

Replacement Local Development Plan 2018-2033  
Background Paper

# BP1: Growth level options report



**Deposit Plan  
September 2025**



**Mae'r ddogfen hon ar gael yn Gymraeg hefyd.**

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# Headlines

This paper has been produced to provide background information to support the pre-deposit public consultation stage of the Conwy Replacement Local Development Plan 2018-2033, which is produced by Conwy County Borough Council.

The background paper sets out proposed options for growth within the County Borough and how these will potentially affect population totals and structures, dwelling requirements and housing mix, and it identifies the possible jobs and employment land implications of the projected growth.

**Figure 1: summary of projected impacts of the preferred growth option for the Conwy Replacement Local Development Plan**

<b>Change 2018-2033</b>	
<b>Household growth</b>	3,350
<b>Dwelling impacts</b>	
<b>Dwelling requirement CCB</b>	3,700
<b>Dwelling requirement exc. ENP*</b>	<b>3,600</b>
<b>Plus contingency</b>	720
<b>Total dwellings excluding ENP*</b>	4,300
<b>Average annual requirement (exc. contingency)</b>	240
<b>Housing land requirements</b>	
<b>Existing supply</b>	2,950
<b>New allocations required</b>	1,350
<b>Economic impacts</b>	
<b>Jobs growth</b>	1,500
<b>Jobs growth excluding ENP*</b>	<b>1,450</b>
<b>Land (ha)</b>	<b>10.5</b>

\* Part of Conwy County Borough which is within the jurisdiction of the Eryri National Park Local Planning Authority.

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

The summary of dwelling and employment impacts over the Plan period is shown in figure 1. Full details are available in section 5 of this report. All data is for change between 2018 and 2033 (the Plan period).

Before testing different growth scenarios for the County Borough, we looked at some of the factors which influence change, including the demographic profile of Conwy County Borough, economic growth, past housing completion rates, and the Council's aspirations for the new LDP. The evidence was used to help shape the wide range of different growth scenarios which were looked at before settling on the one which is presented in this paper.

This paper updates work which was undertaken for the preferred strategy consultation stage of the Replacement Local Development Plan. The levels of growth have changed since that stage of the consultation, following an update of the key evidence in the Employment Land Review. Some of the information in section 2 'looking at the evidence' has also been updated to take account of the latest available evidence.

# 1 Background

- 1.1 This paper has been produced to provide background information on growth options for the Conwy Replacement Local Development Plan 2018-2033 which is produced by Conwy County Borough Council. It forms part of the evidence base for the pre-deposit public consultation stage of the process. The background paper sets out proposed options for growth within the County Borough and how these will potentially affect population totals and structures, dwelling requirements and housing mix. It also identifies the jobs and employment land implications of the projected growth.
- 1.2 This paper builds on work which was undertaken for the key stakeholder pre-deposit participation stage of the Replacement Local Development Plan. From the range of projections which were produced at that stage, five were selected as being the most robust representations of the evidence, and which also support the aspirations of the Replacement Local Development Plan. Three of the growth options were population led projections which used Welsh Government's official projections methodology as a starting point, but use different trends and assumptions about future growth. The two additional growth scenarios were employment led and derived from information in the Employment Land Review (ELR) and the Council's Economic Growth Strategy.
- 1.3 As a result of this engagement with key stakeholders a preferred strategy for the Replacement Local Development Plan was developed which selected one of the employment led projections as the preferred growth option. More details about the selection of the growth option are available in the Preferred Strategy document<sup>1</sup>.
- 1.4 As part of the ongoing examination of the evidence base, the ELR was updated in October 2020, with a further minor update to the land requirement figures in August 2021. The updated version examined the latest data about the economy and jobs within the County Borough, and took specific account of the potential impacts of the Covid-19 pandemic on economic growth. The review was undertaken following a request from Welsh Government to assess

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<sup>1</sup> <http://www.conwy.gov.uk/rldp>

the impact of the Covid-19 pandemic. The revised ELR identified a potential jobs growth of +1,450 over the Plan period (+1,500 jobs including the National Park).

- 1.5 This paper takes forward this growth option identified in the revised ELR. It replaces the dwelling and employment requirement figures for growth over the Replacement Local Development Plan period that were presented in the Preferred Strategy. The previous 'policy on' scenario which generated higher levels of jobs growth is now considered to be a riskier option due to increased uncertainties in the global economy, potentially impacting on regional level projects<sup>2</sup>.
- 1.6 Tweaks were also made to the assumptions and methodologies used when calculating the impacts of the new jobs growth over the Plan period, in light of the new set of 2018-based population and household projections that were published by Welsh Government in August 2020<sup>3</sup>. Some of the information in section 2 'looking at the evidence' has also been updated to take account of the latest available evidence, including results from the 2021 Census and the rebased population estimates which the Office for National Statistics released in November 2023 and February 2024.
- 1.7 This paper looks at the evidence which was examined when considering which growth options to present. The statistical methodologies and policy assumptions used to make this selection are also explained. Some detail of the other growth options that were considered and reasons why they were rejected are also included (see section 4 and appendix A2).
- 1.8 Planning Policy Wales recommends that:
  - (t)he latest Welsh Government local authority level Household Projections for Wales, alongside the latest Local Housing Market Assessment (LHMA) and the Well-being plan for a plan area, will form a fundamental part of the evidence base for development plans. These should be considered together with other key

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<sup>2</sup> More information about the revised Employment Land Review and changes to the growth strategy is available in background paper 18 Employment Land Review <http://www.conwy.gov.uk/rldp>

<sup>3</sup> [https://gov.wales/subnational-populations-projections-2018-based](https://gov.wales/subnational-population-projections-2018-based); <https://gov.wales/subnational-household-projections-2018-based>

evidence in relation to issues such as what the plan is seeking to achieve, links between homes and jobs, the need for affordable housing, Welsh language considerations and the deliverability of the plan, in order to identify an appropriate strategy for the delivery of housing in the plan area. Appropriate consideration must also be given to the wider social, economic, environmental and cultural factors in a plan area in order to ensure the creation of sustainable places and cohesive communities.

and that

(p)lanning authorities need to assess whether the various elements of the projections are appropriate for their area, and if not, undertake modelling, based on robust evidence, to identify alternative options<sup>4</sup>.

The guidance also emphasises the duty of Planning Authorities to take note of the Public Service Board 'Well-being Plans' as a key part of the evidence base.

- 1.9 There are additional caveats to consider when looking at moving beyond the officially produced projections the key predictor of future growth, particularly those which are produced to a standardised methodology across a number of geographical areas and for a range of different, often competing, purposes.
- Any set of projections presents only one possible future.
  - They are based on past trends – projections only take what has happened in the past and see what would happen if those trends continue. And if the period from which the trend is measured is anomalous, it may not give the full picture.
  - No policy elements are included in the official projections, even if these are already known about<sup>5</sup>.

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<sup>4</sup> Planning Policy Wales Edition 12, February 2024 - Chapter 4 Active and Social Places

<sup>5</sup> Examples of policy decisions that we know about that will have an impact on growth levels but are not part of the Welsh Government projections methodology include Brexit and the Ambition North Wales Growth Deal. Though we know that things are likely to change because of these policy decisions, we have no reliable way of predicting \*how\* they will change or even precisely \*what\* they will change, and so cannot produce a robust estimate of future growth based on these 'unknowns' that would meet the strict requirements of National Statistics designation.

- 1.10 Before testing different growth scenarios for the County Borough, we looked at some of the factors which influence change at the local level including the demographic profile of Conwy County Borough, economic growth; past housing completion rates and the Council's aspirations for the new LDP.
- 1.11 We've also looked at the issues which were identified in the Conwy and Denbighshire Public Service Board assessment of local well-being<sup>6</sup> and how they sit with the Replacement Local Development Plan and its duties under the Well-being of Future Generations Act. We have focussed specifically on well-being aspirations for a more balanced population that retains younger people within the area, offers employment opportunities to help achieve this, and provides suitable and affordable housing for our existing and future population.
- 1.12 The background paper was written with reference to guidance in Welsh Government's Development Plans Manual<sup>7</sup> and the National Development Framework (NDF) for Wales, which has development plan status<sup>8</sup>.
- 1.13 All data is for change between 2018 and 2033 (the Plan period) unless otherwise stated.
- 1.14 Unless otherwise stated, figures are for the whole of Conwy County Borough, including that part of the area which is within the jurisdiction of the Eryri National Park Local Planning Authority.
- 1.15 As numbers are only a projection of future requirements and are not an exact count, the results are rounded to the nearest 50 for publication, except for projected annual dwelling requirements and annual migration, which are rounded to the nearest 10. Any calculations are undertaken before rounding is applied, so individual figures in tables may not add to the column or row totals.

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<sup>6</sup> First published in 2017 and updated in 2022.

<sup>7</sup> Development Plans Manual (Edition 3), March 2020, Welsh Government

<https://gov.wales/development-plans-manual-edition-3-march-2020>

<sup>8</sup> Future Wales: the national plan 2040, Welsh Government <https://gov.wales/future-wales-national-plan-2040>

## Note on the release of the 2021 Census results and the proposed 2022-based sub national population and household projections for Wales

- 1.16 Work on this Replacement Local Development Plan began in 2018 when the 2011 Census was still the baseline for much of the demographic and socio-economic data that was available to help us understand and profile Conwy County Borough and the people who live and work here. This was the data that helped to shape the Preferred Strategy stage of the plan. Data from the 2021 Census<sup>9</sup> has now been incorporated into the evidence base, and has allowed us to significantly update section 2 of this paper (especially under the headings 'Demographic profile for Conwy County Borough' and 'Migration' in section 2) alongside other parts of the evidence that rely on Census data or its secondary outputs such as mid-year population estimates or unemployment rates.
- 1.17 Results from the 2021 Census show some differences in population totals and structures compared to the baselines we had previously been working from, particularly around a reduction in the size of the working age population. This emphasises the need for the growth strategy to concentrate on maintaining a balanced age structure within the population in order to meet the Council's aspirations for the Plan (see paragraphs 1.11 and 2.35). 2021 Census-based adjustments to what we know about baseline population totals and structures have a minimal impact on the level of change seen between 2018 and 2033 within the preferred growth strategy, as the change is driven by jobs growth and the impact that will have on population and household numbers rather than being shaped by the structure of the baseline population itself.
- 1.18 The number of households in Conwy County Borough increased by about 1,050 between 2011 and 2021. This is because, as well as changes due to the overall population size, the number of households within the population is also affected by the long-term trend towards smaller household size. This means additional dwellings may be needed to accommodate household growth over time even when population totals fall.

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<sup>9</sup> Data began to be released in the second half of 2022 <https://www.ons.gov.uk/census>

- 1.19 For the Replacement Local Development Plan the most important secondary outputs from the Census will be population and household projections, as these form the starting point for evidence about growth. The next round of Welsh Government's sub-national population and households projections, which will be based on the 2021 Census data, are not due until summer 2025. Planning Policy Wales guidance is that growth strategies should use the latest official projections as a starting point (see 1.8 paragraph above), and the 2018-based sub-national projections, which were used to shape this background paper, remain the latest set of projections. Welsh Government's Knowledge and Analytical Services have also given advice that the 2018-based sub-national projections should continued to be used as the official dataset for forward planning purposes until their 2022-based projections are published.
- 1.20 Delaying publication of the Replacement Local Development Plan until the revised sub-national population and household projections are released would push the deposit stage of the Plan back to 2026 at the earliest, as additional time would be needed to interpret this information for a reassessment of our growth strategy. In consultation with Welsh Government it has been decided to move ahead with the consultation on the deposit stage of the Plan using the currently available evidence in order to avoid further delays. The monitoring process for the Replacement Local Development Plan will have triggers in place that will manage the release of more or less land. This process will take into account new evidence that comes forward over the life of the Plan, including evidence from the Census and new sub-national projections.

