

Poblogaeth a Thai / **Population and Housing**

Cynllun Datblygu Lleol Sir Gaerfyrddin



Carmarthenshire Local Development Plan

Papur Pwnc Drafft / Draft Topic Paper
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How to Have Your Say

Whilst the following paper is the not subject to a formal consultation, the Council as part of its ongoing community involvement, would welcome your views on its content
The final date for receipt of comments is 15th June 2009.

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Executive Summary

Population and Housing

In order to set out the background to the preparation of the LDP's population projections for Carmarthenshire, this paper will provide details of the Council's projections and the way in which these determine the level of housing land provision within the County. Demographic information represents an important component of strategic planning. Projections of future population are vital for development plan purposes, particularly in terms of assessing how much land must be made available for housing, employment and other major uses.

The recent Welsh Assembly Government's (WAG) 2006 based Population Projections by Unitary Authority provide a trend based set of projections from 2006 to beyond the plan period of 2021. These projections (utilising the WAG principal projection) indicates an increase in population from 178,043 in 2006 to 199,246 in 2021. Two further variant projections based on lower and higher fertility and mortality assumptions illustrate the impact changes in datasets may have on forecast. Using the POPGROUP demographic model these projections utilise past trends and project them forward and consequently they will be subject to review in order to ensure their continued accuracy.

This paper proposes that the WAG principal projection (as outlined above) be utilised in the preparation of the LDP. This principal projection illustrates that the County's population could grow by 21,203 over the plan period. It indicates a largely consistent pattern of growth over the plan period equating to a population increase of approximately 1,410 persons per annum.

Table 1: Projected Carmarthenshire Population to 2021, by Broad Age Group

Age	2006	2011	2016	2021
0-4	9,200	10,100	10,300	10,250
5-10	12,200	12,000	12,900	13,300
11-15	11,600	11,000	10,800	11,500
16-17	4,700	4,700	4,300	4,400
18-59Female, 64Male	99,100	100,700	101,700	102,000
60/65 -74	24,200	28,400	32,100	33,600
75-84	12,700	12,900	14,300	17,300
85+	4,300	5,200	5,800	6,800
Total	178,000	185,00	192,200	199,200

Source: POPGROUP

Note : Figures may not add up due to rounding

In determining the level and distribution of housing within the LDP, the plan must take into account the content of Planning Policy Wales and the draft Ministerial Interim Planning Policy Statement on Housing (2006).

This paper, in developing upon the above population projections, seeks to estimate the number of households required for the plan period. In doing so, the plan has utilised the HOUSEGROUP software in order to undertake a projection of estimated households based on the above population projections and incorporating a number of additional datasets.

The projected increase in population over the plan period of approximately 21,200, will equate to a potential requirement of **13,405** additional households in Carmarthenshire

between 2006 and 2021. This increase is attributed to a decrease in household size caused by rises in the number of one-person households (25%), married couple households (15%) and other multi-person households (23%).

In the interests of flexibility, and as a control for any discrepancies in the household projection methodology, a range for the LDP household requirements for the County is proposed. This will allow increased flexibility in the application of indicative site specific figures (both in relation to the distribution of development to particular settlements but also in respect prescribing indicative figures to allocated sites).

A 10% flexibility has been applied with the consequential household requirement for the LDP being:

Range: 12,735 – 14,075

Contents

Executive Summary

- 1. Introduction**
- 2. Purpose of this Paper**
- 3. Policy Context**
 - 3.1 National**
 - 3.2 Regional**
 - 3.3 Local**
- 4. Local Trends and Baseline**
 - 4.1 Demography Paper**
 - 4.2 Discussion Papers**
- 5. Population Projections**
 - 5.1 Introduction**
 - 5.2 What is POPGROUP**
 - 5.3 2006 based Local Authority Population Projections – WAG**
 - 5.4 2006 based Local Authority Population Projections – Population Model**
 - 5.5 2006 based Local Authority Population Projections – Principal Projection**
 - 5.6 Variant Projections**
 - 5.7 Carmarthenshire Local Development Plan Population Projection**
- 6. Housing Projections**
 - 6.1 Introduction**
 - 6.2 2003 based National and Sub National Projections**
 - 6.3 2006 based Local Authority Housing Projections**
 - 6.4 Carmarthenshire Local Development Plan Household Projection**
 - 6.5 Implications of Growth**
- 7. Housing Land Supply**
 - 7.1 Introduction**
 - 7.2 Land Supply to meet the Projected Housing Requirement**
 - 7.3 Phasing**
 - 7.4 Densities**
- 8. Affordable Housing**
- 9. Gypsies and Travellers**

1. Introduction

Carmarthenshire County Council is in the process of preparing a Local Development Plan for its area (excluding that part contained within the Brecon Beacons National Park). The aim of the new Local Development Plan's (LDP) is to make the Development Plan System more relevant, inclusive and engaging to local communities. It also serves to encourage a collaborative approach to plan preparation involving the voluntary, public and private sectors, which should result in a Plan based on consensus.

The LDP will set out a Local Planning Authority's proposals and policies for the future development and use of land within its administrative area. Upon adoption, the LDP will supersede the existing Unitary Development Plan (UDP) with decisions on planning permissions primarily based on its content. A Development Plan therefore provides a measure of certainty about what kind of development will and will not be permitted during the plan period.

