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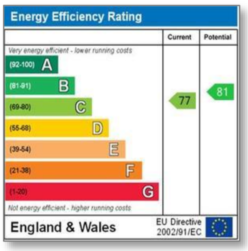


Mid and South West Wales Housing Assessment

Housing Market Summary for

Pembrokeshire

DRAFT: December 2019

Contents

Pembrokeshire 3
Housing Market Summary

Introduction 3
Population Trends and Projections 4
Household Trends and Projections 8
Housing Tenure 9
Cost of Home Ownership 12
Cost of Renting 14
Assessing Overall Housing Need 14
Five-Year Periods 15
Bedroom Size 17
Summary of Key Findings 18

Appendix 1 19
Household Needs by Ward

Appendix 2 21
Household Needs by Ward and Bedroom Size

Table of Figures 23

Pembrokeshire

Housing Market Summary

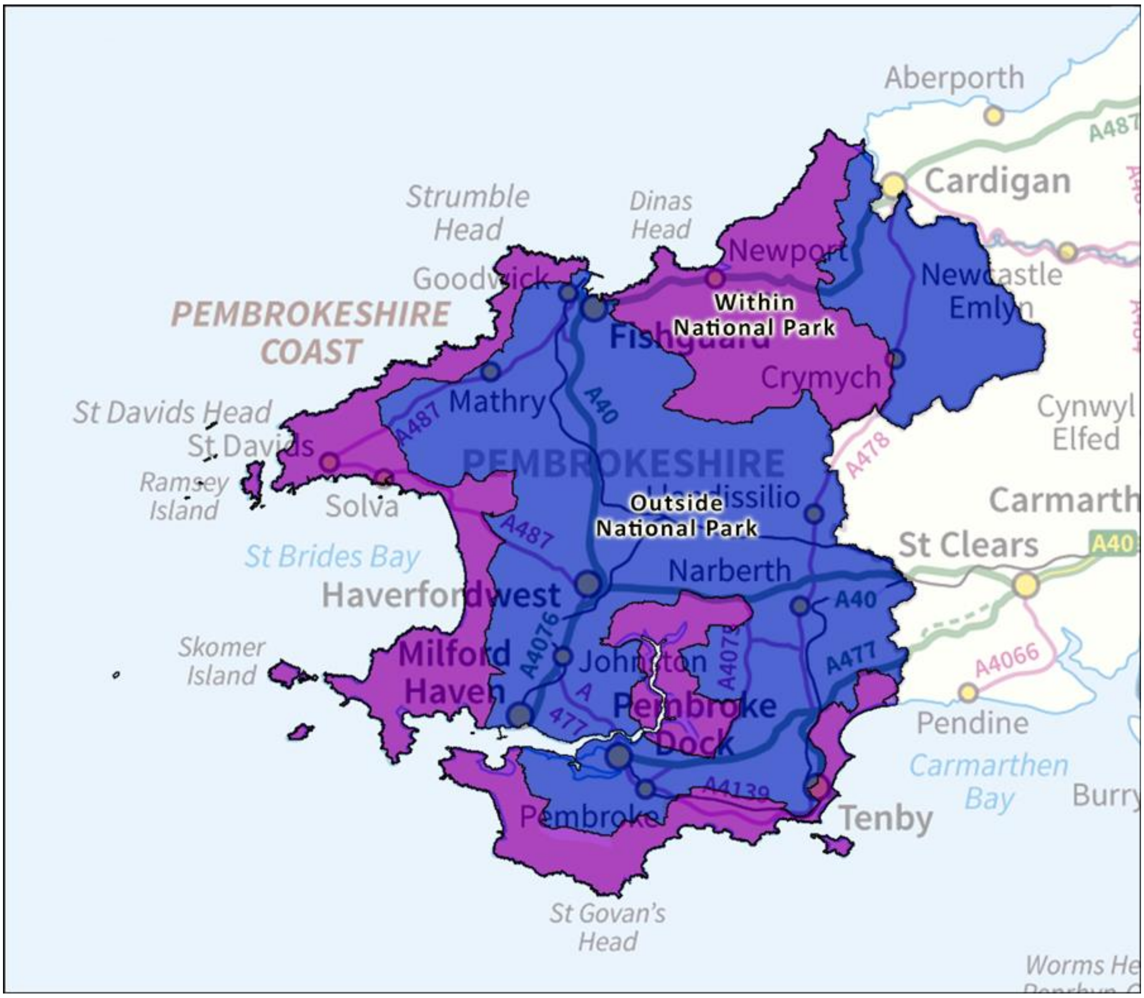
Introduction

1. Opinion Research Services were commissioned by the local authorities of Mid & South West Wales to undertake a cross-border assessment of housing needs in accordance with best practice. This document is a sub-area analysis for Pembrokeshire; and should be read in parallel with the accompanying wider regional report.

2. Pembrokeshire County Council is a unitary authority in Wales. It borders Carmarthenshire to the east, Ceredigion to the northeast and the sea everywhere else. The main town is Haverfordwest. Some parts of Pembrokeshire are within the Pembrokeshire Coast National Park; therefore this report provides information for the area within the national park, the area outside the national park, and the County as a whole.

3. This subdivision is illustrated in Figure 1:

Figure 1: Sub-Areas in Pembrokeshire

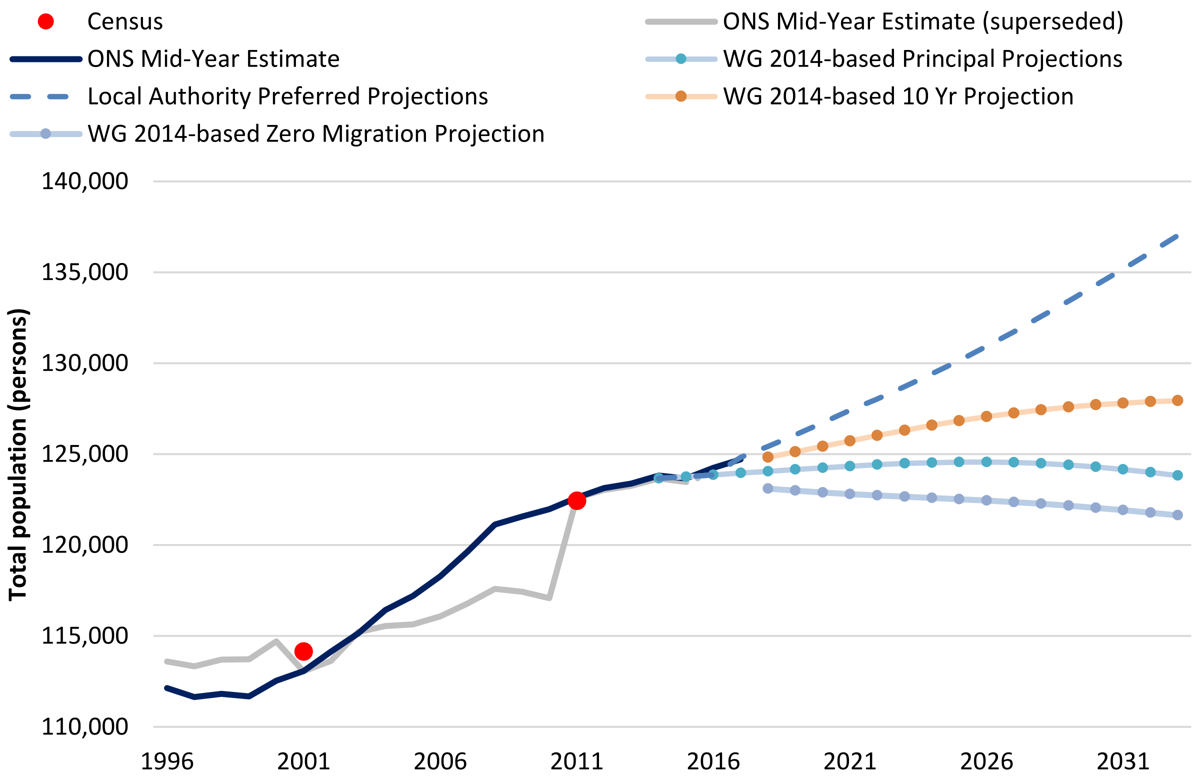


Population Trends and Projections

4. Population and household change are key drivers of demand for homes and these typically form the basis for the assessment of any new housing required.

5. Population projections are based on past trends, and Figure 2 shows the ONS annual mid-year population estimates over the period since 1996 (which take account of data from the 2001 and 2011 Census), together with two future projections for the period 2014-2033: the Welsh Government 2014 principal projection, and Pembrokeshire's preferred dwelling-led (425 dpa[1] outside park, 60 dpa within park) population projections[2]. The different scenarios clearly show the impact that different assumptions can have on the future projections.

