Sunderland City Council and South Tyneside Council

Impact Study – International Advanced Manufacturing Park

Topic Paper Update 2016: Housing

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Advanced Manufacturing Park Case Studies

Please note that in this report some of the tables include rounded figures. This can result in some column or row totals not adding up to 100 or to the anticipated row or column 'total' due to the use of rounded decimal figures. We include this description here as it covers all tables and associated textual commentary included. If tables or figures are to be used in-house then we recommend the addition of a similarly worded statement being included as a note to each table used.

1 Introduction

1.1 Overview

Sunderland and South Tyneside Councils are working jointly to secure the development of an International Advanced Manufacturing Park (IAMP) on land to the north of the Nissan factory in Sunderland.

The development will comprise of around 100ha, suitable for uses within the automotive and advanced manufacturing sectors, along with some distribution uses linked to these growth sectors. The IAMP is expected to create 5,228 jobs as a result of activities associated with the core functions of the IAMP (i.e. manufacturing and directly associated activities hereinafter referred to as “core” activities) and a further 323 Full-Time Equivalent (FTE) jobs within the “hub” comprising of a series of ancillary supporting the needs of the workforce, IAMP visitors and surrounding communities known as the “hub”. The IAMP as a completed development in 2027 would, therefore, be expected to create 5,551 jobs. There are also expected to be multiplier effects leading to a total of between 9,248 and 11,230 net additional FTE jobs associated with the IAMP.

This paper examines two key aspects: how many additional households could be created through additional job growth; and the range of dwellings that would be appropriate for these households. This analysis considers the dwelling requirements associated with a total of 11,230 FTE jobs.

The assessment will be used as part of the evidence base to inform the emerging development plans of the two Councils. This paper updates the previous housing topic paper (May 2016).

1.2 Objectives of this paper

The primary objective of this paper is to understand any potential additional housing requirements within the North East LEP (NELEP) area as a result of the development of the IAMP created by the additional workforce.

To meet this objective, the following specific aspects are examined:

- The likely number of additional dwellings to house the employees of the IAMP.
- The likely profile of the IAMP workforce which establishes the type of housing that may be required.
- The current dwelling profile by “Head of Households” SOC across County Durham, South Tyneside and Sunderland and how that data informs this study.
- What the housing aspirations are by SOC to examine if there is any notable variation between aspirations and current dwelling profile.
- The preferred locations for employees living in Durham, Sunderland and South Tyneside.
- The extent to which the recent residential property market offer meets the aspirations of the IAMP workforce.

2 Approach

2.1 Assessment methodology

To estimate the additional properties required to house the employees of the IAMP, four scenarios have been developed that assume different percentages of employees of the IAMP move to the North East to work and already live in the North East.

In developing the range of properties required to house the employees of the IAMP, our approach has been to use primary household survey data, collected as part of the Strategic Housing Market Assessments (SHMAs) to identify the property type and sizes that the workforce of the proposed IAMP will aspire to. This can be identified because households have previously been classified by SOC category and their housing aspirations by property type and size.

This study to date has identified the total number of new jobs (5,228) and the number of jobs that will be created within each local authority by SOC category. Using this information a housing requirement profile by type and size in the prioritised locations has been developed.

The analysis then focuses on the historic residential property market offer on the market by type and size and split between new build and resale from January 2012 - December 2014 (3 years) providing the context for the analysis on the ability of the property offer on the market to accommodate the types and size of property aspirations within each SOC category and to provide a context for the likely gaps in the housing market.

Case studies where local authorities have dealt with similar projects to identify any good practice in terms of forecasting housing numbers, types and locations have also been undertaken.

The local authorities are prioritised as County Durham, Sunderland, South Tyneside and Gateshead.

2.2 Summary of approach

The assessment has involved the following tasks:

1. Estimating the likely number of additional dwellings to house the employees of the IAMP.
2. Identifying the profile of employees by SOC category and where employees are expected to live to prioritise locations.
3. Identifying the current dwelling stock offered by Sunderland, South Tyneside and County Durham taken from the Strategic Housing Market Assessments to provide a context. It is noted that the IAMP labour market catchment is projected to be much wider than these three districts, but these areas constitute where the majority of employees are anticipated to live.
4. Using the aspirations data from the three household surveys undertaken as part of the Strategic Housing Market Assessments to identify the aspirations for housing type and size within all of the IAMP authorities by SOC

category. This determines the current profile of dwelling stock by SOC for where the majority of employees are likely to live.

5. The preferred locations for employees living in Durham, Sunderland and South Tyneside.
6. Comparing the recent property offer (over the past 3 years) with the aspirations identified through the analysis.
7. Identifying ‘gaps’ in provisions/ supply for particular property types and sizes.

3 Profile of Employees

3.1 Overview

Table 3.1 shows the projected profile of employees by SOC and illustrates the distribution of employees by SOC and expected place of residence. This assumes that the SOC profile of the Core and Hub jobs is representative of the total net FTE jobs growth of 11,230.

Table 3.1: Profile of employees by Standard Occupational Classification (SOC) – Core, Hub employees and multiplier jobs

	SOC 1	SOC2	SOC3	SOC4	SOC5	SOC6	SOC7	SOC8	SOC9	ALL
County Durham	295	560	259	178	825	69	71	506	146	2,909
Darlington	16	16	14	6	20	2	4	8	6	93
Gateshead	79	127	125	59	334	28	36	255	49	1,092
Hartlepool	12	117	45	10	65	4	6	20	6	285
Middlesbrough	4	2	6	0	14	2	0	14	2	45
Newcastle Upon Tyne	32	105	28	34	55	12	12	129	22	431
North Tyneside	22	162	42	16	115	12	16	93	22	502
Northumberland	47	111	30	12	95	8	10	55	14	382
Redcar & Cleveland	0	2	2	0	24	0	2	6	4	40
South Tyneside	47	190	111	71	328	36	34	326	79	1,222
Stockton on Tees	6	55	12	4	24	2	4	14	6	127
Sunderland	210	562	467	322	900	138	152	1050	299	4,101
Total	**771**	**2,011**	**1,143**	**712**	**2,800**	**314**	**348**	**2,476**	**655**	**11,230**

SOC 1	Managers, directors and senior officials.	SOC 6	Caring, leisure and other service occupations
SOC 2	Professional occupations	SOC 7	Sales and customer service occupations
SOC 3	Associate professional and technical occupations	SOC 8	Process, plant and machine operatives
SOC 4	Administrative and secretarial occupations	SOC 9	Elementary occupations
SOC 5	Skilled trades occupations		

The overall analysis estimates 11,230 FTE jobs would be created at the IAMP and that they would be drawn from a wide geographical area but with a focus on County Durham, Sunderland and South Tyneside. The analysis indicates that around three quarters of IAMP employees (73.3%) are expected to live in Sunderland, County Durham and South Tyneside and these local authorities have formed the basis of this report given that data is held from primary household surveys.

However if Gateshead is included, then this accounts for 83% of employees of the IAMP and for the detailed property requirements we have included Gateshead.

It would be anticipated that the existing housing market would provide the majority of housing required, particularly as employees are likely to be already living in the region.

Chart 3.1 The distribution of employees by SOC and expected place of residence

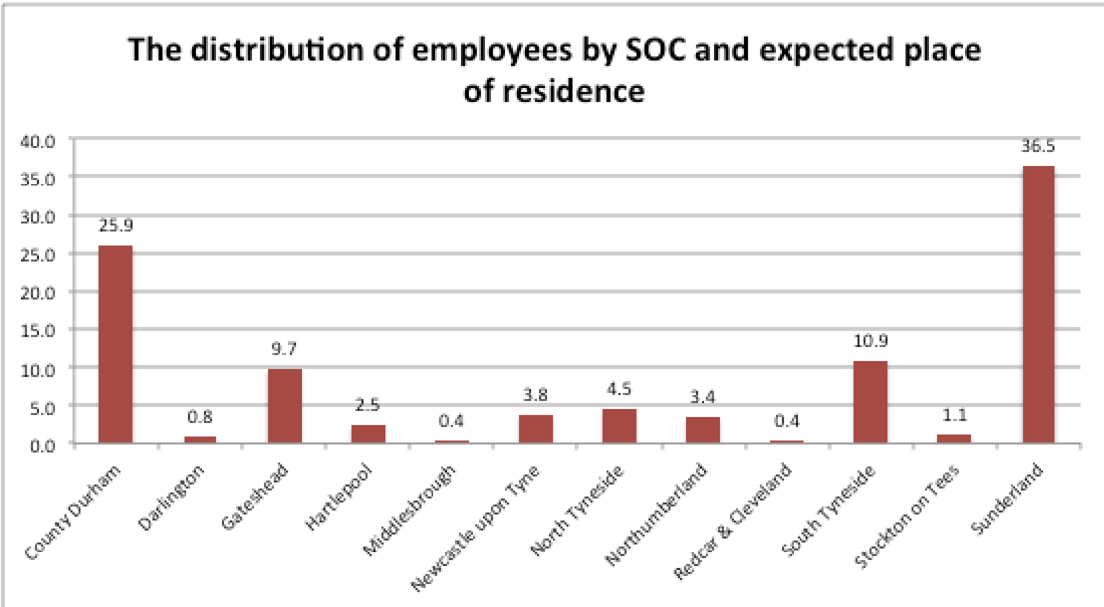


Table 3.2 outlines the percentage of employees in Sunderland, County Durham, Gateshead and South Tyneside by SOC based on Table 3.1. The majority of employees are within SOC1 – SOC5 with fewer at SOC 6 and above. There is general consistency across the three local authorities.

Table 3.2: Percentage of employees in Sunderland, County Durham, Gateshead and South Tyneside by SOC

	SOC 1	SOC 2	SOC 3	SOC 4	SOC 5	SOC 6	SOC 7	SOC 8	SOC 9	Total
County Durham	10.2	19.3	8.9	6.1	28.4	2.4	2.4	17.4	5.0	100.0
Gateshead	7.2	11.7	11.5	5.4	30.6	2.6	3.3	23.3	4.4	100.0
South Tyneside	3.8	15.6	9.1	5.8	26.8	3.0	2.8	26.7	6.5	100.0
Sunderland	5.1	13.7	11.4	7.8	22.0	3.4	3.7	25.6	7.3	100.0

4 Overall Housing Numbers

4.1 Overview

This analysis seeks to establish the potential range of dwellings required based on the potential number of IAMP employees.