In delivering the above the plan will contain detailed policies and proposals for the not only the use of land but also the protection of the environment, it will guide investment and the delivery of services and infrastructure. It will determine the level of provision and location of new housing and employment opportunities and sets the framework for considering all land use proposals during the plan period.

Due regard will be had to national and regional planning policy and guidance in the formulation of outcomes in respect of any emerging issues, options and objectives. In formulating the LDP regard will also be had to strategies and other background documents where relevant.

2. Purpose of this Paper

This paper seeks to provide background information in relation to Population and Housing within the Carmarthenshire LDP. The paper will set out the scope of the respective options building on the various outputs to the process. It will set out the general context for the County and some of the underlying considerations in the selection and refining process as well as their respective impacts upon the County.

It is intended that this paper will:

- set out the background for population and housing;
- develop upon the discussion papers and pre deposit the work already undertaken;
- inform the ongoing pre-deposit engagement and participation;
- assist in the determination of appropriate levels of growth;
- inform the preparation of a preferred strategy and subsequent stages of plan preparation; and,
- form part of the evidence trail at the independent examination.

The paper will outline the future housing requirement for the LDP.

This paper may be updated as the plan progresses. Such updates will ensure that the LDP process is appropriately informed.

Further information on the production of the population and household projections for Carmarthenshire as referred to in this paper are set out within the LDP: Population and

Household Projections Report available on the Councils website. This report (prepared by Carmarthenshire County Council) provides further context for the preparation of population and household projections by setting out the assumptions and considerations used in their preparation. Reference should also be made to the spatial options and settlement hierarchy paper.

The identification of issues and objectives in relation to the County and the LDP including population and housing are considered within the Issues, Vision and Objectives Paper.

3. Policy Context

3.1 National

Planning Policy Wales 2002 and Ministerial Interim Planning Policy Statement 01/2006 – Housing (June 2006)

The Welsh Assembly Governments (WAG) objectives in respect of housing are set out within the Planning Policy Wales (PPW) 2002 and the Ministerial Interim Planning Policy Statement (MIPPS) 01/2006 Housing (June 2006). It identifies the Assembly Governments vision for housing stating that everyone in Wales should have the opportunity to live in good quality, affordable housing, to be able to choose where they live and decide whether buying or renting is best for them or their families. The objective being to provide:

- Homes that are in good condition, in safe neighbourhoods and sustainable communities; and
- Greater choice for people over the type of housing and the location they live in, recognising the needs of all, including those in need of affordable or special needs housing in both urban and rural areas. (MIPPS 01/2006: Para 9.1.1)

Guidance indicates that planning should take account of the following:

- People, Places, Futures – The Wales Spatial Plan;
- Statutory Code of Practice on Racial Equality in Housing – Wales;
- The Assembly Government's latest household projections;
- Local housing strategies;
- Community strategies;
- Local housing requirement assessment (needs and demands);
- The needs of the local and national economy;
- Social considerations (including unmet need);
- The capacity of an area in terms of social, environmental and cultural factors (including consideration of the Welsh language) to accommodate more housing;
- The environmental implications, including energy consumption and greenhouse gas emissions; and
- The capacity of the existing or planned infrastructure. (MIPPS 01/2006: Para 9.2.1)

In assessing housing requirements local planning authorities should utilise the latest WAG projections as a starting point. Any deviations from the WAG projections must be accompanied by a clear justification.

Development Plans should:

- Quantify the housing requirement (both market and affordable);

- Set an affordable housing target;
- Set out a settlement strategy;
- Allocate housing land on the basis of the search sequence specified in 9.2.8 and in the criteria in 9.2.9;
- Include clear policy criteria against which applications for development of unallocated sites will be considered;
- Specify the circumstances in which previously developed sites would be deemed to perform so poorly that their use would not be favoured before that of a (particular) Greenfield site;
- Include clear development control policies to guide the determination of applications, including guidance on design, access, density, off-street parking and open space provision for particular areas as appropriate;
- Specify mechanisms to be used to monitor the take up of housing land;
- Include policies on affordable housing in areas where need has been identified, including any rural areas where exception sites will be considered;
- Include a policy to strictly control new housing in the countryside away from existing settlements or other areas allocated for development; and
- Include policies to indicate where developer contributions will be expected toward infrastructure, community facilities and affordable housing. (MIPPS 01/2006: Para 9.2.23)

Planning policy guidance sets out a series of requirements many of which are considered at various stages within the plan making process. They relate across a number of topic areas ranging from the development and selection of a preferred strategy to the selection of specific sites - for example guidance on the criteria used in deciding which sites to allocate for housing will be considered at the appropriate stage in the plan making process.

Planning Policy Wales - Technical Advice Note 1: Joint Housing Land Availability Studies (June 2006)

Joint Housing Land Availability Studies (JHLAS) set out to:

- Monitor the provision of market and affordable housing.
- Provide an agreed statement of residential land availability
- Set out the need for action where insufficient supply is identified.

The production of the JHLAS represents an important part of the LDP evidence base providing valuable information in relation to previous build rates and the supply of housing land.

Planning Policy Wales - Technical Advice Note 2: Planning and Affordable Housing (June 2006)

Land use planning represents one mechanism which can be used to deliver affordable housing, TAN2 sets out to provide practical guidance on the role of the planning system in its delivery. It defines affordable housing for the purposes of the TAN and seeks to advise local authorities on how to determine affordability. It stresses the need to work collaboratively with notable reference to undertaking the preparation of a LHMA in consultation with key stakeholders. It places a requirement on local authorities to:

- Include an affordable housing target based on the identified housing need set out within the LHMA.
- Identify policy approaches to indicate how target will be achieved.
- Monitor the provision of affordable housing.