Figure 2: Pembrokeshire: Population Projections with Census and MYE (Source: Census, ONS, Welsh Government, Pembrokeshire Preferred Projections)



6. The planning authorities of Pembrokeshire have elected to use their preferred population projections for the following reasons:

> *"A significant evidence base has been produced to support the Plan's approach to Housing. Edge Analytics have produced a range of population and household projections, which support the Authority's approach of a policy-led 425/60 dwellings a year. This figure is identified on the basis that it is in line with longer term migration based projections, is closely aligned to the average build rate of the last ten years and will help to maximise affordable housing delivery and the promotion of a more balanced population profile."* – Pembrokeshire County Council

[1] dpa = dwellings per annum

[2] E.g. https://www.pembrokeshire.gov.uk/objview.asp?object_id=4741&language=

7. Figure 3 shows the annual change in population together with the components of change, which are broadly classified into two categories:

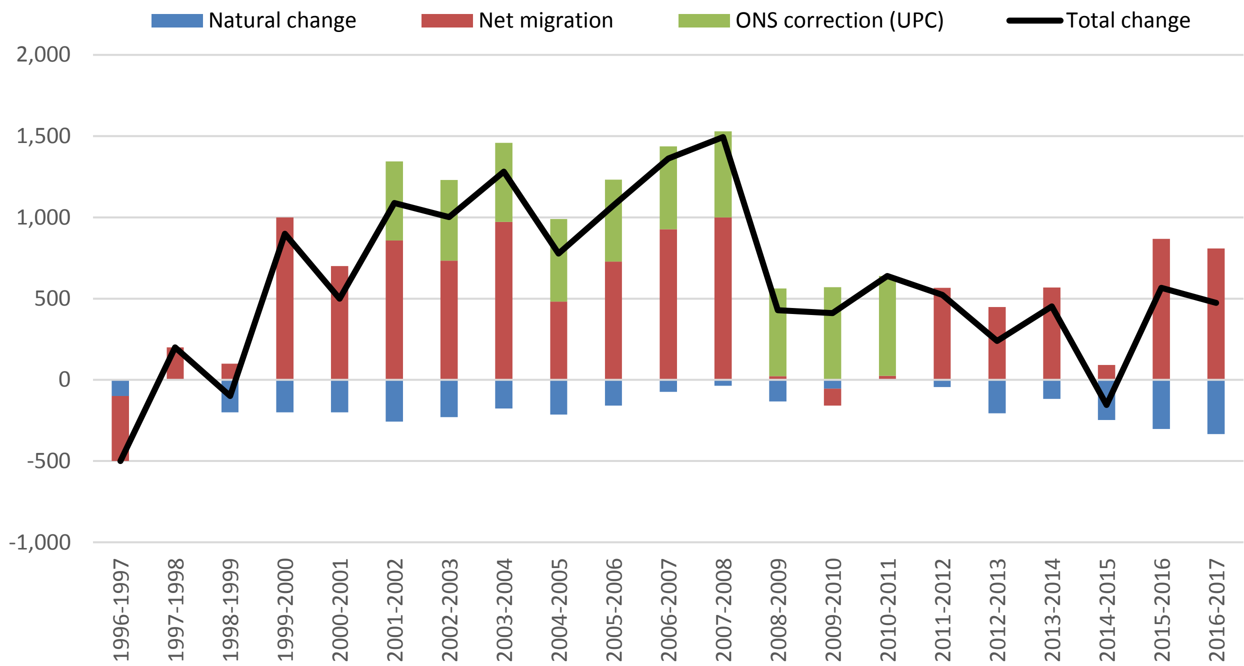
» Natural change in the population (in terms of births and deaths); and

» Changes due to migration, both in terms of international migration and moves within the UK.

8. Given that the population estimates in 2001 and 2011 are far more accurate and robust than the component of change data from year-to-year, the ONS factor in an “accountancy” adjustment to the components of change to correct the data and ensure that it reconciles with the more accurate estimates for the total population in the two Census years. Therefore, in addition to the known population flows, an element of “Unattributable Population Change” (UPC) is included in the figures.

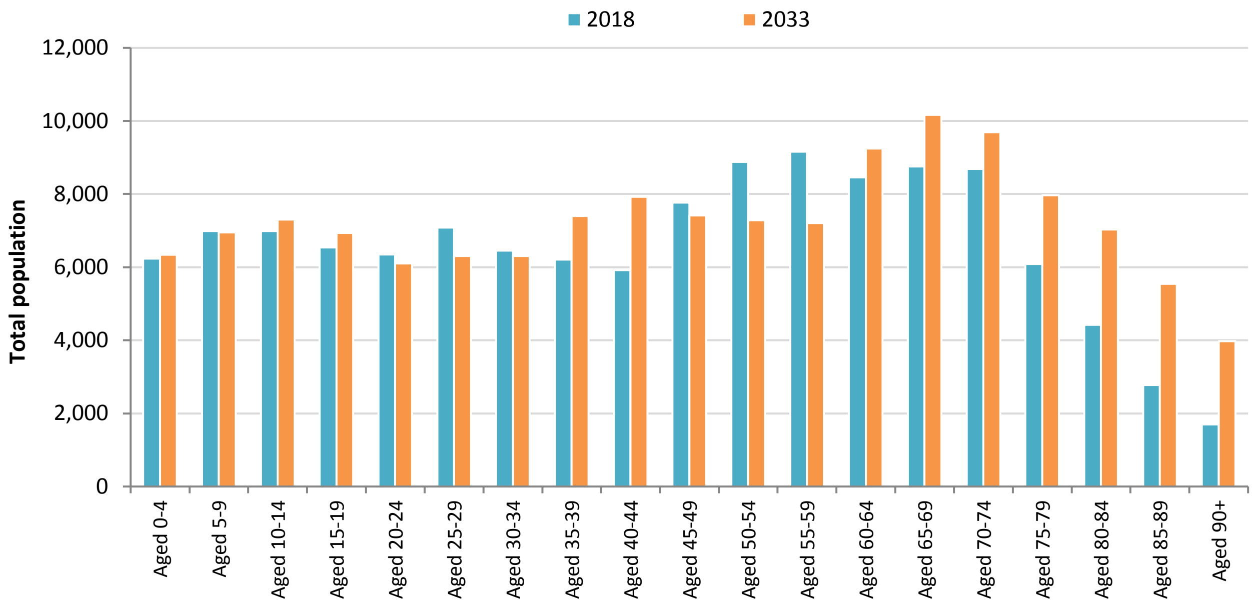
9. The number of deaths has exceeded the number of births each year (except for 2010-2011); although the area has seen growth in the population as a consequence of net inward migration. Rates of inward migration slowed dramatically between 2008-2011 (however, this period was corrected by the ONS post-census), before rising again from 2011 onwards.

Figure 3: Components of Population Change (Source: ONS, Census, Welsh Government)



10. Figure 4 considers the age structure of the current and future population. This indicates that the number of persons aged up to 44 will for the most part increase from 2018-2033. Persons aged 45-59 will decrease in the same time frame. Increases are also projected for each group aged 60 and over, in particular in those aged over 75. The overall number of persons aged 65+ is projected to increase from 32,400 persons in 2018 to 44,400 persons in 2033; this represents an additional 12,000 older persons, a growth of 37%.

Figure 4: Projected Population by Age: Principal Migration Trend (Source: Pembrokeshire preferred projections)



11. Figure 5 shows the overall population estimates for each sub-area together with the 5-year changes from 2002 to 2017 (Figure 6). It is evident that the region of Pembrokeshire outside the National Park saw an increased population, with most growth occurring 2002-2007. The population of Pembrokeshire inside the National Park was more stable with an overall increase of less than 200 in the whole period, and with a decrease from 2012 onwards averaging around 100 persons per year.

Figure 5: Total Population Estimates 2002-2017 by Sub-Area (Source: ONS Mid-Year Estimates)

