around 11,268 over the period 2021-2039 using 2018-based ONS household projections. Growth is mainly expected across older age cohorts, with absolute declines in HRPs aged 55-64 and an increase in HRPs aged 45-54. Figure D1 illustrates how the number of households by HRP age is expected to change over the plan period 2021-2039.

Table D2 Change in number of households by age group and household type 2021 to 2039						
2021	One Person	Household with 1 dependent child	Household with 2 dependent children	Household with 3 or more dependent children	Other households with two or more adults	Total
15-24	720	685	200	102	691	2,398
25-34	3,393	2,733	1,743	706	3,294	11,869
35-44	4,482	4,093	3,769	1,088	3,368	16,801
45-54	5,127	3,741	2,426	627	6,213	18,134
55-64	6,259	1,509	495	105	9,873	18,242
65-74	5,898	267	29	8	8,512	14,715
75-84	5,220	68	6	0	4,926	10,220
85+	3,029	22	0	0	1,252	4,303
TOTAL	34,129	13,117	8,668	2,637	38,131	96,683
2039	One Person	Household with 1 dependent child	Household with 2 dependent children	Household with 3 or more dependent children	Other households with two or more adults	Total
15-24	774	743	217	111	740	2,585
25-34	3,454	2,770	1,760	716	3,353	12,053
35-44	4,452	4,057	3,759	1,083	3,371	16,722
45-54	5,553	4,090	2,689	696	6,698	19,727
55-64	5,802	1,387	448	94	9,214	16,944
65-74	6,819	304	33	9	9,777	16,942
75-84	8,122	106	9	1	7,789	16,027
85+	4,780	35	0	0	2,137	6,953
TOTAL	39,755	13,492	8,914	2,709	43,079	107,950
Change 2021-2039	One Person	Household with 1 dependent child	Household with 2 dependent children	Household with 3 or more dependent children	Other households with two or more adults	Total
15-24	53	58	17	9	49	187
25-34	61	37	17	10	59	184
35-44	-30	-36	-10	-6	3	-79
45-54	426	349	263	70	485	1,593
55-64	-458	-122	-47	-12	-660	-1,299
65-74	921	37	3	1	1,265	2,226
75-84	2,902	38	3	0	2,863	5,807
85+	1,751	13	0	0	885	2,649
TOTAL	5,626	375	247	72	4,948	11,268

Source: ONS 2018-based household projections

Figure D1 Change in HRP age groups 2021-2039



Source: 2018-based ONS household projections

D.11 Table D3 applies household survey data on dwelling occupancy to the demographic profile in 2039. The two right hand columns indicate the likely change in demand for dwelling types and sizes and how this translates to an overall percentage dwelling requirement.

Table D3 Impact of change in households by age group on dwellings occupied by 2039										
Dwelling type and size	Age group of Household Reference Person								TOTAL	%
	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+		
1-bedroom bungalow/level access	3	8	49	44	202	872	1,200	805	3,242	3.0
1-bedroom flat	250	1,068	792	905	575	1,296	847	799	6,649	6.2
1-bedroom house	105	113	184	50	137	105	184	0	902	0.8
1-bedroom other	0	40	6	17	19	62	0	0	147	0.1
2-bedroom bungalow/level access	22	43	253	102	706	1,826	3,295	826	7,059	6.5
2-bedroom flat	734	2,960	3,752	3,086	1,942	1,519	1,062	774	16,118	14.9
2-bedroom house	609	2,555	2,258	3,155	1,863	2,031	1,135	505	14,251	13.2
2-bedroom other	35	26	21	48	57	61	104	0	371	0.3
3-bedroom house	534	4,006	5,791	7,348	6,758	6,053	4,794	2,117	37,133	34.4
3 or more-bedroom bungalow/level access	34	96	124	53	143	402	760	131	1,738	1.6
3 or more-bedroom flat	205	303	552	606	253	188	201	0	2,326	2.2
3 or more-bedroom other	19	13	18	33	64	30	58	0	236	0.2
4 or more-bedroom house	35	820	2,922	4,280	4,226	2,495	2,387	996	17,777	16.5
Total	2,585	12,053	16,722	19,727	16,944	16,942	16,027	6,953	107,950	100.0
Number of bedrooms	Age group of Household Reference Person								TOTAL	%
	15-24	25-34	35-44	45-54	55-64	65-74	75-84	85+		
1	358	1,230	1,030	1,015	932	2,335	2,232	1,604	10,940	10.1
2	1,400	5,584	6,284	6,392	4,568	5,438	5,596	2,105	37,799	35.0
3	791	4,419	6,486	8,040	7,217	6,674	5,813	2,248	41,434	38.4
4 or more	35	820	2,922	4,280	4,226	2,495	2,387	996	17,777	16.5
Total	2,585	12,053	16,722	19,727	16,944	16,942	16,027	6,953	107,950	100.0