#### **Note on considering the impacts of Covid-19 on the RLDP growth strategy**

- 1.21 It is still too early to know how Covid-19 will influence long term population dynamics and the resultant housing and economic impacts of this. Some of our key indicators about population flows were not released until November 2023 (internal and international migration flows data for example) and the Office for National Statistics is still studying this data to understand what it shows. We know we cannot rely on data from the peak of the pandemic period (2020 and 2021) to help us model the medium-term future, as we will

not know what behavioural changes are likely to be long term, and which are just blips in the trajectory before returning to pre-pandemic patterns. Therefore it is best to remain mindful yet cautious when trying to plan for the post-Covid future. Any changes in evidence will of course be scrutinised through the Annual Monitoring Report process.

## 2 Looking at the evidence

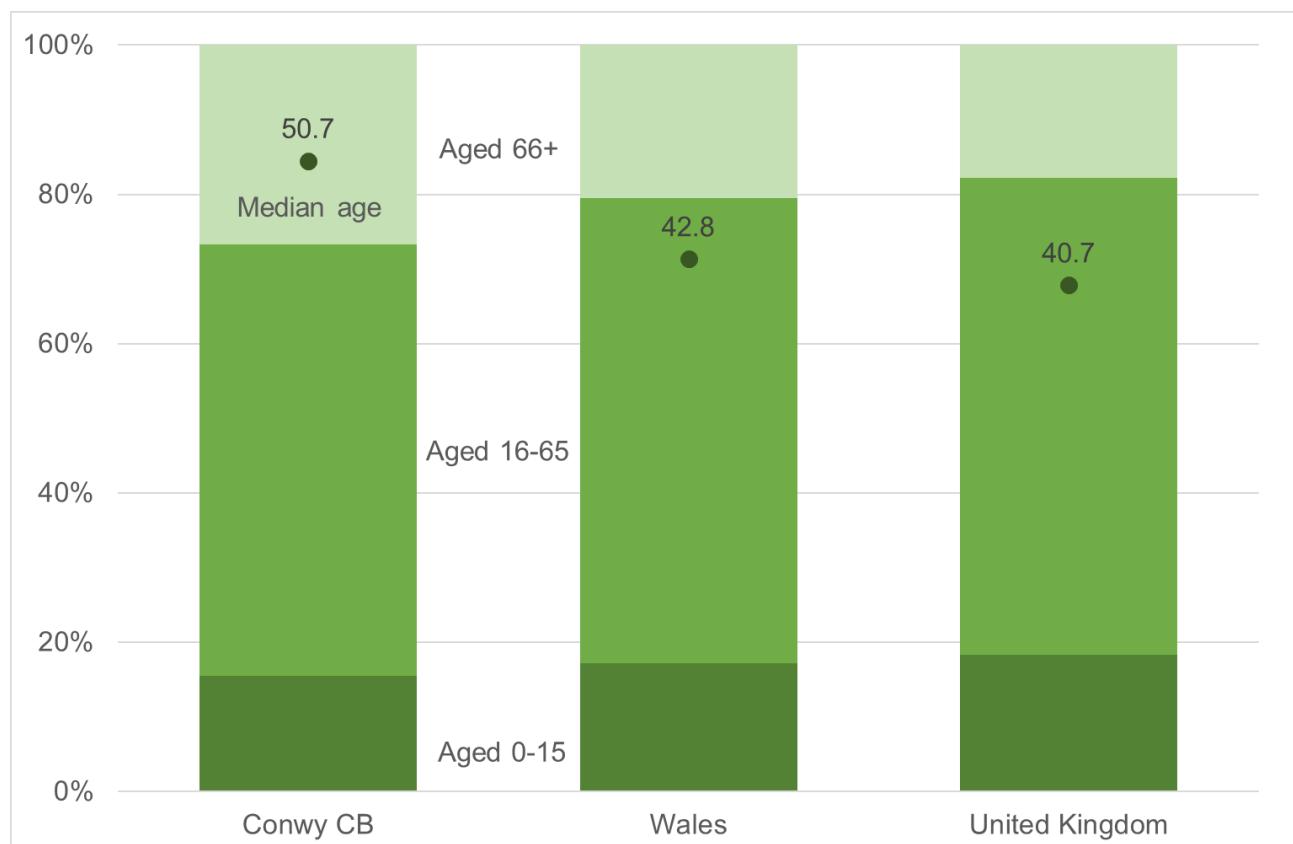
### Demographic profile for Conwy County Borough

- 2.1 The size, shape and key characteristics of the population of the area are the starting point for any analysis of evidence that may shape future growth over the Plan period. We have provided an overview of the population, and have then looked at migration in more detail, as this is the key driver of population change in Conwy County Borough.
- 2.2 The main data sources used to look at the demographic profile of the area are the Office for National Statistics' population estimates and supporting data on components of population change; and Welsh Government's 2018- based sub-national population projections.
- 2.3 The size of the resident population in Conwy County Borough at 30 June 2024<sup>10</sup> was estimated to be 114,900 people. In the 20 years since 2004 the population of Conwy County Borough has increased by 2,600, which is 2.3% – an average of about 0.12% per year, though rates of change have not been evenly spread across the period. In the same period the population of Wales increased by 7.7% and the population of the UK grew by 13.9%.
- 2.4 The population of Conwy County Borough does not replace itself naturally as there are more deaths than births in the area every year. With deaths over a ten year period at an average of 1,600 each year and births at just 1,000 the population of Conwy County Borough would decrease by around 600 persons per year if there were no net in-migration into the area.
- 2.5 The age structure of the County Borough is significantly older than that for Wales or the UK as a whole. Conwy County Borough's 26.7% of the population aged 66 and over compares to 20.5% in Wales as a whole and only 17.8% across the UK. The median age of the population in 2024 was 50.7 years (Wales = 42.8; UK = 40.7). The median age has increased over the last decade from 47.7 to 50.7 years.

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<sup>10</sup> Mid-year population estimates and components of population change, Office for National Statistics. Published July 2025.

**Figure 2: comparative population structures for Conwy County Borough, Wales and the UK**



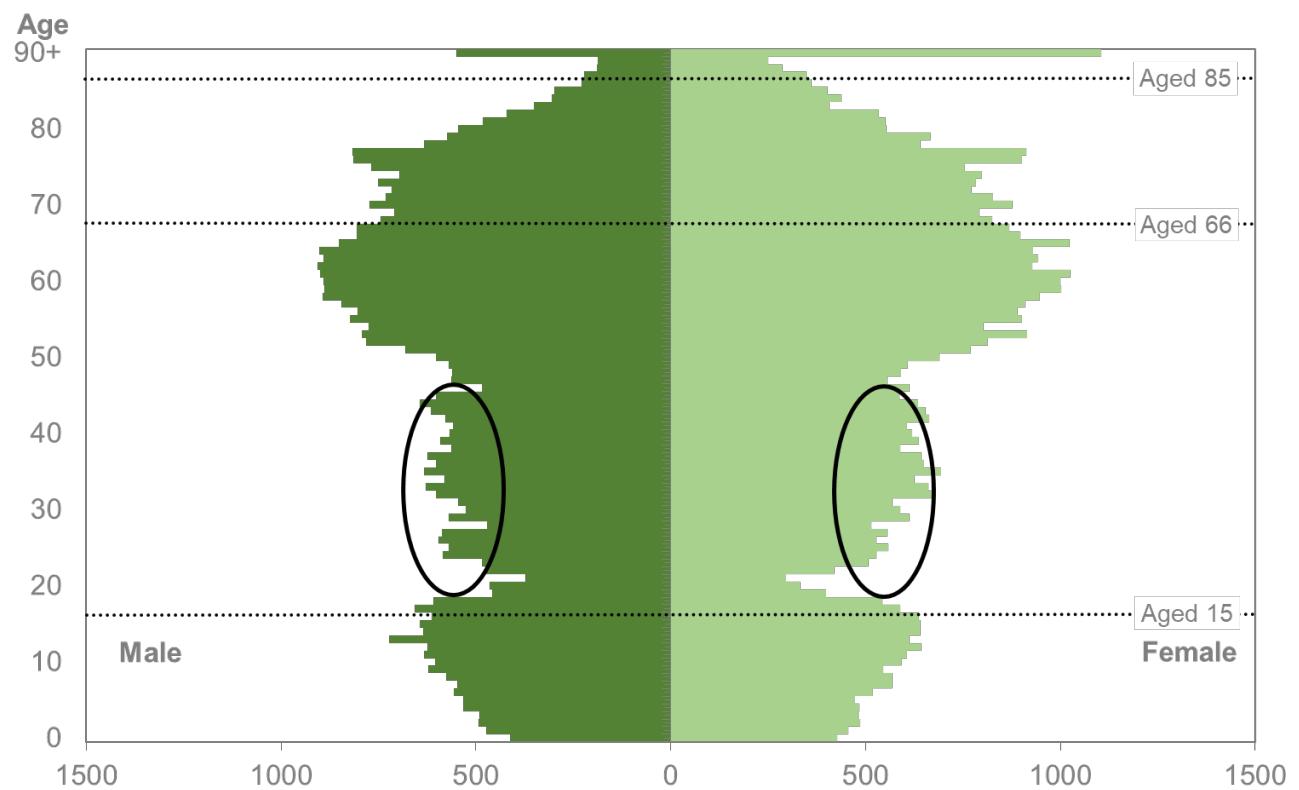
Source: 2024 mid-year population estimates, ONS

- 2.6 The increase in the number of people aged over 66 is mainly due to two factors; firstly improvements in mortality rates mean people are living longer; and secondly the ageing on of the large ‘baby boom’ cohort born after the Second World War.
- 2.7 The number of children in the population has been declining steadily over the past decade or so, reflecting both the decline in number of babies born in the late 1990s / early 2000s, and a return to this lower birth rates trend in the past 10 years or so. Conwy County Borough’s 15.5% of the population aged under 16 compares to 17.1% in Wales as a whole and 18.3% across the UK.
- 2.8 Conwy County Borough’s 57.8% of the population aged 16-65 compares to 62.4% in Wales as a whole and 63.9% across the UK. This is relatively low, and leads to a high dependency ratio – that is, the ratio of people of working age to those who are theoretically ‘dependent’ on that working age population. In 2024 the dependency ratio in Conwy County Borough was 731 dependents

for every 1,000 of working age. In Wales this was 603:1,000 (UK ratio is 565:1,000). A high dependency ratio can put strain on the local economy and on the resources needed to provide health and social care.

- 2.9 The number of people in the working age population group in Conwy County Borough is particularly affected by the out-migration of young adults in the 18-24 age group, and the large post-Second World War 'baby boomers' cohort moving out of the working age group as they reach retirement age.
- 2.10 Retaining young people within our area is a major issue, as the population estimates for Conwy County Borough show a big gap in the age structure between the ages of around 18 to 45. This is the age group which is mostly likely to be economically and socially mobile, seeking work, education and other social opportunities outside the area. Many young people have to leave the area for higher education and though this in itself is not an issue the failure to attract them back to the area after graduation leads to a generational imbalance.
- 2.11 Figure 3 shows that our population is very obviously not the traditional pyramid shape, which would show lots of children and young people at the 'base' supporting a narrower 'peak' of elderly people. Our population is very top-heavy within the older age groups. Though other demographic drivers have all had an impact on this population imbalance (improved life expectancy, reduced fertility and the effects of the post war baby boom), out-migration of young people is a key influence, and one which has impacts on the economic well-being of the area as well as on its social and cultural make-up.
- 2.12 Migration patterns for Conwy County Borough are looked at in more detail in the next sub section of this report.