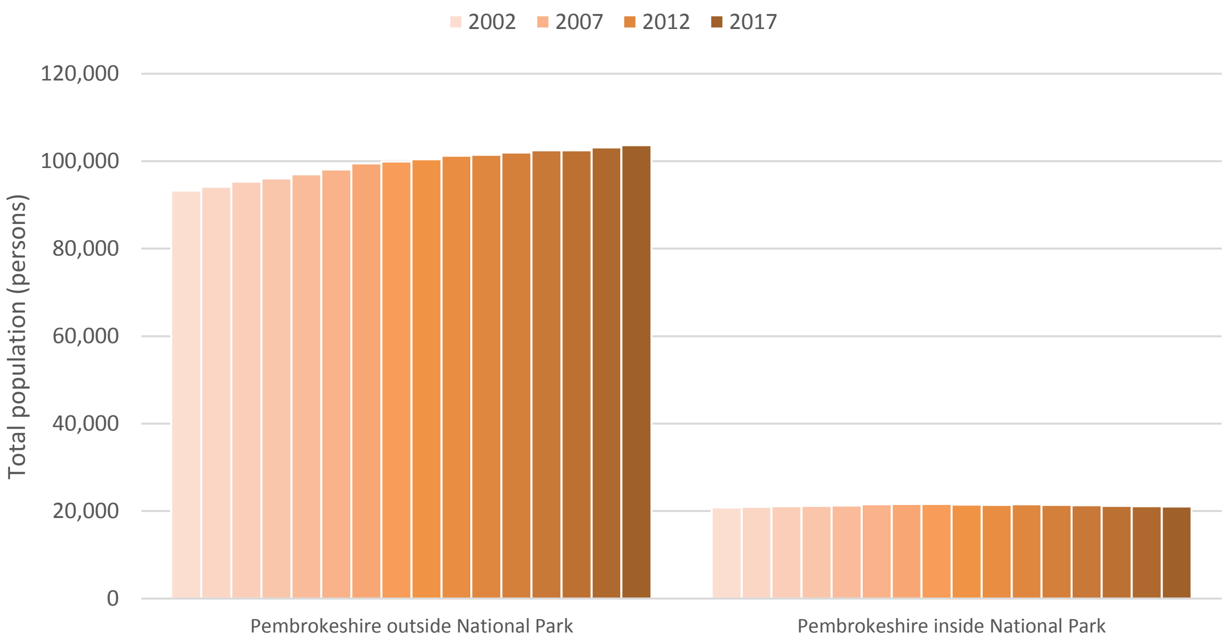
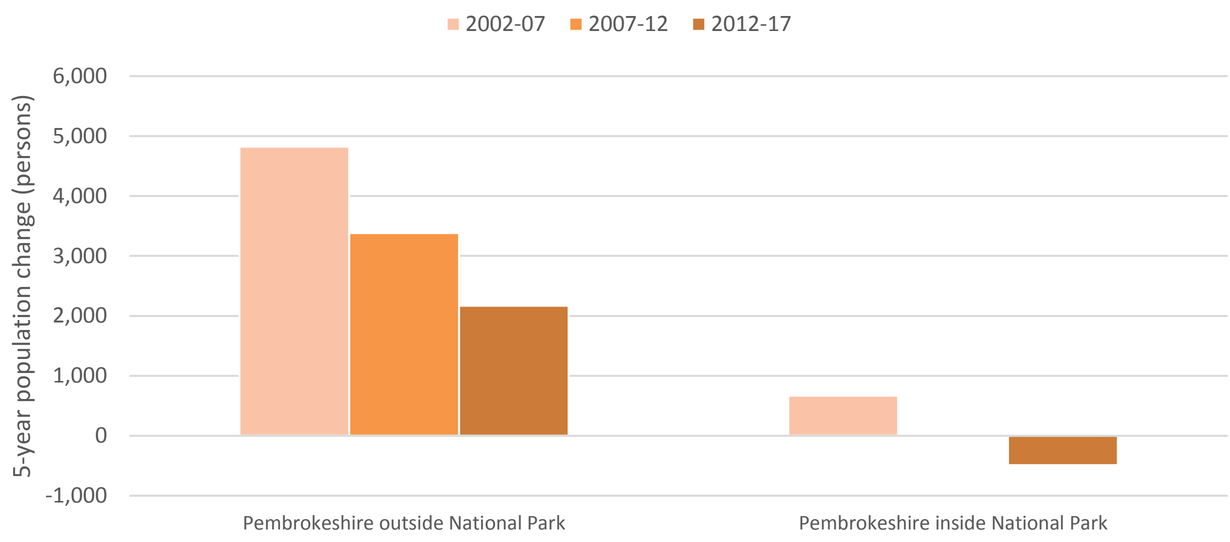
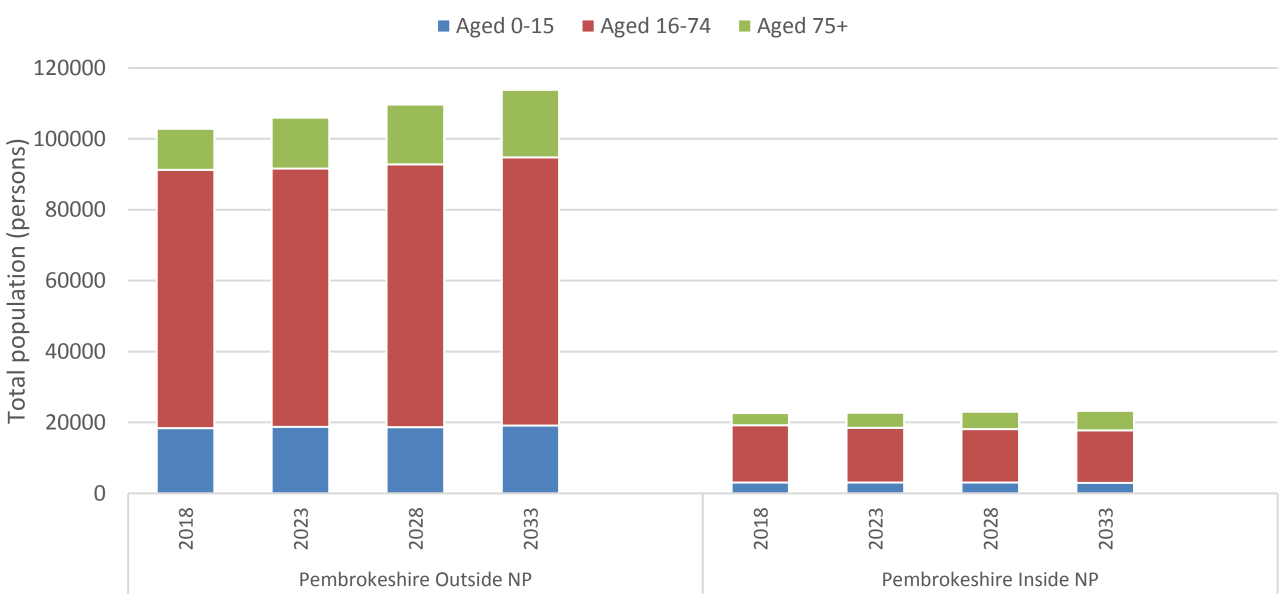


Figure 6: 5-Year Change in Population Estimates 2002-2017 by Sub-Area (Source: ONS Mid-Year Estimates)



12. Figure 7 shows the projected age profile by area. 68% of the overall projected growth in the area outside of the National Park is in those aged 75+, with a further 26% projected to be in those aged 15-75. Inside the national park, the elderly population is projected to grow by approximately 2,100 persons, with reductions in other age groups.

Figure 7: Projected Population by Age and Sub-Area (Source: Welsh Government, ORS Model)



13. Much of the increase in the elderly population can be attributed to current residents aging (rather than though migration into the area), whereas the decrease in the younger population can be primarily attributed to outward migration.

Household Trends and Projections

14. Household projections are based on the population projections, taking account of changes to household characteristics which impact on the number of people in each household. These changes are reflected in changes to average household size.

15. Figure 8 shows that household sizes in Pembrokeshire are getting smaller. In 1991, the average household size was approximately 2.5 people; whereas by 2001 it was just over 2.3 persons. The household projections indicate that household sizes are likely to reduce to an average of around 2.1 by 2033. Because of the falling household size and increasing population, projections show the number of households will increase to 2033, as shown in Figure 9.

Figure 8: Average Household Size (Source: Welsh Government Estimates and Pembrokeshire Preferred Household Projections)

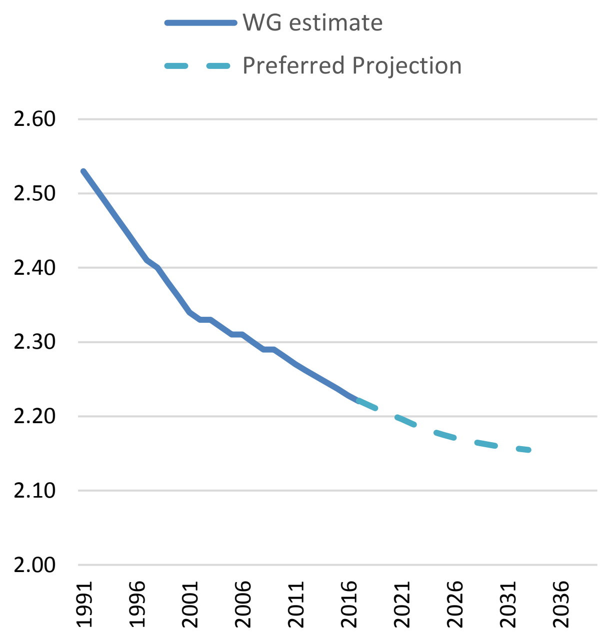
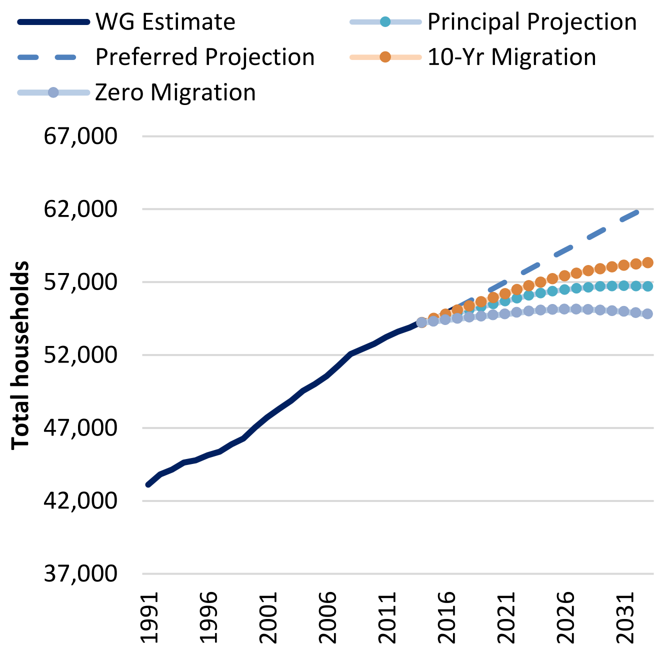


Figure 9: Household Trends and Projections (Source: WG household estimates, WG household projections, Pembrokeshire Preferred Household Projections



16. Figure 9 and Figure 10 show the growth in households derived from Pembrokeshire's favoured population projections. It shows an overall increase of 6,516 households equivalent to an average of 434 per year, with the vast majority of these falling outside the National Park area.

