



HOUSING VISION

Northern Peninsula Housing Market Area Strategic Housing Market Assessment: the Implications of 2012- based Household Projections

Final Report

December 2015

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Northern Peninsula Housing Market Area SHMA: the Implications of 2012-based Household Projections

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1. Introduction

- 1.1 This Update is supplementary to the Northern Peninsula SHMA completed in December 2008 and a series of updates for North Devon¹, Torrington² and West Somerset³ District Councils and the Exmoor National Park Authority⁴ completed between 2012 and 2015⁵.
- 1.2 Since completion of these Updates, the following data of relevance has been released:
- CLG 2012-based Subnational Household Projections; and
 - a further year's internal and international migration data.
- 1.3 This Update reviews the implications of the CLG 2012 Subnational Household Projections⁶ for future housing needs across the local planning authority areas of the following 'Partner Authorities' of the Northern Peninsula Housing Market Area:
- North Devon Council;
 - Torrington District Council;
 - West Somerset District Council; and
 - Exmoor National Park Authority.
- 1.4 This report provides the following new or additional data and information:
- In Section 3: internal migration data for a further year to June 2014 and updated 10 year trends and international migration data for a further year to March 2015 and updated 6 year trends (the period used by ONS/CLG in population and household projections);

¹ Strategic Housing Market Assessment: North Devon and Torrington Update, Final Report, December 2012, Housing Vision

² Strategic Housing Market Assessment: North Devon and Torrington Update, Final Report, December 2012, Housing Vision

³ Strategic Housing Market Assessment: West Somerset Update, Final Report, November 2013, Housing Vision

⁴ Strategic Housing Market Assessment Update: Exmoor National Park in West Somerset, Final Report, January 2014, Housing Vision

⁵ Strategic Housing Market Assessment Update: Northern Peninsula Housing Market Area, January 2015, Housing Vision

⁶ 2012-based Subnational Household Projections in England, CLG, <https://www.gov.uk/government/collections/household-projections#2012-based-projections>

- In Section 4: a review of the demographic implications of 2012-based Subnational Household Projections;
- In Section 5: a review of the implications for meeting future housing need of 2012-based Subnational Household Projections and updated data on the backlog of affordable housing and vacancy rates.
- In Appendix 1: work for this report identified a small error in the allocation of population and household numbers to the North Devon and West Somerset Local Planning Authority Areas and to Exmoor National Park for the household projection scenarios reviewed in the January 2015 Strategic Housing Market Assessment Update: Northern Peninsula Housing Market Area. This appendix compares the accurate totals for the period 2011-2031 included in this report (Scenario 2 only applied to 2011-2021) with those included in the January 2015 Update Report. Variations are minimal amounting to no more than 7 households for any scenario for any area.

2.0 The methodology underpinning the ONS 2012-based Subnational Household Projections

- 2.1 Official projections of the number of households are published by CLG and apply ONS' Subnational Population Projections as a principal input. These population projections were reviewed in detail in the January 2015 SHMA Updates.
- 2.2 Differences between household projections stem from a complex interaction of differences in contributory factors including:
- population change and growth - which is the biggest contributor to changes in the number and type of households;
 - the age/gender composition of the population;
 - relationship assumptions;
 - the population living in communal establishments; and
 - trends in household formation.
- 2.3 Household projections have been produced to 2003, 2004, 2006, 2008 and 2011 bases. The 2011 projections were termed 'interim' and, like the supporting ONS population projections, only run to 2021. The household formation assumptions in the 2011 projections were informed by the limited amount of Census data that was available at the time of their production. Household projections from a 2012 base, consistent with ONS' 2012-based population projections, were published in February 2015⁷.
- 2.4 The 2012-based household projections use Census data which was not available for the 2011-based projections and they also rest on a sounder base of historical evidence. The Census showed that demographic trends calculated for earlier projections were based on inaccurate data. The 2012-based household projections use evidence about past trends that has been revised in the light of the 2011 Census.
- 2.5 Although household projections by age band have been released, Stage 2 projections combining age and household type and enabling detailed projections comparable to those provided in the 2012 SHMAs are still not available. Furthermore, although the 2012-based Household Projections provide a more informed view of household trends between 2001 and 2011, they do not provide a complete revision of trends in the light of the Census.
- 2.6 CLG methodology converts the ONS population projection into households by deducting residents of communal establishments (care homes, prisons etc) and applying household representative rates (formerly headship rates) to the

⁷ <https://www.gov.uk/government/collections/household-projections>

remaining 'household population'. The rate is the number of 'household representatives divided by the household population; rates are calculated for gender, age and relationship (single, married, previously married). Projected future changes in household representative rates are modelled on the basis of long-term historical trends.

- 2.7 Trend projections are sensitive to the length of the historical period used to develop assumptions. ONS currently use a 5/6-year approach, which is a short period on which to base long-term projections. Arguments have been made by a number of agencies that a longer time span should be used. The Greater London Authority (GLA) has recently issued projections that examine the effect of using a longer trend period⁸ and the Inspector considering Cornwall's Local Plan has recently recommended a 10 year period for setting migration assumptions⁹.

⁸ Further Alterations to the London Plan, March 2015

<http://www.london.gov.uk/priorities/planning/london-plan/further-alterations-to-the-london-plan>

⁹ <http://www.cornwall.gov.uk/media/12843214/ID05-Preliminary-Findings-June-2015-2-.pdf>

3.0 New data relevant to the 2012-based Subnational Population Projections' 'Components of Population Change'

Internal migration data

- 3.1 Internal migration refers to population movement within the UK and is an important factor in determining housing needs. Trends can be monitored using estimates of internal migration prepared using a combination of three administrative data sources, the Patient Register Data Service (PRDS), the National Health Service Central Register (NHSCR) and Higher Education Statistics Agency (HESA) data. The accuracy of NHSCR data is reliant on people registering with a GP and those groups who are recognised to register at lower rates include students, especially male students and young men. Conversely, families and older people are more likely to register. Please note that figures are rounded to the nearest 10 or 100 by ONS and, therefore, totals may vary from the sum.
- 3.2 The following table adds a further year's data and reviews trends in net internal migration for the 10 year period to June 2014.