**Figure 3: population pyramids showing the age structure gaps in population aged between 18 and 45 years**



Source: 2024 mid-year population estimates, ONS

2.13 Welsh Government's 2018-based sub national population projections<sup>11</sup> predict that by the end of the proposed plan period in 2033:

- if the central trend continues Conwy County Borough will have a population of 121,200 – an increase of 4,050 (3.4%) from 2018, the start of the Plan period.
- if the low growth variant trend continues Conwy County Borough will have a population of 118,450 – an increase of 1,300 (1.1%).
- if the high growth variant trend continues Conwy County Borough will have a population of 123,250 – an increase of 6,100 (5.2%).
- net increases in the population total will come from in-migration, as natural change alone (births and deaths) would lead to a fall in population totals.

<sup>11</sup> <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Projections/Local-Authority/2018-based>

- population growth will be in the 65+ age group. The number of people of working age and the population aged under 16 will decline.
- dependency ratios are predicted to increase as the whole of the baby-boomer cohort moves into post retirement age group.

## Migration

- 2.14 Migration is the component of population change which has the biggest impact in the County Borough. Without a net gain of in-migrants, the population would not naturally replace itself and the number of people living in the area would decline each year, as there are about 600 more deaths than births in the area every year. However, migration levels fluctuate year by year, are difficult to measure and hard to predict.
- 2.15 Over the past 10 years average annual net migration has been about 700 persons into Conwy County Borough each year. Migration is, however, a volatile component of population change and has fluctuated between a net figure of -50 and +1,550 persons over the past 25 years. This can be a particular problem when using migration to help predict population change in the future. The set of years selected to provide a past trend can produce very different results, as seen in the table below.

**Figure 4: annual average net migration for Conwy County Borough over selected five year periods**

	Annual average net migration
<b>Mid 2019-mid 2024 – most recent five year average</b>	950
<b>Mid 2006-mid 2011 – lowest five year average</b>	420
<b>Mid 1999-mid 2004 – highest five year average</b>	1,150

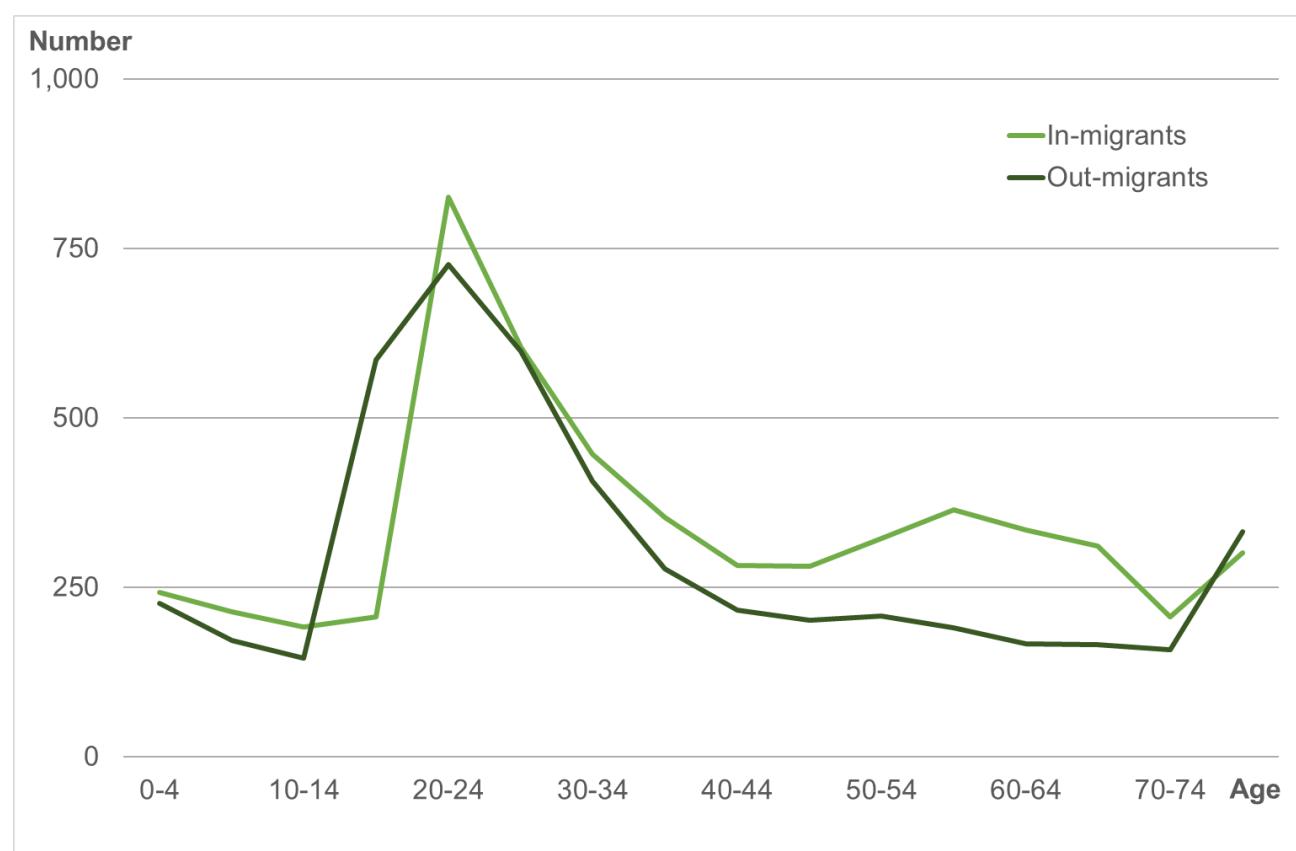
Source: ONS components of population change for mid-year population estimates

- 2.16 To smooth out some of this fluctuation, when looking at the age structure of migrants to provide evidence for this background paper we have used a 10 year average. The relative age structure of migrants is actually much more

stable than the total counts of in- or out-flows, so the ten year average gives a good indication of the pattern of migration.

- 2.17 Most age groups see a net gain of population due to more in-migration than out-migration. However, there is a big rise in out-migration in the 15-29 age groups. There is no higher education institution in Conwy County Borough, so most people wanting to go on to university or other higher education at age 18 have to leave the area. This is also the age group which is mostly likely to be economically and socially mobile, seeking work and other social opportunities outside the area. This age group has become increasingly mobile in recent years so the size and impact of their out-migration has grown. As a 10 year average, these age groups account for 40% of out-migrants.

**Figure 5: average age profile of migrants in Conwy County Borough, 2014/15 to 2023/24**



Source: internal and international migration flow data, ONS

- 2.18 The spike in the age profile for in-migrants in the 20-24 age group suggests that some of these young people return to the area when they have finished higher education. However, not all of those who leave in their late teens or

twenties come back to the area, and this accentuates the older than average age profile of our population structure. About 1,900 people in the 15-29 age groups leave Conwy County Borough each year, and only about 1,650 move in – a net out-migration of about 250 a year.

- 2.19 Though there is net in-migration of people in their 30s to 40s, it does not balance out this net loss of young adults, and leads to an imbalance in our population structure.
- 2.20 There is a bulge in net migration in the pre-retirement age groups – those aged 50 to 64 make up about 19% of in-migrants but only 12% of out-migration. In the last 10 years, net migration in this age group has been an average annual gain of 450 persons. There is also net in-migration in the 65-74 age group, but at a lower rate. On average, from ages 75 onward in-migration and out-migration are balanced.

**Figure 6: proportion of migration in Conwy County Borough, by age group (average 2014/15 to 2023/24)**

	In-migrants Number	In-migrants Percent	Out-migrants Number	Out-migrants Percent
<b>Total migrants</b>	5,500		4,800	
<b>Aged 0-14</b>	650	11.8%	550	11.4%
<b>Aged 15-29</b>	1,650	29.8%	1,900	40.0%
<b>Aged 30-49</b>	1,350	24.8%	1,100	23.1%
<b>Aged 50-64</b>	1,000	18.6%	550	11.8%
<b>Aged 65-74</b>	500	9.4%	300	6.8%
<b>Aged 75+</b>	300	5.5%	350	7.0%

Sources: internal and international migration flow data, ONS

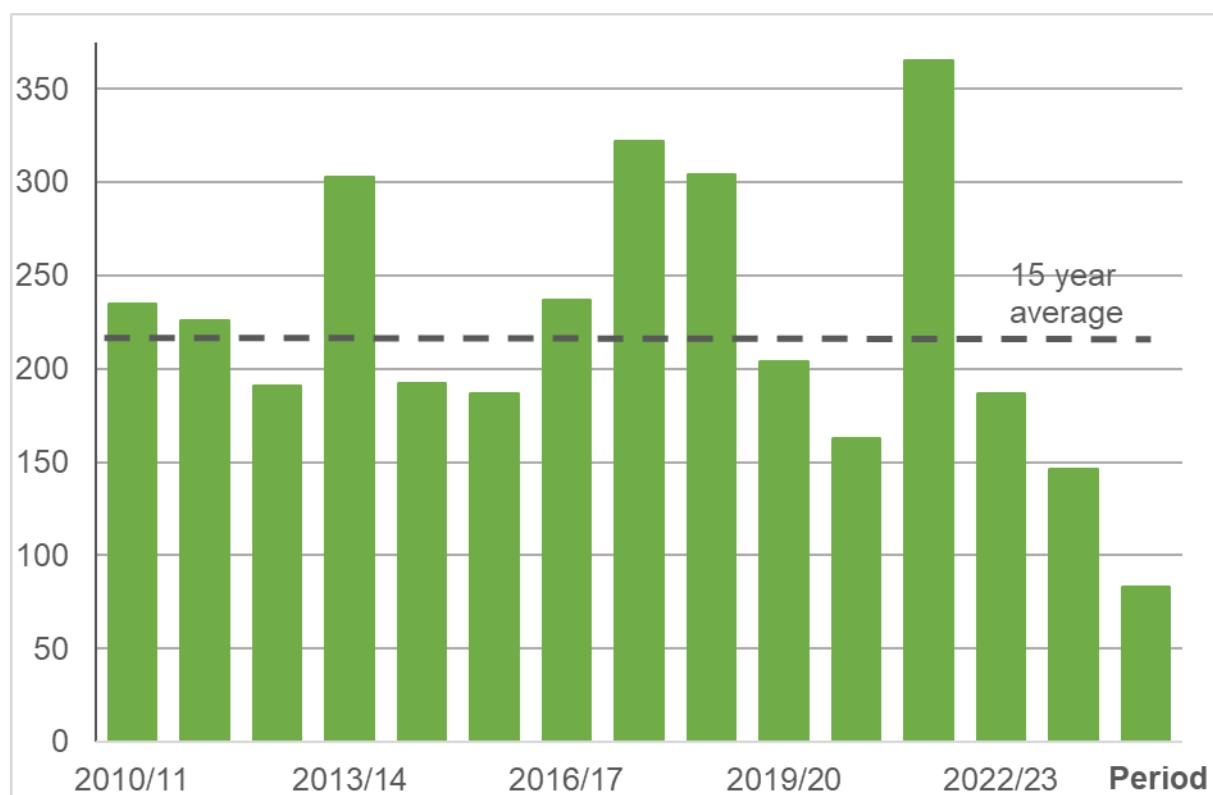
- 2.21 Net out-migration of young adults has a knock-on effect on the whole population structure. As well as being the basis of the working age population that drives our economy, they are also the people who will become parents. Fewer babies being born because of an 'absent' parental cohort means even fewer young adults in the next generation, which then becomes a compound effect on the age imbalance in the population.

