

# Bridgend Local Development Plan

2006-2021



## Background Paper 2: Population and Housing

June 2011



**Background Paper 2:**  
**Population and Housing**

**Development Planning  
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## **1.0 Introduction**

- 1.1 Population and household growth has a fundamental influence on the preparation of Bridgend Local Development Plan (LDP) and its policies, in particular on housing numbers but also for growth of employment, retail and the consequential impacts on community facilities, areas of public open space as well as transport and service infrastructure.
- 1.2 The earlier stages of the LDP were informed by a number of studies and projections which established likely levels of growth over the Plan period, based on an analysis of long-term trends. The level of growth identified was one that carried on these longer term trends and was supported by stakeholders during consultation stages as a level that would cater for future demand without harming the character or environment of the County Borough. In line with Government guidance the level of growth could be accommodated on brown-field sites within existing settlement limits. This approach was set out in the Preferred Strategy that informs the development of the Deposit Plan. However WAG 2006-based household projections published in June 2009 forecast a substantial increase in the number of households in the County Borough over the Plan period.
- 1.3 This background paper sets out justification for the level of population and housing growth proposed in the LDP and explains why it differs from the 2006 and 2008 based WAG projections for the County Borough.

## **2.0 National Policy Context**

2.0.1 This section identifies national policy that has been considered in the formulation of policies for the Local Development Plan.

### **2.1 One Wales**

2.1.1 One Wales presents the high level strategic direction agreed by the Labour and Plaid Cymru groups in the National Assembly. The aspirations of the agreed agenda for governance are presented under the following themes:

- A Healthy Future
- Living Communities
- A Fair and Just Society
- A Rich and Diverse Culture
- A Prosperous Society
- Learning for Life
- A Sustainable Environment

2.1.2 The 'Living Community' theme has particular relevance to population and housing with it acknowledging that a lack of good-quality housing affects people's health and well-being, and influences their long-term life chances. It states that everyone has the right to an affordable home as owner, as part-owner or as tenant. A stock of good-quality, affordable homes is the foundation of thriving local communities in all four corners of Wales.

2.1.3 The shortage of affordable housing, to rent or to buy, is one of the greatest challenges facing many communities in Wales. Many places are already experiencing very considerable housing pressure, with local people effectively priced out of the housing market, unable to afford a home. The resulting impact on individuals, families and communities is all too evident across Wales.

2.1.4 Our ambition is to ensure that all households, in all communities and irrespective of their means, can afford a decent home. Working together, we will create new tools to ensure that housing is affordable in the areas of most severe housing pressure. We will also ensure that the supply of affordable housing increases by at least 6,500 over the next four years.

2.1.5 This programme of government is committed to:

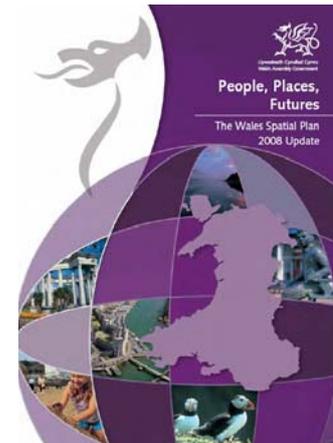
- Meeting housing need

- Improving access to housing
- Increasing the supply of affordable housing
- Ensuring 21st-century housing

## 2.2 Peoples, Places, Futures: The Wales Spatial Plan (2008 Update)

2.2.1 The Wales Spatial Plan (WSP) was first adopted by the National Assembly for Wales in 2004; it was subsequently updated in 2008 and provides a national vision which states:

***We will sustain our communities by tackling the challenges presented by population and economic change. We will grow in ways which will increase Wales' competitiveness while assisting less well-off areas to catch up on general prosperity levels and reducing negative environmental impacts. We will enhance the natural and built environment and we will sustain our distinctive identity.***



2.2.2 The WSP states that the scale of population growth that needs to be accommodated is challenging, with a projected growth of 330,000 persons across Wales between 2006 and 2031 (ONS, 2007). Equally important is the need to maintain a mix of tenure and size of housing to ensure balanced communities. To address this the Welsh Assembly Government is committed to delivering 6,500 new affordable homes by 2011.

2.2.3 The general principles for new housing growth are:

- it should be linked to public transport nodes, including walking and cycling networks;
- it should take account of environmental constraints, including flooding risk; and
- it should meet high standards of energy efficiency.