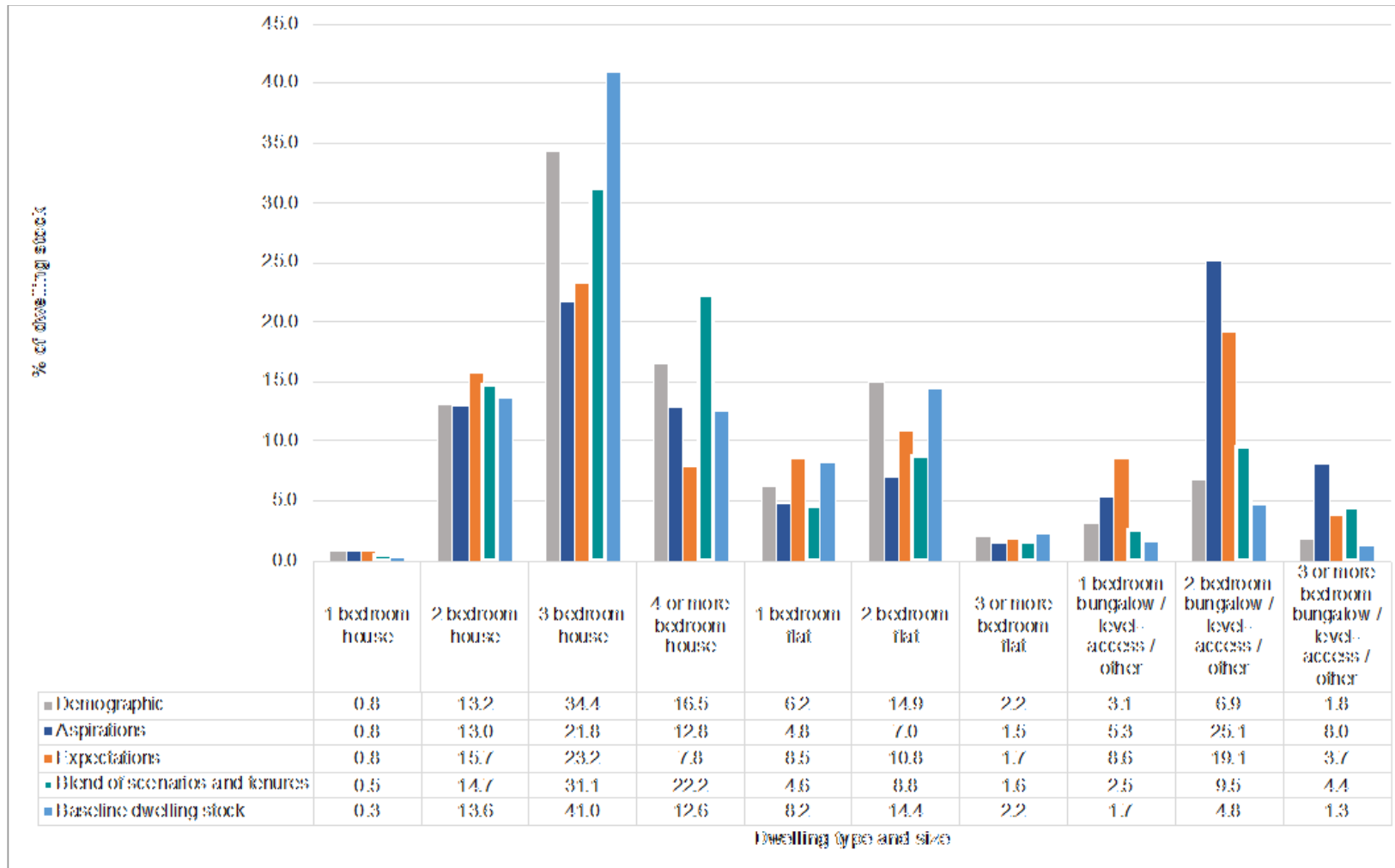
Note totals by age group may vary slightly due to rounding errors; Source: ONS 2018-based household projections and 2021 household survey