- 2.22 Taken together with the issues identified in the ‘demographic profile’ section above (relatively slow population growth compared to national levels, an older than average population structure, high dependency ratios), the current migration patterns pose problems for the area’s aspirations for a more balanced population that retains younger people within the area, offers employment opportunities to help achieve this, and provides suitable and affordable housing for our existing and future population.
- 2.23 Retaining an age balanced population has benefits for the whole of society. The interchange of shared information, knowledge, and culture between generations helps form a vibrant, innovative and integrated resilient community – both ‘moving with the times’ and ‘passing on wisdom’ are essential in building social resilience. Community support and caring roles are also fostered through intergenerational integration, not just within families but with neighbours, friends and through volunteering. This can be a two way process, with older residents helping with child care and development as well as younger people providing formal and informal care for older residents.
- 2.24 For employers and the economy in general, recruiting, retaining and developing young people within the workforce and the wider population helps tackle issues such as an ageing workforce, skills gaps and shortages, talent development, succession planning and customer insight into emerging markets and trends.
- 2.25 It should be noted that migration is affected by many factors over which we have no control at a local level, such as national economic policy or social trends towards overseas retirement. Unforeseen or one-off events can also have a significant impact on migration, such as the influx of economic migrants from Eastern Europe which was seen after EU accession in 2004 or the slow-down in both internal and international migration after the 2008 economic downturn. It is also difficult to predict what the impact on population movement might be from events we know about, such as Brexit. In addition, we do not yet know what changes in population behaviour as a result of Covid-19 will be long-term and have lasting effects and which will be temporary. We therefore need to be careful when trying to interpret trends in migration.

## Dwelling requirement and past completions

2.26 Though completion rates for new build dwellings are affected by the land supply, and may be constrained by housing allocation constraints in the existing Development Plan, it is worth looking at past annual build rates to get some feel for trends over the past decade or so. Potentially, the figures can also be a starting point for understanding the capacity of the construction industry to cope with changes in annual requirements for new dwellings which are suggested by the LDP's growth options.

**Figure 7: annual dwelling completions in Conwy County Borough**



Figures are for the whole of Conwy County Borough, including that part of the area which is within the jurisdiction of the Eryri National Park Local Planning Authority. The average dwelling completion figure in the part of Conwy County Borough Council which falls within ENPA has been 4 a year between 2010/11 and 2024/25.

Data collection about housing completions for 2019/20, 2020/21 and 2021/22 was affected by the Covid 19 pandemic.

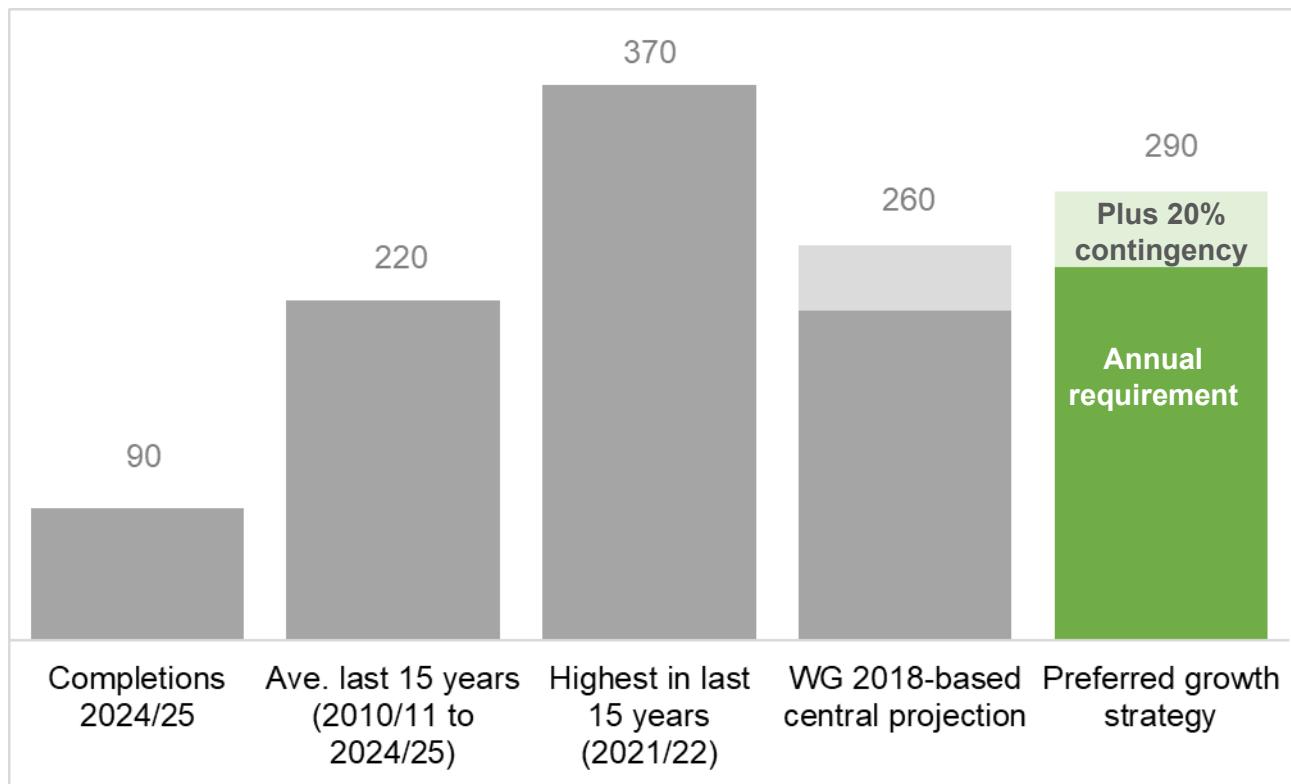
Source: Conwy County Borough Council and Eryri National Park Authority

2.27 Figure 7 shows the annual completion rates for the past 15 years for the County Borough and that part of the Eryri National Park that falls within the

Conwy County Borough boundary. There was a significant reduction in house building activity following the global economic downturn of 2007/08, which did not show a recovery until the end of the 2010s. Housing completions have been lower than expected in the last few years due to continuing impacts from Covid pandemic delays, uncertainties over financial viability due to rising build costs, and large developers who operate in the area facing financial difficulties. More recently large developments are starting to progress, with groundworks and construction of new dwellings underway on site. Completion numbers are expected to rise significantly in the next few years. The Replacement Local Development Plan housing trajectory has more information about this<sup>12</sup>.

- 2.28 Figure 8 compares the preferred growth option presented in this report with a variety of measures of past completions. See sections 4 and 5 of this report for more details.

**Figure 8: dwelling requirement: annual average for growth options, with comparative data for past completions**



<sup>12</sup> <http://www.conwy.gov.uk/rldp>

Figures are for the whole of Conwy County Borough, including that part of the area which is within the jurisdiction of the Eryri National Park Local Planning Authority. The average dwelling completion figure in the part of Conwy County Borough Council which falls within ENPA has been 4 a year between 2010/11 and 2024/25.

Data collection about housing completions for 2019/20, 2020/21 and 2021/22 was affected by the Covid 19 pandemic.

Sources: residential land surveys, Conwy County Borough Council and Eryri National Park Authority, 2018-based household projections, Welsh Government; 2018-based employment led projections, Conwy County Borough Council

2.29 The deliverability of land for housing, along with overall supply and the environmental impacts are also issues that need to be considered when planning for growth. There is more information about these issues in the “Site Deliverability Assessment” and “Housing Land Supply” background papers<sup>13</sup>.

## Economic growth

2.30 As well as considering population and household growth, we also looked at the economic factors which might affect change in the County Borough.

2.31 A key piece of the evidence base is the Conwy Employment Land Review (ELR) which was undertaken by Lichfields Planning Consultants in August 2018<sup>14</sup>. The ELR looks beyond the boundaries of Conwy and examines national trends and regional drivers for economic growth up to 2033. The Experian dataset which is a recognised as a key tool to inform LDP evidence bases across England and Wales was used as the basis for Lichfield’s calculations. The ELR produced seven economic growth scenarios based on labour force predictions, regional growth projects, local policy, population projections and past employment land take-up trends<sup>15</sup>. The ELR was reviewed and updated in October 2020 and August 2021<sup>16</sup>.

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<sup>13</sup> <http://www.conwy.gov.uk/rldp>

<sup>14</sup> The ELR study, commissioned from Lichfields Planning Consultants, is available as part of the background evidence for the LDP <http://www.conwy.gov.uk/rldp>

<sup>15</sup> Lichfields methodology predicts the total number of additional jobs over the 15 year period, then identifies those jobs that would be attributed to B class uses. Standard job to floor space ratios are applied to this figure to make a forecast of the land requirement for each scenario. One scenario started with a land requirement based on past employment land take-up rates.

<sup>16</sup> More information about the revised Employment Land Review and changes to the growth strategy is available in background paper 18 Employment Land Review <http://www.conwy.gov.uk/rldp>

- 2.32 One of the revised economic growth scenarios produced by Lichfields has been used to form the growth option presented in this paper. A growth option proposing 1,450 additional jobs<sup>17</sup> over the Plan period was selected as it indicates the broad scale and direction of economic growth across different sectors in the area, and because it takes into account the effect of a number of significant regional projects that are already progressing or planned in the near future.

### **The Council's aspirations for the 2018-2033 RLDP**

- 2.33 The RLDP will be underpinned by the Well-being and Future Generations Act and the Conwy & Denbighshire Well-being Plan<sup>18</sup>. The current background evidence and Sustainability Appraisal report have identified the priority issues, aspirations and objectives that the RLDP will be working to. These can be viewed in 'Consultation Paper 1: Priority Issues, Vision and Objectives' and the Preferred Strategy document.
- 2.34 The Council's aspirations were reflected when considering the various growth options available. The chosen growth option encourages growth based on a need to promote a more balanced and sustainable age structure in our communities, reduce out commuting, provide for local requirements set out in the North Wales Growth Deal<sup>19</sup> and ensures affordable housing delivery across the Plan area. The strategy seeks to create sustainable places through a more balanced age structure by providing the right level of housing and employment growth and the necessary infrastructure to encourage the younger population to remain and return to the area but also to provide sustainable communities for older people to live healthy and active lives.
- 2.35 Conwy County Borough Council's Corporate Plan 2022-27<sup>20</sup> sets out the priorities for the Council over the next five years. Two of its priorities are particularly relevant to the Replacement Local Development Plan.

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<sup>17</sup> 1,500 additional jobs including the National Park.

<sup>18</sup> <https://conwyanddenbighshirelsb.org.uk/well-being-plan/>

<sup>19</sup> <https://ambitionnorth.wales/north-wales-growth-deal/>

<sup>20</sup> [www.conwy.gov.uk/corporateplan](http://www.conwy.gov.uk/corporateplan)

- Long-term goal 3: People in Conwy live in a prosperous county which has less poverty, and supports learning and skills.
- Long-term goal 4: People in Conwy have access to affordable, appropriate, good quality accommodation that enhances the quality of their lives.

2.36 Future Wales<sup>21</sup> policy 21 designates Llandudno and Colwyn Bay as a regional growth area for North Wales. It states that:

“Local Development Plans should recognise the role of these places as a focus for housing, employment, tourism, public transport and key services within their wider areas and support their continued function as focal points for sub-regional growth”.

The Regional Economic Framework sets out the future economic priorities. Conwy’s Replacement Local Development Plan has a key role to play in shaping and supporting this framework and the North Wales Growth Deal.

2.37 The North Wales Growth Deal has been prepared by the Ambition North Wales Partnership, which covers the North Wales region. The partnership includes Gwynedd, Anglesey, Conwy, Denbighshire, Wrexham, and Flintshire councils, the University of Bangor, Glyndwr University, and the two further education colleges Coleg Cambria and Grŵp Llandrillo Menai. The growth deal aims to improve the region’s economic capacity and impact in land and property provision, energy production and consumption, employment skills, transport, adventure tourism, and digital connectivity and technology. The Replacement Local Development Plan objectives seek to match aspirations linked to this growth strategy, alongside linking with the Well-being of Future Generations Act and the Conwy and Denbighshire Well-being Plan. The objectives most relevant to the Replacement Local development Plan are:

- Strategic Objective 1.
- Strategic Objective 2.
- Strategic Objective 3.
- Strategic Objective 7.

