Warwick District Local Plan Examination 2016.

Statement on Behalf of Representor 12966. Dr P Thornton and Others.

Matter 2 Overall Provision for Housing.

1. In response to the Proposed Modifications to the Local Plan my clients set out their concerns about the overall scale of housing as set out in Modified Policy DS6. These primarily related to the level of provision , included in the total of 16,776 dwellings that would contribute, in part, to meeting the shortfall in housing provision for the City of Coventry. (See objections to the Modifications 4 and 5).

2. The components of the level of housing provision included in the Modification are set out in para 34 of the Housing Requirements Topic paper 2016. These are as follows;

- Warwick District AON: 600 Dwellings per annum
- Proportion of Coventry's Unmet Needs: 332 Dwellings per annum.
- Total Annual requirement: 932 Dwellings per annum.
- Total requirement 2011-2029: 16,776 Dwellings.

3. The total requirement is 3812 dwellings higher than that set out in the Publication Draft Local Plan, which sought to meet a requirement for 12,860 dwellings dwellings. Whereas the Publication Draft Plan sought to provide 108 dwellings per annum as a contribution to meeting Coventry's unmet needs this has now been increased to 332 dwellings per annum. The revised level of provision is based on the Updated Assessment of Housing Needs in Coventry and Warwickshire (2015) (Updated SHMA) and the Coventry and Warwickshire Housing Memorandum (HMoU). The latter is based on the findings of the former. The updated needs assessment has taken account of the 2012 based household projections published by the government in 2015.

4. The 2012 based projections have now been superceded by more recently published 2014 based projections. These have implications for the scale of household growth and therefore housing provision in Coventry and Warwickshire. I therefore set out below comments on the matters raised in questions (5) et seq of Matter 2.

2014 Based Household Projections.

5. Planning Practice Guidance states that the Household Projections form a starting point for objectively assessed housing needs; OAN. In a helpful paper published by Nathaniel Lichfield and Partners (NLP) following publication of the latest projections, they state that the new figures reflect a chronic long term undersupply of housing which have depressed rates of household formation. Any assessments of need derived from these projections should be mindful of that and take account of local market signals such as house prices which are indicative of the relative balance between supply and demand. Also economic factors such as aspirations for job growth will impact on household growth and the demand for housing,

frequently indicating higher levels of provision than those indicated by the projections. I attach a copy of the NLP Paper at Appendix 1.

6. Various iterations of the SHMA appear to have taken these matters into account Therefore the 2014 projections must be seen in that context when assessing their possible impact on the provision for housing in the Local Plan area.

7. Within the NLP Paper there is a summary of the 2014 based projections for the West Midlands Local Authorities.It notes that the fastest growing local authority in the region is Coventry. Here household growth is anticipated to rise from 1835 per annum to 2129 per annum. The consequent higher OAN would be 2213 per annum. The recently examined Development Plan for the City is based on a need or 2120 dwellings per annum.

Housing Requirements in the City of Coventry

Annual Household Growth 2012 based projections.	1855	2012-27
Annual Household Growth 2014 based projections.	2129	2014-39
Annual Housing Requirement based on 2014 based projections.	2213	
Coventry Development Plan. 2011-31. Annualised Housing Requirement.	2120	

Source: Nathaniel Lichfield & Partners. July 2016.

8. The City's Development Plan makes provision for housing on the basis of the physical capacity of the city. Over the Plan Period 2011-2031 the Plan provides for the development of 24,600 dwellings compared to the OAN set out in the Updated Assessment, noted at para 3 above, of some 42,400 dwellings. The shortfall is 17,800 dwellings. This is set out in the HMoU. The HMoU also states that the Warwick Local Plan will provide some 332 dwellings per annum as a contribution towards redressing Coventry's shortfall.

9. On the basis of the above it is understood that:

- The shortfall in housing provision in Coventry compared to its AON is some 890 dwellings per annum. (17,800 /20 years)
- Of that shortfall Warwick District have agreed to provide 332 dwellings per annum.
- The provision above is equivalent to 37.2% of the shortfall.

10. The NLP note indicates that on the basis of the projections alone the scale of housing need in Coventry has increased from 2120 dwellings per annum to 2213 dwellings per annum. If the capacity for housing provision in Coventry remains at 24,600 or 1230 per annum the projections would suggest that the shortfall in provision in Coventry has increased from 890 per annum to 983 per annum. Should it remain the case that Warwick continues to accept 37.3% of that higher shortfall then provision for new housing in the District in response to these new projections would have to rise by 34 dwellings per annum to a figure of 366 per annum.

Meeting Coventry's Shortfall based on 2014 based Household Projections.

a. Coventry Development Plan 2011-2031. Housing Requirement.	42,400
b. Annual Housing requirement in Coventry 2011-31.	2,120
c. Coventry Development Plan 2011-31. Housing Provision.	24,600
d. Coventry Development Plan 2011-31 Annual Housing Provision.	1,230
e. Shortfall in Housing Provision in Coventry 2011-31.	17,800
f. Annual Shortfall in Housing Provision.	890
g. Annual Housing Provision in Warwick to meet portion of shortfall.	332
h. Housing Requirement in Coventry to meet 2014 based Household Projection.	44,260
i. Shortfall in Provision in Development plan based on (h)	19,660
j. Annual Shortfall in Provision.	983
k. Annual Provision of Portion of Shortfall at (j) in Warwick @ 37.3%	366
l. Increase in Annual Provision in Warwick to meet Shortfall.	34

11. I acknowledge that the above approach falls far short of undertaking a further update of the SHMA with a possible and consequential updating of the HMoU. However it does demonstrate that the housing needs in Coventry are increasing and it is therefore open to question if the plan as presently drafted will make an appropriate contribution to meeting the increase in unmet needs from Coventry.

12. At this juncture it is appropriate that I point out that in the representations submitted in relation to modification 4 it was erroneously stated that the housing provision in the Publication Draft Plan was based solely on seeking to meet the Districts own housing needs. As set out in para 34 of the Housing Requirements Topic paper the scale of provision included provision for 108 dwellings per annum to meet in part some of Coventry's unmet housing needs. Notwithstanding that I remain of the view that as the Publication Draft Plan was published for consultation in 2014 and the HMoU was not agreed until 2015 on any pragmatic basis it cannot be contended that the question of addressing those unmet needs was being properly addressed via any planning permissions granted before 2015 since the sites that have come forward to date are for the most part not close to the City of Coventry, as is now the case with the proposals to meet that unmet need now set out in the Modifications.

The Need to Review or Amend the Housing Provision in the Plan.

13. I now turn to deal with how or if the housing provision figures in the plan should be reviewed .

14. The 2014 household projections show that whereas there will be an increase in the rate of household growth in Coventry, there will be a slowing down of the rate in Warwick District. The implied level of housing provision in Warwick to meet the Districts needs under the new projections is 493 per annum; 107 dwellings fewer each year than the 600 per annum set out in the OAN in the SHLAA Update. Setting aside the caveats attached to the projections (see para 5 above) the 2014 based figure would on the face of it suggest a 107 dwellings per annum reduction in housing needs in the District.

15. Against that is the estimate at para 10 above, that provision in the District to meet Coventry's needs may have to be increased by 34 dwellings per annum. The net effect of the projections, subject to the caveats previously refereed to, might be to indicate a net reduction in provision in the district of 73 dwellings per annum. (i.e 107-34 = 73)

16. Such a level of change is in my view of no consequence. It does not indicate a sound basis at this point in the formulation of the plan for any amendments or review of the housing provision figures. What it does indicate however is that the demand for housing in Coventry is increasing and the Local Plan must ensure the provision of sufficient deliverable sites capable of meeting some of the city's needs at sustainable locations close to the City, both in the short and longer term. I will come to the issue of that particular aspect of the plan in submissions on Matter 4.

Alasdair Jones. BA MRTPI.
Obh Representor 12966
August 2016.
Ref: 020

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The 2014-based Household Projections for England

On 12th July 2016, CLG published the 2014-based Household Projections for England, which project average household growth of 210,000 each year across the country between 2014 and 2039. This is the same level projected in the previous, 2012-based projections, despite the latest underlying population projections showing an extra c.10,000 people each year. On the whole, the projections show a continuation of the trends in the 2012-based projections; namely the potential for continued suppression in household formation particularly for younger age groups. They are likely thus to under-estimate the true level of future need and demand for homes in many areas.