- D.12 Table D4 sets out how the profile of dwelling stock changes when aspirations and expectations of households are considered. This indicates a shift towards bungalow/level-access accommodation and an increased need for two bedroom dwellings. Table D4 also recommended a 'blended' scenario which provide an overarching dwelling mix based on a blend of the demographic, aspirations and expectations scenarios. This grounds the analysis in underlying demographic change but takes into account future household aspirations and expectations and tenure mix.
- D.13 Figure D2 summarises the dwelling profiles under the scenarios considered and compares this with current dwelling stock. Under the baseline demographic scenario, the majority of newbuild should be houses (particularly 3-bedroom) and some flats and bungalows/level-access accommodation. Under the aspirations and expectations scenarios, there is an increasing emphasis on bungalows/level-access

Table D4 Dwelling type and size outcomes under alternative scenarios compared with existing dwelling stock					
Dwelling type and size	Scenario				Existing dwelling stock
	Demographic	Aspirations	Expectations	Blended scenario	
1 bedroom house	0.8%	0.8%	0.8%	0.5%	0.3
2 bedroom house	13.2%	13.0%	15.7%	14.7%	13.6%
3 bedroom house	34.4%	21.8%	23.2%	31.1%	41.0%
4 or more bedroom house	16.5%	12.8%	7.8%	22.2%	12.6%
1 bedroom flat	6.2%	4.8%	8.5%	4.6%	8.2%
2 bedroom flat	14.9%	7.0%	10.8%	8.8%	14.4%
3 or more bedroom flat	2.2%	1.5%	1.7%	1.6%	2.2%
1 bedroom bungalow / level-access / other	3.1%	5.3%	8.6%	2.5%	1.7%
2 bedroom bungalow / level-access / other	6.9%	25.1%	19.1%	9.5%	4.8%
3 or more bedroom bungalow / level-access / other	1.8%	8.0%	3.7%	4.4%	1.3%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%
Dwelling type	Demographic	Aspirations	Expectations	Blended	Existing
House	64.9%	48.4%	47.6%	68.6%	67.5%
Flat	23.2%	13.2%	21.0%	15.0%	24.8%
Bungalow/level access/other	11.9%	38.4%	31.4%	16.4%	7.7%
Other	100.0%	100.0%	100.0%	100.0%	100.0%
Number of bedrooms	Demographic	Aspirations	Expectations	Blended	Existing
1	10.1%	10.9%	17.8%	7.7%	10.2%
2	35.0%	45.1%	45.7%	33.0%	34.9%
3	38.4%	31.2%	28.7%	35.5%	42.3%
4	16.5%	12.8%	7.8%	22.2%	12.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

- D.14 Figure D2 summarises the dwelling profiles under the scenarios considered and compares this with current dwelling stock. Under the baseline demographic scenario, the majority of newbuild should be houses (particularly 3-bedroom) and some flats and bungalows/level-access accommodation. Under the aspirations and expectations scenarios, there is an increasing emphasis on bungalows/level-access. It is recommended that the overall dwelling mix is based on the blended scenario. This scenario takes into account the underlying demographics of the borough but takes into account household aspirations and expectations by tenure.