The Affordable Housing Toolkit – Welsh Assembly Government (June 2006)

The toolkit draws together the national policy context in respect of housing and details the mechanisms and powers available for the delivery of affordable housing.

Local Housing Market Assessment Guide – 2006

The guide sets out advice and guidance to allow local authorities in their role as strategic housing bodies to understand their housing markets. LHMA's and the Housing strategy represent important elements of the evidence base and will assist in supporting the affordable housing policies contained within the LDP.

Statutory Code of practice on Racial Equality in Housing – Wales

The MIPPS identifies the requirement for local authorities in preparing its development plan to take account of racial equality in housing. This Statutory Code of Practice sets out the legal framework and good practice in relation to housing.

National Housing Strategy: Better Homes for People in Wales 2001

Provides the vision for the future of Welsh housing stating that 'everyone in Wales should have the opportunity to live in good quality, affordable housing; and to be able to choose where they live and whether buying or renting is best for them and their families'.

WAG Circular – Planning for Gypsy and Traveller Caravan Sites – 2007

The accommodation needs of Gypsy families should be considered by local planning authorities as part of their development plans with the LHMA providing key source of information. It identifies that where there is an assessment of unmet need for Gypsy or traveller accommodation sufficient land should be allocated through the LDP.

3.2 Regional

People, Places, Futures - Wales Spatial Plan Update 2008

The Wales Spatial Plan (WSP) provides the overarching policy context for future spatial development and planning in Wales setting out cross cutting national priorities. It seeks to ensure that what is done in Wales is integrated and sustainable with the actions within an area supportive of each other and which jointly move towards a shared vision for the area. It is a material consideration in the preparation of the LDP.

Carmarthenshire is located within three areas identified within the WSP:

- ❖ Pembrokeshire - The Haven;
- ❖ Swansea Bay - Waterfront and the Western Valleys; and
- ❖ Central Wales

Each spatial plan area sets out a policy statement for housing within the given area identifying the priorities for the region.

Swansea Bay – Waterfront and Western Valleys – In making reference to the location and pattern of development the update places emphasis on the settlement hubs whilst also seeking to revitalise and sustain smaller centres and valley communities, with housing cited as a key influence. Housing should be attractive, affordable and sustainable.

Pembrokeshire – The Haven – Contains an emphasis in respect of key settlements setting the pattern for future housing distribution through the approach contained within the UDP and its framework. Includes a recognition of the importance of housing as a mechanism to revitalise and sustain smaller centres and communities. Housing should be well designed, affordable and sustainable.

Central Wales - A key priority is to ensure access to affordable housing (to buy or rent) in locations which are convenient for local work and services and by ensuring a range of housing types are available in a choice of high quality environments.

3.3 Local

Carmarthenshire Unitary Development Plan – Adopted July 2006

As part of the preparation of the Unitary Development Plan (UDP) Carmarthenshire County Council produced a set of population projections for the plan period through to 2016. It sought to introduce a strategic approach aimed at stemming out migration forecasting a further increase in population growth of 24,830 by 2016 to 176,318. This compares favourably with the official figure of 178,000 at mid 2006 subsequently produced by the Office of National Statistics.

The UDP sought to ensure that an adequate supply of land will be readily available for all appropriate housing developments and that there will be a range and choice of housing available to meet the needs of the present and future population of the plan area.

In doing so it identified a requirement for sufficient land to be allocated to accommodate approximately 11,300 homes over the plan period, of which the existing supply, namely those sites with consent as at 2001 JHLAS base date and allocations from the 3 previous development plans (5+ sites), contributed 5818 with windfall/conversions, small sites and Planning and Development Brief sites contributes some 3494 units. This left a residual requirement of 1988, namely that part met by new UDP allocations. An additional 861 units was then allocated within the UDP on sites of 5 or more to provide an appropriate degree of flexibility in the plans housing provision, providing a final resultant supply of 12,161 dwellings for the plan period.

Residential allocations were distributed within the context set out through the Strategic Sustainable Settlement Framework (See the Strategic Spatial Options and Settlement Hierarchy Paper for further information).

In terms of affordable housing the UDP sets out a series of policies aimed at securing the delivery of range and choice of housing to meet local needs, whilst also acknowledging the enabling role of the council in the provision of affordable housing. In doing so the UDP sets out a series of criteria based policies guiding such provision:

- Affordable Housing (Developer Negotiation).
- Affordable Housing - Exceptions (Sites within or immediately adjoining and forming a logical extension to a recognised settlement).
- Affordable Housing – Minor Settlements (Infill or immediately adjoining and forming a logical extension to a large group of dwellings – single dwelling).
- Local Need Eligibility Criteria.

The adopted UDP incorporates a policy framework which largely reflects planning policy and guidance, delivering housing provision in a manner consistent with the guidance but also in line with the content of the Wales Spatial Plan and its aspirations.

Carmarthenshire County Council – A Step on the Ladder (January 2005)

Identifies affordable housing as a key priority of the Council and provides an informative guide to all interested parties involved in the planning, design, development and delivery of affordable housing in Carmarthenshire.

