

## Warwick Local Plan Examination

### CLG 2012-based household projections

This note has been produced by Warwick District Council at the Inspector's request. It sets out the data from the 2012-based CLG household projections and provides a comparison with figures in the Joint Coventry & Warwickshire Strategic Housing Market Assessment (SHMA) update of September 2014.

The 2012-based CLG household projections were published on 27<sup>th</sup> February 2015. The projections cover the period mid-2012 to mid-2037 and also include household estimates going back to 1991. The household projections are trend-based and indicate the number of additional households that would form if recent demographic trends continue. The 2012-based household projections are largely underpinned by the 2012-based subnational population projections (which were published in May 2014). The projections can be found at <https://www.gov.uk/government/statistical-data-sets/live-tables-on-household-projections>

	2012	2029	2031	2037
Coventry	130,690	162,377	166,035	176,570
North Warwickshire	26,015	28,756	29,059	29,846
Nuneaton & Bedworth	53,107	60,640	61,457	63,762
Rugby	42,274	50,203	51,075	53,639
Stratford-on-Avon	52,326	60,311	61,132	63,257
Warwick	59,127	69,034	70,178	73,406
Coventry/Warwickshire	363,539	431,321	438,936	460,480

The series of tables below look at projected household growth over two different time periods: 2011-29 (to be consistent with the emerging Warwick Local Plan) and 2011-31 (to be consistent with the 2013 SHMA and September 2014 update). The 2012-based household projections project forward from 2012; however, for consistency with work in the SHMA we have taken 2011 as the base date (a household estimate for 2011 is provided in the 2012-based data release).

To convert levels of household growth into estimates of the housing need a vacancy allowance has been included within the figures. The vacancy rate used is the same as used in the SHMA update report of September 2014 with figures for each local authority being:

- Coventry – 4.0%
- North Warwickshire – 4.7%
- Nuneaton & Bedworth – 2.9%
- Rugby – 3.3%
- Stratford-on-Avon – 5.6%
- Warwick – 3.3%

2011-29

<b>Figure 2: Projected household growth and housing need 2011-29 – CLG 2012-based household projections</b>						
	Households 2011	Households 2029	Change in households	% change from 2011	Housing need	Housing need (per annum)
Coventry	128,447	162,377	33,930	26.4%	35,287	1,960
North Warwickshire	25,862	28,756	2,894	11.2%	3,030	168
Nuneaton & Bedworth	52,808	60,640	7,832	14.8%	8,059	448
Rugby	42,089	50,203	8,114	19.3%	8,382	466
Stratford-on-Avon	52,099	60,311	8,212	15.8%	8,672	482
Warwick	58,714	69,034	10,320	17.6%	10,661	592
Coventry/Warwickshire	360,019	431,321	71,302	19.8%	74,091	4,116

2011-31

<b>Figure 3: Projected household growth and housing need 2011-31 – CLG 2012-based household projections</b>						
	Households 2011	Households 2031	Change in households	% change from 2011	Housing need	Housing need (per annum)
Coventry	128,447	166,035	37,588	29.3%	39,092	1,955
North Warwickshire	25,862	29,059	3,197	12.4%	3,347	167
Nuneaton & Bedworth	52,808	61,457	8,649	16.4%	8,900	445
Rugby	42,089	51,075	8,986	21.3%	9,283	464
Stratford-on-Avon	52,099	61,132	9,033	17.3%	9,539	477
Warwick	58,714	70,178	11,464	19.5%	11,842	592
Coventry/Warwickshire	360,019	438,936	78,917	21.9%	82,002	4,100

### Summary of SHMA projections

For context the tables below show a summary of the outputs of projections developed in the SHMA update of September 2014 (H008). The core projections were linked to the 2012-based SNPP (as with the newly published CLG projections) and were modelled on the basis of a number of headship scenarios. The table below takes data from Figure 6 of H008 and also includes the core demographic projection in the earlier (November 2013 SHMA) and the SHMA conclusions on the objective assessment of housing need. All data is provided for the 2011-31 period.

<b>Figure 4: Core scenarios developed in the SHMA update (September 2014) – figures per annum (2011-31) – demographic scenarios</b>				
	SHMA core output	Final SHMA (OAN) conclusion	2012-based with midpoint headship	2012-based with a part-return to trend headship
Coventry	1,179	1,180	1,885	1,811
North Warwickshire	165	175	159	204
Nuneaton & Bedworth	494	495	394	422
Rugby	658	660	441	453
Stratford-on-Avon	538	570	463	508
Warwick	718	720	564	606
Coventry/Warwickshire	3,753	3,800	3,906	4,004

Source: Figure 6 of SHMA update (September 2014)

<b>Figure 5: Comparison of CLG 2012-based household projections with Joint SHMA 2013 and Joint SHMA Update (Sept 2014) 2011-31</b>			
	SHMA 2013 Core Output	Housing Need (per annum) JSHMA Update – Part Return to Trend	Housing need (per annum) CLG Household Projections
Coventry	1,179	1,811	1,955
North Warwickshire	165	204	167
Nuneaton & Bedworth	494	422	445
Rugby	658	453	464
Stratford-on-Avon	538	508	477
Warwick	718	606	592
Coventry/Warwickshire	3,753	4,004	4,100

The table below provides estimates of the 'need' linked to two economic forecasts. The first from Experian and the second based on Cambridge Econometrics (CE). Figures looked at both labour demand and labour supply (essentially with and without assumptions about commuting patterns). The core outputs can be found in Figures 11 and 12 of the SHMA update report (September 2014 – H008) – all figures were calculated using a 'part-return to trend' headship assumption (as in the last column of the table above).

<b>Figure 6: Core scenarios developed in the SHMA update (September 2014) – figures per annum (2011-31) – jobs-led scenarios</b>				
	Experian labour demand	Experian labour supply	CE labour demand	CE labour supply
Coventry	1,000	943	1,164	1,060
North Warwickshire	502	432	583	601
Nuneaton & Bedworth	389	442	433	513
Rugby	437	452	575	571
Stratford-on-Avon	778	764	938	976
Warwick	640	604	886	825

Coventry/Warwickshire	3,747	3,636	4,579	4,546
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Source: Figures 11 and 12 of SHMA update (September 2014)

Further analysis was provided (Figures 14 and 15) of the implications of returning headship rates for people aged 25-34 back to the rates in the 2008-based CLG household projections. Across the HMA this saw an uplift in 'housing need' of 314-369 dwellings per annum with a figure in the range of 49-60 seen in Warwick.