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<sup>21</sup> <https://gov.wales/future-wales-national-plan-2040>

- Strategic Objective 8.
- Strategic Objective 9.
- Strategic Objective 10.
- Strategic Objective 11.
- Strategic Objective 13.

### 3 Growth options that were considered

- 3.1 The evidence was used to help shape the wide range of different growth scenarios we looked at before settling on the five which are presented in this paper.
- 3.2 When looking at predicting future growth, there are three main factors which can drive projections work – demographic change, change in the number of new dwellings and change in employment provision. The three factors are all interrelated – an increase in employment in the area may lead to in-migration and thus population growth, which requires additional housing provision, or lack of sufficient housing provision may cause people to move out of the area, taking their employment skills with them and discouraging employers from developing within the local economy. We try to balance the three elements of growth but can't always do so within the statistical exercise of producing projections, as there is always a dominant driver of growth.
- 3.3 Part of the population and housing projection work has been to calculate the number of jobs (jobs density calculation) required to meet the projected population increase in the County over the Plan period. This is so we can provide evidence to Welsh Government and the Planning Inspector that, right from the outset, we have considered the relationship between housing numbers, employment and the level of employment land allocations required. This approach has been endorsed by the Inspectorate at the Cheshire West and Chester<sup>22</sup> examination into their core strategy, as well as by the Inspector examining the Newport LDP<sup>23</sup>, and whilst they acknowledge that there is no perfect 'fit' between these three elements it is important nonetheless to show evidence of their relationships.
- 3.4 Only one projection is presented in this paper, and this is the Council's preferred growth option for the Replacement Local Development Plan. It is an

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<sup>22</sup> Cheshire West and Chester Local Plan (Part One) Inspectors Report, Paragraph 50 and 51 [http://consult.cheshirewestandchester.gov.uk/portal/cwc\\_ldf/cwc\\_lp/localplanexamination/examination](http://consult.cheshirewestandchester.gov.uk/portal/cwc_ldf/cwc_lp/localplanexamination/examination)

<sup>23</sup> Newport LDP Inspectors report, paragraph 3.18 – 3.23

<http://www.newport.gov.uk/documents/Planning-Documents/LDP-2011-2026/Newport-LDP---Inspectors-Report---515474.pdf>

employment led projection. However, we looked at a broad range of projections before we reached this stage.

## Employment led projections

- 3.5 Employment led projections usually rely on either predictions of job numbers or employment land requirements as a starting point for future growth. Population and household impacts are calculated by using a backward iteration methodology which adjusts components of population change (mainly migration levels amongst the working age population and their dependents) to match jobs growth to population growth levels.
- The growth options we initially looked at were based on economic growth forecasts and other evidence used in the employment land review (ELR)<sup>24</sup>, and aspirations for growth presented in the Conwy Economic Growth Strategy.
  - The ELR proposed a range of different growth scenarios based on sectorial analysis of both past trends in employment land take-up and projections of future jobs growth.
  - Two of these projections were selected for consideration as part of the key stakeholder pre-deposit participation.
  - As a result of this engagement, a projection based on jobs growth of +1,800 over the Plan period (+1,850 including the National Park) was selected as the preferred growth option for the Preferred Strategy consultation stage of the Replacement Local Development Plan. This projection was presented in the version of this Background Paper which was published in July 2019.
  - The updates to the Employment Land Review in October 2020 and August 2021 revised this figure, and the growth strategy presented in this paper in support of the Deposit stage of the Replacement Local Development Plan is based on jobs growth of +1,450 over the Plan period (+1,500 including the National Park)<sup>25</sup>.

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<sup>24</sup> The ELR study, commissioned from Lichfields Planning Consultants, is available as part of the background evidence for the LDP <http://www.conwy.gov.uk/rldp>

<sup>25</sup> More information about the revised Employment Land Review and changes to the growth strategy is available in background paper 18 Employment Land Review <http://www.conwy.gov.uk/rldp>

## Population led projections

3.6 Population led projections use a prediction of population change as a starting point for future growth. There are several elements to population change which can be adjusted to give different pictures of future population. Variations in migration trends and household formation rates tend to be the elements which are most commonly used to build different growth scenarios, but fertility and mortality rates and population age structures can also be varied to look at different aspects of population change.

- Welsh Government's 2014-based 5 year and 10 year migration-trend projections were the starting point for considering dwelling and employment impacts for the Replacement Local Development Plan, together with other evidence about population, housing and employment growth and aspiration.
- Alongside these, we looked at other migration trend based projections. A range of new migration-led projections were also produced in-house, using data which updated the base year for projections to 2017 making use of data published in June 2018<sup>26</sup>. Projections which used exactly the same methodology as the official Welsh Government projections were produced, as well as those that used a propensity model for migration.
- A new set of 2018-based population and household projections were published by Welsh Government in August 2020<sup>27</sup>. The new data presented by these, and the changes in demographic trends and the methodology used to produce these projections, were considered alongside the results to the update to the Employment Land Review which was completed in autumn 2020. They helped to inform the update to the preferred growth option compared to the Preferred Strategy, and are referred to in this paper as the new starting point for considering dwelling and employment impacts for the Replacement Local Development.

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<sup>26</sup> Most recently published data at the time of the publication of the evidence for the key stakeholder pre-deposit participation in December 2018.

<sup>27</sup> [https://gov.wales/subnational-populations-projections-2018-based](https://gov.wales/subnational-population-projections-2018-based); <https://gov.wales/subnational-household-projections-2018-based>

## Dwelling led projections

- 3.7 Dwelling led projections use a prediction of new house building rates as a starting point for future growth.
- The dwelling led growth options we looked at included scenarios based on a number of past housing completion rates back to 2001/02.
  - We also produced projections based on the 2017 Local Housing Market annual affordable housing need figures and an assumption of 20% deliverability to calculate overall need.
- 3.8 Other growth variants were considered but not worked up into full projections. These included variants based on past housing completion trends (not pursued as population led and employment led projections that had already been produced gave comparable levels of housing growth) and variants on household formation rates (not pursued as there is no robust evidence to support variance from the officially produced rates).
- 3.9 Altogether, twenty different growth scenarios were produced before selecting the preferred growth option which are presented in this report. A table giving more details of the case for and against each growth scenario is shown in appendix A2.

## 4 Selected growth option

- 4.1 From the range of projections which were produced for the key stakeholder engagement stage of the Replacement Local Development Plan process, five were selected as being the most robust representations of the evidence in section 3, and which also support the aspirations of the Replacement Local Development Plan. Three of the growth options were population led projections which use Welsh Government's official projections methodology as a starting point, but use different trends and assumptions about future growth. The two additional growth scenarios were employment led and derived from information in the Employment Land Review (ELR) and the Council's Economic Growth Strategy.
- 4.2 As a result of this engagement, a projection based on jobs growth was selected as the preferred growth option and the basis of the Preferred Strategy for the Replacement Local Development Plan.
- 4.3 The Employment Land Review was reviewed and updated in October 2020 and August 2021. As a result the projections of growth over the Replacement Local Development Plan period that were presented in the Preferred Strategy were revised. These revised projections are the basis for this paper and version that is presented in support of the Deposit stage of the Replacement Local Development Plan<sup>28</sup>.
- 4.4 They are employment-led projections. That means jobs growth is the main driver of population change over the period. The Experian Scenario – Revised Jobs Growth option of +1,450 jobs (+1,500 jobs including the National Park) is proposed in the updated Conwy Employment Land Review. It is based on Experian's UK Local Market Forecasts Quarterly model which takes account of the existing economic structure of each Local Authority (broken down by economic sector) and the historical relationship between the regional performance of an industry and the performance observed at the Local Authority level. This growth option also allows for increased affordable housing provision within overall sustainable levels of housing growth.

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<sup>28</sup> More information about the revised Employment Land Review and changes to the growth strategy is available in background paper 18 Employment Land Review <http://www.conwy.gov.uk/rldp>

- 4.5 The methodology for this growth scenario is different from the traditional migration-led projections methodology used in Welsh Government's sub-national projections. Population, household and dwelling impacts are calculated by using a backward iteration methodology which adjusts components of population change (mainly migration levels amongst the working age population and their dependents) to match jobs growth to population growth levels.
- 4.6 When selecting the growth options presented in this background paper, Conwy and Denbighshire Public Service Board's well-being aspirations for a more balanced population that retains younger people within the area, offers employment opportunities to help achieve this, and provides suitable and affordable housing for our existing and future population was a key consideration.

### **Justification for supporting this growth option**

- 4.7 It gives dwelling growth within the range of recent completions figures – about 3,600 new dwellings over the Plan period or an average of about 240 each year (3,700 new dwellings including the National Park).
- 4.8 Dependency ratios are lower than for migration-led projections.
- 4.9 Jobs growth of 1,450 helps match aspirations for economic growth for the region or 1,500 jobs including the National Park.
- 4.10 Jobs driven in-migration sees growth in the working age population, supporting aspirations within the draft Replacement Local Development Plan of economic growth and a more balanced population structure.

### **Arguments against supporting this growth option**

- 4.11 The projection does not match figures based on population trends – though we would not expect it to, as they are measuring different trends.
- 4.12 They may give an over optimistic view of potential for growth, given evidence of an ageing population structure across the Western world.

- 4.13 Back iteration modelling assumes behaviours and their drivers will not change, and does not adequately accommodate the 'pull' factors that may lead to out-migration (or restrict in-migration).

## 5 What the preferred growth option shows

- 5.1 This section of the report gives details of the change in population, jobs and household totals over the Plan period, and also looks at the dwelling, housing mix and employment land implications which arise from these changes.
- 5.2 All data is for change between 2018 and 2033 (the Plan period) unless otherwise stated.
- 5.3 Unless otherwise stated, figures are for the whole of Conwy County Borough, including that part of the area which is within the jurisdiction of the Eryri National Park Local Planning Authority.

### Population change

Figure 9: population projections for Conwy County Borough (table of figures)

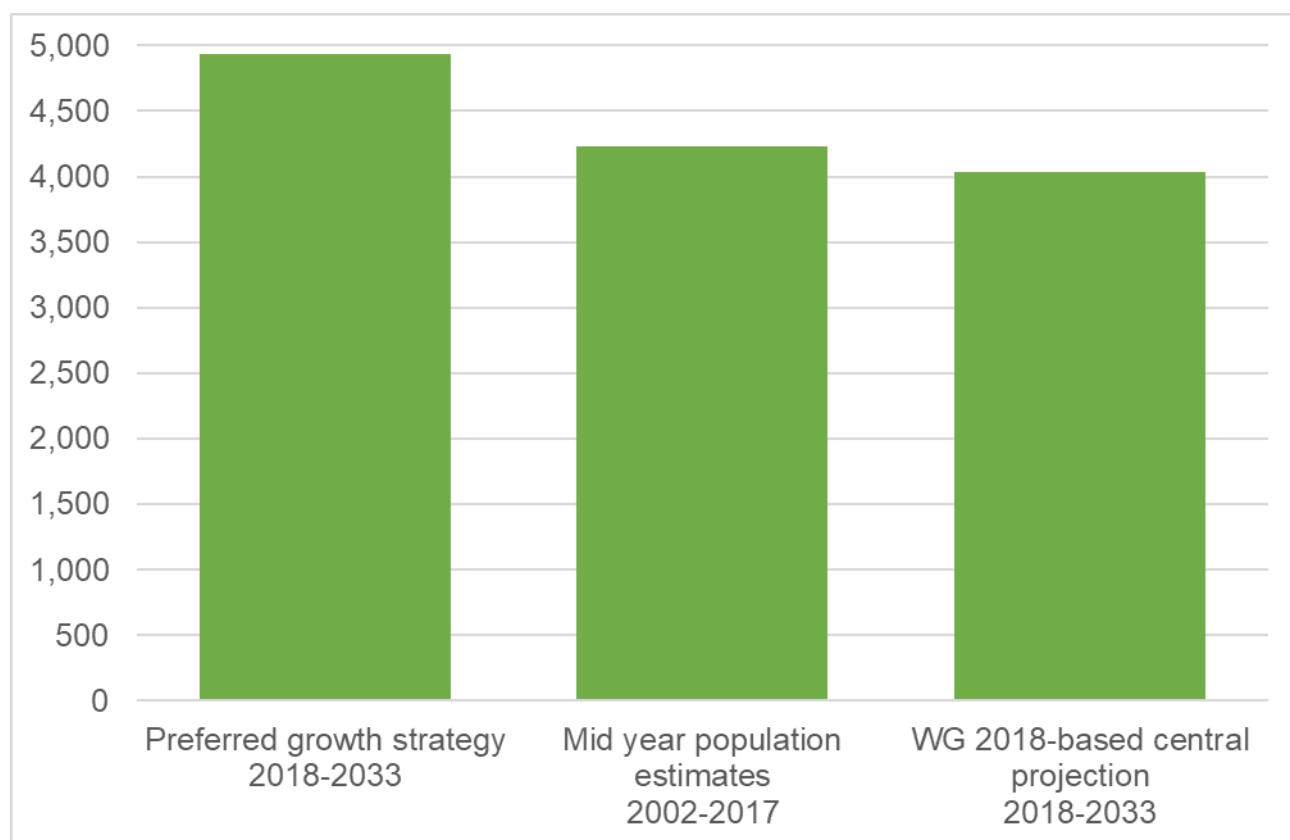
Change 2018-2033	
<b>Number</b>	4,950
<b>Percentage</b>	4.2%
<b>Average annual net migration</b>	1,050
Increase caused by	
<b>Natural change</b>	-10,800
<b>Migration</b>	15,750