Figure D2 Summary of dwelling types in current stock and under baseline demographic, aspiration, expectation and blended scenarios



Source: 2021 household survey and 2018-based household projections

Overall dwelling mix by tenure

- D.15 Table D5 summarises dwelling type/size mix based on the demographic scenario. This analysis assumes an annual target of 799 dwellings based over the period 2021-2031, a minimum 25% affordable housing target on qualifying sites and an affordable tenure split of in urban areas and 35% in rural areas and an affordable tenure split of around 58% rented and 32% affordable home ownership including an allowance for First Homes. The analysis factors in the dwelling type/size analysis carried out as part of the affordable housing needs calculation and also the dwelling type/size choices of households considering affordable home ownership solutions based on the range of dwellings currently available.
- D.16 The analysis can be revised if annual targets and affordable housing delivery targets are updated.

Table D5 Summary of overall dwelling mix by tenure				
Dwelling type/size	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
1 and 2-bedroom house	15-20%	10-15%	15-20%	15-20%
3-bedroom house	30-35%	15-20%	30-35%	30-35%
4 or more-bedroom house	25-30%	2-5%	10-15%	20-25%
1-bedroom flat	0-2%	15-20%	2-5%	2-5%
2 or more - bedroom flat	5-10%	25-30%	5-10%	10-15%
1-bedroom level-access	0-2%	5-10%	0-2%	2-5%
2 bedroom level-access	5-10%	5-10%	15-20%	5-10%
3 or more bedroom-level-access	5-10%	0-2%	2-5%	2-5%
Dwelling type	Market	Social/ Affordable Rented	Affordable home ownership	Overall range
House	75-80%	35-40%	60-65%	65-70%
Flat	5-10%	45-50%	10-15%	15-20%
Bungalow/level-access	15-20%	15-20%	20-25%	15-20%
Number of bedrooms	Market	Affordable Rented	Affordable home ownership	Overall range
1	2-5%	25-30%	5-10%	10-15%
2	25-30%	40-45%	40-45%	35-40%
3	35-40%	20-25%	35-40%	35-40%
4	25-30%	2-5%	10-15%	15-20%

Overall dwelling mix by ward

- D.17 Further analysis considers the range of dwellings by ward and tenure. This is based on the need for affordable/social rented dwellings, the need for affordable home ownership and open market need. This takes account of the dwelling type,

aspirations and expectations of households and the number of bedrooms needed.

- D.18 Table D6 summaries affordable (social/affordable) rented need. Table D7 summarises affordable (affordable home ownership) need and Table D8 market need. It is important that both planners and developers maintain a flexible approach to what is built within North Tyneside and recognise that in some areas development may be restricted to particular types of dwelling, but this analysis helps determine the relative priorities of development in particular wards.