Table 3.1: Internal Migration, North Devon, Torrridge and West Somerset, net effect for the 10 year Period ending June 2014, 000s

Area	2004/ 05	2005/ 06	2006/ 07	2007/ 08	2008/ 09	5 year average	2009/ 10	2010/ 11	2011/ 12	2012/ 13	2013/ 14	5 year average	10 year average
North Devon	0.5	0.5	0.5	0.5	0.3	0.46	0.1	0.5	-0.1	0.0	0.0	0.10	0.28
Torrridge	0.8	1.0	0.8	0.8	0.3	0.74	0.5	0.6	0.8	0.4	0.5	0.56	0.65
West Somerset	0.1	0.1	0.3	0.3	0.1	0.18	0.2	-0.2	0.1	0.0	0.1	0.04	0.11
Total	1.4	1.6	1.6	1.6	0.7	1.38	0.8	0.9	0.7	0.4	0.6	0.68	1.03

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, <http://www.ons.gov.uk/ons/index.html>).

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Key findings:

- There has been a marked slowdown in net internal migration over the 10 years since June 2004, with the average over the most recent 5 year period less than half that over the first 5 years.
- The largest net gains have been in Torrridge and the lowest in West Somerset.

3.3 The following table compares 2012-based Components of Population Change projections of the net effect of internal migration for the 5 years 2013-2017 with average net internal migration for the 10 years between June 2004 and 2014, the most recent period for which data is available. 2012-based Components of Population Change start at 2013 which has been used as the base year.

Table 3.2: Components of Population Change of net internal migration for 2013-2017 compared with NHS internal migration data for 2004-2014, North Devon, Torridge and West Somerset, 000s

Local authority	Base year	2013	2014	2015	2016	2017	Average
North Devon	2012-based SNPP	0.4	0.4	0.4	0.4	0.4	0.40
	Internal migration 2004-2014	-	-	-	-	-	0.28
Torridge	2012-based SNPP	0.6	0.6	0.6	0.6	0.6	0.60
	Internal migration 2004-2014	-	-	-	-	-	0.65
West Somerset	2012-based SNPP	0.2	0.2	0.2	0.2	0.2	0.20
	Internal migration 2004-2014	-	-	-	-	-	0.11

Key findings

- Components of Population Change internal migration projections for 2013-2017 are 30% higher than the 10 year average for North Devon and 45% higher than the 10 year average for West Somerset. Projected and actual internal migration data are similar only for Torridge.
- As emphasised in the SHMA Update of January 2015, population projections may be overstating the growth in population arising from net internal migration, leading to an overestimate of the projected growth in households and the associated need for housing in North Devon and West Somerset.

International migration

3.4 The collation of National Insurance Number Allocations to Adult Overseas Nationals entering the UK (NINO) provides an invaluable source of data on international migration. Although National Insurance registrations do not cover all long-term migrants, while including short-term migrants, they provide invaluable insights into the characteristics of people coming to the UK to work. Data identifies the local authority in which people first registered but they may then have gone on to work anywhere in the country. The following table and chart compare National Insurance Registration by Non-UK Nationals between March 2009 and 2015 and Components of Population Change average annual projections of 'International Migration In' between 2013 and 2022.

Table 3.3: National Insurance Registration by Non-UK Nationals, March 2009-March 2015 and ONS Components of Population Change average annual projections of International Migration In, 2013-2022

Year	North Devon	Torrige	West Somerset
2009/10	287	89	158
2010/11	318	108	178
2011/12	219	102	161
2012/13	204	87	185
2013/14	259	76	136
2014/15	315	203	263
Total	1,602	665	1,081
NINO average 2009-15	267	111	180
ONS 2012-based: average 2013-22	300	100	120

(Source: National Insurance Recording and Pay as You Earn System, Summary Tables, DWP website, <http://www.dwp.gov.uk/>.)

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<http://www.nationalarchives.gov.uk/doc/open-government-licence/>.)

Key findings

- 2012-based Components of Population Change projections of 'International Migration In' for 2013-2022 are close to the average for North Devon and Torrige for the most recent 6 period for which data is available, but are lower than the average for West Somerset.

4.0 Assessment of the implications for household numbers of the 2012-based Subnational Household Projections

4.1 This section assesses the impact of the 2012-based Subnational Household Projections on future housing needs.

4.2 Before the 2012-based Subnational Household Projections were published in February 2015, no household projections were available that fully reflected the results of the 2011 Census and covered the period beyond 2021. In the January 2015 Updates, 5 scenarios were modelled to explore:

- the potential implications for household numbers of the 2012-based Subnational Population Projections; and
- the effects on household change during the period 2011-2031 applying different assumptions about household formation to the 2012-based population projections.

4.3 The scenarios modelled were as follows:

Scenario 1: applied to the 2012-based subnational population projections the average household sizes for each year from 2011 to 2031 from CLG's 2008-based household projections.

Scenario 2: used the same method as Scenario 1, but instead used average household sizes from the 2011-based CLG projections. This Scenario was only available from 2012 to 2021.

Scenario 3: applied CLG 2011-based household representative rates to 2021 then followed the annual trajectory of change of rates in CLG's 2008-based projections. This Scenario was recommended for use in the January 2015 SHMA Updates.

Scenario 4: was based on the household representative rates in the 2008-based CLG projections.

Scenario 5: assumed that household representative rates stayed constant during the projection period.

4.4 Population and household numbers were allocated between planning authority areas at the 2011 base year as follows:

- North Devon Local Planning Authority:
 - 97.17% of North Devon DC's population; and
 - 97.22% of households
- North Devon in Exmoor National Park
 - 2.83% of North Devon DC's population; and

- 2.78% of households
- West Somerset Local Planning Authority
 - 77.46% of West Somerset DC's population; and
 - 76.41% of households
- West Somerset in Exmoor National Park
 - 22.54% of West Somerset DC's population; and
 - 23.59% of households
- Exmoor National Park area
 - 2.83% of North Devon DC's population and 2.78% of households
 - 22.54% of West Somerset DC's population and 23.59% of households

4.5 For each local authority and planning authority area, including the Exmoor National Park, the following tables compare the outcome of the 2012-based household projections with the 2008 and 2011-based household projections and the 5 modelled scenarios. The first table summarises the outcome for each area and assesses the variation in numbers compared with the previously recommended Scenario 3.

Please note: that the effect of disaggregating Exmoor National Park figures for North Devon and West Somerset then summing them has created variations of 1-2 in the totals for each Scenario when compared with the Exmoor National Park total.