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

- 5.4 The projections show population growth over the Plan period of 4,950 (4.2%). In the 15 years to 2018 (the start of the Plan period) the population of Conwy County Borough increased by 2.8%.
- 5.5 Migration is the biggest driver of change. Migration levels vary each year depending on age/gender specific propensities and the impact on migration on the number of people of working age needed to fill the new jobs that are being created. Net migration figures are an average over the Plan period, and annual figures may be higher or lower than this average for any given year.

- 5.6 The natural change figures presented in this table are not the same as would be produced by a natural change (no migration) projections scenario – births and deaths figures include people who have moved into the area during the period. By 2033 this will include measures of these life events that occur to all people who have moved into the area since 2018 and not just the population who were resident in mid-2018.
- 5.7 Welsh Government's official 2018-based projections are referred to in the figure 10 and accompanying analysis, to give an indication of how the employment-led projections used for the preferred growth option may help to rebalance the population structure of Conwy County Borough. Growth levels for the 15 years prior to the Plan period are also included in figure 10 to give a comparison with past population growth levels.

**Figure 10: estimated and projected population change for Conwy County Borough over the Plan period and the previous 15 years**



Sources: mid-year population estimates; ONS; 2018-based population projections, Welsh Government; 2018-based employment led projections, Conwy County Borough Council

- 5.8 The preferred growth option gives a population total that is higher than that shown by the principal projection from Welsh Government's 2018-based projections (4.2% overall growth compared to 3.4% over the 15 years of the Plan), with most of this difference being due to a prediction of better retention/atraction of people of working age within the area due to a jobs-led growth scenario.
- 5.9 The official projections and the preferred growth option all have age structures which are older than the Welsh average, which is to be expected given Conwy County Borough's current age structure. However by 2033 the dependency ratio<sup>29</sup> is lowest with the employment-led projection. (812:1,000 for the preferred growth option compared to 818:1,000 for the main Welsh

<sup>29</sup> Dependency ratio – number of people within the population who are not of working age for each 1,000 people of working age. Working age population is defined as those aged 16 to 66 by the end of the Plan period.

Government projection). The employment-led projections encourage more immigration amongst younger age groups – primarily amongst those of working age, but it also has an impact on the number of children within the population as people of working age are of course more likely to be or become parents than older age groups. The UK as a whole (and most of the western world) will see age structures become older and dependency ratios increase in the same period as the large baby-boomer cohort moves out of the working age group.

- 5.10 By the mid-2030s (just beyond the end of the Plan period), we will start to see a decrease in the older age groups (particularly aged 75+) as we begin to see the demise of the large post-World War 2 baby-boomer cohort (born mid-1940s to early 1960s). This needs to be kept in mind when planning longer term for an ageing population (see section 2 'Looking at the evidence: demographic profile' for more information).

## Household growth

- 5.11 Household projections are obtained by removing institutional populations<sup>30</sup> from the population projections and then sharing the remaining population between household types, based on age/gender specific likelihoods of them being members of different types of household.
- 5.12 Household membership rates continue to change at the same rate as they did between 2001 and 2011. (Household membership rates show the likelihood of people of different ages and genders forming households of different types, such as one person households or two adult + two children households).

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<sup>30</sup> Institutional (or communal establishment) populations are people who are not living as part of a household. It counts only those who are expected to live in a communal establishment for six months or longer. It includes care homes, hospitals, boarding schools, prisons, nurses accommodation, hotels/guesthouses with room for 10 or more guests, sheltered accommodation where fewer than half of units have cooking facilities and/or the main meal is provided communally, and all accommodation provided solely for students (privately or university owned halls of residence, student villages or cluster flats/houses). It does not include houses rented to students by private landlords.

**Figure 11: household projections for Conwy County Borough**

<b>Change 2018-2033</b>	
<b>Number</b>	3,350
<b>Percentage</b>	6.4%
<b>Average household size 2033</b>	2.117
<b>Increase caused by</b>	
<b>Population growth</b>	3,800
<b>Change in average household size</b>	-450

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

- 5.13 The projections show household growth over the Plan period of 3,350 (6.4%).
- 5.14 Household growth rates are higher than population growth rates. This is because, as well as increasing due to growth in the population, the number of households within the population is also affected by the long-term trend towards smaller household size. The last two rows in figure 11 show the relative impact of both types of change.

### Dwelling requirements

- 5.15 When converting household projections to dwelling requirements, an allowance for vacant dwellings and second/holiday homes of about 8.9% is made. This is because there is a need to provide more dwellings than there are households to allow for churn within the housing market and to make a provision for potentially 'hidden' households to be accommodated. Part of this 8.9% is an allowance for holiday/second homes within the dwelling stock. A continued supply of this kind of accommodation is an important contributor to the local economy, which is heavily reliant on the tourism industry. Welsh Government recommends a notional average allowance across Wales of about 4%, with a range between 3% and 13% depending on local evidence<sup>31</sup>.
- 5.16 The 8.9% rate is in line with past trends as rates from the 2001 and 2011 Censuses of Population are 6.7% and 8.9% respectively. Comparable data

<sup>31</sup> Welsh Government Development Plans manual edition 3, March 2020 (para 5.37-5.38)

from the 2021 Census is not yet available. More information is available in background paper 52: Second homes and short term holiday lets<sup>32</sup>.

**Figure 12: new dwelling requirements for growth options for Conwy County Borough**

<b>Change 2018-2033</b>	
<b>Dwelling requirement CCB</b>	3,700
<b>Dwelling requirement exc. ENP*</b>	<b>3,600</b>
<b>Plus contingency</b>	720
<b>Total dwellings excluding ENP*</b>	4,300
<b>Average annual requirement (exc. contingency)</b>	240

\* Part of Conwy County Borough which is within the jurisdiction of the Eryri National Park Local Planning Authority.

As numbers are only a projection of future requirements and are not an exact count, the results are rounded to the nearest 50 for publication, except for projected annual dwelling requirements, which are rounded to the nearest 10.

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

- 5.17 The projections show a dwelling requirements over the Plan period of 3,700. A small proportion of these new dwellings would be expected to be provided within the Eryri National Park Local Planning Authority area. The average dwelling completion figure in the part of Conwy County Borough Council which falls within the National Park has been 5 a year between 2008/09 and 2022/23. With rounding to the nearest 50 this grosses up to about 100 over a fifteen year period, which would bring **the dwelling requirement figure to about 3,600** for the part of Conwy County Borough outside of the National Park.
- 5.18 This is about 240 new dwellings a year. Figure 8 in the section 'Looking at the evidence; dwelling requirements and past completions' looks at how these figures compare with past provision.
- 5.19 In case some of the sites which are expected to be developed during the Plan period do not come forward or experience unforeseen delays in development

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<sup>32</sup> More information is available in background paper 52: Second homes and short term holiday lets <http://www.conwy.gov.uk/rldp>

an additional contingency of 20% has been added to the figure, to allow flexibility in the amount of land which is allocated for housing development<sup>33</sup>. Adding a contingency allowance increases the requirement to 4,300.

- 5.20 Not all of these new dwellings will require new allocations of land for housing. Land with existing permissions, dwellings which have already been built in the early years of the Plan's life and developments of 'windfall' sites will all contribute to the provision of new dwellings. At 1st April 2025 the requirement for new housing land allocations across the Plan period was around 1,350 units including the contingency allowance<sup>34</sup>.

**Figure 13: land supply impacts of preferred growth option**

Change 2018-2033	
<b>Total housing provision</b>	4,300
<b>Existing land supply*</b> (at 1st April 2023)	2,950
<b>New allocations required</b>	<b>1,350</b>

\* sum of dwellings which already have planning permission or are under construction, any completions since start of Plan period, and an estimate of supply from windfall sites over the Plan period. This number will change as the Plan progresses through the consultation process, as a review of existing sites is undertaken.

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

- 5.21 Further work on identifying the amount of land needed to meet the dwelling requirement is presented in the "Site Deliverability Assessment" and "Housing Land Supply" background papers<sup>35</sup>. These papers present evidence about existing supply from housing completions and commitments and the potential supply from windfall sites. The papers explain why the figures are realistic and appropriate for the County Borough, given the evidence.

<sup>33</sup> More information about this issue is available in the "Site Deliverability Assessment" and "Housing Land Supply" background papers <http://www.conwy.gov.uk/rldp>

<sup>34</sup> More information about this issue is available in the "Site Deliverability Assessment" and "Housing Land Supply" background papers <http://www.conwy.gov.uk/rldp>

<sup>35</sup> <http://www.conwy.gov.uk/rldp>

## Impact on deliverability of affordable housing

- 5.22 The Plan sets a target for 1,760 new affordable homes to be built over the plan period. An indication of the deliverability of new social and intermediate tenure affordable housing from these dwelling figures can be provided with a simple calculation, making assumptions of 20% or 30% deliverability within the overall dwelling figure of 4,300, as laid out in the table below.
- 5.23 The definition of affordable housing used here is housing that is available at a social rent, intermediate rent or for intermediate purchase, and which is provided to eligible households whose needs are not met by the market<sup>36</sup>. It does not include the wider definition of low-cost market housing.

**Figure 14: potential deliverability of affordable housing to meet social and intermediate need**

<b>Affordable housing potential at 20% of total dwelling requirement</b>	
<b>Total over Plan period</b>	700
<b>Average annual figure</b>	50
<b>Affordable housing potential at 30% of total dwelling requirement</b>	
<b>Total over Plan period</b>	1,100
<b>Average annual figure</b>	70

Figures exclude that part of Conwy County Borough which is within the jurisdiction of the Eryri National Park Local Planning Authority.

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

## Housing mix

- 5.24 Household projections can be used to provide an indication of the potential change in future housing mix requirement. As already stated in paragraph 5.12 above, average household sizes are expected to decrease in line with past trends.