2.2.4 Housing developed near public transport modes should be at higher than current densities to promote use of public transport and to increase opportunities for combined heat and power systems. Accommodating appropriate development in smaller settlements and rural areas is vital for supporting the development of more rural communities.

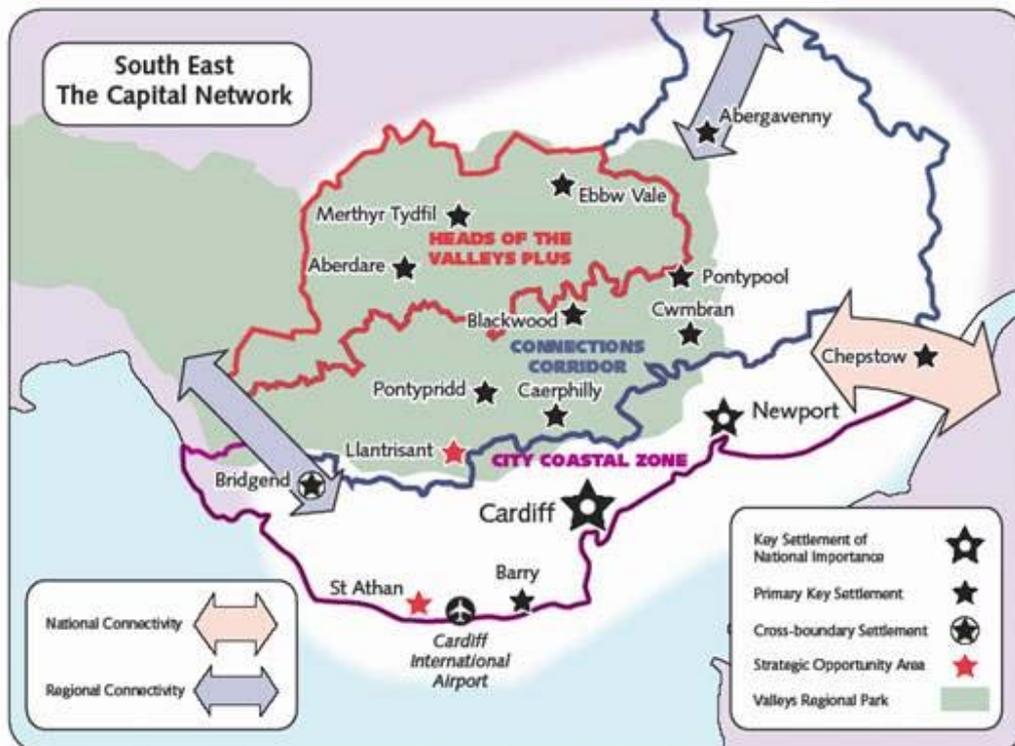
2.2.5 The Plan also contains a detailed strategy for the six spatial plan areas of Wales. This includes South East Wales (The Capital Network) within which Bridgend County Borough is situated. The vision for this area is:

***“An innovative skilled area offering a high quality of life - international yet distinctively Welsh. It will compete internationally by increasing its global visibility through stronger links between the Valleys and the coast and with the UK and Europe, helping to spread prosperity within the area and benefiting other parts of Wales.”***

2.2.6 South East Wales is recognised as Wales’ most populated area but characterised by major economic and social disparities. Its coastal zone is its main economic driver, and the competitiveness of the region needs to be ‘sustained to help raise the economic potential of Wales. The heavy commuting flows between the Valleys and the coast mean that the area functions as an interdependent but unplanned urban network. This gives rise to pressure on transport infrastructure’. As a ‘key centre’ in the region Bridgend is seen as having a close functional relationship with Cardiff and other neighbouring towns.

2.2.7 The Area Framework for South East Wales - The Capital Network, divides the region into three distinctive ‘spatial subsets’ or sub-regions, (see figure 2.1) all of which traverse Bridgend County Borough. The ‘City Coast zone’ of the Spatial Plan area in particular is seen as having ‘high quality employment sites’, particularly where they represent locational or large site opportunities for inward investment, which should be reserved for uses which maximise strategic economic benefits.

**Figure 2.2 Wales Spatial Plan: South East Wales**



2.2.8 The Area Framework envisages that at the heart of the vision for the region there will be a network of strong, sustainable communities spreading prosperity from Cardiff and Newport to the valleys across the region.