Table D6 Affordable (social/rented) mix by ward										
Ward	1-bedroom house	2-bedroom house	3-bedroom house	4 or more-bedroom house	1-bedroom flat	2-bedroom flat	3 or more-bedroom flat	1-bedroom bungalow	2-bedroom bungalow	3 or more-bedroom bungalow
Battle Hill	0-2%	10-15%	25-30%	2-5%	10-15%	20-25%	2-5%	5-10%	5-10%	0-2%
Benton	0-2%	5-10%	15-20%	5-10%	30-35%	20-25%	2-5%	5-10%	2-5%	0-2%
Camperdown	5-10%	15-20%	10-15%	5-10%	20-25%	20-25%	2-5%	5-10%	5-10%	0-2%
Chirton	0-2%	10-15%	20-25%	2-5%	10-15%	25-30%	2-5%	10-15%	5-10%	0-2%
Collingwood	0-2%	5-10%	25-30%	2-5%	10-15%	20-25%	5-10%	2-5%	5-10%	2-5%
Cullercoats	0-2%	5-10%	5-10%	10-15%	30-35%	15-20%	2-5%	10-15%	5-10%	0-2%
Howdon	0-2%	10-15%	10-15%	0-2%	25-30%	25-30%	2-5%	5-10%	10-15%	0-2%
Killingworth	0-2%	5-10%	10-15%	0-2%	20-25%	15-20%	2-5%	20-25%	5-10%	5-10%
Longbenton	0-2%	10-15%	15-20%	0-2%	25-30%	15-20%	2-5%	2-5%	15-20%	0-2%
Monkseaton North	0-2%	5-10%	10-15%	0-2%	30-35%	25-30%	2-5%	5-10%	10-15%	0-2%
Monkseaton South	0-2%	15-20%	10-15%	0-2%	15-20%	25-30%	2-5%	2-5%	10-15%	0-2%
Northumberland	0-2%	10-15%	20-25%	0-2%	20-25%	25-30%	2-5%	2-5%	5-10%	0-2%
Preston	0-2%	10-15%	20-25%	0-2%	10-15%	25-30%	2-5%	0-2%	15-20%	5-10%
Riverside	2.1	10-15%	15-20%	5-10%	15-20%	20-25%	2-5%	10-15%	2-5%	0-2%
St Mary's	0-2%	5-10%	10-15%	0-2%	35-40%	25-30%	2-5%	5-10%	0-2%	0-2%
Tynemouth	0-2%	10-15%	20-25%	2-5%	15-20%	30-35%	2-5%	0-2%	0-2%	0-2%
Valley	0-2%	15-20%	20-25%	0-2%	10-15%	25-30%	2-5%	10-15%	5-10%	0-2%
Wallsend	2-5%	15-20%	15-20%	5-10%	10-15%	30-35%	2-5%	2-5%	2-5%	0-2%
Weetslade	0-2%	15-20%	20-25%	0-2%	15-20%	25-30%	2-5%	2-5%	5-10%	2-5%
Whitley Bay	0-2%	5-10%	15-20%	0-2%	20-25%	25-30%	2-5%	15-20%	2-5%	0-2%
Total	0-2%	10-15%	15-20%	2-5%	15-20%	25-30%	2-5%	5-10%	5-10%	0-2%

Source: 2021 household survey

Table D7 Affordable (affordable home ownership) mix by ward										
Ward	1-bedroom house	2-bedroom house	3-bedroom house	4 or more - bedroom house	1-bedroom flat	2-bedroom flat	3 or more-bedroom flat	1-bedroom bungalow	2-bedroom bungalow	3 or more-bedroom bungalow
Battle Hill	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Benton	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Camperdown	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Chirton	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Collingwood	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Cullercoats	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Howdon	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Killingworth	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Longbenton	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Monkseaton North	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Monkseaton South	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Northumberland	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Preston	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Riverside	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
St Mary's	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Tynemouth	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Valley	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Wallsend	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Weetslade	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Whitley Bay	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%
Total	0-2%	10-15%	20-25%	5-10%	5-10%	25-30%	2-5%	2-5%	10-15%	2-5%

Source: 2021 household survey. Note due to small sample sizes at ward level, the borough-average dwelling mix is shown for each ward