Four scenarios have been developed:

- Scenario A assumes that 50% of the IAMP employees move to the North East to work and 50% of employees already live in the North East.
- Scenario B assumes that 25% of the IAMP employees move to the North East to work and 75% of employees already live in the North East.
- Scenario C assumes that 10% of the IAMP employees move to the North East to work and 90% of employees already live in the North East.
- Scenario D assumes that 5% of the IAMP employees move to the North East to work and 95% of employees already live in the North East.

Analysis assumes a ratio of one employee per dwelling but there may be instances where two partners both work at the IAMP.

Table 4.1 below illustrates the overall housing requirements.

Table 4.1: Overall housing requirements

Local Authority	Total	Scenario			
		A	B	C	D
County Durham	2,909	1,455	727	291	145
Darlington	93	47	23	9	5
Gateshead	1,092	546	273	109	55
Hartlepool	285	143	71	29	14
Middlesbrough	45	22	11	4	2
Newcastle Upon Tyne	431	215	108	43	22
North Tyneside	502	251	125	50	25
Northumberland	382	191	96	38	19
Redcar & Cleveland	40	20	10	4	2
South Tyneside	1,222	611	305	122	61
Stockton on Tees	127	64	32	13	6
Sunderland	4,101	2,050	1,025	410	205
Total	**11,230**	**5,615**	**2,808**	**1,123**	**562**

It should be noted that the scenarios are theoretical and simply explore the impact on dwelling requirements based on different assumptions around the proportion of employees moving to the IAMP area of influence (Table 3.1) and employees originating from the area of influence.

Case studies (Appendix C) of advanced manufacturing parks in other locations would suggest that the vast majority of employees are likely to originate from the area of influence and therefore it is suggested that the results of Scenarios C and D are most likely to reflect dwelling requirements for the IAMP. These would indicate a range of between 1,123 and 562 dwellings across the area of influence to accommodate additional employees working at the IAMP. It is recommended that Scenario C is taken as the preferred scenario from which dwelling requirement analysis proceeds.

Table 4.2 below illustrates this by property type for four priority local authorities under Scenario C. This is based on the aspirations of households by SOC.

Table 4.2: Housing requirements by Property Type for Durham, Gateshead, Sunderland and South Tyneside – Scenario C

	% profile	County Durham	Gateshead	South Tyneside	Sunderland	Other districts	Total
Detached house/cottage 1-2 Beds	3.7	11	4	4	15	7	41
Detached house/cottage 3 Beds	18	53	20	22	74	34	203
Detached house/cottage 4 or more Beds	24.3	71	27	30	100	46	273
Semi-detached house/cottage 1-2 Beds	4.3	13	5	5	18	8	48
Semi-detached house/cottage with 3 Beds	14.3	42	16	17	59	27	160
Semi-detached house/cottage 4 or more Beds	3.8	11	4	5	16	7	43
Terraced house/cottage 1-2 Beds	3.2	9	4	4	13	6	36
Terraced house/cottage 3 Beds	3.1	9	3	4	13	6	35
Terraced house/cottage 4+ Beds	0.9	2	1	1	4	2	10
Bungalow 1-2 Beds	11.8	34	13	14	49	23	133
Bungalow 3+ Beds	5.6	16	6	7	23	11	63
Flat/Apartment 1 Bed	1.4	4	1	2	6	3	15
Flat/Apartment 2 Beds	4.4	13	5	5	18	8	50
Flat/Apartment 3+ Beds	0.9	2	1	1	4	2	10
Other 1-2 Bed	0.1	0	0	0	0	0	1
Other 3 Bed	0.2	1	0	0	1	0	3
Other 4+ Bed	0	0	0	0	0	0	0
TOTAL	**100**	**291**	**109**	**122**	**410**	**191**	**1,123**

For completeness, the housing requirements for scenarios A, B and D are outlined below.

Table 4.3: Housing requirements by Property Type for Durham, Gateshead, Sunderland and South Tyneside – Scenario A

	% profile	County Durham	Gateshead	South Tyneside	Sunderland	Other districts	Total
Detached house/cottage 1-2 Beds	3.7	53	20	22	75	35	205
Detached house/cottage 3 Beds	18	263	99	110	370	172	1013
Detached house/cottage 4 or more Beds	24.3	354	133	148	498	232	1365
Semi-detached house/cottage 1-2 Beds	4.3	63	24	26	88	41	242
Semi-detached house/cottage with 3 Beds	14.3	208	78	87	293	136	802
Semi-detached house/cottage 4 or more Beds	3.8	56	21	23	79	37	216
Terraced house/cottage 1-2 Beds	3.2	47	18	20	66	31	181
Terraced house/cottage 3 Beds	3.1	45	17	19	63	29	173
Terraced house/cottage 4+ Beds	0.9	12	5	5	18	8	48
Bungalow 1-2 Beds	11.8	172	65	72	243	113	664
Bungalow 3+ Beds	5.6	81	31	34	115	53	314
Flat/Apartment 1 Bed	1.4	20	7	8	28	13	76
Flat/Apartment 2 Beds	4.4	64	24	27	91	42	249
Flat/Apartment 3+ Beds	0.9	12	5	5	18	8	48
Other 1-2 Bed	0.1	1	0	0	1	1	4
Other 3 Bed	0.2	4	1	2	5	2	14
Other 4+ Bed	0	0	0	0	0	0	0
TOTAL	**100**	**1,455**	**546**	**611**	**2,050**	**953**	**5,615**

Table 4.4: Housing requirements by Property Type for Durham, Gateshead, Sunderland and South Tyneside – Scenario B

	% profile	County Durham	Gateshead	South Tyneside	Sunderland	Other districts	Total
Detached house/cottage 1-2 Beds	3.7	27	10	11	37	17	103
Detached house/cottage 3 Beds	18	131	49	55	185	86	507
Detached house/cottage 4 or more Beds	24.3	177	66	74	249	116	682
Semi-detached house/cottage 1-2 Beds	4.3	31	12	13	44	21	121
Semi-detached house/cottage with 3 Beds	14.3	104	39	44	146	68	401
Semi-detached house/cottage 4 or more Beds	3.8	28	10	12	39	18	108
Terraced house/cottage 1-2 Beds	3.2	23	9	10	33	15	90
Terraced house/cottage 3 Beds	3.1	22	8	9	32	15	86
Terraced house/cottage 4+ Beds	0.9	6	2	3	9	4	24
Bungalow 1-2 Beds	11.8	86	32	36	121	57	332
Bungalow 3+ Beds	5.6	41	15	17	57	27	157
Flat/Apartment 1 Bed	1.4	10	4	4	14	6	38
Flat/Apartment 2 Beds	4.4	32	12	14	45	21	124
Flat/Apartment 3+ Beds	0.9	6	2	3	9	4	24
Other 1-2 Bed	0.1	1	0	0	1	0	2
Other 3 Bed	0.2	2	1	1	3	1	7
Other 4+ Bed	0	0	0	0	0	0	0
TOTAL	**100.0**	**727**	**273**	**305**	**1025**	**478**	**2808**

Table 4.4: Housing requirements by Property Type for Durham, Gateshead, Sunderland and South Tyneside – Scenario D

	% profile	County Durham	Gateshead	South Tyneside	Sunderland	Other districts	Total
Detached house/cottage 1-2 Beds	3.7	5	2	2	7	4	21
Detached house/cottage 3 Beds	18	26	10	11	37	17	101
Detached house/cottage 4 or more Beds	24.3	35	13	15	50	23	137
Semi-detached house/cottage 1-2 Beds	4.3	6	2	3	9	4	24
Semi-detached house/cottage with 3 Beds	14.3	21	8	9	29	14	80
Semi-detached house/cottage 4 or more Beds	3.8	6	2	2	8	4	22
Terraced house/cottage 1-2 Beds	3.2	5	2	2	7	3	18
Terraced house/cottage 3 Beds	3.1	4	2	2	6	3	17
Terraced house/cottage 4+ Beds	0.9	1	0	1	2	1	5
Bungalow 1-2 Beds	11.8	17	7	7	24	11	67
Bungalow 3+ Beds	5.6	8	3	3	11	5	31
Flat/Apartment 1 Bed	1.4	2	1	1	3	1	8
Flat/Apartment 2 Beds	4.4	6	2	3	9	4	25
Flat/Apartment 3+ Beds	0.9	1	0	1	2	1	5
Other 1-2 Bed	0.1	0	0	0	0	0	0
Other 3 Bed	0.2	0	0	0	1	0	1
Other 4+ Bed	0	0	0	0	0	0	0
TOTAL	**100.0**	**145**	**55**	**61**	**205**	**96**	**562**

Sunderland and South Tyneside Councils should consider their Objectively Assessed Housing Need as part of their strategic review of future housing requirements. This should include a review of how economic growth is likely to impact on overall dwelling requirements. Dwelling requirements associated with the IAMP are in addition to the those derived from economic forecasts used in the calculation of OAN.

It should also be noted that the analysis considers gross requirements based on scenario modelling. It does not factor in potential capacity from new build or existing stock which could accommodate households. Therefore, scenario analysis should be considered to be a maximum requirement. Ultimately, the analysis should help to shape the dwelling types and sizes which would support the requirements of IAMP employees.

5 Existing dwelling stock in each local authority by SOC

5.1 Overview

The following tables are based on data collected as part of SHMAs. This considers the current dwelling type and size profiles of the three main local authority areas (County Durham, South Tyneside and Sunderland) by SOC. The tables illustrate the property choices of existing economically active households by SOC in each of the priority local authorities and the total dwelling stock (all households). Data is only available for County Durham, South Tyneside and Sunderland.