2.2.9 The provision of affordable housing is identified as an objective, along with the strengthening of the Valleys as a desirable place to live, work and visit, with a wider mix of types of housing. It is recognised that private house building and the improvement of public sector housing stock have a key role to play in regeneration in the Valleys.

2.2.10 The main priorities of relevance to population and housing are highlighted below:

#### *Building Sustainable Communities*

- *The Plan reiterates the need for South East Wales to function as a city-region, spreading prosperity from the two major centres of Cardiff and Newport northwards.*
- *Achieving the Vision is dependent on realising the potential and managing any pressures from existing development opportunities*
- *Development will need to be carefully managed to avoid excessive strain on infrastructure and other essential services and to ensure environmental impact is minimised.*

#### *Achieving Sustainable Accessibility*

- *Public transport should operate sufficiently frequently that passengers can “turn up and go”*
- *Seating capacity should be sufficient to meet normal demand, reducing the need for passengers to stand for the journey*
- *Ensure that the road network is used with maximum efficiency with innovative approaches to demand management*
- *Safe cycling and walking routes should be identified for commuters and communities*

#### *Promoting a Sustainable Economy*

- *The area needs to develop a stronger presence in higher value services and the knowledge economy*
- *Supporting and developing higher and further education.*
- *Strategic interventions, focussed on regeneration and investment in the most deprived areas of the region should be along sustainable transport corridors and support key settlements.*

#### *Valuing Our Environment*

- *Getting the best of both high quality urban living and close proximity to stunning countryside*
- *Reducing levels of traffic congestion and developing effective public transport*

- *Sustaining and developing places that are safe for people to walk and cycle, and for reducing crime*

### Respecting Distinctiveness

- *Each town needs to foster its own distinct sense of identity, building on its heritage and culture*
- *Creating a network of settlements with real character that complement each other and add strength to the attractiveness of the region as a whole*

## **2.3 Planning Policy Wales (Edition 4 / February 2011)**

2.3.1 Planning Policy Wales (PPW) sets out the Welsh Assembly Government's land use policies for the development of new build and renovated housing for both the market and affordable housing sectors. PPW is supported by a series of Technical Advice Notes (TANs).

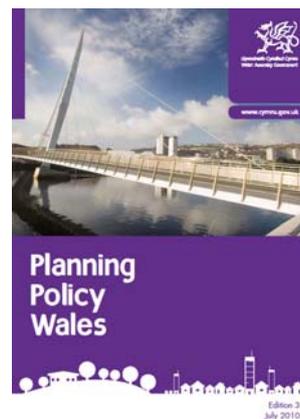
2.3.2 The Assembly Government's vision for housing is for everyone in Wales to have the opportunity to live in good quality, affordable housing, to be able to choose where they live and to decide whether buying or renting is best for them and their families. The objectives are to provide:

- homes that are in good condition, in safe neighbourhoods and sustainable communities; and
- greater choice for people over the type of housing and the location they live in, recognising the needs of all, including those in need of affordable or special needs housing in both urban and rural areas.

2.3.3 PPW states that the Assembly Government will seek to ensure that:

- previously developed land is used in preference to greenfield sites;
- new housing and residential environments are well designed, meeting national standards for the sustainability of new homes<sup>4</sup> and making a significant contribution to promoting community regeneration and improving the quality of life; and that
- the overall result of new housing development in villages, towns or edge of settlement is a mix of affordable and market housing that retains and, where practical, enhances important landscape and wildlife features in the development.

2.3.4 In respect of housing and development plans paragraph 9.2.1 states that in planning the provision for new housing, local planning authorities must work in collaboration with housing authorities, registered social landlords, house builders, developers, land owners and the community and must take account of the following:



- People , Places, Futures - The Wales Spatial Plan;
- Statutory Code of Practice on Racial Equality in Housing - Wales;
- The Assembly Government's latest household projections;
- Local Housing Strategies;
- Community Strategies;
- Local Housing Requirements (needs and demands);
- The needs of the local and national economy;
- Social Considerations (including unmet need);
- The capacity of an area in terms of social, environmental and cultural factors (including consideration of the Welsh language) to accommodate more housing;
- The environmental implications, including sustainable building, energy consumption, greenhouse gas emissions and flood risk;
- The capacity of the existing or planned infrastructure; and
- The need to tackle the causes and consequences of climate change.