Table D8 Market housing mix by ward										
Ward	1- bedroom house	2- bedroom house	3- bedroom house	4 or more - bedroom house	1- bedroom flat	2- bedroom flat	3 or more- bedroom flat	1- bedroom bungalow	2- bedroom bungalow	3 or more- bedroom bungalow
Battle Hill	0-2%	5-10%	40-45%	35-40%	0-2%	0-2%	0-2%	2-5%	5-10%	0-2%
Benton	0-2%	10-15%	35-40%	30-35%	0-2%	0-2%	0-2%	0-2%	10-15%	2-5%
Camperdown	0-2%	20-25%	30-35%	25-30%	2-5%	2-5%	0-2%	0-2%	5-10%	0-2%
Chirton	0-2%	10-15%	50-55%	10-15%	2-5%	5-10%	0-2%	2-5%	2-5%	2-5%
Collingwood	0-2%	0-2%	30-35%	50-55%	0-2%	0-2%	2-5%	0-2%	6-10%	6-10%
Cullercoats	0-2%	15-20%	20-25%	2-5%	5-10%	10-15%	0-2%	0-2%	35-40%	0-2%
Howdon	0-2%	10-15%	35-40%	10-15%	0-2%	2-5%	0-2%	5-10%	20-25%	5-10%
Killingworth	0-2%	5-10%	30-35%	40-45%	0-2%	0-2%	0-2%	2-5%	2-5%	5-10%
Longbenton	0-2%	10-15%	30-35%	40-45%	0-2%	2-5%	0-2%	0-2%	5-10%	5-10%
Monkseaton North	0-2%	0-2%	20-25%	40-45%	0-2%	5-10%	2-5%	0-2%	10-15%	10-15%
Monkseaton South	0-2%	10-15%	30-35%	20-25%	0-2%	10-15%	2-5%	0-2%	5-10%	10-15%
Northumberland	0-2%	30-35%	25-30%	25-30%	2-5%	2-5%	0-2%	0-2%	5-10%	0-2%
Preston	0-2%	10-15%	35-40%	20-25%	0-2%	10-15%	0-2%	0-2%	5-10%	5-10%
Riverside	0-2%	20-25%	40-45%	15-20%	0-2%	5-10%	0-2%	2-5%	2-5%	2-5%
St Mary's	0-2%	5-10%	15-20%	30-35%	0-2%	10-15%	0-2%	0-2%	10-15%	20-25%
Tynemouth	0-2%	15-20%	35-40%	25-30%	5-10%	5-10%	0-2%	0-2%	0-2%	0-2%
Valley	0-2%	10-15%	25-30%	35-40%	0-2%	0-2%	2-5%	0-2%	15-20%	2-5%
Wallsend	0-2%	20-25%	25-30%	5-10%	2-5%	15-20%	5-10%	0-2%	5-10%	5-10%
Weetslade	0-2%	25-30%	15-20%	30-35%	0-2%	2-5%	0-2%	0-2%	5-10%	5-10%
Whitley Bay	2-5%	15-20%	25-30%	20-25%	2-5%	5-10%	2-5%	2-5%	10-15%	2-5%
Total	0-2%	10-15%	30-35%	25-30%	0-2%	5-10%	0-2%	0-2%	5-10%	5-10%

Source: 2021 household survey

Technical Appendix E: Estate Agent review

Selling and lettings agents

The following information was obtained through a review of the current rental and sales market using Right Move and Zoopla and telephone interviews in September 2021:

North Shields

House prices in North Shields have seen a steady increase over the past 5 years with some properties increasing by £50k in value. In October 2021, there were 176 properties up for sale in North Shields. 6 bed property for £450k, 4 bed houses from £430k, 3 bed properties from £240k, 2 bed houses from £250k, 2 bed flats from £300k and 1 bed flats from £185k.

In terms of properties to rent there were 22 in North Shields. The properties for rent included 4 bed properties from £975pm, 3 bed houses from £650pm, 2 bed properties for £725pm and 1 bed apartments for £550pm.

The majority of the agents who were advertising properties in this area were from North Shields or Tynemouth with 9 active agents: Brannen & Partners, Bridgefords, Fresh, Hunters, Jan Forester, Moving Home, Newriver Reit, Pattinson, RA Jackson & Son and Richardsons.

After speaking to three agents they confirmed that North Shields is the most popular area to live within the North Tyneside area due to the housing, retail and leisure facilities on offer. Agents advised that North Shields is also very popular for those commuters working in Newcastle and Sunderland, due to the excellent motorway and train links that enable workers to be in centre of Newcastle within 25 minutes. However agents did note that this wasn't as important as it was 18 months ago due to there now being a large number of home workers due to the pandemic who are not required to go into the office daily.

Agents advised that North Shields is a buoyant market which has a wide range of property types, sizes and prices. Agents advised that there are some high value areas in North Shields around the Quayside including new luxury apartments and that there are also some low value areas including poor quality flats above shops in the town centre and street fronted terraced housing located just outside the centre.

North Shields is a very popular area particularly for families and couples as the majority of properties on offer are 3 bed houses and 1 and 2 bed apartments. Agents advised that family houses with a garden and parking prove the most popular particularly those within 1 mile of the town centre and the train station, in terms of saleability.