Figure 10: Projected Household Change by Sub-Area 2018-2033 (Source: Pembrokeshire Preferred Projections)

	Total Households				Total change 2018-33
	2018	2023	2028	2033	
Outside National Park	45,179	47,132	49,084	51,036	+5,857
Inside National Park	10,517	10,737	10,957	11,177	+659
TOTAL	**55,697**	**57,869**	**60,041**	**62,213**	**+6,516**

Housing Tenure

17. The study considered trends in tenure mix for Pembrokeshire over the last thirty years and this shows some significant changes in the balance between owner occupiers and those renting (Figure 11, Figure 12, Figure 13).

18. In the 1991 Census, students and schoolchildren were treated as usually resident at their 'home' or vacation address. In the 2001 Census students and schoolchildren in full-time education studying away from the family home were enumerated as resident at their term-time address. This contributed to a notable increase in the number of privately renting households in areas with high concentrations of students between 1991 and 2001 (dashed lines in Figure 12 and Figure 13), as a result of the term-time renting student population being included in this group as of 2001.

Figure 11: Households by Tenure 1981-2011 (Source: UK Census of Population. Note: figures may not sum due to rounding)

Tenure	Total Households				Net Change		
	1981	1991	2001	2011	1981-1991	1991-2001	2001-2011
Owner occupied	21,400	29,800	33,400	36,700	+8,400	+3,700	+3,300
Private rent	5,000	4,700	6,400	8,100	-300	+1,700	+1,800
Social rent	10,800	8,200	8,400	8,300	-2,500	+200	-100
TOTAL	**37,100**	**42,700**	**48,200**	**53,100**	**5,500**	**5,500**	**4,900**
Owner occupied	57.6%	69.7%	69.4%	69.1%	+12.2%	-0.4%	-0.3%
Private rent	13.5%	11.0%	13.2%	15.3%	-2.5%	+2.2%	+2.1%
Social rent	28.9%	19.3%	17.4%	15.6%	-9.7%	-1.8%	-1.8%

Figure 12: Number of Households by Tenure 1981-2011 (Source: UK Census of Population. Note: Dashed section denotes change in tenure definition)

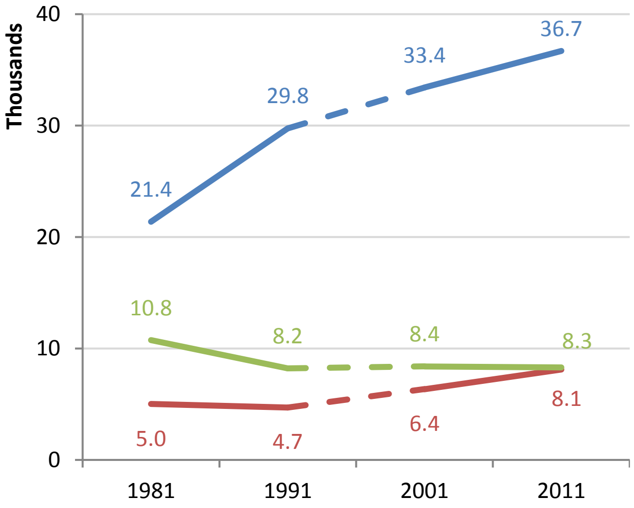
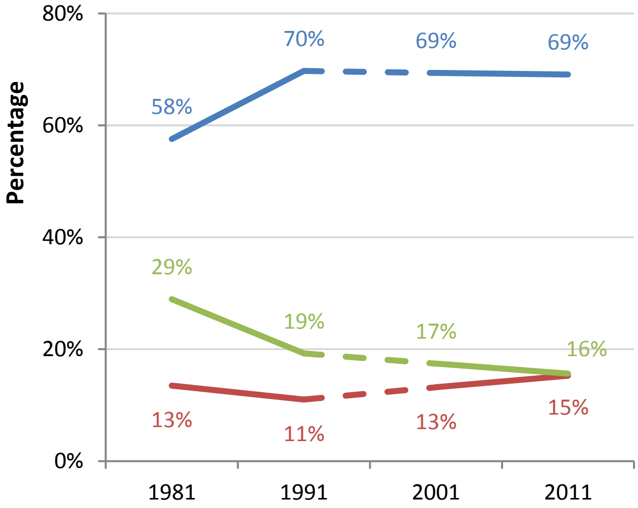


Figure 13: Percentage of Households by Tenure 1981-2011 (Source: UK Census of Population. Note: Dashed section denotes change in tenure definition)



Owner Occupied   Private Rent   Social Rent

19. The tenure changes show:

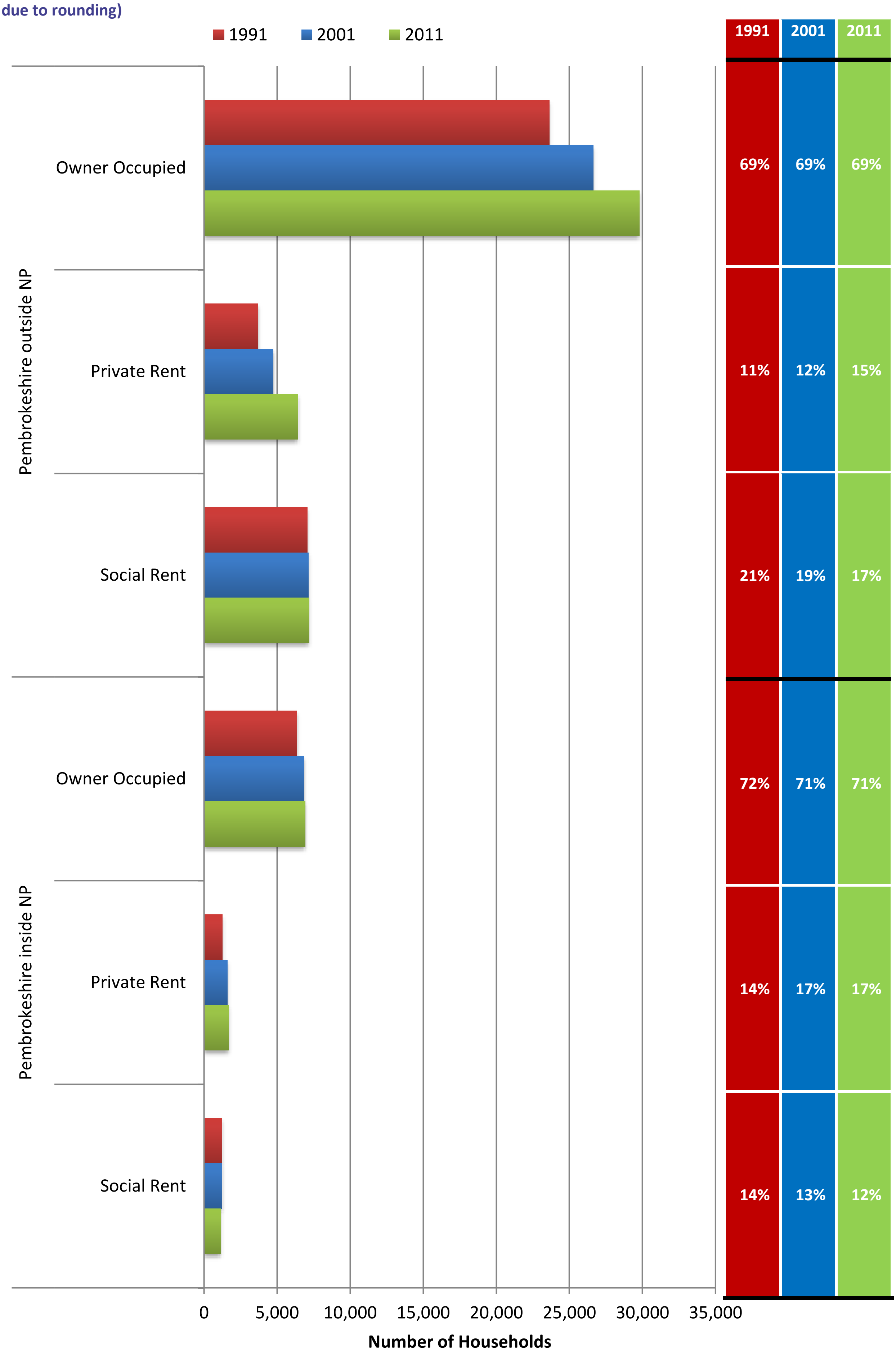
» From 1981-1991: the number of owner occupiers increased from 21,400 to 29,800 households (a gain of 8,400). The number of social tenants reduced by around 2,500 and the number of private tenants also reduced by 300. The reduction in social rent and corresponding increase in owner occupation over this period can be ascribed, in part, to the introduction of the right to buy scheme in 1980.