5.2 County Durham

Table 5.1 below illustrates the data for County Durham. In summary, 47.7% of economically active households currently live in a 3 or 4 bed detached or semi- detached property. 14.8% of households live in a 3 bed terraced house

Table 5.1	SOC1	SOC2	SOC3	SOC4	SOC5	SOC6	SOC7	SOC8	SOC9	Total
Detached house/cottage 1-2 Beds	2.1	0.9	0.8	0.1	0.4	0.6	0.0	0.0	1.5	0.8
Detached house/cottage 3 Beds	11.9	9.4	8.6	11.1	10.4	7.4	3.2	3.1	2.5	8.7
Detached house/cottage 4 or more Beds	25.7	20.6	13.8	7.8	7.7	6.4	7.6	2.0	2.0	13.4
Semi-detached house/cottage 1-2 Beds	4.2	6.4	9.0	7.4	9.5	10.8	13.2	10.1	11.4	8.2
Semi-detached house/cottage with 3 Beds	18.3	17.8	19.1	23.9	25.2	21.9	20.8	24.3	27.6	21.1
Semi-detached house/cottage 4 or more Beds	3.1	8.0	6.0	3.7	3.7	2.9	3.4	0.3	0.0	4.5
Terraced house/cottage 1-2 Beds	8.9	8.2	16.1	17.9	13.7	16.5	18.1	22.6	16.5	13.5
Terraced house/cottage 3 Beds	10.5	12.6	15.6	14.0	14.5	18.3	18.0	19.2	23.4	14.8
Terraced house/cottage 4+ Beds	3.2	4.7	0.3	1.3	1.9	3.3	2.1	0.2	1.2	2.6
Bungalow 1-2 Beds	3.7	2.9	5.8	4.6	6.3	5.4	6.2	5.7	4.1	4.6
Bungalow 3+ Beds	4.2	3.3	0.7	3.6	2.2	1.5	1.3	3.7	3.3	2.8
Flat/Apartment 1 Bed	0.9	0.3	0.7	3.9	2.3	2.1	1.4	5.6	4.4	1.8
Flat/Apartment 2 Beds	1.6	4.2	3.0	0.3	1.9	2.7	4.8	3.1	1.0	2.6
Flat/Apartment 3+ Beds	0.2	0.1	0.3	0.0	0.1	0.0	0.0	0.0	0.4	0.1
Other 1-2 Bed	0.9	0.0	0.1	0.0	0.0	0.2	0.1	0.0	0.8	0.2
Other 3 Bed	0.3	0.5	0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.2
Other 4+ Bed	0.3	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.1
Total	100	100	100	100	100	100	100	100	100	100
Base	**17601**	**31299**	**10666**	**16918**	**16355**	**9836**	**11129**	**4750**	**6468**	**125022**

5.3 South Tyneside

Table 5.2 illustrates the data for South Tyneside. In summary, 39% of economically active households currently live in a 3 or 4 bed detached or semi- detached property. 18.8% of households live in a 3 bed terraced house.

Table 5.2	SOC1	SOC2	SOC3	SOC4	SOC5	SOC6	SOC7	SOC8	SOC9	Total
Detached house/cottage 1-2 Beds	0.0	0.0	0.0	1.0	2.5	3.0	0.0	0.0	0.8	0.7
Detached house/cottage 3 Beds	4.7	4.8	2.7	2.5	2.3	2.7	1.8	5.4	3.8	3.4
Detached house/cottage 4 or more Beds	16.8	8.1	4.5	3.4	3.1	3.3	1.1	0.0	1.1	5.8
Semi-detached house/cottage 1-2 Beds	3.7	5.3	13.7	5.1	4.4	6.9	8.8	1.9	4.2	6.0
Semi-detached house/cottage with 3 Beds	20.6	21.7	24.5	28.8	29.2	25.3	27.3	20.8	28.7	25.0
Semi-detached house/cottage 4 or more Beds	8.7	9.4	3.0	3.3	1.2	2.1	2.0	0.0	0.0	4.7
Terraced house/cottage 1-2 Beds	6.0	6.9	8.9	9.1	9.1	8.6	12.5	9.8	9.3	8.5
Terraced house/cottage 3 Beds	15.6	17.3	17.1	22.2	23.5	19.6	17.8	18.0	16.7	18.8
Terraced house/cottage 4+ Beds	4.2	4.9	5.1	3.5	0.0	2.3	0.7	0.0	1.3	3.0
Bungalow 1-2 Beds	1.8	3.6	1.9	1.5	3.2	1.0	0.5	1.9	2.4	2.2
Bungalow 3+ Beds	3.4	1.1	2.9	0.5	3.1	0.0	1.1	7.5	0.0	1.7
Flat/Apartment 1 Bed	1.3	2.5	1.9	3.8	2.2	6.1	6.2	15.9	4.5	3.7
Flat/Apartment 2 Beds	8.6	10.0	10.0	11.7	12.8	15.0	13.1	14.3	23.9	12.0
Flat/Apartment 3+ Beds	4.4	4.3	3.8	3.6	3.1	3.0	7.1	4.4	3.2	4.2
Other 1-2 Bed	0.0	0.0	0.0	0.0	0.3	1.1	0.0	0.0	0.0	0.1
Other 3 Bed	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other 4+ Bed	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	100	100	100	100	100	100	100	100	100	100
Base	**3,469**	**6,865**	**2,248**	**4,552**	**3,303**	**2,335**	**2,971**	**888**	**1,431**	**28,062**

5.4 Sunderland

Table 5.3 illustrates the data for Sunderland. In summary, 42.9% of economically active households currently live in a 3 or 4 bed detached or semi- detached property. 14.5% of households live in a 3 bed terraced house.

Table 5.3	SOC1	SOC2	SOC3	SOC4	SOC5	SOC6	SOC7	SOC8	SOC9	Total
Detached house/cottage 1-2 Beds	0.0	0.4	2.2	1.1	0.0	0.0	0.5	0.0	0.0	0.5
Detached house/cottage 3 Beds	5.2	4.8	2.0	4.1	1.1	5.4	2.9	2.1	4.4	3.8
Detached house/cottage 4 or more Beds	18.8	17.3	4.8	6.2	7.9	3.4	4.7	2.1	2.1	9.7
Semi-detached house/cottage 1-2 Beds	7.0	7.4	15.8	9.4	19.5	16.4	16.2	21.0	13.9	12.0
Semi-detached house/cottage with 3 Beds	28.8	24.8	21.6	25.0	23.6	23.4	20.0	19.6	28.0	24.4
Semi-detached house/cottage 4 or more Beds	8.9	8.6	3.1	4.0	4.5	3.7	2.0	0.0	1.0	5.1
Terraced house/cottage 1-2 Beds	1.9	5.4	12.4	7.4	5.0	9.3	13.5	15.0	4.5	7.2
Terraced house/cottage 3 Beds	9.6	13.4	16.8	17.5	16.9	15.8	12.0	19.2	18.8	14.5
Terraced house/cottage 4+ Beds	4.9	5.3	3.4	2.9	2.1	1.1	0.7	1.8	1.9	3.3
Bungalow 1-2 Beds	3.0	4.5	4.4	8.0	5.2	5.6	6.1	2.8	7.3	5.4
Bungalow 3+ Beds	3.3	1.3	0.6	4.9	0.4	1.1	1.1	0.0	3.7	2.3
Flat/Apartment 1 Bed	3.2	1.1	4.2	1.4	2.6	4.3	7.8	6.9	8.0	3.6
Flat/Apartment 2 Beds	3.7	4.8	8.8	6.9	10.8	5.4	11.0	6.5	3.2	6.7
Flat/Apartment 3+ Beds	0.8	0.4	0.0	1.1	0.0	5.0	1.6	0.0	0.0	0.9
Other 1-2 Bed	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.3
Other 3 Bed	0.5	0.0	0.0	0.3	0.6	0.0	0.0	2.8	0.0	0.3
Other 4+ Bed	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	100	100	100	100	100	100	100	100	100	100
Base	**8,857**	**10,388**	**4,317**	**9,996**	**5,136**	**3,487**	**6,589**	**1,542**	**3,145**	**55,591**

5.5 District summary

Table 5.4 illustrates the total percentages for the three local authorities as a district summary.

Table 5.4	SOC1	SOC2	SOC3	SOC4	SOC5	SOC6	SOC7	SOC8	SOC9	Total
Detached house/cottage 1-2 Beds	1.2	0.6	1.0	0.5	0.6	0.8	0.2	0.0	1.0	0.7
Detached house/cottage 3 Beds	9.1	7.8	6.2	7.6	7.4	6.2	2.9	3.1	3.2	6.7
Detached house/cottage 4 or more Beds	22.6	18.1	10.4	6.7	7.2	5.3	5.8	1.8	1.9	11.4
Semi-detached house/cottage 1-2 Beds	5.0	6.5	11.3	7.7	10.9	11.5	13.5	11.4	11.2	8.9
Semi-detached house/cottage with 3 Beds	21.7	19.8	20.4	25.0	25.4	22.7	21.5	22.9	27.9	22.5
Semi-detached house/cottage 4 or more Beds	5.5	8.3	4.9	3.7	3.5	3.0	2.7	0.2	0.3	4.7
Terraced house/cottage 1-2 Beds	6.5	7.4	14.2	13.2	11.3	13.7	15.9	19.4	12.2	11.1
Terraced house/cottage 3 Beds	10.8	13.5	16.1	16.3	16.2	17.9	16.0	19.1	21.3	15.2
Terraced house/cottage 4+ Beds	3.9	4.8	1.7	2.1	1.7	2.7	1.4	0.5	1.4	2.9
Bungalow 1-2 Beds	3.3	3.4	4.9	5.2	5.6	4.8	5.3	4.6	4.8	4.5
Bungalow 3+ Beds	3.8	2.6	1.0	3.6	1.9	1.2	1.2	3.4	3.0	2.5
Flat/Apartment 1 Bed	1.7	0.8	1.7	3.1	2.4	3.2	4.1	7.2	5.4	2.5
Flat/Apartment 2 Beds	3.0	5.1	5.4	4.0	5.2	5.2	8.0	5.2	4.6	5.0
Flat/Apartment 3+ Beds	0.8	0.8	0.7	0.9	0.5	1.6	1.5	0.5	0.6	0.9
Other 1-2 Bed	0.6	0.1	0.1	0.0	0.0	0.3	0.0	0.0	1.4	0.2
Other 3 Bed	0.3	0.3	0.1	0.2	0.1	0.0	0.0	0.6	0.0	0.2
Other 4+ Bed	0.2	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.1
Total	100	100	100	100	100	100	100	100	100	100
Base	**29,927**	**48,552**	**17,231**	**31,466**	**24,794**	**15,658**	**20,689**	**7,180**	**11,044**	**208,675**

Table 5.5 below illustrates the range of dwellings currently occupied by households based on the SOC of the Household Reference Person. It shows that overall, 69.1% of existing residents live in Detached 4 bed, Semi-detached 1-3 bed and Terraced 1-3 bed properties. There are some variations by SOC, most notably higher proportions of SOC1 and SOC2 living in detached 4 and semi-detached 3 bedroom properties. Of SOC6 to SOC9 households, 34.7% currently live in terraced dwellings.