The household projections form a key factor in assessing housing needs, with the Planning Practise Guidance (PPG) stating that these form the 'starting point' for objectively assessed housing needs. But they are far from the whole picture:

1. The household projections are derived from the respective population projections which are trend based and may warrant sensitivity testing to reflect local circumstances. Adjustments to the underlying population growth in an area will ultimately impact on the number of households in that area;
2. The projections reflect a long term chronic undersupply of housing as well as recent recessionary factors, which will have influenced household formation and subsequently feed into what are trend-based projections. Where these may under-represent the likely future level of need and demand, it will be necessary to make adjustments to household formation rates;
3. Assessments of housing need should also take account of market signals (such as house prices) which are indicative of the relative balance between supply and demand for housing (not always reflected in demographic projections) and make adjustments to improve affordability;
4. Economic factors, namely the aspiration to see higher levels of job growth in an area, may also trigger the need to increase housing provision to achieve a better balance between homes and jobs; and
5. Many areas need to make an adjustment to their estimates of housing need where it could help to deliver more affordable homes.

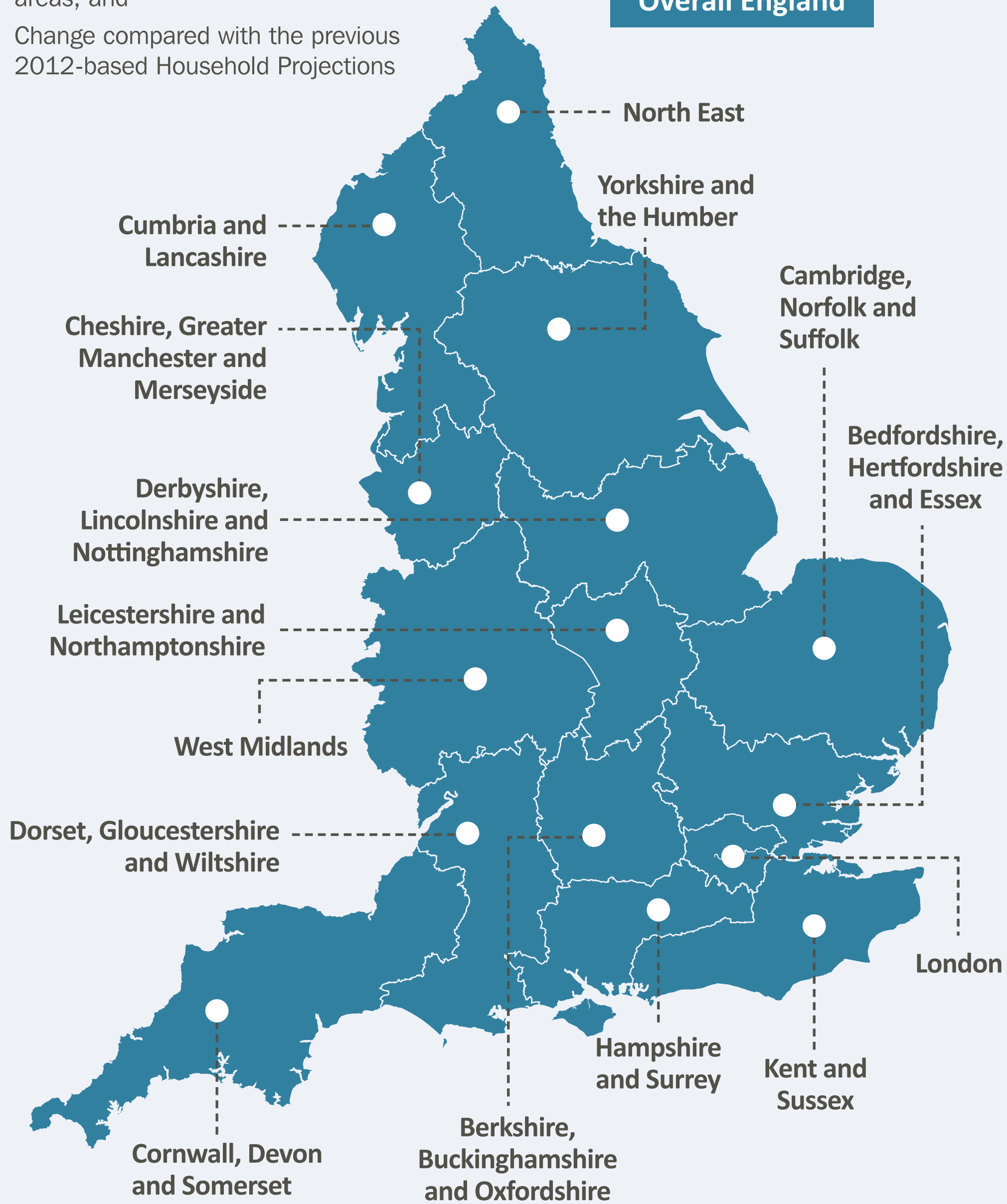
Click Here

To read more about the Population Projections and the potential impact of Brexit on housing needs.

This guide has been produced by NLP to help you navigate the new household projections. Click on an area of England to look at local headlines, including;

- Projected household growth (and how this translates into homes)
- Change in average household size
- Fastest and slowest growing local authority areas; and
- Change compared with the previous 2012-based Household Projections

Click here to view Overall England



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Brexit: the future of international migration and its impact on housing needs

Now the UK has voted in favour of leaving the EU, questions have been asked as to what this means for future migration, population growth and, ultimately, the need for new homes. At such an early stage, it is simply impossible to know what the country's relationship with the EU will look like in the future, and what impact this has on migration and population growth. For example, the UK's agreement with the EU could include access to the Single Market and the continuation of free movement; alternatively, it could become controlled in a similar way to non-EU flows, but this may not necessarily equate to lower flows. Furthermore, any agreement may also reduce the number of people who leave the country, which may simply cancel out any reduction in in-migration from overseas.

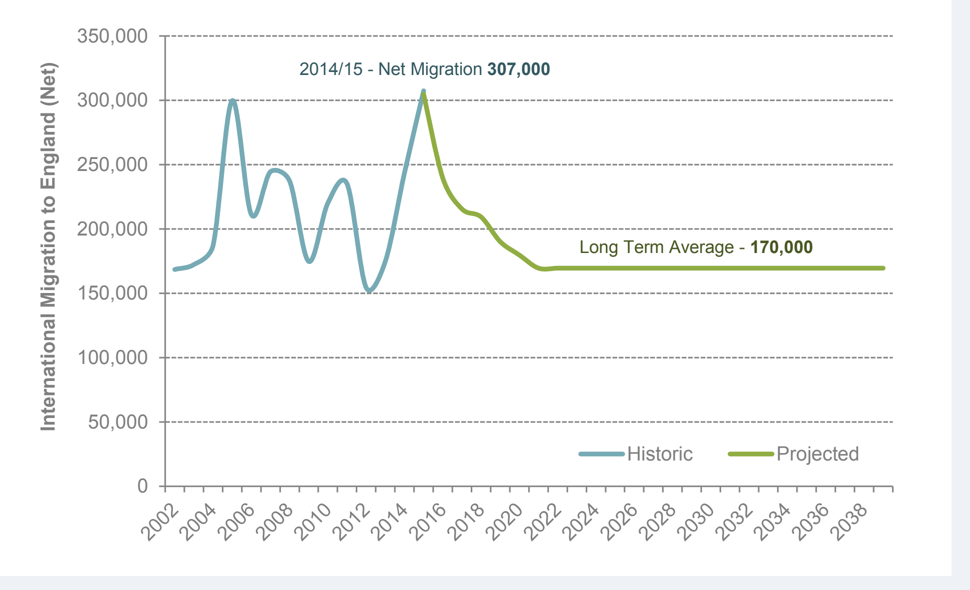
In the interim, it is instructive to look at ONS's latest population projections (which underpin the latest household projections) to see what international migration assumptions they contain.

Net migration to England has averaged 216,000 over the last 15 years, reaching a historic high of 307,000 in 2014/15. Of all inflows, the split between EU and non-EU is broadly 50:50 – on this basis (based on last year's figures) each component represents a net flow of c.154,000 p.a.

ONS's 2014-based Population Projections (published October 2015) already assumed that by 2021, the level of net migration to England will decline by almost half, from 307,000 currently to 170,000 each year. After 2021, the level is projected to remain constant. If one assumed there was no change to the levels of migration from outside the EU (which is currently controlled by Government policy), this essentially implies that net flows with the EU will fall to just 16,000 p.a., i.e. around a 90% reduction on current levels.