» From 1991-2001: the number of owner occupiers continued to climb, increasing from 29,800 to over 33,400 households (a gain of almost 3,700); this was alongside a growth in private tenants, increasing from 4,700 to 6,400 households (a gain of 1,700). The number of social tenants also increased by 200.

» From 2001-2011: the number of owner occupiers increased again from 33,400 to 36,700 (an increase of 3,300 households), the number of private tenants increased from 6,400 to 8,100 households (a gain of 1,800). The number of social tenants decreased by 100. It should be noted that the right to buy was abolished throughout Wales in 2019; and this is likely to lead to future increases in the social rented sector.

20. The change in relative tenure varies inside and outside of the National Park (Figure 14). The largest changes are in the areas outside the National Park, which reflects the population density in the County.

Figure 14: Tenure by Sub Area – Pembrokeshire (Source: Census 1991, Census 2001 and Census 2011. Note: figures may not sum due to rounding)



Cost of Home Ownership

21. Figure 15 shows lower quartile house prices by bedroom size. The data shows both the lower quartile price for existing properties and new build dwellings. When considering first time buyers in particular, many of the purchasers are likely to be newly forming households seeking smaller homes. For two-bedroom properties, there is no price difference between new and existing dwellings, and for three-bedroom properties, the price difference is very small. The gap is largest when considering one-bedroom properties, where new build properties are more expensive than existing one-bedroom properties. This is possibly down to newly built one-bedroom properties being purpose built and to a higher specification than existing one-bedroom dwellings. Existing four-bedroom properties are somewhat more expensive than their newly built counterparts; which is likely down to a range of factors which include the location of new build housing, the relative size of properties, gardens and the availability of parking, comparative quality and condition of existing stock, and other intangible issues such as character.

22. House price trends (2001-2018) based on lower quartile house prices are shown in Figure 16. This data has been adjusted to take account of and remove the impact of inflation; therefore, the values reflect real changes in house prices since 2001. Real house prices increased substantially in the period 2001-2008 (from £58,000 to £163,000 at 2018 values, a real increase of 181%). Values reduced to around £116,000 by mid-2014 and fluctuated around the £120,000 mark up to 2018. House prices in Pembrokeshire have consistently been above the Wales average.

Figure 15: Lower Quartile Prices for Existing Dwellings and Newly Built Dwellings 2017-18 by Property Size (Source: ONS House Price Statistics, Valuation Office Agency and Land Registry Price Paid Data)

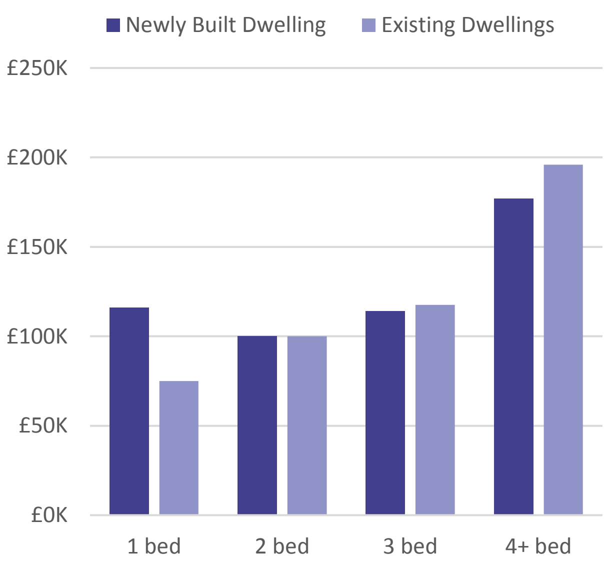
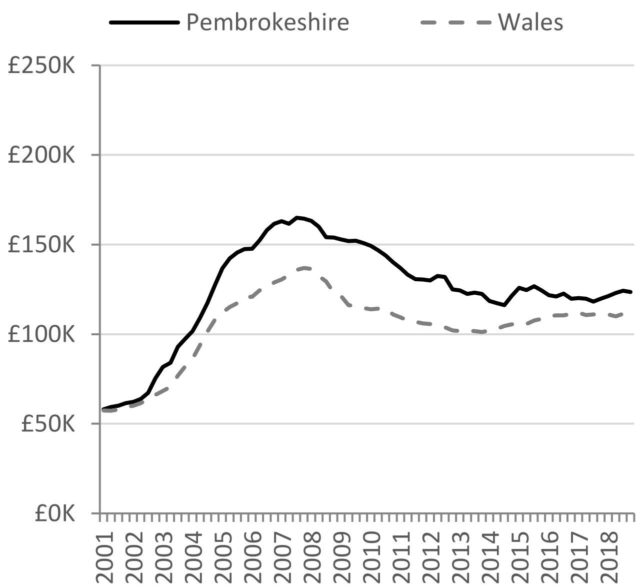


Figure 16: Real House Price Trends: Lower Quartile Prices Adjusted to 2018 Values (Source: ONS House Price Statistics; Bank of England Consumer Prices Index)



23. There is considerable variance in house prices across Pembrokeshire, as shown on the maps below, Figure 17 and Figure 18. House prices within the National Park are over 25% higher than the County average as their location increases their desirability in the market and encourages higher prices. However, the reduction in house prices in real terms over the last 10 years has been larger in the area within the national park than in the area outside it.

Figure 17: Sub-Area House Prices Relative to County Average 2017-18 (Source: ONS House Price Data)

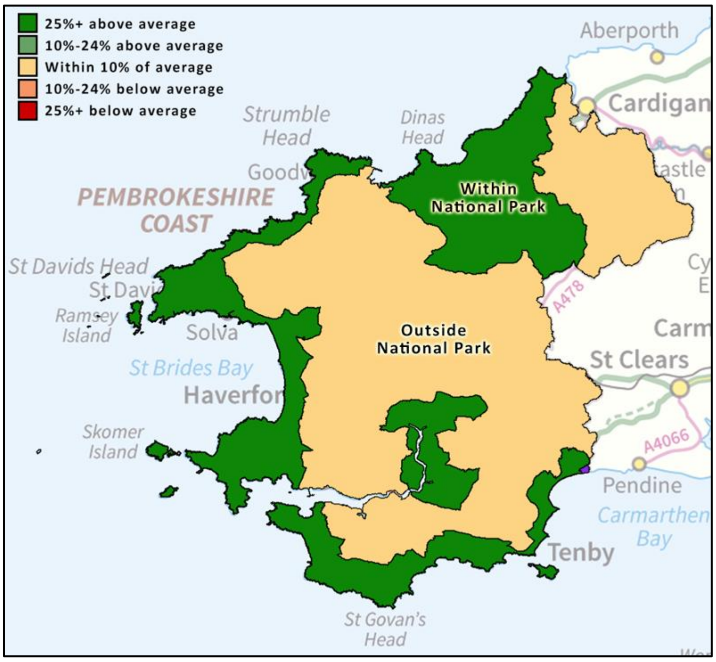
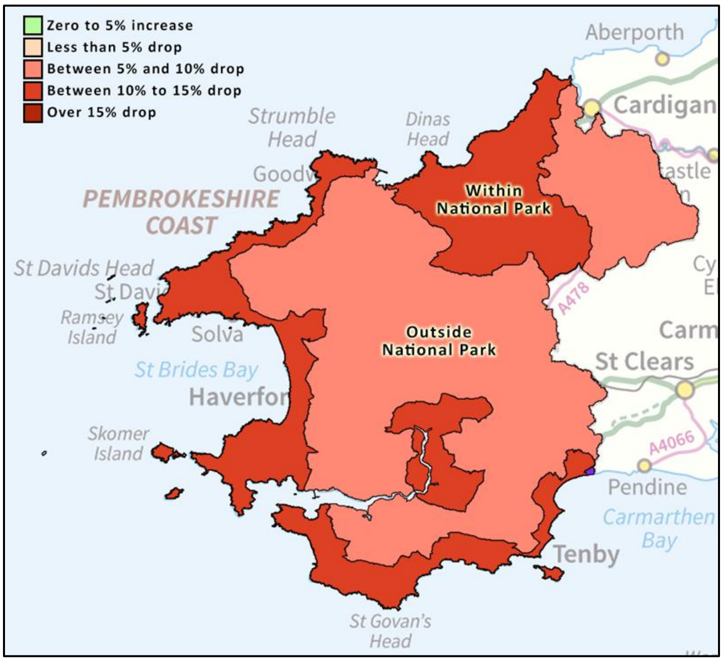
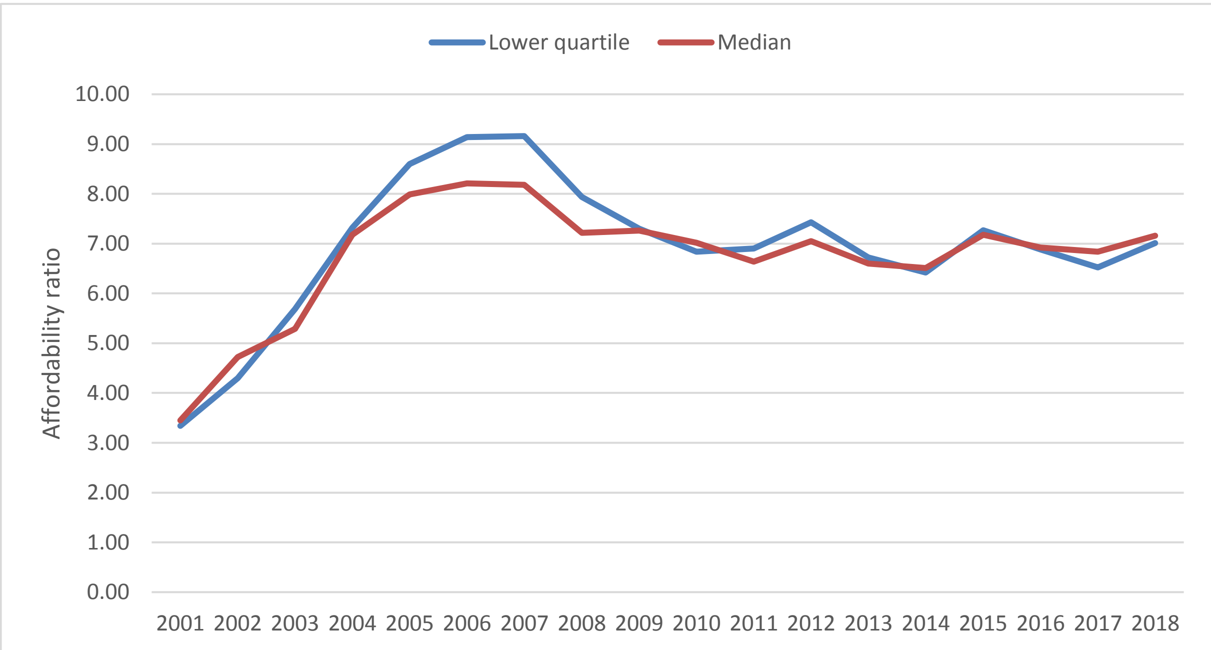