2.3.5 Paragraph 9.2.2 states that the latest Assembly Government local authority level Household Projections for Wales should form the starting point for assessing housing requirements. Household projections provide estimates of the future numbers of households and are based on population projections and assumptions about household composition and characteristics. Local planning authorities should consider the appropriateness of the projections for their area, based upon all sources of local evidence, including the need for affordable housing identified by their Local Housing Market Assessment. Where housing market areas cross local authority boundaries, authorities may wish to consult with neighbouring authorities in addressing their housing requirements. Where local planning authorities seek to deviate from the Assembly Government projections, they must justify their own preferred policy-based projections by explaining the rationale behind them in terms of the issues listed above.

## **2.4 Technical Advice Note 1: Joint Housing Land Availability Studies (2006)**

2.4.1 The Technical Advice Notes issued by the Welsh Assembly Government (WAG) are part of a series of documents that support and expand on the National Planning Guidance provided by 'Planning Policy Wales'.

2.4.2 Technical Advice Note 1: Joint Housing Land Availability Study (2006) should be viewed in conjunction with Chapter 9 of PPW (2011). Local planning authorities are required to ensure that land for housing genuinely available for a 5-year land supply, and where this is not being achieved, local authorities need to consider how to increase supply. A Study group comprising Welsh Assembly Government (WAG), Caerphilly County Borough Council, house-builder representatives and other bodies as appropriate are responsible for agreeing the schedule of sites. The subsequent report represents the agreed view of the Group involved in its preparation.

## **2.5 Technical Advice Note 2: Planning and Affordable Housing (2006)**

- 2.5.1 Technical Advice Note 2: Planning and Affordable Housing (TAN2) should be viewed in conjunction with Chapter 9 of PPW (2011) as part of proposals seeking to increase the supply of affordable housing,.
- 2.5.2 Land use planning is one of the mechanisms that can be used to provide affordable housing. The purpose of TAN 2 is to provide practical guidance on the role of the planning system in delivering such housing. The guidance defines affordable housing for the purposes of this TAN and provides advice to local planning authorities on how to determine affordability. The need to work collaboratively is stressed, including the requirement for housing and planning authorities to undertake Local Housing Market Assessments in consultation with key stakeholders to determine the need for affordable housing.
- 2.5.3 TAN 2 expands on earlier advice to explain the role of local planning authorities alongside housing departments, registered social landlords, private developers and other bodies in seeking to define and quantify the need for affordable housing. This information will be used to inform development plan policies, which aims to secure affordable housing that meets the identified need and contributes to sustainable mixed communities.

## **2.6 Affordable Housing Toolkit (2006)**

- 2.6.1 The Affordable Housing Toolkit seeks to complement other documents by providing practical advice to enable local authorities and their partners to increase the supply of affordable housing in line with their housing needs and circumstances. It highlights the tools and powers available and provides examples of good practice in the field of affordable housing.

## **2.7 Local Housing Market Assessment Guide (2006)**

- 2.7.1 The Local Housing Assessment Guide is a technical document providing practical advice to enable local authorities, as strategic housing bodies, along with partners to understand the nature and level of housing demand and need in their local housing markets.
- 2.7.2 The purpose of the guidance is to integrate the existing approach to assessing housing need into an understanding of how the wider housing market operates. The key objective is to provide clear advice to practitioners on assessing the number of households requiring additional housing, including affordable housing, in their areas. Local Housing Market Assessments are a crucial element of the evidence base underpinning the preparation of Local Development Plans and Local Housing Strategies and will form the evidence base to support affordable housing policies included in the LDP.

## **2.8 Statutory Code of Practice on Racial Equality in Housing – Wales**

- 2.8.1 PPW (2011) identifies that in the preparation of development plans, local planning authorities should take account of racial equality in housing, including Gypsies and Travellers. The *Statutory Code of Practice on Racial Equality in Housing - Wales* identifies the legal framework of racial equality and highlights good practice in the field of housing. It is noted that the ethnic minority population of Wales has grown in size and diversity due to EU migration, as well as an asylum seekers and refugees, and account should be taken of the housing needs of these groups.