Table 4.1: the outcome of household projections scenarios for the Northern Peninsula, totals, 2011-2031

Scenario	North Devon DC	North Devon LPA	Torrige DC	West Somerset DC	West Somerset LPA	ENP in North Devon	ENP in West Somerset	ENP
2008-based CLG projections								
Households	8,510	8,269	9,676	3,165	2,452	241	713	954
2012-based scenarios								
Population	7,900	7,676	11,100	5,400	4,183	224	1,217	1,441
1. Households @ 2008 average household size	6,656	6,468	7,486	2,108	1,633	188	475	664
3. Households @ CLG 2011 to 2021+2008 post -2021	5,817	5,652	6,939	1,674	1,297	165	377	542
4. Households @ CLG 2008 adjusted to 2011 Census	7,043	6,844	7,502	2,135	1,654	199	481	681
5. Households @ constant household formation rates	5,748	5,585	6,787	1,869	1,448	163	421	584
2012-based CLG projections								
Households	5,382	5,232	6,727	1,704	1,302	150	402	552
Variation of 2012-based CLG household projections from 2012-based population projections scenario 3	-435	-420	-212	30	+5	-15	+25	+10

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are lower for North Devon and Torrige but close to the projected total for West Somerset and for the Exmoor National Park area.

Table 4.2: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, North Devon Council, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	40,279	40,685	41,077	41,484	41,909	42,336	42,783	43,217	43,661	44,118	44,563	4,284
2011-based (only available to 2021)												
Households	40,127	40,317	40,518	40,729	40,936	41,171	41,426	41,678	41,945	42,205	42,474	2,347
2012-based scenarios												
Population	94,000	93,800	94,100	94,400	94,800	95,200	96,000	95,600	96,500	97,000	97,500	3,500
1. Households @ 2008 average household size	40,693	40,903	41,208	41,528	41,865	42,247	42,605	42,904	43,302	43,668	44,021	3,328
2. Households @ 2011 average household size	40,171	40,103	40,475	40,514	40,636	40,956	41,125	41,419	41,686	41,989	42,171	2,000
3. Households @ CLG 2011 to 2021+2008 post -2021	40,128	40,230	40,418	40,645	40,867	41,129	41,408	41,689	41,965	42,238	42,521	2,393
4. Households @ CLG 2008 adjusted to 2011 Census	40,128	40,326	40,646	40,984	41,326	41,680	42,035	42,389	42,751	43,103	43,470	3,342
5. Households @ constant household formation rates	40,128	40,252	40,495	40,757	41,024	41,303	41,588	41,876	42,176	42,470	42,781	2,653
2012-based CLG projections												
Households	40,173	40,315	40,535	40,778	41,017	41,287	41,567	41,838	42,119	42,390	42,672	2,499

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	45,014	45,455	45,898	46,339	46,767	47,188	47,602	48,014	48,411	48,789	8,510
2012-based scenarios											
Population	98,000	98,400	98,900	99,400	99,800	100,300	100,700	101,100	101,500	101,900	7,900
1. Households @ 2008 average household size	44,425	44,728	45,078	45,470	45,758	46,130	46,449	46,765	47,066	47,349	6,656
3. Households @ CLG 2011 to 2021+2008 post -2021	42,900	43,262	43,622	43,970	44,325	44,675	45,005	45,338	45,651	45,945	5,817
4. Households @ CLG 2008 adjusted to 2011 Census	43,884	44,274	44,643	45,004	45,357	45,701	46,057	46,434	46,803	47,171	7,043
5. Households @ constant household formation rates	43,148	43,488	43,810	44,119	44,421	44,710	45,000	45,304	45,591	45,876	5,748
2012-based CLG projections											
Households	42,961	43,249	43,542	43,838	44,136	44,435	44,717	45,000	45,280	45,555	5,382

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 435 households lower. The closest scenario applied constant household formation rates and is 366 lower.

Table 4.3: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, North Devon Local Planning Authority area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	39,139	39,534	39,915	40,310	40,723	41,138	41,572	41,994	42,425	42,869	43,302	4,163
2011-based (only available to 2021)												
Households	38,991	39,176	39,371	39,576	39,778	40,006	40,254	40,499	40,758	41,011	41,272	2,281
2012-based scenarios												
Population	91,340	91,145	91,437	91,728	92,117	92,506	92,895	93,283	93,769	94,255	94,741	3,401
1. Households @ 2008 average household size	39,541	39,745	40,042	40,353	40,680	41,051	41,399	41,690	42,077	42,432	42,775	3,234
2. Households @ 2011 average household size	39,034	38,968	39,330	39,367	39,486	39,797	39,961	40,247	40,506	40,801	40,978	1,943
3. Households @ CLG 2011 to 2021+2008 post -2021	38,992	39,091	39,274	39,495	39,710	39,965	40,236	40,509	40,777	41,043	41,318	2,325
4. Households @ CLG 2008 adjusted to 2011 Census	38,992	39,185	39,496	39,824	40,156	40,500	40,845	41,189	41,541	41,883	42,240	3,247
5. Households @ constant household formation rates	38,992	39,113	39,349	39,604	39,863	40,134	40,411	40,691	40,982	41,268	41,570	2,578
2012-based CLG projections												
Households	39,056	39,194	39,408	39,644	39,877	40,139	40,411	40,675	40,948	41,212	41,486	2,430

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	43,740	44,169	44,599	45,028	45,443	45,853	46,255	46,655	47,041	47,408	8,269
2012-based scenarios											
Population	95,227	95,615	96,101	96,587	96,976	97,462	97,850	98,239	98,628	99,016	7,676
1. Households @ 2008 average household size	43,168	43,462	43,802	44,183	44,463	44,825	45,134	45,442	45,734	46,009	6,468
3. Households @ CLG 2011 to 2021+2008 post -2021	41,686	42,038	42,387	42,726	43,071	43,411	43,731	44,055	44,359	44,645	5,652
4. Households @ CLG 2008 adjusted to 2011 Census	42,642	43,021	43,380	43,730	44,073	44,408	44,754	45,120	45,478	45,836	6,844
5. Households @ constant household formation rates	41,927	42,257	42,570	42,870	43,164	43,445	43,727	44,022	44,301	44,578	5,585
2012-based CLG projections											
Households	41,767	42,047	42,332	42,619	42,909	43,200	43,474	43,749	44,021	44,289	5,232

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 420 households lower. The closest scenario applied constant household formation rates and is 353 lower.