Carmarthenshire County Council – Local Housing Market Assessment: 2007 Annual Review

Assembly government guidance highlights the role of Local Housing Market Assessments (LHMA) and that they will form the evidence base for affordable housing policies within the LDP.

Local authorities must combine in partnership with local stakeholders to produce the LHMA. (MIPPS 01/2006: Para 9.1.4) In accordance with the requirements contained within the MIPPS the authority must have an understanding of the housing market to inform and develop a sound and robust LDP. The LHMA represents an important part of the evidence base for not only the LDP through aiding an understanding a range of housing issues within the plan area but also informs the Council's Housing Strategy.

Some of the main points extracted from the emerging 2007 assessment are as follows:

Current housing situation

- House prices have continued to rise, with entry level property now estimated at costing £100,000, with house prices by type and by community network area exceeding the Wales average in the majority of cases. Tywi continued to show strong price growth as did Llanelli and the Amman. Llanelli also exhibited strong growth in private rental overtaking Carmarthen for all but two bed flats and studios.
- Leading on from low growth in lower quartile earnings, coupled with strong house price growth an estimated 60% of households are estimated not to be able to afford an entry level property.

Assessment of supply

- Total number of dwelling units in Carmarthenshire has increased to 79,325.
- 3.8% of the County's homes were vacant in July 2006, according to Council Tax records.
- The rate of new house building doubled between 1999 and 2003 with the majority being private sector housing for open market sale (Source: LHMA 2006).
- Overall housing supply has shown a continued increase.
- Housing association supply continues to be in line with the target of 40 set out in the housing strategy.

Assessment of need

- December 2005 saw the number of applicants on the Housing Choice Register increase to 7,249.
- There has been a worsening of the demand/supply ratios due in virtually all cases to a fall in supply (lettings) accentuating substantial increases in demand through the register.

The 2008 annual review of the LHMA is currently being finalised and due regard will be had to its contents.

Joint Housing Land Availability Study – 1st April 2007 (September 2008)

The provisions of TAN2, requires all authorities in Wales to prepare a Joint Housing Land Availability Study (JHLAS) for its area. This ensures that sufficient land is genuinely available, to provide a five year supply of land for housing. A study group constituting representatives from WAG, Homebuilders Federation, the County Council and other representative bodies is responsible for agreeing the sites and details pertaining to each.

The JHLAS as at the 1st April 2007 identified Carmarthenshire as having a 5 year supply of land sufficient for 3714 dwellings, 90% of which were expected to be provided on large sites (5+ sites). It identifies that there are 370 dwelling under construction on large sites, 94% of which are being developed by the private sector.

The JHLAS reveals that 1175 dwellings were completed during the 21 month period, 98% of which were private sector. The small site contribution to total completions is at an estimated average annual rate of 77 units.

Land sufficient for 6334 dwellings was identified on sites within Category 3(i) and land for a further 101 dwellings on sites in category 3 (ii).

At the time of writing the 2008 JHLAS is being finalised with a view to publication. The content of the 2008 study will be monitored and utilised accordingly.

4. Local Trends and Baseline

4.1 Demography Paper

As part of the preparation of the initial discussion papers a separate demographic paper was prepared and provides an overview of population and demographics within the County and is important background document with regard to preparation of the LDP's evidence base. Reference should be made to this paper and its content in relation to the local trends and baseline data used in the preparation of this paper and the LDP.

4.2 The Discussion Papers

The Discussion Papers set the context for the preparation of the LDP through individual topic areas, developing on, and identifying some of the potential issues, options and objectives for the area. They represent an important first step in the development of a robust evidence base and of a preferred strategy. These papers are not exhaustive in content and are intended to illustrate the scope of the Plan and facilitate a response.

These papers sought to inform members of the Authority, officers, the key Stakeholder Forum and relevant Committees on some key strategic land use policy issues within the County.

The discussion papers and the demographic paper are available to view on the Councils website via the following link:

<http://www.carmarthenshire.gov.uk/english/environment/planning/planning%20policy%20and%20development%20plans/local%20development%20plan/pages/discussionpapers.aspx>

5. Population Projections

5.1 Introduction

In setting out the background to the preparation of the LDP's population projections for Carmarthenshire, this paper provides details of the Council's projections and the way in which they determine the level of housing land provision within the County.

Demographic information represents an important component of strategic planning. Information is needed on the size of the population, its rate of growth, its distribution, its composition by sex, age and socio-economic group. Projections of future population are therefore vital for development plan purposes and assessing how much land must be made available for housing, employment and other major uses.

Further information on the production of the population projections for Carmarthenshire as referred to in this paper are set out within the LDP: Population and Household Projections Report (available via the council website). This report (prepared by Carmarthenshire County Council) provides further context for the preparation of population and household projections by setting out the assumptions and considerations used in their preparation.

5.2 What is POPGROUP

The population and household projections developed for this paper and the LDP have been undertaken through the use of POPGROUP software. It was established by Bradford City Council and Andelin Associates with the support of its User Group. POPGROUP is now developed and administered by the Cathie Marsh Centre for Census and Survey Research (CCSR) at the University of Manchester. The suite of software also includes HOUSEGROUP and LABGROUP.

POPGROUP is a family of software developed to forecast population, households and the labour force for areas and social groups. Based on Excel it has been used as part of WAG Unitary Authority sub-national population projections. It uses standard demographic methods of cohort component projections, household headship rates and economic activity rates. Its flexibility allows integration of official statistics and ancillary data.