So, ONS' projections were already adopting cautious assumptions of net international migration in the long term. Since these population projections form the basis of the household projections, which in turn form the starting point for assessing housing need, this means that the official estimates of household growth are also cautious. Whilst ONS did not take account of potential Brexit (or any associated economic downturn that may result) in their projections, it nonetheless has assumed a significant drop in migration compared to current levels, and there is currently no evidence to suggest that leaving the EU will result in a change to migration of such a scale that it would result in even further downward pressure on the population projections, and therefore housing need falling below these projected levels.

In any event, migration forms only part of the picture of future population growth and housing need; natural change within the population, declining average household size and age structure (with people living longer) will also impact on the number of households. This is before wider considerations, including market signals, employment needs and affordable housing are taken into consideration; all of these factors place upward pressure on housing compared to projected based solely on future population growth.



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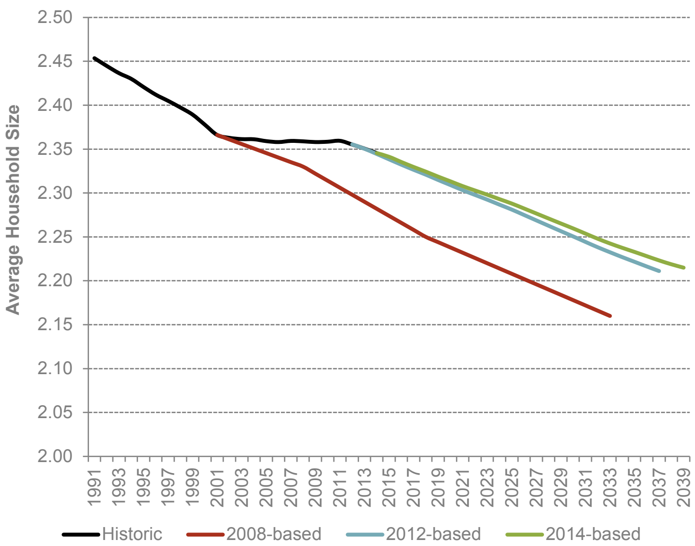
England

Projected Household Growth 2014-39 (2014-based)	**5,257,000**	Average Household Size in 2014	**2.35**
Average Annual Household Growth 2014-39 (2014-based)	**210,000**	Projected Average Household Size in 2039	**2.21**

Projected Overall Rate of Household Growth 2014-39 (2014-based)	**23.1%**	Implied number of homes (Total - based on dwelling vacancy rates)	**5,841,000**
Average Annual Rate of Household Growth 2014-39 (2014-based)	**0.9%**	Implied number of homes (Annual - based on dwelling vacancy rates)	**219,000**

Fastest Growing Areas	
1	London
2	Bedfordshire, Essex and Hertfordshire
3	Kent and Sussex
Slowest Growing Areas	
1	Cumbria and Lancashire
2	North East
3	Yorkshire and the Humber
Greatest Increase cf. 2012-based Projections	
1	London
2	Kent and Sussex
3	Leicestershire and Northamptonshire



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Bedfordshire, Essex and Hertfordshire	16,740	17,240	↑ 504	17,900
Berkshire, Buckinghamshire and Oxfordshire	9,250	8,880	↓ -365	9,220
Cambridgeshire, Norfolk and Suffolk	9,560	9,000	↓ -560	9,490
Chester, Greater Manchester and Merseyside	14,780	14,730	↓ -50	15,340
Cornwall, Devon and Somerset	11,070	11,150	↑ 81	11,920
Cumbria and Lancashire	3,560	2,970	↓ -587	3,140
Derbyshire, Lincolnshire and Nottinghamshire	9,180	8,720	↓ -452	9,100
Dorset, Gloucestershire and Wiltshire	8,990	8,990	↑ 8	9,450
Hampshire and Surrey	11,720	11,200	↓ -511	11,640
Kent and Sussex	16,100	16,920	↑ 828	17,690
Leicestershire and Northamptonshire	6,470	7,130	↑ 662	7,390
London	53,110	55,590	↑ 2,488	57,650
North East	5,770	5,570	↓ -200	5,810
West Midlands	17,870	18,030	↑ 153	18,700
Yorkshire and the Humber	15,610	14,160	↓ -1,454	14,800

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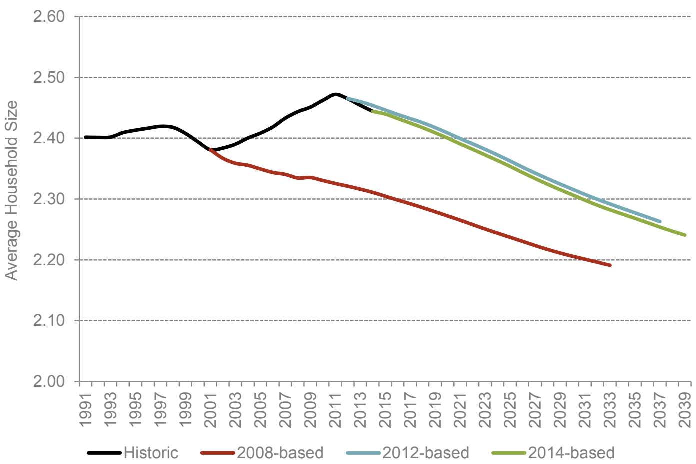
London

Projected Household Growth 2014-39 (2014-based)	**1,390,000**	Average Household Size in 2014	**2.44**
Average Annual Household Growth 2014-39 (2014-based)	**55,600**	Projected Average Household Size in 2039	**2.24**
Projected Overall Rate of Household Growth 2014-39 (2014-based)	**40.3%**	Implied number of homes (Total - based on dwelling vacancy rates)	**1,439,000**
Average Annual Rate of Household Growth 2014-39 (2014-based)	**1.6%**	Implied number of homes (Annual - based on dwelling vacancy rates)	**57,560**

Fastest Growing Areas	
1	Tower Hamlets
2	City of London
3	Barking and Dagenham
Slowest Growing Areas	
1	Kensington and Chelsea
2	Hammersmith and Fulham
3	Wandsworth
Greatest Increase cf. 2012-based Projections	
1	Tower Hamlets
2	Westminster
3	Greenwich

Past and Projected Average Household Size



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Barking and Dagenham	1,507	1,545	↑ 38	1,579
Barnet	2,843	2,796	↓ -47	2,881
Bexley	1,088	1,263	↑ 175	1,297
Brent	1,556	1,866	↑ 311	1,918
Bromley	1,738	1,868	↑ 130	1,933
Camden	1,292	1,647	↑ 356	1,735
City of London	90	74	↓ -16	93
Croydon	2,327	2,416	↑ 89	2,479
Ealing	1,961	1,655	↓ -307	1,710
Enfield	2,310	2,291	↓ -19	2,339
Greenwich	1,635	2,002	↑ 367	2,057
Hackney	1,796	2,098	↑ 301	2,153
Hammersmith and Fulham	452	666	↑ 215	696
Haringey	1,952	1,925	↓ -27	2,003
Harrow	1,417	1,318	↓ -99	1,356
Havering	1,306	1,380	↑ 73	1,409
Hillingdon	1,783	1,894	↑ 112	1,966
Hounslow	1,897	1,784	↓ -113	1,828
Islington	1,710	1,723	↑ 12	1,808
Kensington and Chelsea	247	317	↑ 69	354
Kingston upon Thames	1,053	1,057	↑ 4	1,091
Lambeth	1,838	1,805	↓ -33	1,863
Lewisham	2,100	2,156	↑ 56	2,203
Merton	1,270	1,100	↓ -170	1,134
Newham	2,244	2,434	↑ 190	2,485
Redbridge	2,114	2,010	↓ -103	2,061
Richmond upon Thames	1,089	1,155	↑ 66	1,199
Southwark	2,072	2,078	↑ 6	2,142
Sutton	1,345	1,243	↓ -102	1,271
Tower Hamlets	2,740	3,255	↑ 515	3,412
Waltham Forest	1,656	1,665	↑ 9	1,697
Wandsworth	1,417	1,471	↑ 54	1,532
Westminster	1,262	1,637	↑ 375	1,858