Table 4.4: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, North Devon in the Exmoor National Park area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	1,140	1,151	1,162	1,174	1,186	1,198	1,211	1,223	1,236	1,249	1,261	121
2011-based (only available to 2021)												
Households	1,136	1,141	1,147	1,153	1,158	1,165	1,172	1,179	1,187	1,194	1,202	66
2012-based scenarios												
Population	2,660	2,655	2,663	2,672	2,683	2,694	2,705	2,717	2,731	2,745	2,759	99
1. Households @ 2008 average household size	1,152	1,158	1,166	1,175	1,185	1,196	1,206	1,214	1,225	1,236	1,246	94
2. Households @ 2011 average household size	1,137	1,135	1,145	1,147	1,150	1,159	1,164	1,172	1,180	1,188	1,193	57
3. Households @ CLG 2011 to 2021+2008 post -2021	1,136	1,139	1,144	1,150	1,157	1,164	1,172	1,180	1,188	1,195	1,203	68
4. Households @ CLG 2008 adjusted to 2011 Census	1,136	1,141	1,150	1,160	1,170	1,180	1,190	1,200	1,210	1,220	1,230	95
5. Households @ constant household formation rates	1,136	1,139	1,146	1,153	1,161	1,169	1,177	1,185	1,194	1,202	1,211	75
2012-based CLG projections												
Households	1,117	1,121	1,127	1,134	1,140	1,148	1,156	1,163	1,171	1,178	1,186	69

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	1,274	1,286	1,299	1,311	1,324	1,335	1,347	1,359	1,370	1,381	241
2012-based scenarios											
Population	2,773	2,785	2,799	2,813	2,824	2,838	2,850	2,861	2,872	2,884	224
1. Households @ 2008 average household size	1,257	1,266	1,276	1,287	1,295	1,305	1,315	1,323	1,332	1,340	188
3. Households @ CLG 2011 to 2021+2008 post -2021	1,214	1,224	1,235	1,244	1,254	1,264	1,274	1,283	1,292	1,300	165
4. Households @ CLG 2008 adjusted to 2011 Census	1,242	1,253	1,263	1,274	1,284	1,293	1,303	1,314	1,325	1,335	199
5. Households @ constant household formation rates	1,221	1,231	1,240	1,249	1,257	1,265	1,274	1,282	1,290	1,298	163
2012-based CLG projections											
Households	1,194	1,202	1,210	1,219	1,227	1,235	1,243	1,251	1,259	1,266	150

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 15 households lower. The closest scenario applied constant household formation rates and is 13 lower.

Table 4.5: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, Torridge District Council and Local Planning Authority, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	30,034	30,550	31,066	31,606	32,133	32,657	33,170	33,681	34,199	34,707	35,216	5,182
2011-based (only available to 2021)												
Households	28,043	28,441	28,838	29,261	29,682	30,107	30,508	30,906	31,313	31,715	32,124	4,081
2012-based scenarios												
Population	64,000	64,700	65,200	65,800	66,300	66,900	67,500	68,100	68,700	69,300	69,900	5,900
1. Households @ 2008 average household size	28,444	28,897	29,270	29,710	30,091	30,513	30,882	31,292	31,664	32,069	32,475	4,031
2. Households @ 2011 average household size	28,070	28,797	29,106	29,440	29,727	30,152	30,508	30,815	31,177	31,488	31,805	3,735
3. Households @ CLG 2011 to 2021+2008 post -2021	28,043	28,384	28,686	29,045	29,401	29,765	30,119	30,468	30,828	31,178	31,539	3,496
4. Households @ CLG 2008 adjusted to 2011 Census	28,043	28,432	28,785	29,190	29,599	29,998	30,391	30,774	31,173	31,561	31,958	3,915
5. Households @ constant household formation rates	28,043	28,383	28,692	29,054	29,423	29,784	30,136	30,478	30,833	31,177	31,530	3,487
2012-based CLG projections												
Households	28,071	28,394	28,702	29,069	29,421	29,781	30,123	30,467	30,828	31,181	31,538	3,467

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	35,699	36,177	36,655	37,123	37,588	38,034	38,469	38,896	39,311	39,710	9,676
2012-based scenarios											
Population	70,500	71,100	71,700	72,200	72,800	73,300	73,800	74,300	74,700	75,100	11,100
1. Households @ 2008 average household size	32,813	33,189	33,608	33,928	34,334	34,675	35,006	35,330	35,638	35,930	7,486
3. Households @ CLG 2011 to 2021+2008 post -2021	31,878	32,217	32,570	32,917	33,267	33,618	33,966	34,313	34,649	34,982	6,939
4. Households @ CLG 2008 adjusted to 2011 Census	32,374	32,776	33,170	33,556	33,926	34,277	34,608	34,935	35,239	35,545	7,502
5. Households @ constant household formation rates	31,900	32,261	32,617	32,963	33,297	33,618	33,929	34,240	34,536	34,830	6,787
2012-based CLG projections											
Households	31,879	32,209	32,554	32,887	33,224	33,558	33,880	34,195	34,504	34,798	6,727

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 212 households lower for Torridge. The closest scenario applied constant household formation rates and is 60 lower.

Table 4.6: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, West Somerset Council, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	16,538	16,646	16,766	16,894	17,027	17,169	17,315	17,469	17,627	17,780	17,951	1,413
2011-based (only available to 2021)												
Households	15,519	15,639	15,762	15,891	16,015	16,153	16,293	16,433	16,580	16,713	16,860	1,341
2012-based scenarios												
Population	34,600	34,600	34,600	34,600	34,700	34,700	34,800	34,900	35,100	35,200	35,300	700
1. Households @ 2008 average household size	16,019	16,088	16,159	16,192	16,321	16,367	16,509	16,612	16,767	16,869	16,943	924
2. Households @ 2011 average household size	15,516	15,594	15,537	15,532	15,654	15,657	15,794	15,931	15,944	16,030	16,173	657
3. Households @ CLG 2011 to 2021+2008 post -2021	15,520	15,547	15,567	15,618	15,661	15,730	15,808	15,884	15,972	16,049	16,143	623
4. Households @ CLG 2008 adjusted to 2011 Census	15,520	15,591	15,647	15,734	15,803	15,893	15,994	16,100	16,209	16,317	16,438	918
5. Households @ constant household formation rates	15,520	15,571	15,611	15,681	15,737	15,814	15,902	15,992	16,089	16,183	16,290	770
2012-based CLG projections												
Households	15,588	15,628	15,656	15,714	15,765	15,841	15,921	15,996	16,088	16,173	16,273	685