5.3 2006-based Local Authority Population Projections – WAG

June of 2008 saw the publication for the first time by WAG population projections at a Unitary Authority level. The publication of this data reflects the need for those who plan for the future to deliver services and to help frame sustainable policies to consider the population by age and sex. The projections are trend based and provide estimates of the size of the future population, and are based on assumptions about births, deaths and migration. The projections use the 2006 estimates as the base for projecting the population for each unitary authority over a 25 year period, namely 2006 – 2031.

They represent a new approach to the development of population projections and have included close collaboration with local authorities and other key users in Wales. The **2006-based Local Authority Population Projections – Technical Report (WAG)** sets out in detail the methodology and model used to calculate the projections. The technical report can be viewed on the WAG website via the following link:

<http://wales.gov.uk/topics/statistics/headlines/pop2009/hdw20090324/?lang=en>

The above technical report sets out that the projections are trend based and that the process of demographic change is cumulative with projections becoming increasingly uncertain the further forward they are carried. In order to illustrate the impact

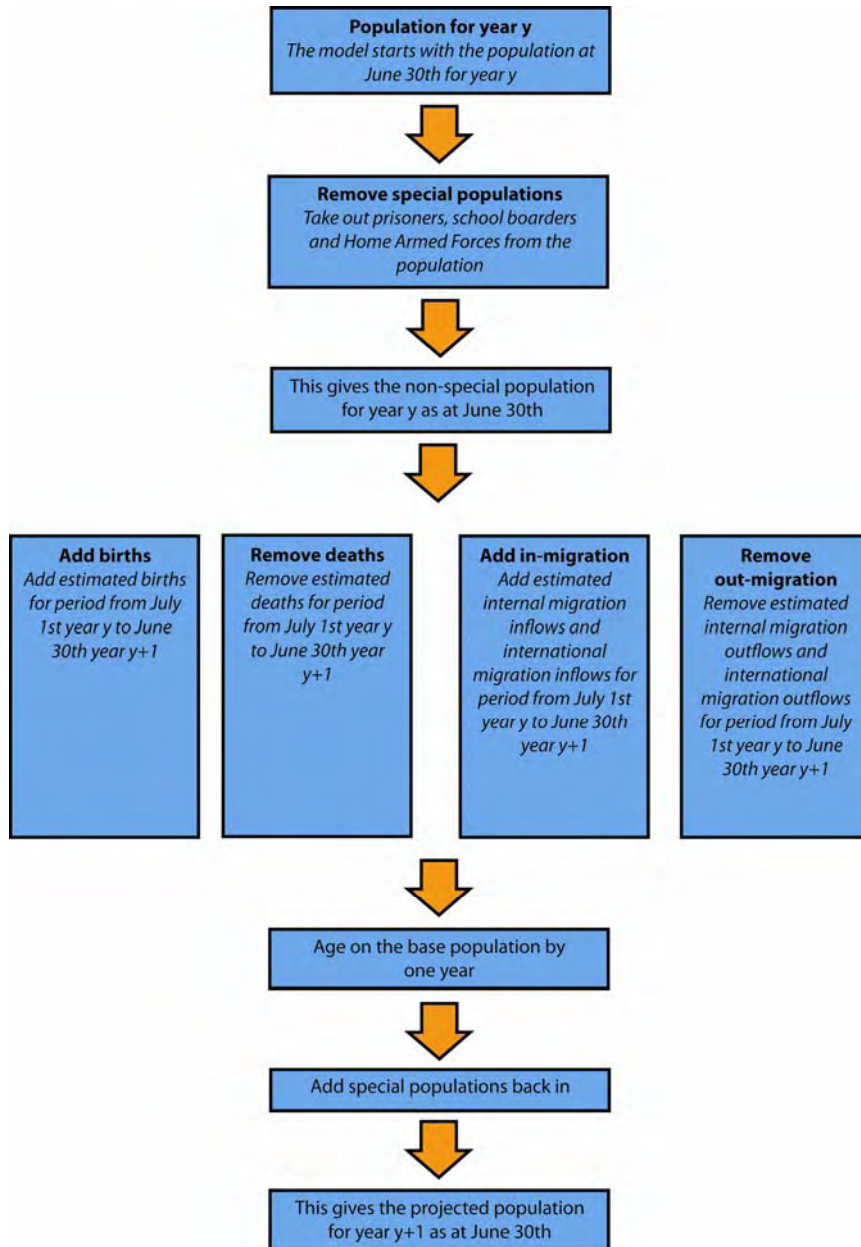
Population and Housing Paper
Draft - May 2009

demographic change can have on some populations and the uncertainty associated with projections a number of variant proposals have also been published alongside the principal projection. These include the Higher and Lower variants as set out below. These illustrate the impact that small changes in assumptions can have, and in particular the cumulative nature of these changes.

A further variant sought to demonstrate the impact that the size of migration flows may have. It highlighted that migration assumptions can be more critical than fertility and mortality assumptions. In this regard a scenario of no migration (natural change only) would see population within the County remaining largely stagnant with a slight fall of 680 during the plan period. These variant projections are purely illustrative and should not be seen as higher and lower thresholds. [WAG Technical Report P.4]

5.4 2006-based Local Authority Population Projections - Population Model

The following diagram taken from the fore mentioned Technical Paper provides an overview of the model used for the sub-national population projections.