Figure 18: 10-year Change in Sub-Area House Prices 2008-2018 (Source: ONS House Price Data)



24. A key measure of affordability is the ratio of house prices to earnings. Figure 19 shows the variation over time of the workplace-based affordability ratio for both median and lower quartile house prices/incomes based on ONS data[3]. This closely follows the trends in house prices seen in Figure 16, with property becoming steadily more affordable since 2008 and remaining relatively steady in recent years.

Figure 19: Workplace Based Affordability Ratio Trends – Pembrokeshire (Source: ONS)



[3]https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoworkplacebasedearningslowerquartileandmedian

Cost of Renting

25. Figure 20 sets out the weekly rents for different property sizes. This includes:

» Median and lower quartile private rent;

» Local Housing Allowance (LHA) maximum (based on Broad Rental Market Areas [BRMA]);

» Social rent based on existing average rents.

Figure 20: Weekly Rent Thresholds 2018 (Source: Private Rental Market Statistics, Valuation Office Agency; Welsh Government. Note: Private rent data excludes housing benefit funded tenancies)

Weekly Rent £	Private Rent		Maximum Local Housing Allowance		Social Rent
	Median	Lower Quartile	Ceredigion BRMA	Pembroke BRMA	
Room only	£69.76	£64.78	£62.50	£59.23	-
1 bedroom	£86.24	£79.52	£89.28	£79.78	£69.91
2 bedrooms	£109.24	£94.67	£99.39	£95.00	£77.26
3 bedrooms	£126.49	£114.99	£116.52	£115.07	£82.83
4+ bedrooms	£149.49	£137.99	£132.33	£138.08	£107.19

26. Pembrokeshire is covered by two BRMAs (Broad Rental Market Areas): Pembrokeshire and Ceredigion. For most property sizes, the median private rent is the highest figure. The exception to this is one-bedroom properties, where the Ceredigion BRMA LHA rate is slightly higher than the median private rent. Broadly speaking, the LHA rates are higher than the equivalent lower quartile private rents. It is important to note that the Valuation Office Agency (VOA) private rent figures exclude housing benefit funded tenancies to ensure the figures are representative of non-subsidised free market rents.

Assessing Overall Housing Need

27. Certain types of household are not included within the projections. Homeless and concealed households increase the requirement for affordable homes, whilst overcrowded households in the private rented sector also require an affordable home. However, overcrowded households, if rehoused, will leave a market property for occupation by another household (Figure 21).

Figure 21: Current Households Not Counted by the Household Projections (Source: StatsWales, Census 2011. Note: figures may not sum due to rounding.)

	Concealed and Homeless Households	Overcrowded in market	Change in affordable households	Change in market households	Net Change to household projections
	(a)	(b)	c=(a)+(b)	(d)=(a)-(c)	(e)=(c)+(d)
Pembrokeshire outside NP	121	75	+196	-75	+121
Pembrokeshire inside NP	19	16	+35	-16	+19
TOTAL	**140**	**91**	**+231**	**-91**	**+140**

28. Applying these modifications to the projected housing need results in the following market/affordable household split over the 2018-33 period (Figure 22):

Figure 22: Housing Need by Tenure 2018-33 (Source: ORS model. Note: figures may not sum due to rounding.)

	Households Requiring Market Housing			Households Requiring Affordable Housing		
	2018	2033	Net Change	2018	2033	Net Change
Pembrokeshire outside NP	35,570	40,021	+4,451	9,609	11,136	+1,527
Pembrokeshire with NP	9,005	9,538	+533	1,512	1,657	+145
TOTAL	**44,575**	**49,559**	**+4,984**	**11,121**	**12,794**	**+1,672**

Five-Year Periods

29. In March 2006, Welsh Government published "Local Housing Market Assessment Guide", which details the methodology that authorities should use to establish need in their local housing markets. It contains a section on enumerating affordable need. This was subsequently supplemented by "Getting Started With Your Local Housing Market Assessment" in November 2014, which outlines a staged, quantitative approach to calculating housing need in detail. One key goal of this document was to introduce a consistency of approach across Wales.

30. The methodology as presented describes a five-year period, before being averaged out to annual figures. It implicitly assumes that any backlog of affordable need will be met within these five years. However, the 2006 guidance contains the following at paragraph 6.42:

> *6.42 In reality, levels of unmet need are unlikely to be reduced to zero given that people's housing circumstances change, and there will always be households falling in and out of housing need. The quota should be based upon meeting need over a period of five years, or the relevant local development plan time period, whichever is the longer. It does not imply that any individual household has to wait for this period.*
>
> *There may be merit in linking the quota to the remaining time period of the adopted housing policies or the likely time period of any forthcoming housing policies in development plans. It is not generally recommended to use a period of less than five years in which to meet all unmet current need. For the purposes of this assessment, it is necessary to decide the rate at which identified current need should be met. If a five-year period is used, this means that 20% of current unmet need should be addressed each year. However, this is a judgement which partnerships can make at the beginning of, or during, the assessment process.*
>
> **Local Housing Market Assessment Guide – WAG 2006**

31. The rate at which the current identified need (Figure 21) should be met is a judgement for the Council as part of their planning process. To assist the Council, the following tables sub-divides housing need over the 15 years of the plan period into three five-year periods (2018-23, 2023-28, 2028-33). In the first table (Figure 23), the backlog present at the start of the period is spread over the full length of the plan. The second table (Figure 24) illustrates the impact of meeting the backlog of need over the first five years.

32. Note that although the backlog of need is in affordable housing, providing this housing will reduce the market housing requirement (see Figure 21). As a result, the timetable for meeting the backlog of affordable need also impacts on the associated market requirement over each five-year period.