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	18,121	18,290	18,467	18,640	18,821	19,004	19,182	19,360	19,530	19,703	3,165
2012-based scenarios											
Population	35,600	35,600	35,700	35,900	36,100	36,200	36,400	36,500	36,700	36,800	2,200
1. Households @ 2008 average household size	17,109	17,180	17,304	17,426	17,557	17,640	17,812	17,890	18,054	18,127	2,108
3. Households @ CLG 2011 to 2021+2008 post -2021	16,239	16,325	16,425	16,517	16,628	16,741	16,857	16,970	17,085	17,194	1,674
4. Households @ CLG 2008 adjusted to 2011 Census	16,582	16,715	16,845	16,967	17,086	17,204	17,317	17,434	17,544	17,655	2,135
5. Households @ constant household formation rates	16,412	16,527	16,645	16,750	16,856	16,964	17,071	17,180	17,283	17,389	1,869
2012-based CLG projections											
Households	16,372	16,472	16,574	16,675	16,785	16,896	17,001	17,101	17,196	17,292	1,704

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 30 households higher which is the closest scenario.

Table 4.7: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, West Somerset Council Local Planning Authority area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	12,810	12,894	12,987	13,086	13,189	13,299	13,412	13,531	13,654	13,772	13,905	1,095
2011-based (only available to 2021)												
Households	12,021	12,114	12,209	12,309	12,405	12,512	12,621	12,729	12,843	12,946	13,060	1,039
2012-based scenarios												
Population	26,801	26,801	26,801	26,801	26,879	26,879	26,956	27,034	27,188	27,266	27,343	542
1. Households @ 2008 average household size	12,408	12,462	12,517	12,542	12,642	12,678	12,788	12,868	12,988	13,067	13,124	716
2. Households @ 2011 average household size	12,018	12,079	12,035	12,031	12,126	12,128	12,234	12,340	12,350	12,417	12,528	509
3. Households @ CLG 2011 to 2021+2008 post -2021	12,022	12,043	12,058	12,098	12,131	12,184	12,245	12,304	12,372	12,432	12,504	483
4. Households @ CLG 2008 adjusted to 2011 Census	12,022	12,077	12,120	12,188	12,241	12,311	12,389	12,471	12,555	12,639	12,733	711
5. Households @ constant household formation rates	12,022	12,061	12,092	12,147	12,190	12,250	12,318	12,387	12,463	12,535	12,618	596
2012-based CLG projections												
Households	11,911	11,941	11,963	12,007	12,046	12,104	12,165	12,223	12,293	12,358	12,434	523

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	14,037	14,167	14,305	14,439	14,579	14,720	14,858	14,996	15,128	15,262	2,452
2012-based scenarios											
Population	27,576	27,576	27,653	27,808	27,963	28,041	28,195	28,273	28,428	28,505	1,704
1. Households @ 2008 average household size	13,253	13,308	13,404	13,498	13,600	13,664	13,797	13,858	13,985	14,041	1,633
3. Households @ CLG 2011 to 2021+2008 post -2021	12,579	12,645	12,723	12,794	12,880	12,968	13,057	13,145	13,234	13,318	1,297
4. Households @ CLG 2008 adjusted to 2011 Census	12,844	12,947	13,048	13,143	13,235	13,326	13,414	13,504	13,590	13,676	1,654
5. Households @ constant household formation rates	12,713	12,802	12,893	12,975	13,057	13,140	13,223	13,308	13,387	13,470	1,448
2012-based CLG projections											
Households	12,510	12,586	12,664	12,741	12,825	12,910	12,990	13,067	13,139	13,213	1,302

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 5 households higher which is the closest scenario.

Table 4.8: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, West Somerset in the Exmoor National Park area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	3,728	3,752	3,779	3,808	3,838	3,870	3,903	3,938	3,973	4,008	4,046	318
2011-based (only available to 2021)												
Households	3,498	3,525	3,553	3,582	3,610	3,641	3,672	3,704	3,737	3,767	3,800	314
2012-based scenarios												
Population	7,799	7,799	7,799	7,799	7,821	7,821	7,844	7,866	7,912	7,934	7,957	158
1. Households @ 2008 average household size	3,611	3,626	3,642	3,650	3,679	3,689	3,721	3,744	3,779	3,802	3,819	208
2. Households @ 2011 average household size	3,497	3,515	3,502	3,501	3,528	3,529	3,560	3,591	3,594	3,613	3,645	148
3. Households @ CLG 2011 to 2021+2008 post -2021	3,498	3,504	3,509	3,520	3,530	3,546	3,563	3,580	3,600	3,617	3,639	140
4. Households @ CLG 2008 adjusted to 2011 Census	3,498	3,514	3,527	3,546	3,562	3,582	3,605	3,629	3,654	3,678	3,705	207
5. Households @ constant household formation rates	3,498	3,510	3,519	3,534	3,547	3,564	3,584	3,605	3,626	3,648	3,672	174
2012-based CLG projections												
Households	3,677	3,687	3,693	3,707	3,719	3,737	3,756	3,773	3,795	3,815	3,839	162

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	4,084	4,123	4,162	4,201	4,242	4,284	4,324	4,364	4,402	4,441	713
2012-based scenarios											
Population	8,024	8,024	8,047	8,092	8,137	8,159	8,205	8,227	8,272	8,295	496
1. Households @ 2008 average household size	3,856	3,872	3,900	3,928	3,957	3,976	4,015	4,032	4,069	4,086	475
3. Households @ CLG 2011 to 2021+2008 post -2021	3,660	3,680	3,702	3,723	3,748	3,773	3,800	3,825	3,851	3,876	377
4. Households @ CLG 2008 adjusted to 2011 Census	3,738	3,768	3,797	3,824	3,851	3,878	3,903	3,930	3,954	3,979	481
5. Households @ constant household formation rates	3,699	3,725	3,752	3,775	3,799	3,824	3,848	3,872	3,896	3,919	421
2012-based CLG projections											
Households	3,862	3,886	3,910	3,934	3,960	3,986	4,011	4,034	4,057	4,079	402

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 25 households higher. The closest scenario applied constant household formation rates and is 19 households lower.