5.5 2006-based Local Authority Population Projections – Principal Projection

Population by Age – Life expectancy within the County has been showing an increase with a growth in the elderly population and a more modest in child age groups. The projections indicate that there is likely to be an increasing population aged 65+. The population of working age, (a key group in terms of economic activity and labour supply) is projected to increase by 2.5% over the plan period.

Population – Migration – The migration of people between Carmarthenshire and the rest of the UK is anticipated to indicate that more people will be arriving than departing. The projections set Carmarthenshire as experiencing the highest net inflow of local authorities in Wales. There is however expected to be a trend towards a negative international net migration with more people leaving than arriving.

Total Population – Highlights that the total level of population within Carmarthenshire by 2021 is set to increase to 199,246 which equates to a population growth of approximately 12%. The natural growth of population as indicated within the WAG variant shows that population within the County is remaining largely level with a slight decline of 680 over the plan period. The impact of migration on population is therefore clear and this has a significant influence on population growth during the plan period.

5.6 Variant Projections

In order to illustrate the potential for uncertainty with the population projections mentioned above, variant projections (from the local authority based WAG projections) were also run alongside the WAG principal projection. The three variants are as follows:

- Lower Variant – lower fertility rates and higher mortality rates.
- Higher Variant – higher fertility rates and lower mortality rates.
- Natural Change Variant – zero migration (in or out).

Table 1: Variant Population Projections 2006 – 2021

	2006	2011	2016	2021
Lower	178,043	183,023	188,509	193,878
Higher	178,043	186,872	195,814	204,498

5.7 Carmarthenshire Local Development Plan Population Projection

The publication of the Local Authority based population projections by WAG allows for effective planning for the future of the County which is based upon a set of data focused around the needs of local authorities. It is intended to utilise the principal projection in the preparation of the LDP.

The use of these projections will hopefully provide a consistent and reliable picture of the County's population change during the plan period. This is, however, very much dependent on reviews to the population projections being important considerations (particularly given that trend based projections assume that past patterns will continue into the future). The intention for the LDP reviews to be undertaken on a 5 yearly basis and the potential for them to be carried out every 4 years effectively means that a first review will be undertaken 2016. This will afford an opportunity to review the plan in light of monitoring which will have taken place and address any issues. Such a review will have regard to the current and potential future uncertainty as a economic climate and its potential impact on the projections. The assembly projections are trend based and thus illustrate what the position could be if there was a continuation of historic trends over the previous 5 years to 2006, into the future.

The collaboration with local authorities throughout their development (notably through the Welsh Statistical Liaison Committee) has it is felt contributed to the model and set of projections.

The utilisation of these figures accords with the Assembly's requirement for any deviation from them to be fully justified.

The methodologies used to produce the projections are set out within the LDP: Population and Household Projections Report (available via the Councils website). This report (prepared by Carmarthenshire County Council) provides further context for the preparation of population and household projections setting out the assumptions and considerations used in their preparation.

The principal projection illustrates that the County's population could grow by 21,203 over the plan period. It indicates a largely consistent pattern of growth over the plan period equating to a population increase of approximately 1,410 persons per annum.

Table 2: Population Projection 2006 – 2021

	Age Group	2006	2011	2016	2021
Persons	0-4	9,179	10,110	10,298	10,250
	5-9	9,983	9,842	10,795	10,979
	10-14	11,530	10,802	10,653	11,622
	15-19	11,501	11,605	10,888	10,729
	20-24	9,334	10,165	10,263	9,550
	25-29	8,565	9,453	10,286	10,389
	30-34	9,143	9,102	9,991	10,823
	35-39	11,350	9,886	9,862	10,748
	40-44	12,640	12,121	10,659	10,649
	45-49	12,071	13,231	12,716	11,262
	50-54	12,051	12,687	13,856	13,344
	55-59	13,465	12,710	13,353	14,529
	60-64	12,130	13,892	13,185	13,834
	65-69	9,755	12,059	13,821	13,192
	70-74	8,345	9,208	11,436	13,161
	75-79	7,035	7,323	8,270	10,363
	80-84	5,657	5,535	6,012	6,981
85-89	2,968	3,595	3,712	4,260	
90+	1,341	1,626	2,136	2,583	
	Total	178,043	184,955	192,191	199,246

Should Carmarthenshire be planning for the future of the County based on the Assembly Government's Local Authority Population Projections?

6. Housing Projections

6.1 Introduction

The purpose of this section is to elaborate on the manner in which the population projection set out above has been translated into the housing provision requirement for

the LDP. The LDP is required to ensure that sufficient residential land is made available to meet the future needs of the County's communities. This is reflective of the LDP's strategic role.

In estimating the number of new houses required during the plan period, it is necessary to take account of the increases in the number of houses required. This reflects a number of factors with the constituent make up of households e.g. the trend has been for families to have fewer children moving away from the image of the nuclear family. There has been an increase in single parent families reflecting changes in society's attitude and the higher rates of divorce with resultant smaller households.

Further information on the production of the household projections for Carmarthenshire as referred to in this paper is set out within the LDP: Population and Household Projections Report (available via the council's website). This report prepared by Carmarthenshire County Council provides further context for the preparation of household projections setting out the methodology and the assumptions, datasets etc used in their preparation.

The HOUSEGROUP module of the POPGROUP suite of software has been used to project the number of households for the plan period based upon the population projections set out previously.