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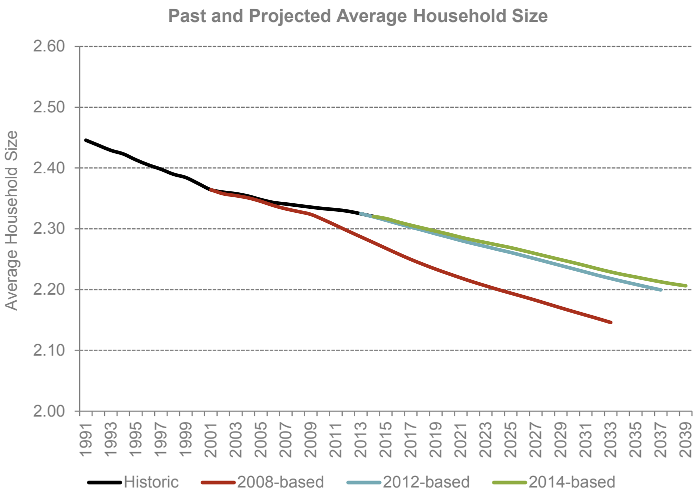
Yorkshire and the Humber

Projected Household Growth 2014-39 (2014-based)	354,000	Average Household Size in 2014	2.32
Average Annual Household Growth 2014-39 (2014-based)	14,160	Projected Average Household Size in 2039	2.21
Projected Overall Rate of Household Growth 2014-39 (2014-based)	15.6%	Implied number of homes (Total - based on dwelling vacancy rates)	369,000
Average Annual Rate of Household Growth 2014-39 (2014-based)	0.6%	Implied number of homes (Annual - based on dwelling vacancy rates)	14,760

Fastest Growing Areas	
1	York
2	Sheffield
3	Kirklees
Slowest Growing Areas	
1	Richmondshire
2	Scarborough
3	North East Lincolnshire
Greatest Increase cf. 2012-based Projections	
1	Sheffield
2	York
3	Barnsley



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Barnsley	756	797	↑ 41	832
Bradford	1,793	1,509	↓ -285	1,575
Calderdale	784	705	↓ -79	734
Craven	127	107	↓ -21	117
Doncaster	559	498	↓ -61	516
East Riding of Yorkshire	902	697	↓ -206	730
Hambleton	164	129	↓ -34	135
Harrogate	355	258	↓ -98	271
Kingston upon Hull, City of	538	400	↓ -138	414
Kirklees	1,394	1,426	↑ 32	1,492
Leeds	2,796	2,458	↓ -338	2,551
North East Lincolnshire	220	191	↓ -29	199
North Lincolnshire	457	340	↓ -117	355
Richmondshire	58	4	↓ -54	5
Rotherham	569	496	↓ -72	514
Ryedale	116	126	↑ 9	138
Scarborough	167	125	↓ -42	143
Selby	333	278	↓ -55	292
Sheffield	1,822	1,945	↑ 123	2,008
Wakefield	964	862	↓ -102	900
York	735	806	↑ 72	837

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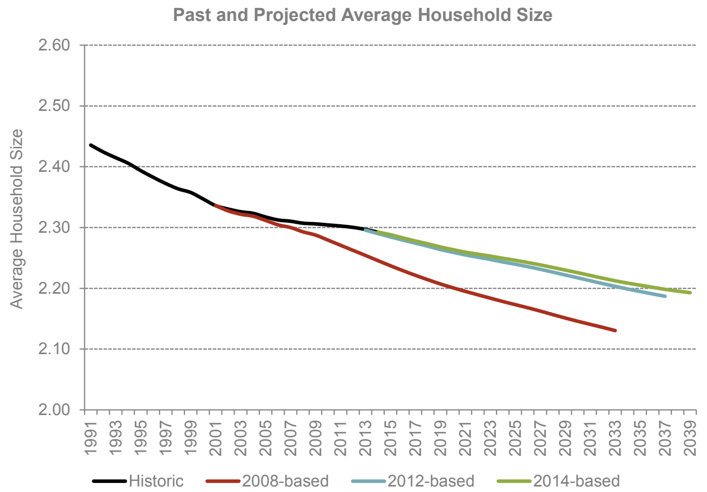
Derbyshire, Lincolnshire and Nottinghamshire

Projected Household Growth 2014-39 (2014-based)	218,000	Average Household Size in 2014	2.29
Average Annual Household Growth 2014-39 (2014-based)	8,720	Projected Average Household Size in 2039	2.19
Projected Overall Rate of Household Growth 2014-39 (2014-based)	17.7%	Implied number of homes (Total - based on dwelling vacancy rates)	227,000
Average Annual Rate of Household Growth 2014-39 (2014-based)	0.7%	Implied number of homes (Annual - based on dwelling vacancy rates)	9,080

Fastest Growing Areas	
1	South Derbyshire
2	South Kesteven
3	Rushcliffe
Slowest Growing Areas	
1	Chesterfield
2	North East Derbyshire
3	Derbyshire Dales
Greatest Increase cf. 2012-based Projections	
1	Ashfield
2	Nottingham
3	Gedling



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Amber Valley	343	312	↓ -31	326
Ashfield	386	425	↑ 39	441
Bassetlaw	299	245	↓ -54	254
Bolsover	195	193	↓ -2	203
Boston	268	218	↓ -49	227
Broxtowe	345	310	↓ -35	322
Chesterfield	193	189	↓ -4	196
Derby	928	855	↓ -73	892
Derbyshire Dales	209	149	↓ -60	163
East Lindsey	399	333	↓ -66	357
Erewash	363	346	↓ -17	359
Gedling	352	385	↑ 34	397
High Peak	262	193	↓ -68	203
Lincoln	243	265	↑ 22	283
Mansfield	242	238	↓ -4	248
Newark and Sherwood	364	387	↑ 23	404
North East Derbyshire	217	185	↓ -32	189
North Kesteven	398	358	↓ -40	370
Nottingham	1,053	1,090	↑ 37	1,137
Rushcliffe	418	430	↑ 12	445
South Derbyshire	475	441	↓ -34	457
South Holland	416	344	↓ -72	358
South Kesteven	527	558	↑ 31	580
West Lindsey	280	273	↓ -7	286

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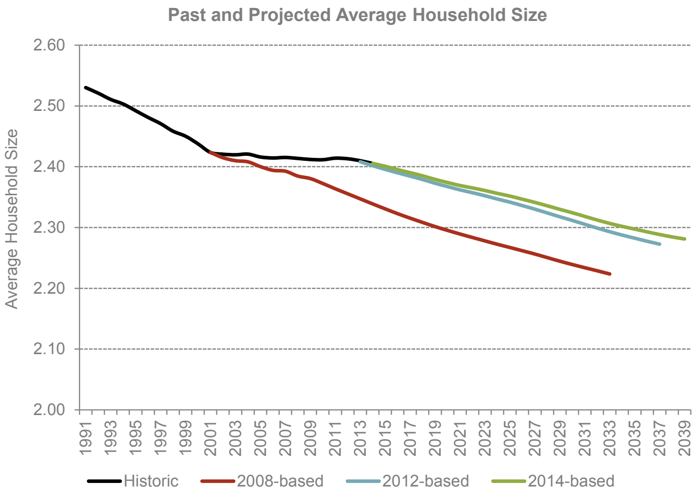
Leicestershire and Northamptonshire

Projected Household Growth 2014-39 (2014-based)	178,000
Average Annual Household Growth 2014-39 (2014-based)	7,120
Average Household Size in 2014	2.41
Projected Average Household Size in 2039	2.28
Projected Overall Rate of Household Growth 2014-39 (2014-based)	24.9%
Average Annual Rate of Household Growth 2014-39 (2014-based)	1.0%
Implied number of homes (Total - based on dwelling vacancy rates)	185,000
Implied number of homes (Annual - based on dwelling vacancy rates)	7,400

Fastest Growing Areas	
1	Corby
2	Charnwood
3	Leicester
Slowest Growing Areas	
1	Oadby and Wigston
2	Rutland
3	Blaby
Greatest Increase cf. 2012-based Projections	
1	Leicester
2	Charnwood
3	Corby



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Blaby	238	265	↑ 27	272
Charnwood	752	875	↑ 123	911
Corby	373	423	↑ 50	440
Daventry	267	249	↓ -19	257
East Northamptonshire	310	353	↑ 43	370
Harborough	361	375	↑ 14	388
Hinckley and Bosworth	331	348	↑ 17	360
Kettering	431	424	↓ -6	443
Leicester	1,160	1,479	↑ 319	1,530
Melton	159	151	↓ -8	156
North West Leicestershire	248	284	↑ 36	294
Northampton	1,081	1,077	↓ -5	1,113
Oadby and Wigston	65	113	↑ 48	120
Rutland	106	89	↓ -17	95
South Northamptonshire	304	352	↑ 48	366
Wellingborough	280	272	↓ -9	280