On average properties sell in around 30 days and agents advised that there is on average between 5 and 10 viewings on one single property with offers made in excess of the asking price, which is also pushing up the house prices. The larger 3 and 4 bed properties sell quicker than the smaller 1 beds and one agent advised that it took 91 days to sell a recent 1 bed property in the area.

Agents mentioned that the area has seen a number of new build developments which have been popular. Recent developments have been completed by Bellway Homes and

Miller Homes providing a range of 2, 3 and 4 bed homes. Agents advised that new build schemes offering incentives including the Help to Buy product were more popular than those not offering this scheme and the affordable units were extremely popular with first-time buyers.

Agents advised that the rental market is also very popular, however the majority of people prefer to buy rather than rent. Agents advised that they have had a number of renters moving from nearby cities to North Shields due to its coastal location and the properties on offer are more affordable than neighbouring cities. These renters have moved recently due to the pandemic and not needing to be located as close to the office due to home working.

Whitley Bay

House prices in Whitley Bay have remain pretty stagnant over the past 5 years. In October 2021, there were 94 properties up for sale in Whitley Bay. There was a wide range of available properties for sale including a 10 bed terraced house for £435k, 5 bed properties from £525k, 4 bed properties from £699k, 3 bed properties from £399k, 2 bed properties from £300k, and 1 bed properties from £200k.

In terms of properties to rent there were 15 in Whitley Bay. The properties for rent included 3 bed properties from £1,000pm, 2 bed properties from £750pm and 1 bed properties from £635pm.

The majority of the agents who were advertising properties in this area were from Whitley Bay and there were 10 active agents: Brannen & Partners, Cooke & Co, Embleys, JG Sawyers & Sons, Letsafe, Pattinson, Rook Matthews, Signature, Trading Places and Your Move.

After speaking to two agents they confirmed that Whitley Bay is a very popular area to live within North Tyneside due to its seaside/coastal location and attracts families and older people due to the types of properties on offer.

Agents advised that Whitley Bay had a varied housing market in terms of sales and lettings and that demand has increased for the larger properties over the past few years. The general feeling from all agents was that Whitley Bay it is a pleasant place to live, however there has been an ongoing lack of new homes coming to the market which has put an upward pressure on the house values and made the area unaffordable for some.

On average properties sell in around 17 days and agents advised that there is on average 10 viewings on one single property. The larger 3, 4 and 5 bed properties sell quicker than the smaller 1 and 2 beds and one agent advised that it took 130 days to sell a recent 1 bed property in the area.

Agents mentioned that the area hasn't seen any new build development recently and that there is a need to increase the new build housing offer to stop households moving outside of the Whitley Bay area.

Several agents felt that affordable housing would be popular in the area but advised that very few of their clients have enquired about this type of tenure. It was acknowledged that the area is high value and therefore unaffordable but questioned the feasibility of providing affordable homes in this area due to the client group being established families and older people who in most cases have equity in order to purchase a property.

Agents did advise that there is a general lack of larger 4 and 5 bed homes in the area and that the 2 bed terraced street fronted properties and those apartments which are part of a former B&B/hotel were generally in poor condition and did take some time to sell or rent.

Agents advised that the rental market is very popular, however the majority of people prefer to buy rather than rent. Agents advised that there is a generally lack of choice in the private rented sector market unless you are looking for a flat within a former hotel or B&B.

Tynemouth

House prices in Tynemouth have seen a steady increase over the past 5 years with some properties increasing by £50k in value. In October 2021, there were 28 properties up for sale in Tynemouth. There was a wide range of available properties for sale including an 8 bed property for £1.2m, 5 bed detached properties starting from £650k, 4 bed houses from £620k, 3 bed properties from £540k, 2 bed properties from £525k, and 1 bed properties from £150k.

In terms of properties to rent there were 4 in Tynemouth. The properties for rent included 1 x 3 bed house for £950pm, 1 x 2 bed house for £675pm, 1 x 2 bed flat for £725pm and 1 x 1 bed flat for £575pm.

The majority of the agents who were advertising properties in this area were from Tynemouth or North Shields. There were 3 active agents in Tynemouth: Brannen & Partners, Bridgefords and Jan Forster.