6.2 2003 based National and Sub National Projections

Housing Projections had been previously supplied by the WAG in the form of the 2003 based Sub National Projections at a regional level. This was supplied to the Strategic Planning Groups with the intention that the sub national figure would be subsequently apportioned between the group's respective authorities. The relevant group for Carmarthenshire is the South West Wales Strategic Planning Group (SWWRPG).

Each group (in considering the WAG figures) did so with varying levels of confidence. With regard to the SWWRPG, the regional figure was not accepted and each authority subsequently agreed to undertake its own projections, which were to be aggregated up to regional level.

6.3 2006 based Local Authority Household Projections

The Assembly is currently preparing household projections based on the local authority population projections (see above). This will be the first time that household projections have been published at Unitary Authority level in Wales. The scheduled release of these projections is March/April 2009, however at the time of writing no final confirmation of the release date has been received.

The authority, having resolved to utilise the equivalent population data for unitary authorities, awaits the release of the household projections with interest. In their absence however it is prudent to make progress based upon the best available information. In this regard the Council has utilised the 2006 population projections as a base for the calculation of its own household requirements. The Council will review its own projections once the Assembly projections are released.

6.4 Carmarthenshire Local Development Plan Household Projections

Utilising the HOUSEGROUP module of the software, a projection of estimated households for the plan period based on the above population projections and incorporating a number of additional datasets has been undertaken. Further details of the approach taken are contained within the LDP: Population and Household Projections Report.

Given the potential uncertainty with population projections and the move away from predict and provide to monitor and manage, the council have considered the scenario of using the Assembly projections (population) but retaining household headship rates at their 2004 level. Future headship rates are themselves often difficult to predict with any degree of certainty, should we therefore be considering enhancements to the base headship rates to reflect changes over time?

The following sets of cohorts relating to trends in household formation have been applied to the detailed population projections in order to provide an estimate of future housing requirements:

- **Household Types:**
 - Married Couple
 - Cohabiting Couple
 - Lone Parent
 - Other Multi-person
 - One Person
- **Concealed Family Types:**
 - Concealed Married Couple
 - Concealed Cohabiting Couple
 - Concealed Lone Parent

It should be noted that other factors such as the housing market, local economy and the planning system will influence the supply of housing to meet the demand created through household creation.

Table 3: Projected Household Requirement – Carmarthenshire LDP 2006 – 2021

	2006	2011	2016	2021
<i>Household Types</i>				
Married couple	37,106	38,976	40,963	42,868
Cohabiting couple	5,282	5,453	5,701	5,848
Lone parent	5,825	5,824	5,832	5,844
Other multi-person	4,632	4,959	5,311	5,692
One person	23,729	25,338	27,346	29,727
All Households	76,574	80,550	85,154	89,979
(Resultant increase = 13,405)				
Private household population	175,450	182,362	189,595	196,649
Average household size	2.29	2.26	2.23	2.19
Concealed married couple	141	142	150	157
Concealed cohabiting couple	130	138	144	145
Concealed lone parent	212	215	219	218
<i>All concealed families</i>	483	495	512	521

Source: HOUSEPOP

The result of the above projection indicates that there would be an increase in population over the plan period of approximately 21,200. As can be seen from the above table, this equates to a potential requirement of **13,405** additional households in Carmarthenshire between 2006 and 2021.

Headline projection results for household types in the County for the period of the Local Development Plan are: the continued rise in married couple (+5,800), other multi-person households (+1,100) and a rapid upward trend in one-person households. The two other types of household are forecast to remain around current levels.

Between 2006 and 2021 the number of one-person households is forecast to increase by a quarter (25%), married couple households will rise by 15%, whilst other multi-person households will increase by 23%. There will also be an increase in the number of cohabiting couple households, which are forecast to grow by 11%. The number of lone parent household is predicted to remain broadly the same over the fifteen year period.

In the interests of flexibility, and as a control for any discrepancies in the household projection methodology, it is considered appropriate to apply a range in terms of the LDP household requirements for the County. The use of this range will allow increased flexibility in the application of indicative figures both in relation to the distribution of development to particular settlements and also in respect of prescribing indicative figures to allocated sites.

Based on the identified potential requirement of **13,405** as set out above it is proposed to apply 10% flexibility with a consequential household requirement for the LDP being:

Range: 12,735 – 14,075

Based on the assumptions used, should the Council be planning for 13,405 potential new household to 2021?

6.5 Implications of Growth

It is acknowledged that the use of the WAG 2006 based population projections for unitary authority areas highlights a high level of growth (which when translated into household requirement indicates a potential annual supply of some 893 units). By way of context, the UDP sought to allocate 11,300 residential units (approx 750 per year). In addition it is also worth noting that the 2007 JHLAS highlights that over the period July 01 – April 07 indicates a 5.75 year average annual completion rate of 575.

It is considered that the level of requirement, particularly when taken with the use of a range as set out above, provides a degree of greater flexibility to accommodate growth.

The intention for LDP reviews to be undertaken on a 5 yearly basis and the potential for this to be carried out every 4 years effectively means that a first review will be undertaken 2016. This will afford an opportunity to review the plan in light of the monitoring that will have taken place and address any issues in relation to the housing land requirement. It is also worth noting at this point that reviews to population projections will be important considerations, particularly given that trend based projections assume that past patterns will continue into the future. Worthy of note in respect of population projections is the 2011 census of population and its results.

These are unlikely to impact upon the adoption of the plan, but they will require consideration as part of any monitoring and review process.