The data clearly shows differentiation in the range of dwellings likely to be occupied by different SOC groups and it is important that a range of dwellings continues to be developed. The data would suggest increasing the proportion of detached 4 bed and semi-detached 3 bed within new housing developments to reflect the profile of dwellings required by SOC1 and 2 groups.

Table 5.5: Range of dwellings currently occupied by households based on the SOC of the Household Reference Person

	SOC 1	SOC 2	SOC 3	SOC 4	SOC 5	SOC 6	SOC 7	SOC 8	SOC 9	Total
Det 4/ Semi 3	44.3	38.0	30.8	31.6	32.6	28.0	27.2	24.7	29.8	33.9
Terr 3	10.8	13.5	16.1	16.3	16.2	17.9	16.0	19.1	21.3	15.2
Terr 1-2	6.5	7.4	14.2	13.2	11.3	13.7	15.9	19.4	12.2	11.1
Semi 1-2	5.0	6.5	11.3	7.7	10.9	11.5	13.5	11.4	11.2	8.9
Flats	5.6	6.7	7.8	8.0	8.1	9.9	13.6	12.9	10.6	8.4
Det 1-3	10.3	8.4	7.2	8.2	8.0	7.1	3.0	3.1	4.2	7.4
Bungalow	7.1	5.9	5.9	8.8	7.4	6.0	6.5	8.0	7.8	7.0
Semi 4	5.5	8.3	4.9	3.7	3.5	3.0	2.7	0.2	0.3	4.7
Terr 4	3.9	4.8	1.7	2.1	1.7	2.7	1.4	0.5	1.4	2.9
Other	1.1	0.5	0.1	0.4	0.3	0.3	0.0	0.6	1.4	0.5
TOTAL	100	100	100	100	100	100	100	100	100	100
Detached 4/ Semi-det 3/ Terraced 3	66.6	65.3	72.4	68.9	70.9	71.1	72.7	74.6	74.4	69.1
Terraced (all sizes)	21.2	25.7	32.0	31.7	29.2	34.3	33.3	21.2	34.8	29.2

Source: Local Authority SHMA household surveys

6 Dwelling Aspirations

6.1 Dwelling aspirations of current households by SOC category

Table 6.1 illustrates the aspirations, as expressed in the household surveys through the Strategic Housing Market Assessments of households by SOC category. This illustrates the type of housing these households would like rather than those they are living in (although this could be the same).

Within the current household context the strongest aspirations are for detached properties with 3 or 4 bedrooms and there is particular interest in bungalows amongst SOC5, 8 and 9. Three bed semi-detached properties also rank relatively highly on the aspiration preferences.

Table 6.1: Aspirations, as expressed in the household surveys through the SHMAs of households by SOC category

	SOC1	SOC2	SOC3	SOC4	SOC5	SOC6	SOC7	SOC8	SOC9	Total
Detached house/cottage 1-2 Beds	3.7	3.0	3.8	1.7	4.4	0.0	6.8	16.4	4.1	3.7
Detached house/cottage 3 Beds	15.7	17.6	23.0	16.6	14.8	14.9	28.0	18.6	13.6	18.0
Detached house/cottage 4 or more Beds	33.9	36.2	23.3	16.4	17.8	16.2	9.6	11.7	4.4	24.3
Semi-detached house/cottage 1-2 Beds	4.8	3.6	3.0	2.8	6.8	6.1	3.3	4.7	9.1	4.3
Semi-detached house/cottage with 3 Beds	8.3	9.3	16.5	26.5	7.5	32.0	17.3	7.3	5.9	14.3
Semi-detached house/cottage 4 or more Beds	1.7	5.2	1.4	2.3	2.8	5.6	7.3	0.0	4.8	3.8
Terraced house/cottage 1-2 Beds	1.0	3.0	2.1	2.8	8.2	2.3	3.0	0.0	10.0	3.2
Terraced house/cottage 3 Beds	1.1	3.0	8.5	4.7	1.0	1.0	4.4	4.6	0.0	3.1
Terraced house/cottage 4+ Beds	2.0	1.3	0.7	0.0	0.8	0.0	0.5	0.0	0.0	0.9
Bungalow 1-2 Beds	10.5	6.0	9.4	16.1	24.0	9.8	5.8	27.4	33.0	11.8
Bungalow 3+ Beds	10.9	4.3	3.7	4.1	5.2	5.4	5.8	6.3	3.0	5.6
Flat/Apartment 1 Bed	3.6	0.8	0.0	0.6	0.0	0.0	3.8	0.0	2.0	1.4
Flat/Apartment 2 Beds	1.3	4.7	4.1	5.5	6.6	3.1	4.6	3.0	10.2	4.4
Flat/Apartment 3+ Beds	1.4	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9
Other 1-2 Bed	0.0	0.0	0.4	0.0	0.0	0.5	0.0	0.0	0.0	0.1
Other 3 Bed	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	0.0	0.3
Other 4+ Bed	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL	100	100	100	100	100	100	100	100	100	100
TOTAL	6,253	11,766	3,072	5,402	3,794	3,223	4,172	940	1,517	40,139

6.2 Overall aspiration applied to the profile of IAMP Employees

Table 6.2 applies the overall aspirations of the existing population (taken from the Durham, South Tyneside and Sunderland SHMA household survey results) to the potential aspirations of the people taking up the new jobs created by the IAMP by SOC category.

Table 6.2: Dwelling type aspiration

	SOC1	SOC2	SOC3	SOC4	SOC5	SOC6	SOC7	SOC8	SOC9	Total
Detached house/cottage 1-2 Beds	29	61	44	12	124	0	24	406	27	410
Detached house/cottage 3 Beds	121	353	263	118	415	47	97	461	89	2027
Detached house/cottage 4 or more Beds	261	727	267	117	500	51	33	290	29	2730
Semi-detached house/cottage 1-2 Beds	37	71	34	20	190	19	11	116	60	485
Semi-detached house/cottage with 3 Beds	64	186	188	189	210	100	60	182	38	1605
Semi-detached house/cottage 4 or more Beds	13	104	16	16	78	18	25	0	32	431
Terraced house/cottage 1-2 Beds	8	60	25	20	230	7	11	0	65	361
Terraced house/cottage 3 Beds	8	60	97	34	29	3	15	113	0	345
Terraced house/cottage 4+ Beds	15	25	8	0	24	0	2	0	0	96
Bungalow 1-2 Beds	81	120	108	115	673	31	20	680	216	1329
Bungalow 3+ Beds	84	87	42	29	145	17	20	155	19	629
Flat/Apartment 1 Bed	28	17	0	4	0	0	13	0	13	152
Flat/Apartment 2 Beds	10	95	47	39	184	10	16	74	67	497
Flat/Apartment 3+ Beds	11	43	0	0	0	0	0	0	0	96
Other 1-2 Bed	0	0	5	0	0	1	0	0	0	8
Other 3 Bed	0	0	0	0	0	10	0	0	0	29
Other 4+ Bed	0	0	0	0	0	0	0	0	0	0
TOTAL	**771**	**2,011**	**1,143**	**712**	**2,800**	**314**	**348**	**2,476**	**655**	**11,230**

Source: Local Authority SHMA household surveys.

The tables indicate that the strongest aspiration in the four authorities is for 3 and 4 bed detached properties and 3 bed semi-detached properties (6,361 or 56.6%).

Whilst it would be anticipated that the existing housing market would provide the majority of housing required, particularly as employees are likely to be already living in the region, the local authorities should recognise the distinctive characteristics of the IAMP workforce and ensure that new developments take account of these findings to help to provide appropriate accommodation for the IAMP workforce.

In the most current SHMA documents for each of the three authorities, the need for larger semi-detached and detached properties are identified as being required and recommendations are made to deliver these types of units on new development.

The location preferences for Durham, South Tyneside and Sunderland are included in Appendix A. There is no available data for Gateshead. The preferred locations are:

- South Tyneside: South Shields Inner, East and Urban Fringe
- Sunderland: Ashbrooke, Barnes/Humbledon
- Durham: Durham City, Central Durham

7 The potential for the current property offer to meet aspirations

7.1 Overview

Having identified the type of properties required and the general proportions / numbers by SOC category, this section of the paper seeks to determine whether the properties that have been on the market over the past three years would have accommodated the likely demand from the projected workforce at the IAMP.

All properties that have come onto the market through Zoopla[1] over the past 3 years have been identified. This is intended as a guide only because we cannot identify their condition and saleability and we have not identified location preferences through the aspirations data within each local authority; therefore properties coming onto the market may not be of the quality, type or location required. It does however, provide a useful reference.

7.2 The existing market offer

Table 7.1 below illustrates the number of properties that came onto the market for sale over the period 2012-2015 in the four authorities of County Durham, Gateshead, South Tyneside and Sunderland. It is split between new build and resale, and property type and size. Over the four years 83,595 properties came onto the market for sale; 9,489 flats and 74,106 houses. This data is provided at local authority level in Appendix B. 6,013 properties sold were new build.