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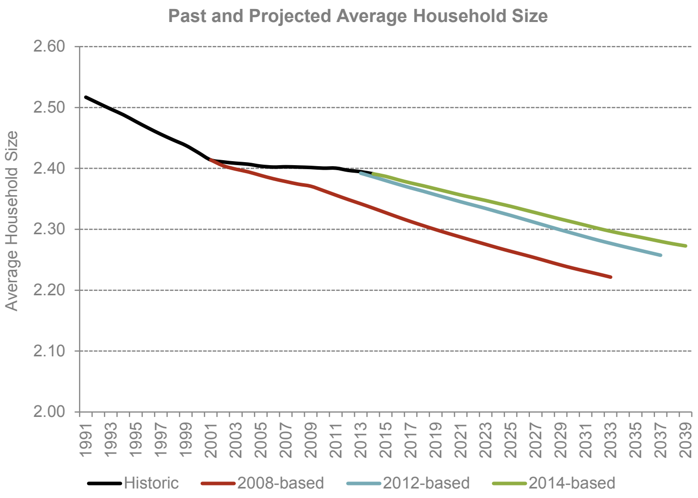
West Midlands

Projected Household Growth 2014-39 (2014-based)	**451,000**	Average Household Size in 2014	**2.39**
Average Annual Household Growth 2014-39 (2014-based)	**18,040**	Projected Average Household Size in 2039	**2.27**
Projected Overall Rate of Household Growth 2014-39 (2014-based)	**19.2%**	Implied number of homes (Total - based on dwelling vacancy rates)	**468,000**
Average Annual Rate of Household Growth 2014-39 (2014-based)	**0.8%**	Implied number of homes (Annual - based on dwelling vacancy rates)	**18,720**

Fastest Growing Areas	
1	Coventry
2	Sandwell
3	Birmingham
Slowest Growing Areas	
1	Staffordshire Moorlands
2	Tamworth
3	Redditch
Greatest Increase cf. 2012-based Projections	
1	Coventry
2	Birmingham
3	Wolverhampton



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Birmingham	4,279	4,461	↑ 182	4,617
Bromsgrove	277	255	↓ -22	263
Cannock Chase	255	217	↓ -38	223
Coventry	1,835	2,129	↑ 294	2,213
Dudley	601	536	↓ -66	553
East Staffordshire	435	366	↓ -69	380
Herefordshire, County of	632	592	↓ -39	625
Lichfield	299	236	↓ -63	247
Malvern Hills	208	258	↑ 50	270
Newcastle-under-Lyme	232	297	↑ 65	306
North Warwickshire	153	130	↓ -24	136
Nuneaton and Bedworth	426	353	↓ -73	364
Redditch	181	122	↓ -59	124
Rugby	455	432	↓ -22	447
Sandwell	1,317	1,327	↑ 10	1,389
Shropshire	887	871	↓ -16	911
Solihull	611	612	↑ 1	628
South Staffordshire	180	192	↑ 12	197
Stafford	349	309	↓ -39	320
Staffordshire Moorlands	152	137	↓ -15	143
Stoke-on-Trent	434	474	↑ 40	493
Stratford-on-Avon	437	398	↓ -39	420
Tamworth	189	109	↓ -80	111
Telford and Wrekin	404	420	↑ 16	434
Walsall	762	801	↑ 39	825
Warwick	571	478	↓ -94	493
Wolverhampton	552	695	↑ 143	722
Worcester	320	302	↓ -18	312
Wychavon	281	347	↑ 66	365
Wyre Forest	160	172	↑ 12	180

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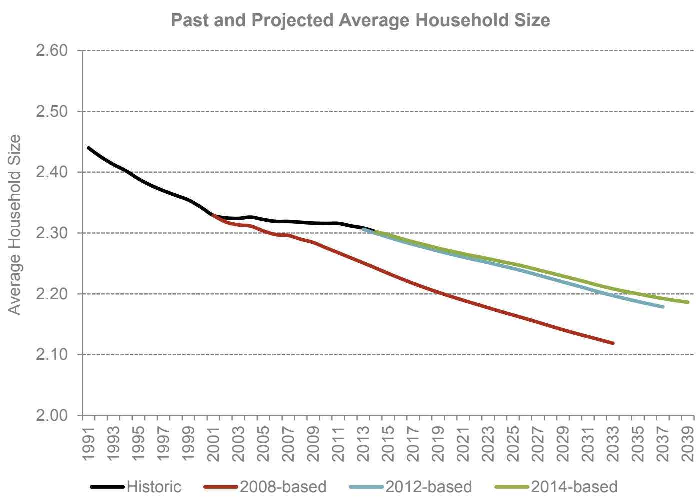
Cambridgeshire, Norfolk and Suffolk

Projected Household Growth 2014-39 (2014-based)	225,000
Average Annual Household Growth 2014-39 (2014-based)	9,000
Average Household Size in 2014	2.30
Projected Average Household Size in 2039	2.19
Projected Overall Rate of Household Growth 2014-39 (2014-based)	21.7%
Average Annual Rate of Household Growth 2014-39 (2014-based)	0.9%
Implied number of homes (Total - based on dwelling vacancy rates)	237,000
Implied number of homes (Annual - based on dwelling vacancy rates)	9,480

Fastest Growing Areas	
1	South Cambridgeshire
2	South Norfolk
3	East Cambridgeshire
Slowest Growing Areas	
1	Waveney
2	King's Lynn and West Norfolk
3	Suffolk Coastal
Greatest Increase cf. 2012-based Projections	
1	Cambridge
2	Huntingdonshire
3	North Norfolk



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Babergh	262	269	↑ 7	280
Breckland	522	500	↓ -22	527
Broadland	394	366	↓ -27	377
Cambridge	319	438	↑ 118	458
East Cambridgeshire	547	420	↓ -127	434
Fenland	439	423	↓ -16	438
Forest Heath	314	278	↓ -36	302
Great Yarmouth	362	304	↓ -58	321
Huntingdonshire	654	711	↑ 57	733
Ipswich	517	388	↓ -129	402
King's Lynn and West Norfolk	474	418	↓ -56	491
Mid Suffolk	384	387	↑ 3	402
North Norfolk	367	375	↑ 8	434
Norwich	540	512	↓ -27	540
Peterborough	890	815	↓ -75	846
South Cambridgeshire	807	769	↓ -38	792
South Norfolk	658	651	↓ -8	673
St Edmundsbury	349	318	↓ -32	327
Suffolk Coastal	448	360	↓ -88	393
Waveney	310	295	↓ -14	317

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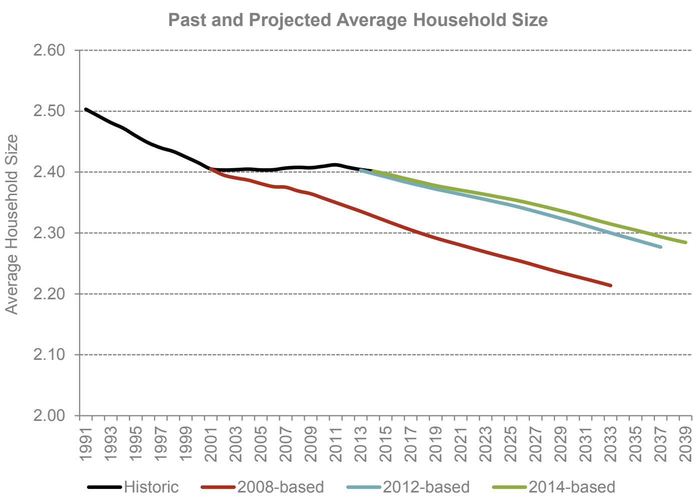
Bedfordshire, Essex and Hertfordshire

Projected Household Growth 2014-39 (2014-based)	431,000	Average Household Size in 2014	2.40
Average Annual Household Growth 2014-39 (2014-based)	17,240	Projected Average Household Size in 2039	2.28
Projected Overall Rate of Household Growth 2014-39 (2014-based)	29.3%	Implied number of homes (Total - based on dwelling vacancy rates)	447,000
Average Annual Rate of Household Growth 2014-39 (2014-based)	1.2%	Implied number of homes (Annual - based on dwelling vacancy rates)	17,880