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<sup>36</sup> See <https://www.gov.uk/guidance/definitions-of-general-housing-terms>

**Figure 15: projected change in number of households in Conwy County Borough 2018-2033, by household type**

	Change Number	Change Percent
<b>Total households</b>	3,350	6.4%
<b>1 person households</b>	2,000	11.0%
<b>2 person households</b>	1,450	7.6%
<b>3 person households</b>	-150	-2.0%
<b>4 person households</b>	100	1.5%
<b>5+ person households</b>	-100	-3.0%
<b>All households with children</b>	-150	-1.3%
<b>1 person household aged 65+</b>	1,600	17.0%

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

**Figure 16: proportion of change by household type**

Change 2018-2033	
<b>Total households</b>	3,350
<b>1 person households</b>	60.2%
<b>2 person households</b>	44.0%
<b>3 person households</b>	-4.2%
<b>4 person households</b>	2.5%
<b>5+ person households</b>	-2.5%
<b>All households with children</b>	-4.8%
<b>1 person household aged 65+</b>	47.8%

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

- 5.25 These figures are based on household change rather than dwelling figures and so will match those in the ‘household growth’ section above, rather than the figures in the section on ‘dwelling requirement’.
- 5.26 Further analysis shows that one and two person households make up nearly all of the projected increase in household numbers between 2018 and 2033.

- 5.27 Though the **number** of households of four or more persons is expected to stay about the same over the period, the **proportion** of households of 4 or more people will decrease slightly (falling from about 16% of all households in 2018 to about 15% of all households in 2033).
- 5.28 Census data also supports the notion that new provision should be concentrated on dwellings for smaller households, and not on larger dwellings, as the County Borough is already significantly over provided with larger properties that are under occupied. Using a very simplified measure of under occupation, in 2021 there were over 27,400 households living in accommodation that had more bedrooms than inhabitants. This was 52.5% of all households, and included 5,100 households containing only one or two residents who were living in dwellings containing four or more bedrooms<sup>37</sup>. This was an increase on results from the 2011 Census where 26,000 (50.8%) households lived in accommodation that had more bedrooms than inhabitants.
- 5.29 Consideration also needs to be given to providing housing which is suitable to meet the needs of an ageing population, with particular emphasis on the needs of lone pensioner households. By 2033, around 20% of all households and 54% of all one person households are expected to be people aged 65 or over who are living alone. In 2021 there were an estimated 9,650 people aged 65 and over living alone in Conwy County Borough<sup>38</sup> – this was over 18% of all households.
- 5.30 However by the late-2030s (just beyond the end of the Plan period) we are likely to see a decrease in the number of lone pensioner households as we begin to see the demise of the large post-World War 2 baby-boomer cohort. This needs to be kept in mind when planning longer term for an ageing population (see section 2 ‘Looking at the evidence: population’ for more information’).

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<sup>37</sup> 2021 Census custom dataset using variables households size by number of bedrooms and 2011 Census table DC4405EW: The calculation allocated each household member a bedroom of their own, making no adjustments for couples or siblings who might share a room. Any dwelling with more bedrooms than occupants was considered under occupied.

<sup>38</sup> 2021 Census, Office for National Statistics

- 5.31 Concentrating new provision towards smaller dwellings also increases the potential to make more affordable open-market housing available in the County Borough. Within the market, smaller properties are usually cheaper, and generally meet the needs of newly forming households/first time buyers better than larger dwellings.
- 5.32 Within the social housing sector, providing smaller dwellings could help meet the needs of households who have faced cuts to benefits as a result of the introduction of the under occupancy charge (the so called bedroom tax) and thus need to move to smaller accommodation. The latest Local Housing Market Assessment<sup>39</sup> shows an under provision of one bedoomed properties in particular within the social housing stock. An under provision of larger properties within the social housing stock (4+ bedrooms) is also evident from demand recorded on the housing register, which suggests that what provision of larger properties may need to be concentrated within this housing sector.

## Employment impacts

- 5.33 Figure 17 shows the jobs growth and employment land requirements which are projected to arise from the preferred growth option for Conwy County Borough Council's RLDP.

**Figure 17: employment impacts of growth options for Conwy County Borough**

Economic impacts	
<b>Jobs growth</b>	1,500
<b>Jobs growth excluding ENP*</b>	1,450
<b>Land (ha)</b>	10.5

\* Part of Conwy County Borough which is within the jurisdiction of the Eryri National Park Local Planning Authority.

Sources: 2018-based population and household projections, and employment led projections, Conwy County Borough Council

- 5.34 The projections show jobs growth over the Plan period of 1,500. This equates to employment land requirements of about 10.5 ha for new jobs over the Plan

<sup>39</sup> More information is available in the Conwy County Borough Council Local Housing Market Assessment (2022-37) <https://www.conwy.gov.uk/en/Resident/HousingServices/Policies-plans-strategies/Local-Housing-Market-Assessment.aspx>.

period (additional employment land may be needed for replacement or expansion of existing sites).

- 5.35 A small proportion of these jobs would be expected to be provided within the Eryri National Park Local Authority Area. With rounding to the nearest 50, this would bring the jobs requirement figure to about 1,450 for the part of Conwy County Borough outside of the National Park. This would have minimal impact on land requirements.
- 5.36 The employment impacts of the projections are obtained using two different methodologies. This employment led growth scenario starts with jobs and employment land requirement and back-engineers the population, household and dwelling requirement figures from those figures. This methodology was applied to the preferred growth option<sup>40</sup>.
- 5.37 The total jobs requirement is converted to an employment land requirement by using a national average jobs density of 21 sqm per job to get a total floorspace requirement. The floorspace figure is then divided by Conwy's average developer density of 3,000 sqm/ha to get an overall employment land requirement<sup>41</sup>.
- 5.38 These methodologies for looking at relationship between population, dwelling requirement and the employment impacts will not produce the same figures that come from the Employment Land Review<sup>42</sup> and other parts of the RLDP evidence base that are looking specifically at economic issues. These reviews use different methodologies and different assumptions about the drivers of growth to look at different issues, so it would not be expected that they will match precisely<sup>43</sup>. The ELR uses a methodology based on growth in different types of employment sectors, and looks at the land needed for this

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<sup>40</sup> With population led projections, the working age population is the starting point for calculations that take into account economic activity rates, commuting patterns, and development densities before arriving at jobs and employment land growth. This methodology is not used for the preferred growth option, but was used in the growth options paper that was presented as part of the key stakeholder pre-deposit participation stage of the Replacement Local Development Plan process.

<sup>41</sup> Methodology advice originally obtained from BE Group, who produced the Employment Land Review background papers for Flintshire and Wrexham LDPs. Average jobs density is an average for most service sectors.

<sup>42</sup> The ELR study, commissioned from Lichfields Planning Consultants, is available as part of the background evidence for the LDP <http://www.conwy.gov.uk/rldp>

<sup>43</sup> See paragraphs 2.31-2.33, 3.2 and 3.3 for more detail

employment. This forecasting model doesn't match the types of data or calculations used when looking at population and household growth, and the related dwelling requirement. ELR land requirements also include contingency for losses of existing employment land that might occur during the plan period, and to allow flexibility within development delivery timescales.

## Appendix 1: Wider implications of population and household growth

Projections, whilst not being an absolute truth about future population totals and structures, do give an indication of what might happen in coming years – and not just in terms of housing requirements and changes in the labour supply. The future population structure and household numbers in the County Borough will impact on many factors which affect service delivery and sustainability, such as pupil numbers, social care needs for an ageing population, the amount of refuse produced and the need for employment land.

We use projections because we need to forward plan our business and our service provision. If used alongside other knowledge, research and data sources, they give an indication of what is likely to happen in the future. We can then plan to accommodate the predicted changes, or form strategies which will minimise their impact (or even change the future).

However, projections are only a starting point when trying to understand the future, and we need to regularly review the projections process, because trends change.

Figure 18 shows, in simplified form, some possible impacts of the RLDP growth options on service delivery for Conwy County Borough Council. It focuses on some of the uses Unitary Authorities have made of projections over the past few years.

Figures are for change between 2018 and 2033 – the current intended end date for the Replacement Local Development Plan. 2018 totals are taken from the revised mid year population estimates that were published by the Office for National Statistics in November 2023.

Unless otherwise stated, figures are for the whole of Conwy County Borough, including that part of the area which is within the jurisdiction of the Eryri National Park Local Planning Authority.

Figure 18: possible impacts on service delivery of preferred growth strategy

Impact indicator	Totals 2018	Change 2018-2033
<b>Projection</b>		
<b>Population</b>	114,400	4,950
<b>Households</b>	51,800	3,350
<b>Housing</b>		
<b>Total dwelling requirement</b> (excluding Eryri National Park)	-	3,600
<b>Annual dwelling requirement</b>	-	240
<b>Affordable housing provision potential</b> (at 20% of total requirement)	-	50-60 a year
<b>Business and employment</b>		
<b>Working age population*</b>	65,050	1,350
<b>Labour force</b> (working age population who are economically active)	50,100	1,600
<b>Jobs growth</b> (excluding Eryri National Park)	50,000	1,450
<b>Income in local economy</b>	-	Increase
<b>Business impact</b>	-	Positive
<b>Employment land needed for jobs growth**</b>	-	10.5 ha
<b>Transport</b>		
<b>Traffic level increase (relative)</b>	-	High
<b>Bus passes</b>	-	Much higher
<b>School bus cost</b>	-	No change
<b>Education</b>		
<b>Pre school age (0-4)</b>	5,350	-400
<b>Primary school age (5-10)</b>	7,350	-850
<b>Secondary school / FE places (11-17)</b>	8,400	400
<b>Social care</b>		
<b>Aged 75-84</b> (potential increased support)	10,050	3,150
<b>Aged 85+</b> (potential increased support)	4,500	2,050
<b>Change in “care” sector employment</b>	-	More needed
<b>Potential impact on children’s services</b>	-	Reduced client base
<b>Refuse collection</b>		
<b>Amount of domestic refuse</b>	-	4.3%
<b>Number of domestic collection points</b>	-	6.5%
<b>Council tax</b>		
<b>Change in tax base</b>	-	Increase
<b>Number of one adult household allowances</b>	20,750	2,250

\* Changes in state pension age are taken into account when calculating the working age population. At the end of the 2018-33 projection periods that age is 67 for men and women, so working age is all residents aged 16-66. In 2018 the working age population are in the age range 16-64 as state retirement age is 65 for men and women.

\*\* Additional employment land may be needed for replacement or expansion of existing sites.

Sources: 2018-based projections, Conwy County Borough Council; 2018 mid-year population estimates, ONS; 2018 household estimates, Welsh Government; jobs density figures, ONS

## Appendix 2: List of growth options that were considered

Altogether, twenty different growth options were considered before selecting the five which are presented for this background paper.

The following table gives details of these.