Table 7.1: Number of properties on the market for sale in 2012 to 2015

		New build				Resale			
		2012	**2013**	**2014**	**2015**	**2012**	**2013**	**2014**	**2015**
Zero Bed	**Flat**	4	1	0	0	13	15	28	16
	House	1	7	0	1	239	188	140	267
One Bed	**Flat**	9	25	20	6	490	331	260	499
	House	0	1	0	2	268	186	154	217
Two Beds	**Flat**	48	63	57	86	1691	1268	1035	2120
	House	102	115	75	238	6501	4640	3492	6087
Three Beds	**Flat**	1	1	6	4	299	257	189	400
	House	347	703	588	1533	10127	7438	5408	9324
Four Beds plus	**Flat**	1	0	0	0	82	50	34	80
	House	283	500	307	878	4372	3019	2111	4247
All Beds	**Flat**	63	90	83	96	2575	1921	1546	3115
	House	733	1326	970	2652	21507	15471	11305	20142

Source: Zoopla

1 Estimated by Zoopla to include between 95-98% of the market

Table 7.2 illustrates this by percentage. Of all houses coming onto the market (both newbuild and resale) in 2015, 2.1% are one bedroom houses, 22.7% are two bedroom houses, 47.6% are 3 bedroom houses and 22.4% are 4 bedroom houses. These are consistent figures over the period 2012-2015. Whilst the type of property e.g. detached, semi or terraced cannot be identified this is a positive indicator for the choice of properties that potentially are available.

Individual local authority figures are available in Appendix B.

Table 7.2: Number of properties on the market for sale in 2012 to 2015 (Percentage)

		New build				Resale			
		2012	**2013**	**2014**	**2015**	**2012**	**2013**	**2014**	**2015**
Zero Bed	**Flat**	0.5	0.1	0.0	0.0	0.1	0.1	0.2	0.1
	House	0.1	0.5	0.0	0.0	1.0	1.1	1.1	1.1
One Bed	**Flat**	1.1	1.8	1.9	0.2	2.0	1.9	2.0	2.1
	House	0.0	0.1	0.0	0.1	1.1	1.1	1.2	0.9
Two Beds	**Flat**	6.0	4.4	5.4	3.1	7.0	7.3	8.1	9.1
	House	12.8	8.1	7.1	8.7	27.0	26.7	27.2	26.2
Three Beds	**Flat**	0.1	0.1	0.6	0.1	1.2	1.5	1.5	1.7
	House	43.6	49.6	55.8	55.8	42.1	42.8	42.1	40.1
Four Beds plus	**Flat**	0.1	0.0	0.0	0.0	0.3	0.3	0.3	0.3
	House	35.6	35.3	29.2	32.0	18.2	17.4	16.4	18.3
All Beds	**Flat**	**7.9**	**6.4**	**7.9**	**3.5**	**10.7**	**11.0**	**12.0**	**13.4**
	House	**92.1**	**93.6**	**92.1**	**96.5**	**89.3**	**89.0**	**88.0**	**86.6**

Source: Zoopla

7.3 Case studies

Case studies of other advanced manufacturing projects have been researched. These have been built over varied timescales and for differing purposes and have resulted in the creation of or proposal to bring large employment opportunities to a restricted geographic location.

To obtain further insight into the impact the creation of these large employment developments may have had on housing demand, interviews have been undertaken with key individuals involved in the planning and development of the sites including; the Homes and Communities Agency, local authorities and site developers.

The Factors Impacting Housing Demand Levels and Recommendations
The site locations explored show a range of strategies and methodologies used from sites at differing stages in their life cycle including from the planning stage to expansion. The feedback suggests that the overall impact created by each of the

sites differs greatly. This is due to a number of factors namely its size and time taken to build. However, a common number key themes can be identified from each case that needed to understood and considered to ensure the impact on housing demand is accurately measured.

- **The current status of the housing demand and supply available within the geographic area the site is to be built.** An existing under or over supply of housing present within the area can present either an opportunity, or an area of concern. This data should form the basis of any further research undertaken to assess how any changes to this demand may occur as a result of the development of a site.
- **The site must clearly outline and understand the amount and types of workers needed.** Obtaining a clear understanding of this should allow assessment in the current availability of this type and amount of workforce that is currently living within the area. If a high level of suitable workers are currently located in the area changes to housing demand may be minimal. This is often the case when; a high level of similar businesses are located in the area, the area holds historical links with a certain skill set or specialist educational facilities are located nearby.
- **The location of the site and availability of transportation links may also impact the level housing demand a site will create.** If the site is in a central location and easily accessible many workers may opt to commute, as relocation will not be necessary. Therefore the impact on housing demand will be lessened. Furthermore, the image and desirability of an area can often impact the decision to relocate. Areas deemed highly desirable can prove popular particularly if relocation packages are offered to workers thus easing any financial pressure that may be incurred.
- **The timescales predicated for the build and development of the site.** A number of the case studies presented longer timescales for site development, subsequently these highlighted a more gradual impact to housing demand that is not directly calculated. A site with a longer growth and development plan typically lessens the strain on housing demand and can often be suitably monitored and predicted via regular SHMA updates.

The case studies are included in Appendix C**.**

8 Conclusions and Recommendations

An analysis of the potential requirements for residential property (types and sizes) created by the IAMP has been undertaken which has considered:

- The likely profile of the IAMP workforce which establishes the type and numbers of housing that may be required;
- The current dwelling profile by "Head of Households" SOC for County Durham, South Tyneside and Sunderland;
- What the housing aspirations are by SOC to examine if there is any notable variation between aspirations and current dwelling profile;
- The preferred locations for employees living in Durham, Sunderland and South Tyneside; and
- The extent to which the recent property offer meets the aspirations of the IAMP workforce.

The overall analysis would indicate approximately 11,230 FTE jobs would be created at the IAMP and in multiplier jobs and that they would be drawn from a wide geographical area but with a focus on County Durham, Sunderland and South Tyneside. The analysis indicates that around three quarters of IAMP employees (73.3%) are expected to live in Sunderland, County Durham and South Tyneside and these local authorities have formed the basis of this report. However if Gateshead is included, then this accounts for 83% of employees of the IAMP and therefore for the detailed property requirements Gateshead has been included.

On the basis of four scenarios, the IAMP dwelling requirements outlined above suggest the need for an additional 562-1,123 dwellings based on 90-95% of workers already residing in the sub-region. Higher levels of in-migration would result in higher dwelling demand, ranging between 2,808 and 5,615.

A total of four scenarios have been outlined in this paper including:

- Scenario A - 50% of the IAMP employees move to the North East to work and 50% of employees already live in the North East, yielding a requirement of 5,615 dwellings.
- Scenario B - 25% of the IAMP employees move to the North East to work and 75% of employees already live in the North East, yielding a requirement of 2,808 dwellings.
- Scenario C - 10% of the IAMP employees move to the North East to work and 90% of employees already live in the North East, yielding a requirement of 1,123 dwellings.
- Scenario D - 5% of the IAMP employees move to the North East to work and 95% of employees already live in the North East, yielding a requirement of 562 dwellings.

The analysis is based on available evidence and provides a broad indication of the distribution workers by Local Authority area. It is advised that the numbers of additional dwellings is considered in addition to OAN economic growth scenarios and not a component of them, simply because the jobs growth from IAMP is in addition to economic growth forecasts within the sub-region.

Within the three authorities, 69.1% of existing residents live in Detached 4 bed, Semi-detached 1-3 bed and Terraced 1-3 bed properties. There are some variations by SOC, most notably higher proportions of SOC1 and SOC2 living in Detached 4 and Semi-detached 3 bedroom properties. Of SOC6 to SOC9 households, 34.7% currently live in terraced dwellings.

The data clearly shows differentiation in the range of dwellings likely to be occupied by different SOC groups given the current evidence base within each authority and it is important that a range of dwellings continues to be developed. The data would suggest increasing the proportion of detached 4 bed and semi-detached 3 bed on new developments to reflect the profile of dwellings required by SOC1 and 2 groups. Within the current household context the strongest aspirations are for detached properties with 3 or 4 bedrooms and there is particular interest in bungalows amongst SOC 5, 8 and 9 according aspirations gleaned from household surveys. Three bed semi-detached properties also rank relatively highly on the aspiration preferences.

By applying the overall aspirations of the existing population to the potential aspirations of the people taking up the new jobs created by the IAMP by SOC category the strongest aspiration is for 3 and 4 bed detached properties and 3 bed semi-detached properties. (6,361 or 56.6% of households).

This percentage is reflected in the four authorities of Gateshead, Sunderland, County Durham and South Tyneside. Whilst it would be anticipated that the existing housing market would provide the majority of housing required, particularly as employees are likely to be already living in the region, local authorities should recognise the distinctive characteristics of the IAMP workforce and ensure that new developments take account of these findings to help to provide appropriate accommodation for the IAMP workforce.

In the most current SHMA documents for each of the three authorities, the need for larger semi-detached and detached properties are identified as being required and recommendations are made to deliver these types of units on new development. The preferred locations within the three authorities where data is held are:

- South Tyneside: South Shields Inner, East and Urban Fringe
- Sunderland: Ashbrooke, Barnes/Humbledon
- County Durham: Durham City, Central Durham

41.7% of houses coming onto the market in 2015 are 3 bed houses and a further 24.7% are 2 bed houses. These are consistent figures over the past 3 years. Whilst the type of property e.g. detached, semi or terraced cannot be identified this is a positive indicator for the choice of properties that potentially are available.

It is recommended that:

- When new developments are being proposed, Councils should consider the extent to which this will reflect the type/size dwelling profile aspirations and expectations of IAMP employees as evidenced in the study. In particular, the available evidence would suggest the development of 3 and 4 bedroom detached houses, semi-detached houses with 3 or 4 bedrooms would be appropriate for IAMP employees, along with bungalows;

- When considering Objectively Assessed Housing Need, Councils should acknowledge the role of the IAMP in delivering economic growth and a potential impact on overall housing numbers; and
- Under Duty to Co-operate, Councils should consider how the development of the IAMP is likely to affect their housing markets and the impact should be regularly reviewed.