The above population section identified the use of three WAG projections: namely, the Principal Projection, Higher Variant and Lower Variant. Whilst a natural change (zero migration) variant was also highlighted, this represents a useful example in demonstrating the respective vagaries of the forecasting process and the important role played by migration.

It would be useful at this time for comparative reasons and despite the stated desire to progress with the principal projection to highlight the respective requirements emerging from the Variant projections. The future population levels identified under the variants and the principal projection and the likely housing requirement over the plan period are:

	Projected Population Increase	Household Requirement	Dwellings Per Year
Higher Variant	26,455	15,230	1,015
Principal Projection	21,203	13,405	893
Lower Variant	15,835	11,406	760

7. Housing Land Supply

7.1 Introduction

This section develops on the requirement for the LDP to ensure that sufficient residential land is made available to meet the future needs of the area's communities. This section will take the household requirement set out previously and outline how this will be met through land supply within the plan.

7.2 Land Supply to meet the Projected Housing Requirement

In meeting the above household projections the Council will need to identify the amount of land that will need to be allocated for residential development within the LDP. In doing so, it is accepted that some of this requirement will have already been met by existing committed allocations etc.

The Council has a current adopted development plan in the form of the UDP. This allocates land for development for its plan period through to 2016. In addition there are a number of sites which can be identified as Windfall sites (i.e. sites that will come forward over the plan period through change of use or those sites that have not been allocated for housing within the UDP). These sites will make a significant contribution to the land supply figure. The Council in determining which sites are taken forward into the LDP, will re-assess those that do not have the benefit of a planning consent. Sites with planning consent may, where appropriate, be taken forward into the LDP. The consideration of sites will be subject to the emerging site assessment methodology.

The invitation for **candidate sites** resulted in the receipt of some 1500 sites of differing scale and range of uses. These sites will be considered and where appropriate, assessed for inclusion within the LDP. The site assessment methodology (see Site Assessment Methodology Paper) will be used to assess (where appropriate) the suitability of such sites for inclusion.

The Council will seek to identify those **strategic sites**, (either individually or cumulatively) which will make an important contribution to the implementation of the emerging preferred strategy.

Non-strategic sites are those sites that in their omission from the preferred strategy would not jeopardise its implementation. Non strategic sites can often be interpreted as accommodating local growth needs. Whilst they may not be strategic in nature, they will be of sufficient size to have an effect on, and contribute to the local community's requirements for growth. Given the diverse nature of the County and its settlements, the definition of large and contributory sites can be difficult to define. Consequently, and in line with the JHLAS, they can for allocation purposes be defined as capable of accommodating 5 or more dwellings.

The provision of the above housing requirement identified previously is expected to be met through the following:

- Existing committed sites with planning consent (sites of 5 or more with planning consent).
- The development of a range of strategic and non strategic sites in accordance with the emerging settlement hierarchy.
- The inclusion of small sites and windfall allowances including infill developments.

7.3 Phasing

The Council will consider the use of phasing of within the plan. Consideration will be given to the use of phasing in the interests of the well being of local communities and to ensure that new development respects (and integrates with) the needs of the local environment, the area's character and the Welsh language.

7.4 Densities

The LDP will reflect a number of considerations in determining the densities appropriate for a given site. These include: market trends, developer obligations (including affordable housing provision), an areas character and any constraints present. In light of increases in density experienced (over and above the indicative figures contained within the UDP), an average density per hectare which is more reflective of the market and provides encouragement for sustainability located development maybe required. In this regard 30 dwellings per hectare (as utilised in planning policies set out in England), may represent an appropriate figure in urban areas. It is recognised that an area's character and site considerations may (where appropriate) require the application of lower (or in appropriate circumstances higher) densities.

The application of a lower density away from urban areas was subject to comment as part of the responses to the discussion papers. A number of respondents sought the use of lower "non city" densities in less urban areas.

8. Affordable Housing

The importance of affordable housing is widely acknowledged and has emerged as a key issue through the pre-deposit plan making process. The Council is currently looking at the approaches to tackling affordable housing and will be working closely with partners in developing a robust and co-ordinated approach. A separate statement setting out background information and issues such as the affordable housing target

and mechanisms for delivery and monitoring will be published in due course. This will support the approaches set out within the emerging preferred strategy.

9. Gypsies and Travellers

The Local Housing Market Assessment Guide (Welsh Assembly Government) – March 2006 (Appendix F, P.156) provides the following draft definition of ‘gypsies and travellers’ for the purposes of an accommodation assessment process.

“Persons of nomadic habit of life whatever their race or origin, including such persons who on grounds only of their own or their family’s or dependents’ educational or health needs or old age have ceased to travel temporarily or permanently, and all other persons with a cultural tradition of nomadism and/or caravan dwelling.”

The definition is suitably broad to allow an understanding of the accommodation needs of this community encompassing both ethnic Gypsies and Travellers and ‘New Travellers’. In assessing need it should be noted that accommodation needs can also be addressed through ‘bricks and mortar’ housing and not just through the provision of authorised caravan sites.

The LDP is required to make suitable provision to meet the accommodation requirements of Gypsies and Travellers. The content of the LHMA together with both internal and external contacts will be used to identify levels of provision and requirements. In this respect the Council is in the process of examining Gypsy and Travellers needs and will be undertaking a survey to that effect. The outcome from which will be utilised to inform the LDP and will form part of the evidence base.

Should a deficiency be identified then it will be considered and where appropriate addressed.