### 3.0 Regional and Local Context

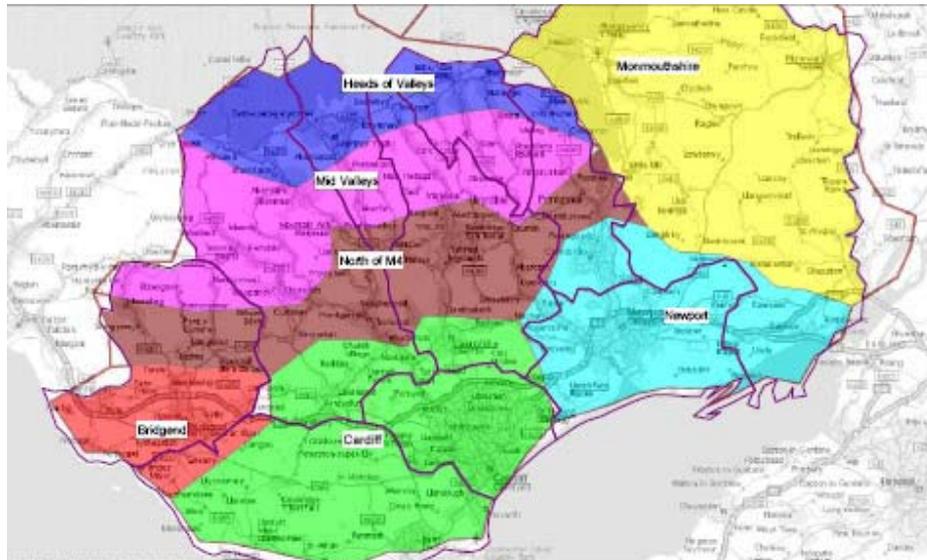
3.0.1 The Local Development Plan (LDP) must have regard to other strategies and policy documents produced locally and at regional level in order to ensure consistency. This section seeks to review the key elements of strategies and studies that form part of the population and housing evidence base at a regional and local level.

### 3.1 South East Wales Regional Housing Market Study

3.1.1 A study has been undertaken for the South East Wales Regional Housing Forum on the South East Wales Regional Housing Market. This study provides a comprehensive assessment of the sub-regional housing market and helps to identify 3 Housing Market Areas (HMAs) operating within Bridgend County Borough. These HMAs are:

- Mid-Valleys
- North of M4
- Bridgend

3.1.2 The boundaries of these market areas have been defined through quantitative and qualitative analysis undertaken as part of the Housing Market Study and are shown below:



### South East Wales Strategic Planning Group (SEWSPG) - Housing Apportionment

3.1.3 In June 2006, the Welsh Assembly Government (WAG) published *Ministerial Interim Planning Policy Statement (MIPPS) 01/2006: Housing*, which stated that within each region local planning authorities should work together collaboratively, and with appropriate stakeholders to apportion to each authority the Welsh Assembly Government household projections, or agree their own regional policy-

based projections and that the Wales Spatial Plan should be used as the basis for the exercise.

- 3.1.4 The South East Wales Strategic Planning Group (SEWSPG) agreed to apportion the Sub National Household Projection of 108,900 additional households for South- East Wales from 2006 - 2021 between its 10 constituent Local Planning Authorities. Initial housing assessments, based on existing UDP and LDP work was undertaken by all the local authorities, and was used as the basis for further discussions and consultation within SEWSPG.
- 3.1.5 The result of this collaborative exercise is contained in the **South-East Wales Regional Apportionment Memorandum of Understanding**. It represents a working hypothesis for future housing apportionment in South-East Wales, and is intended to inform the preparation of LDPs in the region.
- 3.1.6 As part of the process Bridgend County Borough has been apportioned 500 dwellings per annum from 2006 to 2021, which equates to a requirement of 7,500 dwellings over the LDP period. However, this figure was considered to be flexible, with the overall apportionment will be monitored by SEWSPG and any variations from it reconsidered.