After speaking to two agents they confirmed that Tynemouth is a very popular area to live within North Tyneside due to its seaside/costal location and attracts families due to the types of properties on offer.

Agents advised that Tynemouth had a varied housing market in terms of sales and lettings and that demand has increased for the larger properties over the past few years. The general feeling from all agents was that Tynemouth it is a pleasurable place to live, however there has been an ongoing lack of new homes coming to the market which has put an upward pressure on the house values and made the area unaffordable for some.

On average properties in Tynemouth sell in around 35 days and agents advised that there is on average 8 viewings on one single property. The larger 4 and 5 bed properties sell quicker than the smaller 1 and 2 beds and one agent advised that it took 100 days to sell a recent 1 bed property in the area.

Agents mentioned that the area hasn't seen any new build development recently and that there is a need to increase the new build housing offer to stop households moving outside of the Tynemouth area.

Agents did advise that there is a general lack of larger 4 bed homes in the area and that the 2 bed terraced street fronted properties and those apartments within a HMO which were a former B&B/hotel were generally in poor condition and did take some time to sell or rent.

Agents advised that the rental market is very popular, however the majority of people prefer to buy rather than rent. Agents advised that there is a generally lack of choice in the private rented sector market unless you are looking for a flat within a former hotel or B&B.

Benton

House prices in Benton have seen a steady increase over the past 5 years with properties increasing by £50k. In October, there were 35 properties up for sale in the area including 3 bed properties from £300k, 2 bed properties from £230k and 1 bed properties from £115k.

In terms of properties to rent there were 5 in Benton and all were 2 bed properties ranging from £750pm to £625pm.

The majority of the agents who were advertising properties in this area were from outside of Benton in Newcastle upon Tyne. There is one active agent in Benton: Bowes Mitchell.

Benton is a popular area for families. The majority of the properties on offer in the area are 2 and 3 bed houses and agents advised that generally Benton is more affordable than neighbouring North Shields and Whitley Bay. Agents advised that there hasn't been any new build activity in the area for a while and that there is a general shortage of larger family 3, 4 and 5 bed homes which have been in greater demand over the past 18 months due to home working and families needed extra space at home.

On average properties in Benton sell in around 20 days and agents advised that there is on average 15 viewings on one single property. The 2 and 3 bed properties sell quicker than the smaller 1 beds and the larger 4 beds.

The agent felt that more affordable housing would be popular in the area and advised that some clients do enquire about this type of tenure. The agent advised that the social housing estate is very popular when they come up for re-sale due to being affordable and of a decent size and design.

Agents advised that the rental market is also popular, however there is a generally shortage of rentals particular again larger families homes.

Wallsend

House prices in Wallsend have remained stagnant over the past 5 years. In October 2021, there were 101 properties up for sale in the area including 5 bed homes from £322k, 4 beds from £320k, 3 bed properties from £250k, 2 bed properties from £135k and 1 bed properties from £85k.

In terms of properties to rent there were 21 in Wallsend, 3 bed houses from £825pm, 2 bed houses from £625pm, 2 bed apartments from £425pm and 1 bed flats from £450pm.

The majority of the agents who were advertising properties in this area were from Wallsend or North Shields. There are five active agents in Wallsend: Mike Rogerson, Newriver Reit, Next2Buy, Pattinson and Your Move.

After speaking to one agent that Wallsend is a popular area for families and first-time buyers. The majority of the properties on offer in the area are 2 and 3 bed houses and agents advised that generally Wallsend is more affordable than neighbouring North Shields and Whitley Bay which is why it is more popular with first-time buyers. Agents advised that there hasn't been any new build activity in the area for a while and that this would be very much welcomed, particular 4 and 5 bed homes which are in short supply.

On average properties in Wallsend sell in around 35 days and agents advised that there is on average 12 viewings on one single property. The 1 and 3 bed properties sold quicker than the 2 and 4 beds.

The agent felt that affordable housing would be popular in the area and advised that some clients do enquire about this type of tenure.

Agents advised that the rental market is also popular, however the majority of people prefer to buy rather than rent due the lack of choice in this sector.