Appendix A

Location Preferences

A1 Location preferences

The purpose of this appendix is to summarise the location preferences stated by households planning to move by current District and Standard Occupational Classification (SOC). It is based on the data obtained from SHMA household surveys. It includes data on locational preferences both within and outside the current District of residence.

A1.1 Durham

	SOC 1	SOC 2	SCO 3	SOC 4	SOC 5	SOC 6	SOC 7	SOC 8	SOC 9	Total
Barnard Castle	1.1	2.1	0.0	0.7	1.5	6.9	1.7	10.9	0.0	1.9
Bishop Auckland	1.4	1.4	5.1	1.8	7.8	0.0	4.7	37.1	26.7	3.4
Central Durham	4.6	8.9	0.0	25.7	4.6	16.4	24.3	14.2	0.0	12.1
Chester-le-Street	4.1	6.0	5.7	4.1	0.0	14.1	5.4	0.0	16.4	5.3
Consett	0.0	4.4	0.0	5.2	8.9	23.5	11.0	0.0	30.1	5.7
Crook and Willington	0.0	0.0	0.0	2.5	4.0	2.4	0.0	0.0	0.0	0.8
Durham City	20.3	30.5	11.7	19.0	20.5	0.0	2.7	14.2	0.0	20.4
Easington and Peterlee	7.4	3.8	0.0	0.0	10.7	6.3	11.0	0.0	0.0	4.8
Newton Aycliffe	0.0	0.0	18.2	6.0	7.8	0.0	0.0	0.0	0.0	2.4
Seaham	4.9	4.2	0.0	2.5	3.0	0.0	0.0	0.0	0.0	2.9
Sedgefield	5.5	2.8	0.0	1.8	0.0	0.0	7.1	0.0	0.0	3.0
Spennymoor	1.8	1.8	0.0	8.3	0.0	6.3	0.0	7.6	0.0	2.7
Stanley	0.0	0.8	0.0	0.0	4.5	0.0	2.7	0.0	0.0	0.9
Upper Teesdale	2.7	0.3	0.0	0.0	2.8	0.0	0.0	0.0	0.0	0.7
Weardale	2.8	1.3	0.0	0.7	0.0	0.0	6.2	0.0	0.0	1.8
Wingate	6.0	0.0	23.3	0.0	0.0	0.0	0.0	0.0	0.0	2.1
Darlington	0.0	2.4	7.0	0.0	7.0	0.0	0.0	0.0	0.0	1.8
Hartlepool	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stockton on Tees	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Middlesbrough/ Redcar and Cleveland	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Sunderland	0.0	0.9	3.1	8.3	0.0	0.0	0.0	0.0	0.0	1.8
South Tyneside	2.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Gateshead	2.1	2.4	0.0	0.0	0.0	0.0	3.2	0.0	26.7	1.9
Newcastle/North Tyneside	6.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Northumberland	6.9	0.0	18.2	2.1	4.6	0.0	0.0	0.0	0.0	2.6
Yorkshire and the Humber	4.4	5.2	0.0	5.2	0.0	0.0	3.6	0.0	0.0	3.9

North West	1.8	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Elsewhere in the UK	8.0	9.8	5.8	5.6	0.0	0.0	14.9	0.0	0.0	7.9
Outside UK	0.0	1.4	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.6
Co. Durham (not specified)	5.1	4.8	1.9	0.7	8.3	24.1	0.9	16.0	0.0	4.9
Tyne and Wear (not specified)	0.0	0.0	0.0	0.0	4.0	0.0	0.0	0.0	0.0	0.3
Tees Valley (not specified)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
North East (not specified)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL	100	100	100	100	100	100	100	100	100	100

A1.2 South Tyneside

	SOC 1	SOC 2	SCO 3	SOC 4	SOC 5	SOC 6	SOC 7	SOC 8	SOC 9	Total
Hebburn	1.7	9.7	0.0	7.2	19.1	9.8	27.2	10.2	0.0	10.1
Jarrow	3.6	7.0	0.0	16.9	11.6	8.4	0.0	13.8	0.0	7.1
South Shields Inner	22.0	20.2	24.7	18.6	33.7	42.1	25.5	76.0	54.5	26.4
South Shields West	2.9	0.9	4.3	15.0	5.0	11.1	6.5	0.0	0.0	4.7
South Shields East	26.0	9.1	7.7	12.8	3.9	4.6	23.0	0.0	24.7	12.7
Urban Fringe	16.8	30.0	29.1	14.1	15.3	18.5	11.2	0.0	0.0	20.4
Gateshead	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.1
Sunderland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
North Tyneside	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
County Durham	8.8	0.0	0.0	2.8	0.0	0.0	0.0	0.0	0.0	1.7
Tees Valley	2.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8
Northumberland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sunderland/ North Tyneside	4.8	6.4	11.7	3.4	3.9	0.0	0.0	0.0	0.0	4.5
Elsewhere in North East	2.4	5.6	7.7	0.0	3.6	0.0	0.0	0.0	20.8	3.4
Outside NE	8.9	8.0	14.7	7.9	3.9	5.4	6.7	0.0	0.0	7.5
TOTAL	100	100	100	100	100	100	100	100	100	100

A1.3 Sunderland

	SOC 1	SOC 2	SCO 3	SOC 4	SOC 5	SOC 6	SOC 7	SOC 8	SOC 9	Total
Carley Hill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Castletown	2.4	0.0	4.4	2.9	0.0	0.0	0.0	0.0	0.0	1.5
Downhill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fulwell	2.3	4.6	12.8	2.5	0.0	7.1	20.7	0.0	0.0	5.9
Hylton Castle	2.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Hylton Red House	0.0	0.0	0.0	0.0	0.0	0.0	10.6	0.0	0.0	1.0
Marley Pots / Witherack	0.0	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Roker	1.7	14.2	3.1	2.4	0.0	0.0	10.0	0.0	0.0	5.5
Southwick	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Town End Farm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ashbrooke	13.5	8.3	26.5	9.2	27.3	23.4	13.7	0.0	0.0	14.4
Barnes/Humbledon	3.9	5.4	8.1	6.0	5.3	20.2	0.0	61.3	34.7	6.7
City Centre	0.0	0.0	0.0	0.0	15.7	0.0	0.0	0.0	0.0	1.3
Ford	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Grindon	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Hendon	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Millfield	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pallion	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	38.0	0.5
Pennywell	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
South Hylton	2.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Thornley Close	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Easington Lane	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
East Rainton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fencehouses	0.0	0.0	0.0	5.0	0.0	0.0	0.0	0.0	27.3	1.2
Hetton Downs / Eppleton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Hetton-le-Hole	0.0	0.0	0.0	0.0	0.0	0.0	0.0	38.7	0.0	0.3
Houghton-le-Spring	5.3	0.0	3.3	7.5	0.0	0.0	0.0	0.0	0.0	2.8

Moorsley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newbottle	0.0	0.0	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Penshaw	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Shiney Row	1.7	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8
Doxford Park	5.9	1.6	4.2	5.0	0.0	0.0	10.3	0.0	0.0	4.0
East Herrington	3.6	1.7	4.4	6.5	0.0	0.0	0.0	0.0	0.0	2.8
Farringdon	0.0	0.0	0.0	2.8	0.0	0.0	0.0	0.0	0.0	0.5
Grangetown	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ryhope	1.9	0.0	0.0	5.6	0.0	0.0	4.5	0.0	0.0	1.7
Silksworth	0.0	2.1	0.0	3.0	0.0	9.2	9.8	0.0	0.0	2.4
Albany	0.0	0.0	0.0	4.4	0.0	6.0	0.0	0.0	0.0	1.1
Ayton	1.7	0.0	0.0	2.0	4.5	0.0	0.0	0.0	0.0	1.1
Barmston	0.0	0.0	0.0	0.0	0.0	13.1	0.0	0.0	0.0	0.7
Biddick/Columbia	0.0	1.4	0.0	0.0	0.0	0.0	7.8	0.0	0.0	1.1
Blackfell	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Concord	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Donwell	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fatfield	1.5	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Harraton	1.8	0.0	2.9	0.0	0.0	8.4	0.0	0.0	0.0	1.2
Lambton	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3
Oxclose	0.0	0.0	3.7	2.3	0.0	0.0	0.0	0.0	0.0	0.8
Rickleton	0.0	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Springwell	0.0	0.0	0.0	8.4	0.0	6.0	0.0	0.0	0.0	1.7
Sulgrave	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Usworth	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Washington Village	6.6	0.0	0.0	4.1	11.7	0.0	0.0	0.0	0.0	3.1
Newcastle	7.8	3.5	0.0	3.1	0.0	0.0	0.0	0.0	0.0	3.1
Gateshead	1.7	1.7	0.0	2.0	0.0	0.0	0.0	0.0	0.0	1.1
North Tyneside	0.0	0.0	3.4	2.0	0.0	0.0	0.0	0.0	0.0	0.7
South Tyneside	2.0	1.7	0.0	5.7	5.0	0.0	0.0	0.0	0.0	2.2
Easington/ Seaham	0.0	0.0	0.0	0.0	0.0	6.7	0.0	0.0	0.0	0.4
Durham City	3.9	4.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.0
Elsewhere in Co. Durham	1.8	5.0	4.4	2.3	26.0	0.0	7.4	0.0	0.0	5.3
Tyne and Wear	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4

Elsewhere in NE	5.6	6.9	8.0	0.0	0.0	0.0	5.2	0.0	0.0	4.3
Elsewhere in UK	9.6	12.4	7.4	5.1	0.0	0.0	0.0	0.0	0.0	6.9
Outside UK	4.2	3.8	0.0	0.0	4.5	0.0	0.0	0.0	0.0	2.2
Total	100	100	100	100	100	100	100	100	100	100

Appendix B

Properties coming to the market 2012-2014 in each focus Local Authority

B1 Properties coming to the Market 2012-2014 in each focus Local Authority

The following table shows the number of units coming onto the market by property type and size. All beds include all properties (all bed sizes). Zero beds is more difficult to explain; for flats it may mean bedsits or studios. The data is reported in this way and therefore is reported as such. Identifying larger properties in line with preferences of the report is a more useful role for the data.