Figure 23: Housing need by tenure 2018-33 in five-year periods, backlog met over full 15 years (Source: ORS model. Note: figures may not sum due to rounding)

Backlog Over 15 Years	Households Requiring Market Housing							
	2018	Net Change 18-23	2023	Net Change 23-28	2028	Net Change 28-33	2033	Net Change 18-33
Pembrokeshire outside NP	35,570	+1,475	37,045	+1,486	38,532	+1,489	40,021	+4,451
Pembrokeshire inside NP	9,005	+178	9,184	+178	9,362	+177	9,538	+533
TOTAL	**44,575**	**+1,654**	**46,229**	**+1,665**	**47,894**	**+1,665**	**49,559**	**+4,984**

Backlog Over 15 Years	Households Requiring Affordable Housing							
	2018	Net Change 18-23	2023	Net Change 23-28	2028	Net Change 28-33	2033	Net Change 18-33
Pembrokeshire outside NP	9,609	+518	10,127	+506	10,633	+503	11,136	+1,527
Pembrokeshire inside NP	1,512	+48	1,560	+48	1,608	+50	1,657	+145
TOTAL	**11,121**	**+566**	**11,687**	**+554**	**12,241**	**+553**	**12,794**	**+1,672**
GRAND TOTAL	**46,691**	**+2,041**	**48,732**	**+2,040**	**50,772**	**+2,042**	**52,814**	**+6,123**

Figure 24: Housing need by tenure 2018-33 in five-year periods, backlog met over initial five years (Source: ORS model. Note: figures may not sum due to rounding)

Backlog Over 5 Years	Households Requiring Market Housing							
	2018	Net Change 18-23	2023	Net Change 23-28	2028	Net Change 28-33	2033	Net Change 18-33
Pembrokeshire outside NP	35,570	+1,425	36,995	+1,511	38,507	+1,514	40,021	+4,451
Pembrokeshire inside NP	9,005	+168	9,173	+184	9,357	+182	9,538	+533
TOTAL	**44,575**	**+1,593**	**46,168**	**+1,695**	**47,863**	**+1,696**	**49,559**	**+4,984**

Backlog Over 5 Years	Households Requiring Affordable Housing							
	2018	Net Change 18-23	2023	Net Change 23-28	2028	Net Change 28-33	2033	Net Change 18-33
Pembrokeshire outside NP	9,609	+649	10,258	+441	10,698	+438	11,136	+1,527
Pembrokeshire inside NP	1,512	+71	1,583	+36	1,619	+38	1,657	+145
TOTAL	**11,121**	**+720**	**11,841**	**+477**	**12,318**	**+476**	**12,794**	**+1,672**
GRAND TOTAL	**46,691**	**+2,145**	**48,836**	**+1,988**	**50,824**	**+1,990**	**52,814**	**+6,123**

Bedroom Size

33. Figure 25 represents the household split in Figure 22 calculated as a percentage of the total housing requirement:

Figure 25: Housing Need by Tenure 2018-33 represented as percentages of total positive need (Source: ORS model. Note: figures may not sum due to rounding. Note: figures may not sum due to rounding)

	Households Requiring Market Housing	Households Requiring Affordable Housing	Totals
	% of Net Change	% of Net Change	% of Total Net Change
Pembrokeshire outside NP	67%	23%	90%
Pembrokeshire with NP	8%	2%	10%
TOTAL	**75%**	**25%**	**100%**

34. Given this tenure split and the household sizes comprising these totals, the bedroom requirements of the households comprising this change can be derived (Figure 26):

Figure 26: Changes in Bedroom Requirements by Tenure – Households 2018-33 (Source: ORS Model. Note: figures may not sum due to rounding)

	Households Requiring Housing				
	1-bedroom	2-bedroom	3-bedroom	4+ bedrooms	TOTAL
MARKET HOUSING					
Pembrokeshire outside NP	+245	+1,211	+2,141	+854	+4,451
Pembrokeshire with NP	+58	+195	+196	+85	+533
TOTAL MARKET HOUSING	**+303**	**+1,405**	**+2,337**	**+938**	**+4,984**
AFFORDABLE HOUSING					
Pembrokeshire outside NP	+476	+618	+387	+47	+1,527
Pembrokeshire with NP	+73	+52	+17	+3	+145
TOTAL AFFORDABLE HOUSING	**+548**	**+670**	**+404**	**+50**	**+1,672**

35. Figure 27 represents these changes in bedroom requirements as a percentage of total market and affordable change respectively:

Figure 27: Changes in Bedroom Requirements by Tenure – Households 2018-33 as a percentage of total positive market change and affordable change respectively (Source: Welsh Government, ORS Model. Note: figures may not sum due to rounding)

	Households Requiring Housing				
	1-bedroom	2-bedroom	3-bedroom	4+ bedrooms	TOTAL
MARKET HOUSING					
Pembrokeshire outside NP	5%	24%	43%	17%	89%
Pembrokeshire with NP	1%	4%	4%	2%	11%
TOTAL MARKET HOUSING	**6%**	**28%**	**47%**	**19%**	**100%**
AFFORDABLE HOUSING					
Pembrokeshire outside NP	28%	37%	23%	3%	91%
Pembrokeshire with NP	4%	3%	1%	0%	9%
TOTAL AFFORDABLE HOUSING	**33%**	**40%**	**24%**	**3%**	**100%**

Summary of Key Findings

36. There has been a consistent increase in the number of owner occupiers in each of the previous three intercensal decades (1981-91, 1991-01, 2001-11). There has been a shift away from social rented housing to the private rented sector in the twenty years since 1991. The majority tenure is still owner occupation. House prices have remained relatively steady since 2014.

37. The population is projected to increase**,** and the age profile is projected to change with an increased number of people aged 60+. Due to the reducing average household size and the predicted population increase, the number of households is projected to increase by 434 per year (6,516 in total) over the 15-year period 2018-33.

38. Of the total housing need, 75% is for market tenures and the remaining 25% is for affordable. There will likely be changes in the types of dwelling required across all tenures, most notably an increase in two and three-bedroom properties in the market tenure, and one and two-bedroom affordable properties.

Appendix 1

Household Needs by Ward

39. The table below (Figure 28) takes the total market and affordable housing household needs from Figure 22 and apportions them at ward level according to the best available estimate of the population of each ward[4]. It should noted that ward level population statistics in the absence of a recent census are known to have wide error margins, and as such this information should be considered indicative.

Figure 28: Household Needs from Figure 21 Apportioned by Ward Population (Source: ORS model, ONS 2017)

	Households Requiring Market Housing			Households Requiring Affordable Housing		
	2018	2033	Net Change	2018	2033	Net Change
Amroth	433	481	48	108	124	16
Burton	667	741	75	166	191	25
Camrose	951	1,057	106	237	273	36
Carew	522	580	58	130	150	20
Cilgerran	766	852	86	191	220	29
Clydau	528	587	59	132	151	20
Crymych	969	1,077	108	242	278	36
Dinas Cross	600	667	67	150	172	22
East Williamston	879	977	98	219	252	33
Fishguard North East	689	767	77	172	198	26
Fishguard North West	530	590	59	132	152	20
Goodwick	747	831	84	186	214	28
Haverfordwest: Castle	845	939	94	211	243	32
Haverfordwest: Garth	1,021	1,135	114	255	293	38
Haverfordwest: Portfield	846	940	95	211	243	32
Haverfordwest: Prendergast	851	946	95	212	244	32
Haverfordwest: Priory	892	992	100	223	256	33
Hundleton	625	695	70	156	179	23
Johnston	946	1,052	106	236	272	36
Kilgetty/Begelly	786	874	88	196	226	29
Lampeter Velfrey	584	649	65	146	168	22
Lamphey	590	656	66	147	169	22
Letterston	884	983	99	221	254	33
Llangwm	868	965	97	217	249	33

[4] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/wardlevelmidyearpopulationestimatesexperimental

	Households Requiring Market			Households Requiring Affordable		
	2018	2033	Net Change	2018	2033	Net Change
Llanrhian	519	577	58	129	149	19
Maenclochog	1,094	1,216	122	273	314	41
Manorbier	743	826	83	185	213	28
Martletwy	708	788	79	177	203	27
Merlin's Bridge	794	883	89	198	228	30
Milford: Central	731	813	82	182	210	27
Milford: East	825	918	92	206	237	31
Milford: Hakin	800	889	89	200	230	30
Milford: Hubberston	1,091	1,213	122	272	313	41
Milford: North	1,010	1,123	113	252	290	38
Milford: West	824	916	92	206	237	31
Narberth	864	961	97	216	248	32
Narberth Rural	436	485	49	109	125	16
Newport	434	482	49	108	125	16
Neyland: East	818	910	91	204	235	31
Neyland: West	736	818	82	184	211	28
Pembroke Dock: Central	587	653	66	146	168	22
Pembroke Dock: Llanion	980	1,090	110	245	281	37
Pembroke Dock: Market	693	770	77	173	199	26
Pembroke Dock: Pennar	1,213	1,348	136	303	348	45
Pembroke: Monkton	597	664	67	149	171	22
Pembroke: St. Mary North	803	893	90	200	231	30
Pembroke: St. Mary South	518	576	58	129	149	19
Pembroke: St. Michael	881	980	99	220	253	33
Penally	601	668	67	150	173	23
Rudbaxton	307	342	34	77	88	12
Saundersfoot	921	1,024	103	230	264	35
Scleddau	545	606	61	136	157	20
Solva	689	767	77	172	198	26
St. David's	641	713	72	160	184	24
St. Dogmaels	795	884	89	198	228	30
St. Ishmael's	509	566	57	127	146	19
Tenby: North	749	833	84	187	215	28
Tenby: South	862	959	96	215	247	32
The Havens	519	577	58	130	149	19
Wiston	717	797	80	179	206	27
Total	**44,575**	**49,559**	**4,984**	**11,121**	**12,794**	**1,672**

Appendix 2

Household Needs by Ward and Bedroom Size

40. The table below (Figure 29) takes the market and affordable housing splits from Figure 28 and disaggregates them into bedroom size by tenure based on projected household sizes (see Figure 26 for similar process at sub-area level). It should noted that ward level population statistics[5] in the absence of a recent census are known to have wide error margins, and as such this information should also be considered indicative at best.