Projection / growth scenario	Argument for this growth option	Argument against this growth option	Included in options paper?
<b>Population led - 2017-based 5 year migration trend (Welsh Government methodology)</b>	* Uses same methodology and assumptions used in official Welsh Government projections and updates them with latest available data.	* Based on only 5 years migration trend, but projecting for 15 years for Plan period. * Growth levels too low to support aspirations within the draft RLDP. * Perpetuates trend toward out-migration amongst young adults, and does not support the aspiration within the draft RLDP of a more balanced population structure.	No
<b>Population led - 2017-based 10 year migration trend (Welsh Government methodology)</b>	* Uses same methodology and assumptions used in official Welsh Government projections and updates them with latest available data.	* Based on only 10 years migration trend, but projecting for 15 years for Plan period. * Growth levels too low to support aspirations within the draft RLDP. * Perpetuates trend toward out-migration amongst young adults, and does not support the aspiration within the draft RLDP of a more balanced population structure.	No
<b>Population led - 2017-based 15 year migration trend (Welsh Government methodology)</b>	* Uses same methodology and assumptions used in official Welsh Government projections and updates them with latest available data. * Migration trend formed from 15 years of data, which matches the length of the Plan period.	* Growth levels possibly too low to support aspirations within the draft RLDP. * Perpetuates trend toward out-migration amongst young adults, and does not support the aspiration within the draft RLDP of a more balanced population structure.	Yes - option 1 key stakeholder pre-deposit participation stage

Projection / growth scenario	Argument for this growth option	Argument against this growth option	Included in options paper?
<b>Population led - 2017-based 5 year migration trend (propensity model)</b>	<ul style="list-style-type: none"> <li>* Uses some of the same methodology and assumptions used in official Welsh Government projections and updates them with latest available data.</li> <li>* Propensity model helps to mitigate impact of trend toward outward migration amongst young adults and sees growth in the working age population, supporting aspirations within the draft RLDP of economic growth and a more balanced population structure.</li> </ul>	<ul style="list-style-type: none"> <li>* Based on only 5 years migration trend, but projecting for 15 years for Plan period.</li> <li>* Propensity modelling assumes behaviours and their drivers will not change, and do not adequately accommodate the 'pull' factors that may lead to out-migration (or restrict in-migration).</li> <li>* May give an over optimistic view of potential for growth, given evidence of an ageing population structure across the Western world.</li> </ul>	No
<b>Population led - 2017-based 10 year migration trend (propensity model)</b>	<ul style="list-style-type: none"> <li>* Uses some of the same methodology and assumptions used in official Welsh Government projections and updates them with latest available data.</li> <li>* Propensity model helps to mitigate impact of trend toward outward migration amongst young adults and sees growth in the working age population, supporting aspirations within the draft RLDP of economic growth and a more balanced population structure.</li> </ul>	<ul style="list-style-type: none"> <li>* Based on only 10 years migration trend, but projecting for 15 years for Plan period.</li> <li>* Propensity modelling assumes behaviours and their drivers will not change, and do not adequately accommodate the 'pull' factors that may lead to out-migration (or restrict in-migration).</li> <li>* May give an over optimistic view of potential for growth, given evidence of an ageing population structure across the Western world.</li> </ul>	Yes - option 2 key stakeholder pre-deposit participation stage

Projection / growth scenario	Argument for this growth option	Argument against this growth option	Included in options paper?
<b>Population led - 2017-based 15 year migration trend (propensity model)</b>	<ul style="list-style-type: none"> <li>* Uses some of the same methodology and assumptions used in official Welsh Government projections and updates them with latest available data.</li> <li>* Propensity model helps to mitigate impact of trend toward outward migration amongst young adults and sees growth in the working age population, supporting aspirations within the draft RLDP of economic growth and a more balanced population structure.</li> <li>* Migration trend formed from 15 years of data, which matches the length of the Plan period.</li> </ul>	<ul style="list-style-type: none"> <li>* Propensity modelling assumes behaviours and their drivers will not change, and do not adequately accommodate the 'pull' factors that may lead to out-migration (or restrict in-migration).</li> <li>* May give an over optimistic view of potential for growth, given evidence of an ageing population structure across the Western world.</li> </ul>	Yes - option 3 key stakeholder pre-deposit participation stage
<b>Employment led - 1,500 new jobs during Plan period</b>	<ul style="list-style-type: none"> <li>* Based on aspiration within the Conwy Economic Growth Strategy 2017-2027, which trends forward past jobs growth.</li> <li>* Takes into account sectoral employment analysis and national economic trends.</li> <li>* Jobs driven in-migration sees growth in the working age population, supporting aspirations within the draft RLDP of economic growth and a more balanced population structure.</li> <li>* Updates projections used in earlier stages of consultation on the RLDP with the latest evidence, including initial considerations of the impacts of Covid-19</li> </ul>	<ul style="list-style-type: none"> <li>* Does not match figures based on population trends - though would not expect it to, as they are measuring different trends.</li> <li>* May give an over optimistic view of potential for growth, given evidence of an ageing population structure across the Western world.</li> </ul>	Yes – option presented in the Deposit Plan

Projection / growth scenario	Argument for this growth option	Argument against this growth option	Included in options paper?
<b>Employment led - 1,850 new jobs during Plan period</b>	<ul style="list-style-type: none"> <li>* Based on aspiration within the Conwy Economic Growth Strategy 2017-2027, which trends forward past jobs growth.</li> <li>* Takes into account sectoral employment analysis and national economic trends.</li> <li>* Jobs driven in-migration sees growth in the working age population, supporting aspirations within the draft RLDP of economic growth and a more balanced population structure.</li> </ul>	<ul style="list-style-type: none"> <li>* Does not match figures based on population trends - though would not expect it to, as they are measuring different trends.</li> <li>* May give an over optimistic view of potential for growth, given evidence of an ageing population structure across the Western world.</li> </ul>	Yes – option presented in the Preferred Growth Strategy, and option 4 key stakeholder pre-deposit participation stage
<b>Employment led - 3,500 new jobs during Plan period</b>	<ul style="list-style-type: none"> <li>* Based on aspiration within the Conwy Economic Growth Strategy 2017-2027, which trends forward past jobs growth.</li> <li>* Takes into account sectoral employment analysis and national economic trends.</li> <li>* Jobs driven in-migration sees growth in the working age population, supporting aspirations within the draft RLDP of economic growth and a more balanced population structure.</li> </ul>	<ul style="list-style-type: none"> <li>* Does not match figures based on population trends - though would not expect it to, as they are measuring different trends.</li> <li>* Levels of growth are high, and might be above those which would be sustainable or deliverable within the aspiration of the draft RLDP.</li> <li>* May give an over optimistic view of potential for growth, given evidence of an ageing population structure across the Western world.</li> </ul>	Yes - option 5 key stakeholder pre-deposit participation stage
<b>Population led - 2017-based natural change (zero migration)</b>	<ul style="list-style-type: none"> <li>* Illustrates the impact of a natural change only scenario (that is, what would happen to the population if all migration stopped).</li> <li>* A zero migration projection is always produced as a variant projection as part of the publication of Welsh Government's official sub-national projections.</li> </ul>	<ul style="list-style-type: none"> <li>* Unrealistic scenario, which allows for no in- or out-migration. Population change is based solely on births and deaths within the existing population.</li> <li>* Growth levels too low to support aspirations within the draft RLDP.</li> <li>* Unlikely to be supported by WG or the Inspector.</li> </ul>	No

Projection / growth scenario	Argument for this growth option	Argument against this growth option	Included in options paper?
<b>Population led - 2018-based central trend projection (official Welsh Government principal projection)</b>	* Welsh Government's 2018-based central trend projection and a suggested starting point for assessing growth options for the LDP (Planning Policy Wales 2024).	* Based on only 5 years migration trend, but projecting for 15 years for Plan period. * Growth levels too low to support aspirations within the draft RLDP.	No
<b>Population led - 2018-based low growth variant projection (official Welsh Government variant projection)</b>	* Welsh Government's 2018-based low growth variant projection and a suggested starting point for assessing growth options for the LDP (Planning Policy Wales 2024).	* Based on only 5 years migration trend, but projecting for 15 years for Plan period. * Growth levels too low to support aspirations within the draft RLDP.	No
<b>Population led - 2018-based high growth variant projection (official Welsh Government variant projection)</b>	* Welsh Government's 2018-based high growth variant projection and a suggested starting point for assessing growth options for the LDP (Planning Policy Wales 202	* Based on only 5 years migration trend, but projecting for 15 years for Plan period. * Growth patterns do not support aspirations within the draft RLDP.	No
<b>Population led - 2014-based 5 year migration trend (official Welsh Government principal projection)</b>	* Welsh Government's 2014-based 5 year migration trend projection and a suggested starting point for assessing growth options for the LDP (Planning Policy Wales 2019).	* Based on only 5 years migration trend, but projecting for 15 years for Plan period. * Population base data has been revised and five more years of data are available, so now out of date. * Growth levels too low to support aspirations within the draft RLDP. * Superseded by 2018-based projections released by Welsh Government in August 2020.	No

Projection / growth scenario	Argument for this growth option	Argument against this growth option	Included in options paper?
<b>Population led - 2014-based 10 year migration trend (official Welsh Government variant projection)</b>	<ul style="list-style-type: none"> <li>* Welsh Government's 2014-based 10 year migration trend projection and a suggested starting point for assessing growth options for the LDP (Planning Policy Wales 2019).</li> </ul>	<ul style="list-style-type: none"> <li>* Based on only 10 years migration trend, but projecting for 15 years for Plan period.</li> <li>* Population base data has been revised and five more years of data are available, so now out of date.</li> <li>* Growth levels too low to support aspirations within the draft RLDP.</li> <li>* Superseded by 2018-based projections released by Welsh Government in August 2020.</li> </ul>	No
<b>Population led - 2008-based 5 migration trend (superseded official Welsh Government projection)</b>	<ul style="list-style-type: none"> <li>* Welsh Government's 2008-based projections, which have now been superseded</li> <li>* Included to provide comparison with the extant 2007-2022 LDP, which used this projection as the basis of its growth strategy.</li> </ul>	<ul style="list-style-type: none"> <li>* Evidence is significantly out of date.</li> <li>* Unlikely to be supported by WG or the Inspector.</li> </ul>	No
<b>Housing led - affordable housing need calculation (SARTH cat 1&amp;2)</b>	<ul style="list-style-type: none"> <li>* Based on affordable housing need as identified by the 2017 LHMA affordable housing need calculation, including only households on the single access register who are in category 1 &amp; 2 need.</li> <li>* Identifies potential total housing requirement to achieve affordable housing need, presuming deliverability of affordable housing at 20% (total dwelling requirement would be a 5x gross-up of this figure).</li> </ul>	<ul style="list-style-type: none"> <li>* Land requirement for housing unlikely to be deliverable - annual figure is almost twice the highest level seen in last 15 years.</li> <li>* All levels of growth are significantly above those which would be sustainable within the aspiration of the draft RLDP.</li> </ul>	No

Projection / growth scenario	Argument for this growth option	Argument against this growth option	Included in options paper?
<b>Housing led - affordable housing need calculation (full SARTH)</b>	<ul style="list-style-type: none"> <li>* Based on affordable housing need as identified by the 2017 LHMA affordable housing need calculation, including all households on the single access register.</li> <li>* Identifies potential total housing requirement to achieve affordable housing need, presuming deliverability of affordable housing at 20% (total dwelling requirement would be a 5x gross-up of this figure).</li> </ul>	<ul style="list-style-type: none"> <li>* Land requirement for housing unlikely to be deliverable - annual figure is more than twice the highest level seen in last 15 years.</li> <li>* All levels of growth are significantly above those which would be sustainable within the aspiration of the draft RLDP.</li> </ul>	No
<b>Employment led - past land take up</b>	<ul style="list-style-type: none"> <li>* Based on latest employment land take-up rate, which when trended forward would equate to 20.8 ha during the Plan period</li> </ul>	<ul style="list-style-type: none"> <li>* Trends forward an anomalously high employment land take-up rate which will not be sustainable over the Plan period.</li> <li>* Does not take into account evidence from official sources on labour force and sectoral trends</li> <li>* Land requirement for housing unlikely to be deliverable.</li> <li>* All levels of growth are significantly above those which would be sustainable within the aspiration of the draft RLDP.</li> </ul>	No
<b>Housing led - highest past completions (500 per year)</b>	<ul style="list-style-type: none"> <li>* Based on highest annual housing completion rate in past 15 years (2003/04)</li> <li>* Tests deliverability of high dwelling requirement, trending forward the upper end of capacity within the local construction industry.</li> <li>* Other past completion rates(annual figures and averages of different time periods) were also considered but not worked up to full projections as the variant growth levels were likely to be covered by other projections that had already been produced.</li> </ul>	<ul style="list-style-type: none"> <li>* Trends forward an anomalously high completion rate, which the construction industry may not be able sustainable over a 15 year period.</li> <li>* Land requirement for housing unlikely to be deliverable.</li> <li>* All levels of growth are significantly above those which would be sustainable within the aspiration of the draft RLDP</li> </ul>	No