			New build				Resale			
			2012	2013	2014	2015	2012	2013	2014	2015
County Durham	All Beds	Flat	25	13	20	14	415	281	225	535
		House	385	766	585	1671	11238	8177	5891	11996
South Tyneside	All Beds	Flat	10	8	6	18	763	721	484	1097
		House	69	131	157	351	2426	1889	1268	2477
Sunderland	All Beds	Flat	14	46	18	9	566	390	389	615
		House	168	217	99	383	4626	3206	2793	3196
Gateshead	All Beds	Flat	14	23	39	55	831	529	448	868
		house	111	212	129	247	3217	2199	1353	2473
County Durham	Zero Bed	Flat	0	0	0	0	2	4	0	6
		House	1	7	0	1	167	144	106	197
South Tyneside	Zero Bed	Flat	0	0	0	0	0	1	0	1
		House	0	0	0	0	18	10	7	8
Sunderland	Zero Bed	Flat	3	1	0	0	5	6	25	4
		House	0	0	0	0	29	12	12	34
Gateshead	Zero Bed	Flat	1	0	0	0	6	4	3	5
		House	0	0	0	0	25	22	15	28
County Durham	One Bed	Flat	1	0	0	0	95	67	57	102
		House	0	0	0	1	117	82	67	126
South Tyneside	One Bed	Flat	0	0	0	0	97	70	50	134
		House	0	1	0	0	22	21	19	9
Sunderland	One Bed	Flat	4	20	15	2	150	108	80	137
		House	0	0	0	0	92	62	60	48
Gateshead	One Bed	Flat	4	5	5	4	148	86	73	126
		House	0	0	0	1	37	21	8	34
County Durham	Two Beds	Flat	23	13	19	14	278	179	152	386
		House	49	61	41	147	3428	2488	1877	3787
South Tyneside	Two Beds	Flat	9	8	6	18	508	500	335	731
		House	13	15	8	33	602	424	284	578
Sunderland	Two Beds	Flat	7	25	3	7	364	242	248	411
		House	28	21	6	35	1429	983	843	891
Gateshead		Flat	9	17	29	47	541	347	300	592

	Two Beds	**House**	12	18	20	23	1042	745	488	831
County Durham	**Three Beds**	**Flat**	0	0	1	0	29	24	12	33
		House	183	403	354	994	5155	3816	2691	5281
South Tyneside	**Three Beds**	**Flat**	1	0	0	0	132	129	86	191
		House	45	81	101	216	1325	1090	752	1411
Sunderland	**Three Beds**	**Flat**	0	0	0	0	41	26	29	55
		House	65	112	58	184	2184	1487	1338	1473
Gateshead	**Three Beds**	**Flat**	0	1	5	4	97	78	62	121
		House	54	107	75	139	1463	1045	627	1159
County Durham	**Four Beds plus**	**Flat**	1	0	0	0	11	7	4	8
		House	152	295	190	528	2371	1647	1150	2605
South Tyneside	**Four Beds plus**	**Flat**	0	0	0	0	26	21	13	40
		House	11	34	48	102	459	344	206	471
Sunderland	**Four Beds plus**	**Flat**	0	0	0	0	6	8	7	8
		House	75	84	35	164	892	662	540	750
Gateshead	**Four beds plus**	**Flat**	0	0	0	0	39	14	10	24
		House	45	87	34	84	650	366	215	421

Appendix C

Advanced Manufacturing Park Case Studies

C1 South Yorkshire AMP

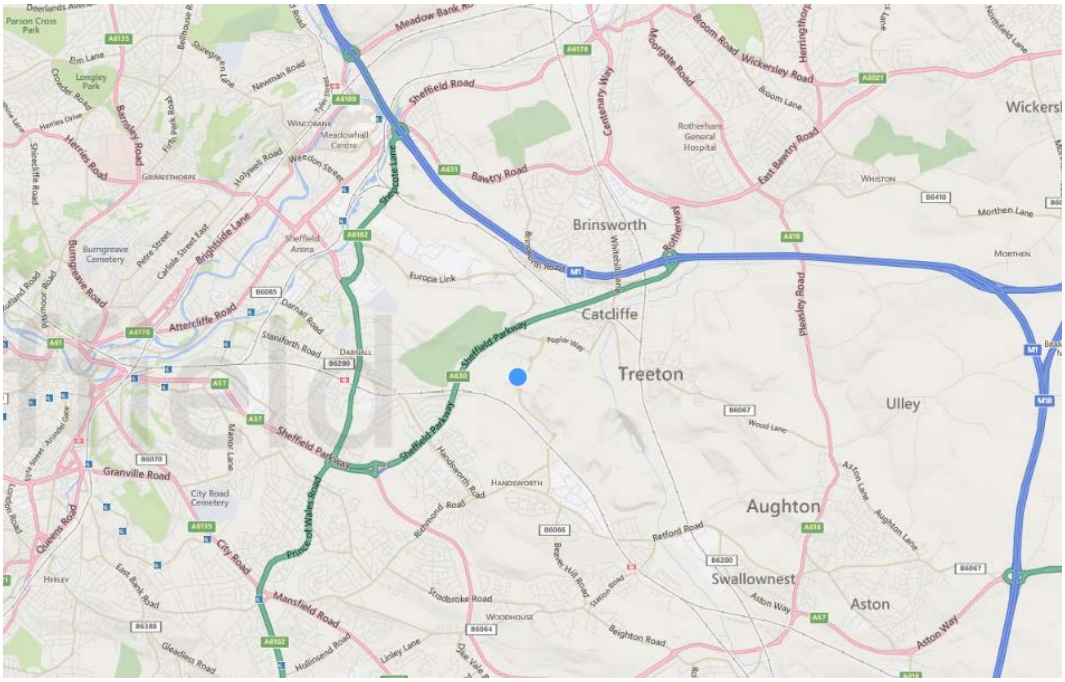
C1.1 Overview

The South Yorkshire Advanced Manufacturing Park is a 100-acre site on the Rotherham-Sheffield border in South Yorkshire. The site is well established and has been present for over 20 years.

During this time the site has experienced significant investment via the *"R-evolution at the AMP"* scheme. The scheme focuses on further developing the site to attract manufacturing companies and it is predicted to create more high quality jobs and investment.

Further plans for the project encompass the development of 3,890 homes over the next 10-15 years. The plan is to accommodate the growing workforce at the site and to create a more commercially viable uses on the site.

Location of AMP site



C1.2 Summary

- Joint venture between public and private sector organisations including Harworth Estates (owner of the land).
- Companies located on the site include; aerospace, automotive, sport, environmental, nuclear, and energy, oil and gas, defence and construction.
- Companies based at the park: The University of Sheffield Advanced Manufacturing Research Centre with Boeing (AMRC), Rolls-Royce, Castings

Technology International (CTi), TWI Technology Centre (Yorkshire) and the Nuclear AMRC.

- Currently employs over 700 people with the plans for the next 10-15 years predicting that by completion the site will provide over 6,000 jobs

C1.3 Housing Strategies and Challenges

Rotherham Council's planning department highlighted that no formal housing strategy was devised for the development prior to planning permission being granted. They identified that the initial proposal was made around 15 years ago and at that point it was not considered a concern or a consideration during the planning application process. The council stated that the slow speed with which the park has grown since has supported the decision to not account for any further housing demand as a result of the AMP.

The Councils stated that the skilled nature of the workforce in Rotherham and surrounding areas acted as a draw for businesses and ensured that housing demand remained consistent, as most workers would already live within the area or be within a commutable distance. This is supported by the IIA (Integrated Impact Assessment, 2013) that highlighted that the proportion of Rotherham's working population employed in manufacturing and construction is higher than the national average.

However, the SHMA data for Rotherham does highlight an increase in migration to the area between 2008 and 2010. It shows that an estimated 3,325 households were newly formed within the Borough between 2008 and 2010 (1,663 per annum) suggesting that the presence of the AMP may have impacted on housing demand.

The Council felt that the biggest challenge they had faced was a lack of public transport to the Park. They felt that this was an area they had overlooked and continues to pose a challenge to them and employers. This was also identified as a challenge in the IIA, which stated that; *"Polices promoting new development, for example housing and employment allocations may put pressure on the transport network. The strategic road network in Rotherham (including the A633 and A630) is vulnerable to congestion and diversion from the M1."*

The proposed figure of up to 4,000 properties to be built on the development was agreed as a number that would assist the housing need in the area as it was predicted that after 2016, more of Sheffield's housing needs would be met in Rotherham. Research by DTZ for the Regional Assembly confirmed that Sheffield and Rotherham form a single housing market. This was also supported by the IIA that indicated that any increases in local job opportunities would likely put pressure on housing requirements via increased migration into Rotherham.

C2 Case Study 2 - Teesside Advanced Manufacturing Park (AMP), Middlesbrough

C2.1 The Site

Teesside Advanced Manufacturing Park (TAMP) is a triangular site located less than a mile from Middlesbrough town centre and is situated between the A66 trunk road and Riverside Park in Middlesbrough. The overall area is bordered to the west, east and north by the River Tees and to the South by the A66 dual carriageway and Darlington to Saltburn railway line.

The site has been designated as an Enterprise Zone as Middlesbrough's contribution to a suite of Enterprise Zone sites across the Tees Valley.

Site Location

C2.2 Summary

Teesside Advanced Manufacturing Park is adjacent to the highly successful Riverside Park Industrial Estate as well as the wider Tees Valley industrial heartland and offers development opportunities for companies in the advanced manufacturing and engineering, chemicals and renewable energy sectors. The TAMP site has been recognised as to be a catalyst for economic diversification and growth in the Tees Valley sub-region.

The area holds a great history of engineering, energy production and chemical industries. Hartlepool and the wider Tees Valley is home to many of the major players in these industries including Darchem, Cummins, Caterpillar, Sabic, Johnson Matthey, Huntsman, EDF Energy Renewables, Deep Ocean, JDR Cables, AMEC and Sembcorp.