Fastest Growing Areas	
1	Central Bedfordshire
2	Uttlesford
3	Watford
Slowest Growing Areas	
1	Rochford
2	Maldon
3	Chelmsford
Greatest Increase cf. 2012-based Projections	
1	Central Bedfordshire
2	Basildon
3	Bedford



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Basildon	645	753	↑ 108	766
Bedford	869	974	↑ 105	1,033
Braintree	668	598	↓ -70	615
Brentwood	310	332	↑ 22	348
Broxbourne	387	410	↑ 23	427
Castle Point	273	243	↓ -30	252
Central Bedfordshire	1,512	1,694	↑ 182	1,765
Chelmsford	641	645	↑ 4	660
Colchester	833	798	↓ -35	833
Dacorum	695	732	↑ 37	757
East Hertfordshire	768	751	↓ -17	775
Epping Forest	672	686	↑ 14	718
Harlow	340	368	↑ 28	380
Hertsmere	575	515	↓ -61	531
Luton	1,074	1,139	↑ 65	1,170
Maldon	214	192	↓ -22	203
North Hertfordshire	688	699	↑ 11	720
Rochford	255	247	↓ -8	254
Southend-on-Sea	796	831	↑ 34	880
St Albans	648	634	↓ -14	655
Stevenage	380	378	↓ -2	385
Tendring	642	632	↓ -10	682
Three Rivers	476	444	↓ -33	457
Thurrock	800	845	↑ 46	866
Uttlesford	482	494	↑ 12	519
Watford	533	573	↑ 39	587
Welwyn Hatfield	561	633	↑ 72	661

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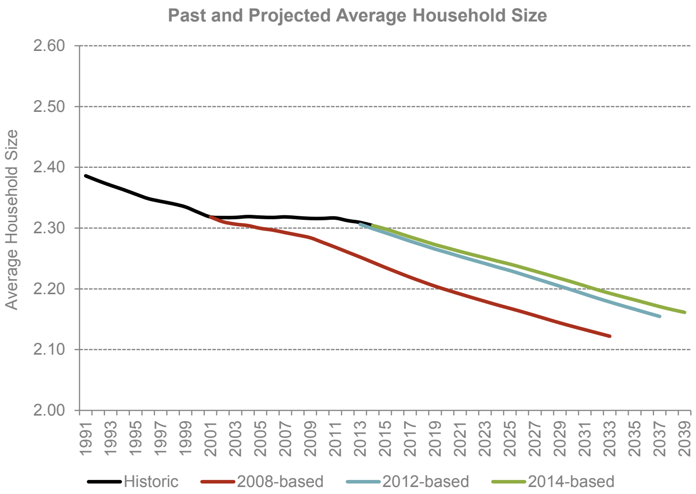
Kent and Sussex

Projected Household Growth 2014-39 (2014-based)	423,000
Average Annual Household Growth 2014-39 (2014-based)	16,920
Average Household Size in 2014	2.30
Projected Average Household Size in 2039	2.16
Projected Overall Rate of Household Growth 2014-39 (2014-based)	29.0%
Average Annual Rate of Household Growth 2014-39 (2014-based)	1.2%
Implied number of homes (Total - based on dwelling vacancy rates)	442,000
Implied number of homes (Annual - based on dwelling vacancy rates)	17,680

Fastest Growing Areas	
1	Dartford
2	Ashford
3	Swale
Slowest Growing Areas	
1	Hastings
2	Dover
3	Brighton and Hove
Greatest Increase cf. 2012-based Projections	
1	Wealden
2	Canterbury
3	Thanet



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Adur	284	303	↑ 19	311
Arun	779	855	↑ 76	903
Ashford	650	711	↑ 61	741
Brighton and Hove	1,248	1,230	↓ -18	1,283
Canterbury	606	787	↑ 181	830
Chichester	537	519	↓ -18	561
Crawley	575	566	↓ -9	576
Dartford	568	597	↑ 29	614
Dover	365	444	↑ 79	475
Eastbourne	473	520	↑ 47	553
Gravesham	445	508	↑ 63	524
Hastings	373	331	↓ -42	346
Horsham	590	577	↓ -13	594
Lewes	523	529	↑ 6	550
Maidstone	837	848	↑ 11	878
Medway	1,270	1,315	↑ 44	1,365
Mid Sussex	636	693	↑ 57	710
Rother	459	485	↑ 26	523
Sevenoaks	482	485	↑ 3	500
Shepway	475	533	↑ 58	561
Swale	800	781	↓ -20	815
Thanet	695	782	↑ 87	858
Tonbridge and Malling	603	592	↓ -11	615
Tunbridge Wells	589	480	↓ -109	500
Wealden	633	837	↑ 204	871
Worthing	601	616	↑ 15	637

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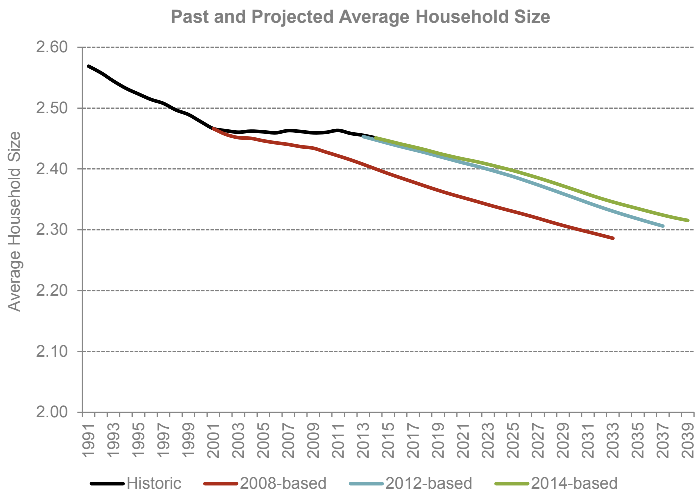
Berkshire, Buckinghamshire and Oxfordshire

Projected Household Growth 2014-39 (2014-based)	222,000
Average Annual Household Growth 2014-39 (2014-based)	8,880
Average Household Size in 2014	2.45
Projected Average Household Size in 2039	2.32
Projected Overall Rate of Household Growth 2014-39 (2014-based)	23.8%
Average Annual Rate of Household Growth 2014-39 (2014-based)	1.0%
Implied number of homes (Total - based on dwelling vacancy rates)	230,000
Implied number of homes (Annual - based on dwelling vacancy rates)	9,200

Fastest Growing Areas	
1	Milton Keynes
2	Aylesbury Vale
3	Slough
Slowest Growing Areas	
1	West Berkshire
2	Chiltern
3	South Oxfordshire
Greatest Increase cf. 2012-based Projections	
1	Oxford
2	Vale of White Horse
3	Aylesbury Vale

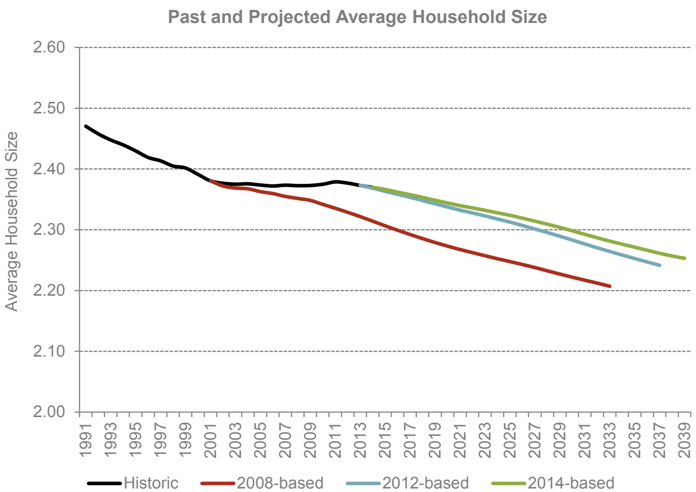


	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Aylesbury Vale	895	988	↑ 93	1,026
Bracknell Forest	519	457	↓ -62	468
Cherwell	528	539	↑ 11	561
Chiltern	226	238	↑ 12	247
Milton Keynes	1,468	1,390	↓ -79	1,439
Oxford	392	557	↑ 165	581
Reading	487	506	↑ 18	530
Slough	866	664	↓ -203	680
South Bucks	322	300	↓ -22	314
South Oxfordshire	398	405	↑ 7	425
Vale of White Horse	377	479	↑ 102	495
West Berkshire	510	364	↓ -145	378
West Oxfordshire	413	385	↓ -28	406
Windsor and Maidenhead	626	539	↓ -87	563
Wokingham	660	542	↓ -118	562
Wycombe	557	527	↓ -30	546