Figure 29: Household Needs from Figure 26 Apportioned by Bedroom Size (Source: ORS model, ONS 2017)

	Households Requiring Market Housing						Households Requiring Affordable Housing				
	1-bed	2-bed	3-bed	4+bed	TOTAL		1-bed	2-bed	3-bed	4+bed	TOTAL
Amroth	3	14	23	9	48		5	7	4	0	16
Burton	5	21	35	14	75		8	10	6	1	25
Camrose	6	30	50	20	106		12	14	9	1	36
Carew	4	16	27	11	58		6	8	5	1	20
Cilgerran	5	24	40	16	86		9	12	7	1	29
Clydau	4	17	28	11	59		6	8	5	1	20
Crymych	7	31	51	20	108		12	15	9	1	36
Dinas Cross	4	19	31	13	67		7	9	5	1	22
East Williamston	6	28	46	18	98		11	13	8	1	33
Fishguard North East	5	22	36	15	77		8	10	6	1	26
Fishguard North West	4	17	28	11	59		7	8	5	1	20
Goodwick	5	24	39	16	84		9	11	7	1	28
Haverfordwest: Castle	6	27	44	18	94		10	13	8	1	32
Haverfordwest: Garth	7	32	54	21	114		13	15	9	1	38
Haverfordwest: Portfield	6	27	44	18	95		10	13	8	1	32
Haverfordwest: Prendergast	6	27	45	18	95		10	13	8	1	32
Haverfordwest: Priory	6	28	47	19	100		11	13	8	1	33
Hundleton	4	20	33	13	70		8	9	6	1	23
Johnston	6	30	50	20	106		12	14	9	1	36
Kilgetty/Begelly	5	25	41	17	88		10	12	7	1	29
Lampeter Velfrey	4	18	31	12	65		7	9	5	1	22
Lamphey	4	19	31	12	66		7	9	5	1	22
Letterston	6	28	46	19	99		11	13	8	1	33

[5] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/wardlevelmidyearpopulationestimatesexperimental

	Households Requiring Market Housing						Households Requiring Affordable Housing				
	1-bed	2-bed	3-bed	4+bed	TOTAL		1-bed	2-bed	3-bed	4+bed	TOTAL
Llangwm	6	27	46	18	97		11	13	8	1	33
Llanrhian	4	16	27	11	58		6	8	5	1	19
Maenclochog	7	34	57	23	122		13	16	10	1	41
Manorbier	5	23	39	16	83		9	11	7	1	28
Martletwy	5	22	37	15	79		9	11	6	1	27
Merlin's Bridge	5	25	42	17	89		10	12	7	1	30
Milford: Central	5	23	38	15	82		9	11	7	1	27
Milford: East	6	26	43	17	92		10	12	7	1	31
Milford: Hakin	5	25	42	17	89		10	12	7	1	30
Milford: Hubberston	7	34	57	23	122		13	16	10	1	41
Milford: North	7	32	53	21	113		12	15	9	1	38
Milford: West	6	26	43	17	92		10	12	7	1	31
Narberth	6	27	45	18	97		11	13	8	1	32
Narberth Rural	3	14	23	9	49		5	7	4	0	16
Newport	3	14	23	9	49		5	7	4	0	16
Neyland: East	6	26	43	17	91		10	12	7	1	31
Neyland: West	5	23	39	15	82		9	11	7	1	28
Pembroke Dock: Central	4	18	31	12	66		7	9	5	1	22
Pembroke Dock: Llanion	7	31	51	21	110		12	15	9	1	37
Pembroke Dock: Market	5	22	36	15	77		9	10	6	1	26
Pembroke Dock: Pennar	8	38	64	26	136		15	18	11	1	45
Pembroke: Monkton	4	19	31	13	67		7	9	5	1	22
Pembroke: St. Mary North	5	25	42	17	90		10	12	7	1	30
Pembroke: St. Mary South	4	16	27	11	58		6	8	5	1	19
Pembroke: St. Michael	6	28	46	19	99		11	13	8	1	33
Penally	4	19	32	13	67		7	9	5	1	23
Rudbaxton	2	10	16	6	34		4	5	3	0	12
Saundersfoot	6	29	48	19	103		11	14	8	1	35
Scleddau	4	17	29	11	61		7	8	5	1	20
Solva	5	22	36	15	77		8	10	6	1	26
St. David's	4	20	34	13	72		8	10	6	1	24
St. Dogmaels	5	25	42	17	89		10	12	7	1	30
St. Ishmael's	3	16	27	11	57		6	8	5	1	19
Tenby: North	5	24	39	16	84		9	11	7	1	28
Tenby: South	6	27	45	18	96		11	13	8	1	32
The Havens	4	16	27	11	58		6	8	5	1	19
Wiston	5	23	38	15	80		9	11	6	1	27

Table of Figures

Figure 1: Sub-Areas in Pembrokeshire....3

Figure 2: Pembrokeshire: Population Projections with Census and MYE (Source: Census, ONS, Welsh Government, Pembrokeshire Preferred Projections) 4

Figure 3: Components of Population Change (Source: ONS, Census, Welsh Government)....5

Figure 4: Projected Population by Age: Principal Migration Trend (Source: Pembrokeshire preferred projections) 6

Figure 5: Total Population Estimates 2002-2017 by Sub-Area (Source: ONS Mid-Year Estimates) 6

Figure 6: 5-Year Change in Population Estimates 2002-2017 by Sub-Area (Source: ONS Mid-Year Estimates) 7

Figure 7: Projected Population by Age and Sub-Area (Source: Welsh Government, ORS Model)....7

Figure 8: Average Household Size (Source: Welsh Government Estimates and Pembrokeshire Preferred Household Projections)....8

Figure 9: Household Trends and Projections (Source: WG household estimates, WG household projections, Pembrokeshire Preferred Household Projections 8

Figure 10: Projected Household Change by Sub-Area 2018-2033 (Source: Pembrokeshire Preferred Projections) 8

Figure 11: Households by Tenure 1981-2011 (Source: UK Census of Population. Note: figures may not sum due to rounding) 9

Figure 12: Number of Households by Tenure 1981-2011 (Source: UK Census of Population. Note: Dashed section denotes change in tenure definition) 9

Figure 13: Percentage of Households by Tenure 1981-2011 (Source: UK Census of Population. Note: Dashed section denotes change in tenure definition) 9

Figure 14: Tenure by Sub Area – Pembrokeshire (Source: Census 1991, Census 2001 and Census 2011. Note: figures may not sum due to rounding) 11

Figure 15: Lower Quartile Prices for Existing Dwellings and Newly Built Dwellings 2017-18 by Property Size (Source: ONS House Price Statistics, Valuation Office Agency and Land Registry Price Paid Data) 12

Figure 16: Real House Price Trends: Lower Quartile Prices Adjusted to 2018 Values (Source: ONS House Price Statistics; Bank of England Consumer Prices Index)....12

Figure 17: Sub-Area House Prices Relative to County Average 2017-18 (Source: ONS House Price Data)....13

Figure 18: 10-year Change in Sub-Area House Prices 2008-2018 (Source: ONS House Price Data) 13

Figure 19: Workplace Based Affordability Ratio Trends – Pembrokeshire (Source: ONS)....13

Figure 20: Weekly Rent Thresholds 2018 (Source: Private Rental Market Statistics, Valuation Office Agency; Welsh Government. Note: Private rent data excludes housing benefit funded tenancies) 14

Figure 21: Current Households Not Counted by the Household Projections (Source: StatsWales, Census 2011. Note: figures may not sum due to rounding.) 14

Figure 22: Housing Need by Tenure 2018-33 (Source: ORS model. Note: figures may not sum due to rounding.) 15

Figure 23: Housing need by tenure 2018-33 in five-year periods, backlog met over full 15 years (Source: ORS model. Note: figures may not sum due to rounding)....16

Figure 24: Housing need by tenure 2018-33 in five-year periods, backlog met over initial five years (Source: ORS model. Note: figures may not sum due to rounding)....16

Figure 25: Housing Need by Tenure 2018-33 represented as percentages of total positive need (Source: ORS model. Note: figures may not sum due to rounding. Note: figures may not sum due to rounding) 17

Figure 26: Changes in Bedroom Requirements by Tenure – Households 2018-33 (Source: ORS Model. Note: figures may not sum due to rounding) 17

Figure 27: Changes in Bedroom Requirements by Tenure – Households 2018-33 as a percentage of total positive market change and affordable change respectively (Source: Welsh Government, ORS Model. Note: figures may not sum due to rounding) 17

Figure 28: Household Needs from Figure 21 Apportioned by Ward Population (Source: ORS model, ONS 2017) 19
Figure 29: Household Needs from Figure 26 Apportioned by Bedroom Size (Source: ORS model, ONS 2017)....................................21

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