The site is viewed as a key regeneration opportunity and a highly accessible 'gateway' site in Middlesbrough and represents an opportunity to enhance the potential of the Riverside Park Employment Area. It is predicted that the site will create 84 new jobs by 2015 – confirmation of completion of this target has not been identified.

C2.3 Housing Strategies and Challenges

The Tees Valley has a strong existing engineering and chemical industry skills base. This is supported by local Colleges and Universities who work closely with local businesses to deliver and develop the skills required.

As a result of the existing industry located across the Tees Valley, it is believed that the impact on housing demand will be minimal. This is due to; the current accessibility of local workers who are suitable the skills needed at the site and due to the excellent transportation links around the site, it is predicted that many will opt to commute.

C3 Case Study 3 - Ansty Park/ MIRA Technology Park, West Midlands

C3.1 The Site

Both of the sites fall within the Rugby Borough Council area and the Council highlighted that any housing demand changes or strategies have been undertaken in tandem. Therefore both schemes are considered jointly.

Ansty Park, located adjacent to Junction 2 of the M6, will provide 1.5 million sq ft of space set in 100 acres of landscaped parkland. Located in the heart of the West Midlands, Ansty Park science and technology campus is designed to host some of the world's most progressive organisations

Site Location

C3.2 Summary

Ansty Park is a development of 1.5 million sq feet of business space set in 100 acres of landscaped parkland.

Phase 1 is complete and now the home to the Sainsbury's Store Support Centre and the Manufacturing Technology Centre (MTC) employing over 900 people. Phase 2 will comprise of six state-of-the-art buildings ranging in size

The site is promoted by a number of partners. These include: Coventry City Council, Highbridge Properties, Homes and Communities Agency, Manufacturing Technology Centre, Rugby Borough Council.

MIRA Technology Park is the UK Automotive Enterprise Zone. MIRA's estate covers an area of approximately 874 acres and the site has over 58 miles (95km) of test track, which along with its other specialist testing equipment make it a unique automotive testing facility within the UK.

MIRA Technology Park was awarded Enterprise Zone status in August 2011 by the UK government and is the only transport sector focused Enterprise Zone in the UK.

Presently there are some 50 buildings on the site employing over 650 people on the campus either for MIRA or related companies based on site.

Companies based at the site include: Land Rover, Jaguar, Michelin, Pirelli, Triumph, Ashok Leyland, Bosch and Continental

C3.3 Housing Strategies and Challenges

The location of the Ansty Park Site ensures it is both appealing to investors and workers due to its proximity to Coventry however, the site falls in the Rugby Council Borough area and therefore an assessment of Rugby Borough Council’s strategy has been untaken.

Rugby Borough Council conducted a robust range of assessments prior to the development of both projects in order to assess the impact on housing demand. They indicated this has presented them with a challenge and accurately measuring housing demand has been difficult. This has been due to the presence of a number of other schemes and large employment sites within the area. All sites were in different locations across the Borough, required different workforce/skill sets and the overall plans for each park varied greatly as a result.

When assessing the impact on housing demand, the council examined the area as a whole due to the large developments taking place. They suggested that although they are confident of their findings, measuring the impact of the parks separately would provide more accurate results and recommended that Sunderland and South Tyneside Councils adopt this approach if possible.

Ansty Park is considered the larger park of the two projects. Despite this, the Council believe that it had has little impact on housing demand within the Borough. They believe that is due to the location of the site being 10 minutes from Coventry. The Council believe that most employees commute to the Park from Coventry.

The strategies followed by Rugby Borough Council to ensure an accurate assessment of the changes in housing demand were based on understanding current employment within the Borough and ensuring this was compared with the housing supply present.

C4 Case Study - Airbus, Broughton and The Airfields Site, Flintshire

C4.1 Airbus, Broughton - The Site

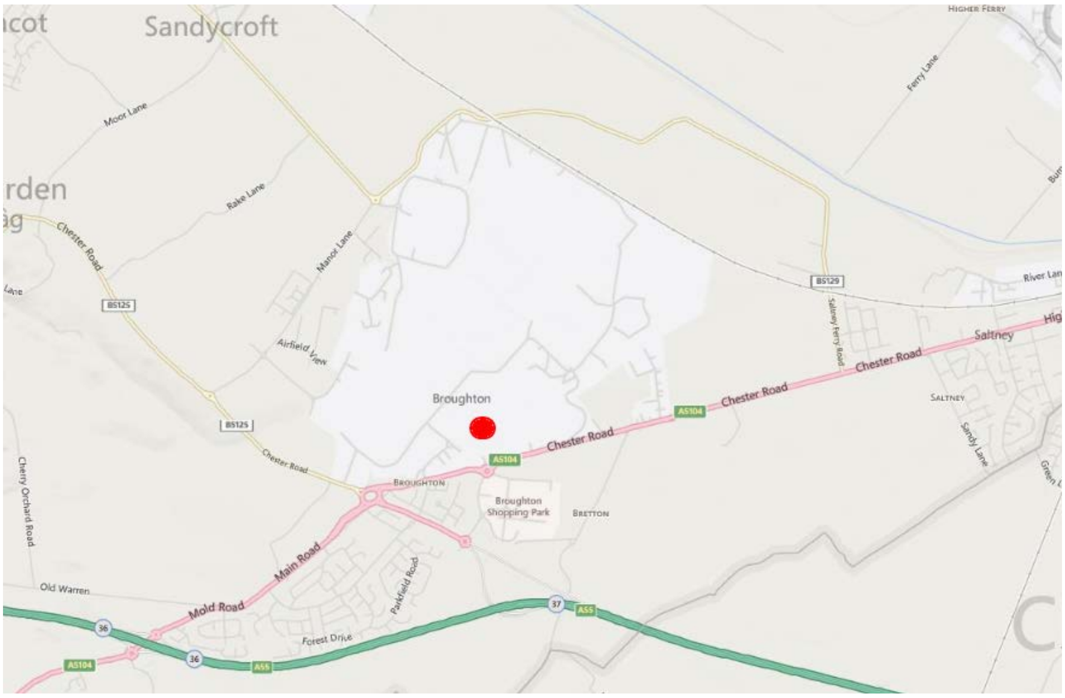
Airbus UK is a subsidiary of Airbus SAS, which produces wings for the Airbus group. The company's Broughton site is the UK's largest single manufacturing site and currently employs around 6,000 people within Flintshire.

Despite not being a specifically defined as advanced manufacturing, the large employment opportunities offered by the site present potential impacts on housing demand within the Borough of Flintshire.

The facility is made up of 2 sites:

- The West Factory – Built in 2003 which makes wings for the Airbus A380 superjumbo
- The North Factory – The new, 46,000 sq metre factory is Broughton's largest development and was built in 2011. The £400m plant is responsible for making carbon-fibre wings for Airbus's new A350 airliner and accommodates approximately 650 workers.

Site Location



C4.2 Housing Strategies and Challenges

The Airbus site has been in existence for many years, as a result, Flintshire Borough Council stated that the *"Workforce has been integrated into the local housing market for a very long time"*. Feedback from the council suggests that no separate assessment has ever taken place to accommodate a change in housing demand. The Council felt that due to the length of time that the site has been present, *"No big bang moment"* with Airbus and its respective commercial and operational growth. They believe that any impacts have developed over a long period of time and thus, felt that there has not been a specific housing response.

It was suggested that although demand for housing has been influenced, they identified that this is likely as a result of a protracted period of housing under supply that appears to have raised the overall demand within the area. It is believed that this has been further exacerbated by significant and fairly consistent under supply in Cheshire West that has served to reinforce a westerly migration trend or pattern.

The new Local Plan for Flintshire highlights this is now being addressed by the release of Green Belt land and an annual housing target of circa 1,100 new dwellings per annum (plans highlight that aside from the Green Belt land, much of this is situated in Ellesmere Port and the former Vale Royal area of the Borough).

The Council also indicated that good transport links to the site have also meant that the employment catchment for Airbus extends both into England and outwards toward Denbighshire in Wales. As a result, they believe the location of a similar site would need to assess its accessibility as this may further impact on change to housing demand.

C4.3 The Site - The Airfields Site, Deeside

The 250-acre Airfields site has been earmarked for a major industrial, commercial and housing development site. Located next to the Deeside industrial estate it will form another part of the Deeside Enterprise Zone. The project is predicted to create around 800 jobs.

Calbee Inc announced in October 2014 it was to open a new factory on the site in 2015 that would create the first 100 jobs in the area.

C4.4 Flintshire - Housing Strategies and Challenges

The overall housing delivery in Flintshire has shown positive growth trends post recession and the level of new build is picking up with a stronger focus and interest within Welsh border locations including those in close proximity to the site itself (i.e. Broughton, Kinnerton, Harwarden, Ewloe, Penyffordd, Hope, Rossett).

The Flintshire Unitary Development Plan has reflected the fact that Broughton is an important centre for employment and it has made a sustainable housing allocation south of the site for up to 300 homes.

This site is now under construction and the Council stated that they intend to conduct an occupancy survey in the area within the next 2 years. This will aim to establish who has moved in from where and whether this was for employment related reasons. The Council stated that they believe this may provide them with some evidence which could assist in planning for future growth proposals for the area.

Overall, the Council noted that the key areas of significant employment are assessed in the planning strategy process and that the Housing Needs Assessments also looks generally at potential employment growth scenarios. They have indicated that this approach has worked well and has not resulted in any major housing challenges for the Borough and therefore, Flintshire Borough Council would advise that a similar strategy may assist when analysing any changes that may occur in housing demand for IAMP.

The development plans for the Airfields Site have come at a time when the significant job losses have been experienced in the area. Flintshire Council stated that it had recorded 258 job losses in the industrial zone between April 2013-14. Furthermore, the paper manufacturer UPM announced plans to close one of two machines at its plant on Deeside industrial park that could affect up to 130 jobs. Therefore, the demand for many jobs created is likely to be met by the current supply of workforce available within Flintshire. The data published on behalf of the UK government indicates Flintshire employs 29.8% of people in the manufacturing sector compared with 11.8% in Wales and 8.5% in the UK.