Hampshire and Surrey

Projected Household Growth 2014-39 (2014-based)	**280,000**	Average Household Size in 2014	**2.37**
Average Annual Household Growth 2014-39 (2014-based)	**11,200**	Projected Average Household Size in 2039	**2.25**
Projected Overall Rate of Household Growth 2014-39 (2014-based)	**21.9%**	Implied number of homes (Total - based on dwelling vacancy rates)	**291,000**
Average Annual Rate of Household Growth 2014-39 (2014-based)	**0.9%**	Implied number of homes (Annual - based on dwelling vacancy rates)	**11,640**

Fastest Growing Areas	
1	Reigate and Banstead
2	Epsom and Ewell
3	Tandridge
Slowest Growing Areas	
1	Hart
2	Rushmoor
3	Havant
Greatest Increase cf. 2012-based Projections	
1	Test Valley
2	Guildford
3	Elmbridge



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Basingstoke and Deane	852	686	↓ -166	702
East Hampshire	417	371	↓ -46	385
Eastleigh	507	493	↓ -15	504
Elmbridge	409	444	↑ 35	468
Epsom and Ewell	375	402	↑ 27	413
Fareham	398	367	↓ -31	378
Gosport	271	254	↓ -17	264
Guildford	499	538	↑ 39	560
Hart	234	200	↓ -34	206
Havant	355	356	↑ 1	367
Isle of Wight	515	496	↓ -19	550
Mole Valley	350	315	↓ -35	325
New Forest	693	663	↓ -30	693
Portsmouth	775	729	↓ -46	756
Reigate and Banstead	869	814	↓ -55	839
Runnymede	399	391	↓ -8	410
Rushmoor	271	207	↓ -64	214
Southampton	836	871	↑ 35	898
Spelthorne	492	439	↓ -53	454
Surrey Heath	232	240	↑ 8	248
Tandridge	422	448	↑ 26	467
Test Valley	297	376	↑ 79	388
Waverley	455	376	↓ -79	394
Winchester	456	422	↓ -34	443
Woking	335	306	↓ -28	316

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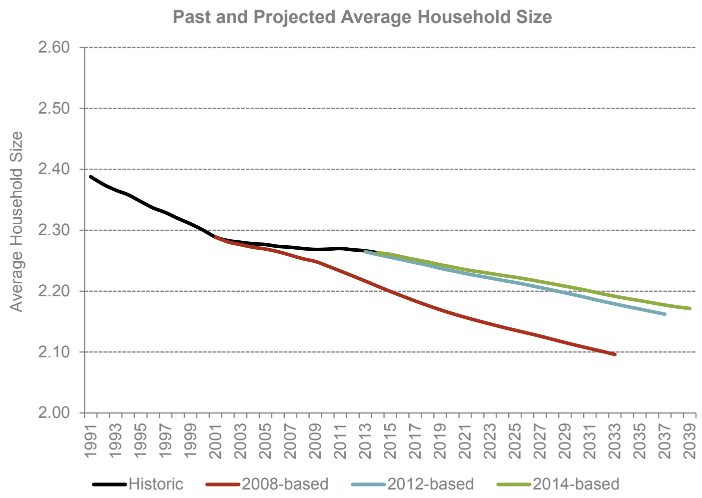
Cornwall, Devon and Somerset

Projected Household Growth 2014-39 (2014-based)	**279,000**	Average Household Size in 2014	**2.26**
Average Annual Household Growth 2014-39 (2014-based)	**11,160**	Projected Average Household Size in 2039	**2.17**
Projected Overall Rate of Household Growth 2014-39 (2014-based)	**20.9%**	Implied number of homes (Total - based on dwelling vacancy rates)	**298,000**
Average Annual Rate of Household Growth 2014-39 (2014-based)	**0.8%**	Implied number of homes (Annual - based on dwelling vacancy rates)	**11,920**

Fastest Growing Areas	
1	Sedgemoor
2	North Somerset
3	Bristol, City of
Slowest Growing Areas	
1	Isles of Scilly
2	West Somerset
3	Plymouth
Greatest Increase cf. 2012-based Projections	
1	Exeter
2	Plymouth
3	East Devon



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Bath and North East Somerset	454	459	↑ 5	477
Bristol, City of	1,895	1,904	↑ 9	1,978
Cornwall	2,164	2,023	↓ -141	2,278
East Devon	537	607	↑ 70	657
Exeter	384	509	↑ 125	527
Isles of Scilly	-8	-4	↑ 3	~
Mendip	391	399	↑ 9	421
Mid Devon	286	262	↓ -23	272
North Devon	266	219	↓ -47	244
North Somerset	1,032	956	↓ -76	996
Plymouth	490	563	↑ 73	585
Sedgemoor	486	548	↑ 62	572
South Hams	183	208	↑ 26	244
South Somerset	540	530	↓ -10	559
Taunton Deane	449	460	↑ 11	484
Teignbridge	442	501	↑ 59	536
Torbay	410	439	↑ 29	479
Torridge	317	286	↓ -30	314
West Devon	264	209	↓ -55	227
West Somerset	87	70	↓ -17	79

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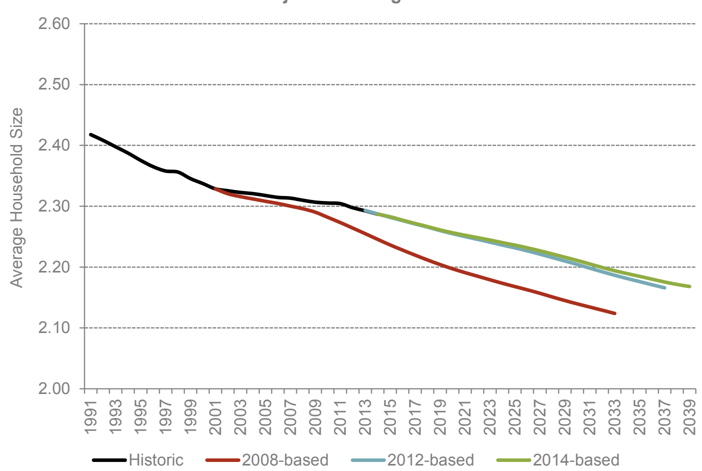
Dorset, Gloucestershire and Wiltshire

Projected Household Growth 2014-39 (2014-based)	225,000	Average Household Size in 2014	2.29
Average Annual Household Growth 2014-39 (2014-based)	9,000	Projected Average Household Size in 2039	2.17
Projected Overall Rate of Household Growth 2014-39 (2014-based)	22.4%	Implied number of homes (Total - based on dwelling vacancy rates)	236,000
Average Annual Rate of Household Growth 2014-39 (2014-based)	0.9%	Implied number of homes (Annual - based on dwelling vacancy rates)	9,440

Fastest Growing Areas	
1	Bournemouth
2	Tewkesbury
3	Christchurch
Slowest Growing Areas	
1	Purbeck
2	Weymouth and Portland
3	Forest of Dean
Greatest Increase cf. 2012-based Projections	
1	Bournemouth
2	North Dorset
3	Tewkesbury



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Bournemouth	909	1,111	↑ 202	1,173
Cheltenham	464	414	↓ -49	435
Christchurch	210	234	↑ 24	252
Cotswold	265	286	↑ 20	315
East Dorset	277	295	↑ 18	306
Forest of Dean	234	253	↑ 19	268
Gloucester	568	554	↓ -14	582
North Dorset	177	250	↑ 73	266
Poole	632	590	↓ -42	619
Purbeck	102	115	↑ 13	130
South Gloucestershire	1,029	1,082	↑ 53	1,107
Stroud	428	460	↑ 32	481
Swindon	1,190	849	↓ -341	877
Tewkesbury	372	435	↑ 63	459
West Dorset	347	365	↑ 18	406
Weymouth and Portland	147	174	↑ 27	189
Wiltshire	1,634	1,527	↓ -107	1,589