Table 4.9: 2012-based CLG Subnational Household Projections compared with scenarios based on the 2012-based ONS Subnational Population Projections, Exmoor National Park Authority area, 2011-2031

Scenario	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Change 2011-21
2008-based CLG projections												
Households	4,868	4,903	4,942	4,982	5,024	5,068	5,114	5,161	5,209	5,256	5,307	440
2011-based (only available to 2021)												
Households	4,634	4,666	4,699	4,734	4,768	4,806	4,845	4,883	4,924	4,962	5,002	369
2012-based scenarios												
Population	10,459	10,453	10,462	10,470	10,504	10,516	10,549	10,583	10,642	10,679	10,716	257
1. Households @ 2008 average household size	4,762	4,784	4,808	4,825	4,864	4,885	4,927	4,959	5,005	5,038	5,065	303
2. Households @ 2011 average household size	4,634	4,650	4,647	4,647	4,678	4,688	4,724	4,763	4,773	4,801	4,839	205
3. Households @ CLG 2011 to 2021+2008 post -2021	4,634	4,643	4,653	4,671	4,687	4,709	4,735	4,760	4,788	4,813	4,842	208
4. Households @ CLG 2008 adjusted to 2011 Census	4,634	4,655	4,677	4,706	4,732	4,762	4,795	4,829	4,863	4,898	4,935	301
5. Households @ constant household formation rates	4,634	4,649	4,665	4,688	4,708	4,733	4,761	4,790	4,820	4,850	4,882	249
2012-based CLG projections												
Households	4,794	4,807	4,820	4,841	4,859	4,885	4,911	4,937	4,966	4,994	5,025	231

Scenario	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	Change 2011-31
2008-based CLG projections											
Households	5,358	5,409	5,461	5,513	5,566	5,619	5,671	5,723	5,772	5,822	954
2012-based scenarios											
Population	10,798	10,809	10,846	10,905	10,961	10,998	11,054	11,088	11,145	11,178	719
1. Households @ 2008 average household size	5,114	5,138	5,176	5,215	5,252	5,282	5,329	5,356	5,401	5,426	664
3. Households @ CLG 2011 to 2021+2008 post -2021	4,874	4,904	4,937	4,967	5,002	5,038	5,073	5,108	5,143	5,176	542
4. Households @ CLG 2008 adjusted to 2011 Census	4,980	5,021	5,060	5,098	5,135	5,171	5,207	5,244	5,279	5,314	681
5. Households @ constant household formation rates	4,920	4,956	4,992	5,024	5,056	5,089	5,121	5,154	5,186	5,218	584
2012-based CLG projections											
Households	5,056	5,088	5,120	5,152	5,187	5,221	5,254	5,285	5,315	5,346	552

Key findings

- Compared with the recommended Scenario 3 from the January 2015 Updates, 2012-based Household Projections are 10 households higher which is the closest scenario.

Evidence of change in the number of households

- 4.6 This section reviews evidence of household change which might act as a 'reality check' in relation to 2012-based household projections. Two 'proxy indicators' of change in the number of households are available:
1. Valuation Office Agency data of the annual number of Council Tax accounts for the period to March 2015; and
 2. annual data collected by the Department for Energy and Climate Change (DECC) of the number of domestic electricity meters for the period to 31st December 2013.
- 4.7 Such data must be treated with caution as it applies only to the first few years following the 2011 Census and uses different time periods.
- 4.8 The following table identifies changes in Council Tax accounts between March 2011 and 2015.

Table 4.10: VOA Properties by Council Tax Band 31st March, 2011-2015

Year	2011	2012	Annual change	2013	Annual change	2014	Annual change	2015	Annual change	Change since 2011
North Devon	43,600	43,730	130	43,870	140	44,110	240	44,340	240	+740
Torridge	30,290	30,620	330	30,850	230	31,020	170	31,480	460	+1,190
West Somerset	17,450	17,530	80	17,600	70	17,700	100	17,830	130	+380
Total	91,340	91,880	540	92,320	440	92,830	510	93,650	830	+2,310

Key findings

- Council Tax data shows increases of 540, 440, 510 and 830 registered properties across the study area in the 3 years since 2011, a total increase of 2,310.
 - The largest increase was in Torridge (+1,190) followed by North Devon (+740) then West Somerset (+380).
- 4.9 The following table identifies changes in the number of domestic electricity meters between the end of 2011 and the end of 2013.

Table 4.11: DECC end of year number of domestic consumers by number of electricity Meter Point Administration Numbers (MPANs), 2011-2013

Year	2011	2012	Annual change	2013	Annual change	Change since 2011
North Devon	42,913	43,066	153	43,195	129	282
Torridge	30,141	30,320	179	30,461	141	320
West Somerset	17,626	17,665	39	17,731	66	105
Total	90,680	91,051	371	91,387	336	707

Key findings

- DECC domestic electricity meters data shows an increase of 707 domestic consumers between 2011 and 2013, which is less than the increase in Council Tax accounts of 980.

4.10 The following table identifies changes in 2012-based household projections and Council Tax accounts between 2011 and 2015.

Table 4.12: 2012-based household projections compared with Council Tax Account and domestic electricity consumer data, 2011-2015

Local authority	Indicator	Change 2011-2012	Change 2012-2013	Change 2013-2014	Change 2014-2015	Totals 2011-2015
North Devon	Household projections	142	220	243	239	844
	Council Tax accounts	130	140	240	240	750
	Domestic electricity consumers	153	128	No data	No data	-
Torridge	Household projections	323	308	367	352	1,350
	Council Tax accounts	330	230	170	460	1,190
	Domestic electricity consumers	179	141	No data	No data	
West Somerset	Household projections	40	28	58	51	177
	Council Tax accounts	80	70	100	130	380
	Domestic electricity consumers	39	66	No data	No data	-

Key findings

- For North Devon: with the exception of 2012-2013, increases in the number of Council Tax accounts were very close to projected increases in the number of households, and the overall total is within a 10% margin, both of which provide support for the accuracy of 2012-based household projections.
- For Torridge: the number of Council Tax accounts was close to projected increases only in the number of households in 2011-12 but overall totals are within a 12% margin which provides support for the 2012-based household projections.