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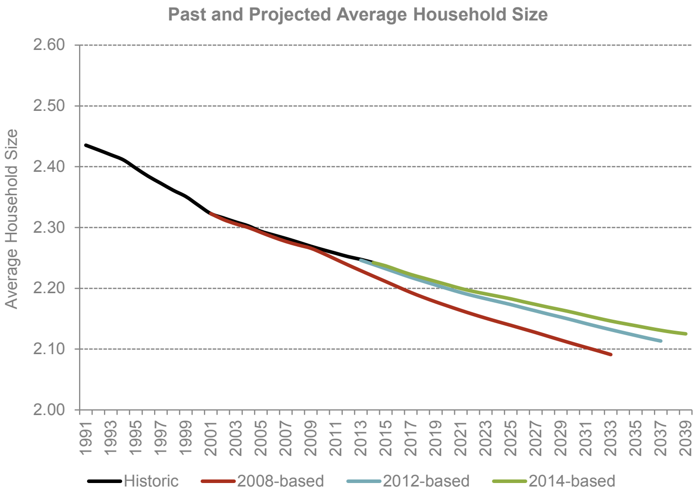
North East

Projected Household Growth 2014-39 (2014-based)	139,000	Average Household Size in 2014	2.24
Average Annual Household Growth 2014-39 (2014-based)	5,560	Projected Average Household Size in 2039	2.13
Projected Overall Rate of Household Growth 2014-39 (2014-based)	12.1%	Implied number of homes (Total - based on dwelling vacancy rates)	145,000
Average Annual Rate of Household Growth 2014-39 (2014-based)	0.5%	Implied number of homes (Annual - based on dwelling vacancy rates)	5,800

Fastest Growing Areas	
1	Newcastle upon Tyne
2	North Tyneside
3	Stockton-on-Tees
Slowest Growing Areas	
1	Redcar and Cleveland
2	Darlington
3	Northumberland
Greatest Increase cf. 2012-based Projections	
1	Newcastle upon Tyne
2	Sunderland
3	Middlesbrough



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
County Durham	1,212	1,154	↓ -58	1,205
Darlington	181	148	↓ -32	155
Gateshead	427	403	↓ -24	419
Hartlepool	178	171	↓ -7	179
Middlesbrough	248	243	↓ -5	255
Newcastle upon Tyne	770	969	↑ 199	1,008
North Tyneside	751	665	↓ -86	689
Northumberland	580	498	↓ -82	532
Redcar and Cleveland	101	72	↓ -29	75
South Tyneside	343	291	↓ -52	302
Stockton-on-Tees	528	438	↓ -90	456
Sunderland	448	513	↑ 65	529

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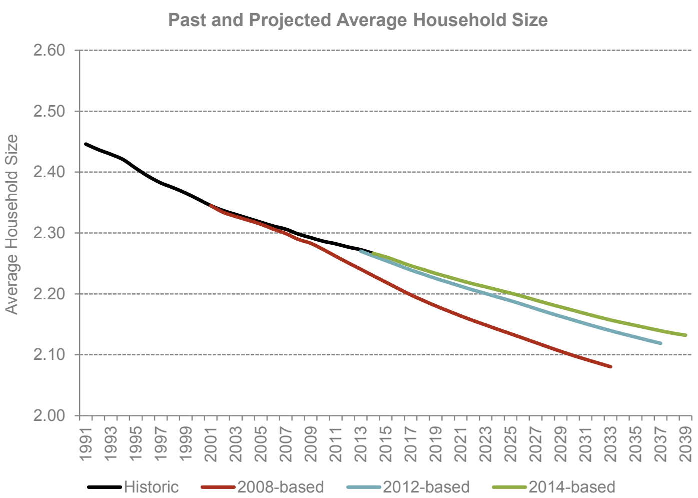
Cumbria and Lancashire

Projected Household Growth 2014-39 (2014-based)	**74,000**
Average Annual Household Growth 2014-39 (2014-based)	**2,960**
Average Household Size in 2014	**2.27**
Projected Average Household Size in 2039	**2.13**
Projected Overall Rate of Household Growth 2014-39 (2014-based)	**8.7%**
Average Annual Rate of Household Growth 2014-39 (2014-based)	**0.3%**
Implied number of homes (Total - based on dwelling vacancy rates)	**79,000**
Implied number of homes (Annual - based on dwelling vacancy rates)	**3,160**

Fastest Growing Areas	
1	Chorley
2	Fylde
3	Lancaster
Slowest Growing Areas	
1	Barrow-in-Furness
2	Copeland
3	Burnley
Greatest Increase cf. 2012-based Projections	
1	Lancaster
2	Chorley
3	Fylde



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Allerdale	99	78	↓ -21	83
Barrow-in-Furness	8	-76	↓ -84	~
Blackburn with Darwen	247	123	↓ -124	128
Blackpool	166	119	↓ -48	128
Burnley	50	52	↑ 2	55
Carlisle	195	167	↓ -28	175
Chorley	430	463	↑ 32	482
Copeland	51	9	↓ -41	10
Eden	99	65	↓ -34	72
Fylde	219	237	↑ 18	255
Hyndburn	79	49	↓ -29	52
Lancaster	305	360	↑ 55	379
Pendle	193	138	↓ -55	146
Preston	297	228	↓ -69	240
Ribble Valley	121	113	↓ -8	117
Rossendale	195	162	↓ -33	172
South Lakeland	155	120	↓ -35	138
South Ribble	257	163	↓ -94	169
West Lancashire	140	155	↑ 15	164
Wyre	251	245	↓ -6	260

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Cheshire, Greater Manchester and Merseyside

Projected Household Growth 2014-39 (2014-based)	**368,000**
Average Annual Household Growth 2014-39 (2014-based)	**14,720**

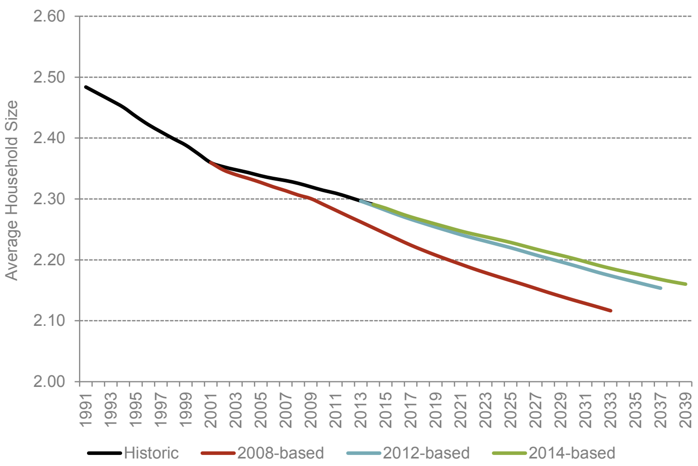
Average Household Size in 2014	**2.29**
Projected Average Household Size in 2039	**2.16**

Projected Overall Rate of Household Growth 2014-39 (2014-based)	**16.6%**
Average Annual Rate of Household Growth 2014-39 (2014-based)	**0.7%**

Implied number of homes (Total - based on dwelling vacancy rates)	**384,000**
Implied number of homes (Annual - based on dwelling vacancy rates)	**15,360**

Fastest Growing Areas	
1	Salford
2	Manchester
3	Trafford
Slowest Growing Areas	
1	Cheshire West and Chester
2	Halton
3	Knowsley
Greatest Increase cf. 2012-based Projections	
1	Liverpool
2	Manchester
3	Trafford

Past and Projected Average Household Size



	Annual Household Growth 2012-37 (2012-based)	Annual Household Growth 2014-39 (2014-based)	Difference in Annual Household Growth (Absolute)	Implied number of homes (Annual based on dwelling vacancy rates)
Bolton	892	691	↓ -201	718
Bury	516	496	↓ -20	517
Cheshire East	950	813	↓ -137	848
Cheshire West and Chester	525	468	↓ -58	489
Halton	235	214	↓ -21	219
Knowsley	233	251	↑ 17	257
Liverpool	1,238	1,599	↑ 361	1,672
Manchester	2,123	2,422	↑ 299	2,533
Oldham	639	615	↓ -24	638
Rochdale	419	444	↑ 25	457
Salford	1,214	1,266	↑ 52	1,333
Sefton	533	513	↓ -20	542
St. Helens	450	391	↓ -58	410
Stockport	832	849	↑ 17	877
Tameside	768	563	↓ -204	589
Trafford	877	991	↑ 114	1,021
Warrington	826	716	↓ -110	739
Wigan	900	785	↓ -115	815
Wirral	610	643	↑ 33	668

Home Footnotes/Contacts

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Footnotes

Total figures for projected household growth/implied number of homes for broad areas have been rounded to the nearest thousand.

Implied number of homes is based on applying the dwelling vacancy rate (using Census 2011 data) for each Local Authority to projected household growth. This is not a substitute for a full analysis of OAN based on other relevant factors in line with Government policy and the Planning Practice Guidance.

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