- For West Somerset: the number of Council Tax accounts was significantly higher than projected increases in the number of households and the overall total is over twice as large.

5.0 Assessment of the implications for meeting housing need of the CLG 2012-based Subnational Household Projections

5.1 This section considers the future need for housing arising from 2012-based household projections.

The backlog of affordable housing

5.2 Before considering future housing requirements, it is necessary to take stock of the extent to which current housing needs are being met. The principal sources of data and information are the housing registers maintained by Devon HomeChoice and Homefinder Somerset. However, these may well provide underestimates as applicants are dissuaded from applying because of the relative scarcity of social housing.

5.3 The backlogs of affordable housing in the North Devon Local Planning Authority and Torridge Council areas have been quantified by identifying all those registered with Devon HomeChoice who had no permanent home of their own, i.e., applicants in one of the following circumstances:

- in temporary accommodation/hostel;
- lodger;
- rough sleeping;
- sharing with family/friends; and
- sofa surfing/no fixed abode.

5.4 These categories overlap on the housing register and to avoid double counting, those rough sleeping and of no fixed abode have been subtracted from those in temporary accommodation/hostel; lodgers and sharing with family/friends.

5.5 The backlogs of affordable housing are in the North Devon LPA and in the Exmoor National Park Authority in the North Devon Council area has been apportioned as a proportion of total households by reducing the North Devon Council backlog of applicant households by 2.78% which has been allocated to the Exmoor National Park Authority.

5.6 As equivalent data is not available for West Somerset and for Exmoor National Park in West Somerset, the backlog of affordable housing have been quantified by identifying all those registered with Homefinder Somerset allocated to the Gold and Silver housing needs categories which include those lodging or sharing with families. Separate data has been provided for the LPA and ENP areas.

5.7 The following table identifies the current backlog of affordable housing

Table 5.1: backlog of affordable housing, North Devon, Torrington, West Somerset and Exmoor National Park Areas, August 2015

Housing circumstances	North Devon LPA	Torrington Council and LPA	West Somerset LPA	Exmoor National Park in North Devon	Exmoor National Park in West Somerset
Gold and Silver Band Applicants	-	-	207	-	43
In temporary accommodation/hostel	89	31	-	3	-
Lodger	61	17	-	2	-
Rough sleeping	11	10	-	0	-
Sharing with family/friends	324	144	-	9	-
Sofa surfing/of no fixed abode	104	33	-	3	-
Totals	589	235	207	17	43

(Source: Devon Home Choice and Homefinder Somerset)

Key findings:

- There are backlogs of affordable housing of 589 units in North Devon LPA, a substantial increase over the past 12 months and which can be accounted for by an increase from 258 sharing with family/friends in October 2014 to 324 in August 2015; 235 units in Torrington Council and LPA areas; 207 in West Somerset LPA and 60 in the Exmoor National Park area (17 within North Devon and 43 within West Somerset).

Implications of the 2012-based Subnational Household Projections for meeting future housing needs

- 5.8 The 2012-based household projections in Tables 4.1-4.9 provide annual totals but are not capable of providing projections by household type. Consequently, it is not possible to provide revised breakdowns of housing requirements by bedsize or tenure. The publication date of detailed Stage 2 household projections has still not been confirmed.
- 5.9 As the 2012-based projections relate to households, it is appropriate to apply a conversion factor allowing for such 'market signals' as vacant dwellings, second homes and homes occupied by non-residents to provide a net dwelling requirement. Three adjustments have been made:
1. Vacancy rates: CLG Live Table 615, 'All vacant dwellings by local authority district' calculated at October 2014 measured in relation to Table 125, 'Dwelling stock estimates by local authority district, 2001-2014' at 31st March enable vacancy rates to be applied to household projections data.
 2. Second and holiday homes including vacant dwellings: these are a feature of the area, especially in the Exmoor National Park. Using Census Table

KS401, 'Dwellings, household spaces and accommodation', the proportion of 'Household spaces with no usual residents' has been applied to include both vacant dwellings and to take account of second and holiday homes. However, it must be emphasised that there is no evidence that new homes are used as second and holiday homes at the same rate as the general or older housing stock and further research is required. Therefore, the use of this indicator may overstate the conversion requirement arising from the rate of second and holiday homes, especially in the Exmoor National Park.

3. The backlog of affordable housing: this has been calculated as explained at 5.2-5.7 above and can be added to any of the totals above
- 5.10 The following tables draw from household projections in Tables 5.1-5.8 to assess the implications for housing needs. The table is in four parts:
1. Part 1 presents the unadjusted household projections.
 2. Part 2 presents the household projections adjusted for vacancy rates.
 3. Part 3 presents the household projections adjusted for second and holiday homes including vacant homes; and
 4. Part 4 sets out the backlog of affordable housing which can be added to any of the totals above.

Please note: that the effect in Table 5.3 of disaggregating Exmoor National Park figures for North Devon and West Somerset then summing them has created variations of 1-2 in the totals for each Scenario when compared with the National Park total in Table 5.2. The accurate total is placed in brackets in the final column of Table 5.3 where appropriate.

Table 5.2: the impact on housing requirements of household projection scenarios, North Devon, Torridge and West Somerset Local Planning Authorities and the Exmoor National Park Authority, 2011-2031, 2012-based projections highlighted

Household projection scenarios	North Devon LPA 2011-2031	Torridge LPA 2011-2031	West Somerset LPA 2011-2031	Exmoor NPA 2011-2031
1. Unadjusted				
2008-based CLG household projections	8,269	9,676	2,452	954
2012-based @ 2008 average household size	6,468	7,486	1,633	664
2012-based @ CLG 2011 to 2021+2008 post -2021	5,652	6,939	1,297	542
2012-based @ CLG 2008 adjusted to 2011 Census	6,844	7,502	1,654	681
2012-based @ constant household formation rates	5,585	6,787	1,448	584
2012-based CLG household projections	5,232	6,727	1,302	552
2. Adjusted for vacant dwellings rates of:				
	3.33%	3.05%	2.78%	3.33% & 2.78%*
2008-based CLG household projections	8,544	9,971	2,520	983
2012-based @ 2008 average household size	6,683	7,714	1,678	684
2012-based @ CLG 2011 to 2021+2008 post -2021	5,840	7,151	1,333	558
2012-based @ CLG 2008 adjusted to 2011 Census	7,072	7,731	1,700	701
2012-based @ constant household formation rates	5,771	6,994	1,488	602
2012-based CLG household projections	5,406	6,932	1,338	569
3. Adjusted for vacant dwellings, second & holiday homes rates of:				
	10.26%	8.94%	11.22%	19.20%
2008-based CLG household projections	9,117	10,541	2,727	1,137
2012-based @ 2008 average household size	7,132	8,155	1,816	791
2012-based @ CLG 2011 to 2021+2008 post -2021	6,232	7,559	1,443	646
2012-based @ CLG 2008 adjusted to 2011 Census	7,546	8,173	1,840	812
2012-based @ constant household formation rates	6,158	7,394	1,610	696
2012-based CLG household projections	5,769	7,328	1,448	658
4. The backlog of affordable housing:				
At August 2015	589	235	207	60

Note: * the vacancy rates for the North Devon and West Somerset areas have been applied to those areas of the Exmoor National Park within each Council area.

Table 5.3: the impact on housing requirements of household projection scenarios, the Exmoor National Park Authority and North Devon and West Somerset Councils in the Exmoor National Park, 2011-2031, 2012-based projections highlighted

Household projection scenarios	North Devon in the Exmoor National Park	West Somerset in the Exmoor National Park	Exmoor NPA 2011-2031
1. Unadjusted			
2008-based CLG household projections	241	713	954
2012-based @ 2008 average household size	188	475	663 (664)
2012-based @ CLG 2011 to 2021+2008 post -2021	165	377	542
2012-based @ CLG 2008 adjusted to 2011 Census	199	481	680 (681)
2012-based @ constant household formation rates	163	421	584
2012-based CLG household projections	150	402	552
2. Adjusted for vacant dwellings rates of:			
	3.33%	2.78%	3.33% & 2.78%*
2008-based households	249	733	982 (983)
2012-based @ 2008 average household size	194	488	682 (684)
2012-based @ CLG 2011 to 2021+2008 post -2021	170	387	558
2012-based @ CLG 2008 adjusted to 2011 Census	206	494	700 (701)
2012-based @ constant household formation rates	168	433	601 (602)
2012-based CLG household projections	155	413	568 (569)
3. Adjusted for vacant dwellings, second & holiday homes rates of:			
	19.20%	19.20%	19.20%
2008-based households	287	850	1,137
2012-based @ 2008 average household size	224	566	790 (791)
2012-based @ CLG 2011 to 2021+2008 post -2021	197	449	646
2012-based @ CLG 2008 adjusted to 2011 Census	237	573	811 (812)
2012-based @ constant household formation rates	194	502	696
2012-based CLG household projections	179	479	658
4. The backlog of affordable housing:			
At August 2015	17	43	60

Note: * the vacancy rates for the North Devon and West Somerset areas have been applied to those areas of the Exmoor National Park within each Council area.

The effect of disaggregating then summing the Exmoor National Park figures has created variations of 1 -2 in the totals for each scenario when compared with the previous table. The accurate total is in brackets.

Conclusions

- 5.11 Household and housing projections based on the 2012-based subnational household projections imply significant reductions when compared with the application of 2008-based household projections.
- 5.12 However, 2012-based household projections may be overstating the current rate of household growth. As reviewed in Chapter 4, whilst recent rates of international immigration are close to those projected in Components of Population Change, recent rates of internal migration suggest that those projected in Components of Population Change may be overestimates for Torridge and for North Devon and West Somerset in which the Exmoor National Park is located (see Table 3.2 in particular). In these areas, the 2012-based projections include an effective 'margin' which might take account of increased net internal migration resulting from economic recovery.
- 5.14 Although the evidence is limited and should be treated with caution, slightly lower levels of household formation than are implied by the 2012-based household projections are suggested for North Devon and Torridge by the proxy indicators of household growth, the number of Council Tax accounts and domestic electricity meters. It is not clear why this is the case, either the projections or the proxy indicators may be inaccurate, or housing growth may not be meeting projected household growth.

APPENDIX 1: POPULATION AND HOUSEHOLD SCENARIO TOTALS 2011-2031 FOR THE NORTH DEVON AND WEST SOMERSET LPAs AND FOR THE EXMOOR NATIONAL PARK COMPARED WITH TOTALS INCLUDED IN THE NORTHERN PENINSULA SHMA UPDATE, JANUARY 2015

A1 Projections for the North Devon and West Somerset Local Planning Authorities; for the Exmoor National Park in North Devon and West Somerset, and for the Exmoor National Park have been apportioned as proportions of Exmoor National Park households in North Devon and West Somerset at the time of the 2011 Census. The methodology underpinning these calculations was explained in paragraphs 5.2-5.6 of the January 2015 Northern Peninsula Housing Market Area Strategic Housing Market Assessment Update. Further refinement of the proportions allocated to each area has been undertaken in this update, the revised proportions are set out in paragraph 4.4 above and their effect is summarised in the following table.

Scenario	North Devon LPA		West Somerset LPA		ENP in North Devon		ENP in West Somerset		Exmoor National Park	
	12.15	01.15	12.15	01.15	12.15	01.15	12.15	01.15	12.15	01.15
2008-based CLG projections										
Households	8,269 (-6)	8,275	2,452 (-1)	2,453	241 (+6)	235	713 (+1)	712	954 (+7)	947
2012-based scenarios										
Population	7,676 (-6)	7,682	4,183 (-2)	4,185	224 (+6)	218	1,217 (+2)	1,215	1,441 (+8)	1,433
1. Households @ 2008 average household size	6,468 (-5)	6,473	1,633 (-1)	1,634	188 (+4)	184	475 (+1)	474	663 (+5)	658
3. Households @ CLG 2011 to 2021+2008 post -2021	5,652 (-4)	5,656	1,297 (0)	1,297	165 (+4)	161	377 (0)	377	542 (+5)	537
4. Households @ CLG 2008 adjusted to 2011 Census	6,844 (-5)	6,849	1,654 (-1)	1,655	199 (+5)	194	481 (+1)	480	681 (+6)	675
5. Households @ constant household formation rates	5,585 (-4)	5,589	1,448 (0)	1,448	163 (+4)	159	421 (0)	421	583 (+4)	579

Key findings

- Compared with Tables 5.2, 5.3, 5.6, 5.7 and 5.8 in the January 2015 Updates, there are variations of between 0 and 7 households for any area for any Scenario.