## **3.2 Bright Future – A Community Strategy for Bridgend County 2009 – 2012**

- 3.2.1 Bridgend County's Community Strategy was published in 2009. The Bridgend Local Service Board (LSB) is co-ordinating strategic action across the County so that agencies work together to realise the vision for Bridgend:

***A bright future that celebrates and builds on the successes of our past and present. Our:***

***Strong Communities***

***Young Voices***

***Healthy Living***

***New Opportunities***

***Proud Past***

***Green Spaces***



- 3.2.2 Relevant commitments within the Community Strategy of particular relevance to population and housing include:

**Strong Communities**

- *Develop the support and training available for local businesses, community and voluntary groups*

- *Support local voluntary and community groups to be better able to influence local and national policy and strategy*

#### Young Voices

- *Increase the range of learning opportunities for all children and young people, including those who find formal learning difficult.*
- *Provide the guidance, help and support to enable children and young people to develop the skills they need, and the personal attributes to apply them, to make the best of their talents.*

#### Healthy Living

- *Helping employers to improve the health of their staff by promoting healthy lifestyles and making the workplace a safe and healthy place to be.*

#### New Opportunities

*Ensure that help is available for local people currently out of work so that they can get the right skills to be able to find work locally and that companies are confident that they can find local people with the skills they need.*

- *Increase the number of contracts given to local companies to provide goods and services to the council and other public sector organisations, making procurement more sustainable.*
- *Provide a good range of adult and community learning opportunities for people to study the things that are important to them and to employers.*
- *Encourage organisations work together to help all people who find difficulty with reading, writing and using numbers.*

#### Proud Past

- *Improve our historic town centres and support the improvement of town centre buildings*
- *Implement the regeneration proposals for Porthcawl.*
- *Develop and support training available for local businesses, community and voluntary groups.*

#### Green Spaces

- *Work towards a sustainable transport infrastructure which reduces the dependency on the car, recognises the benefits of public and community transport and encourages walking and cycling.*
- *Create a rural business centre developing rural skills and encouraging social enterprises.*

### **3.3 Bridgend Local Housing Market Assessment (2009)**

3.3.1 Fordham Research was commissioned to conduct a Local Housing Market Assessment (LHMA) for Bridgend County Borough. The report presents a comprehensive analysis of the Bridgend County Borough Housing Market. It

includes a review of the current local situation, a discussion of the housing market dynamics and recommendations as to the appropriate action in Bridgend County Borough. The report follows the general structure of the Welsh Assembly Government (WAG) Local Housing Market Assessment Guide of March 2006 as well as meeting the requirements of Technical Advice Note 2 (TAN2) 'Planning and Affordable Housing' (June 2006).

- 3.3.2 The LHMA intends to enable a better understanding of the local housing market, the key drivers of local housing demand and supply and the level of affordable housing need within the County Borough. It forms a key part of the robust evidence base to inform the development of housing and planning policies.
- 3.3.3 The 2009 Local Housing Market Assessment concluded that there is an overall annual requirement for **affordable housing** of 1,514. This compares to the 7 year trend in provision between 2000 and 2007 of 70 affordable houses per annum, and a projected UDP build-rate of both market and affordable housing of 498 dwellings per annum.
- 3.3.4 Part of the 2009 assessment suggested In terms of the size of affordable housing required, a split of 40% smaller (one and two bedroom) dwellings and 60% larger (three and four bedroom) properties could be pursued by the Council.
- 3.3.5 The LHMA and the related Housing Viability Study and the development of the LDPs Affordable Housing policy and target is discussed in more detail in Background Paper 8.

#### 3.4 **Local Housing Strategy (2009 – 2014)**

- 3.4.1 The Local Housing Strategy sets out the current local housing situation and strategic vision across all tenures in Bridgend and includes an Action Plan which is updated annually. It seeks to support the regeneration of communities and sets out a framework for meeting housing need and the needs of specific groups.
- 3.4.2 One of its key strategic objectives is to increase the supply of affordable housing, with particular focus on the needs of smaller households to support demographic change, including developing appropriate housing options for an increasingly ageing population.

## **4.0 Development of Population and Housing figures in the LDP**

4.0.1 Estimating future levels of population is an important element of the Local Development Plan process. Future levels of anticipated growth raise some very significant issues which have a major influence on all land requirements such as housing, employment and retail.

### **4.1 Pre-Deposit Proposals / LDP Preferred Strategy**

4.1.1 The Bridgend LDP Pre-Deposit Proposals considered a range of alternative Growth Options for the future level of development and their wider spatial implications in Bridgend County Borough, that would best achieve the Vision, address the identified Key Needs and Issues and meet the LDP Objectives. It was considered that reasonable alternative options for growth needed to be identified and evaluated if the LDP was to develop a sound, coherent and effective Strategy.

4.1.2 In developing a series of possible growth options, three different principal drivers of growth were identified:

- -Population and Household Growth through new residential development;
- Economic Growth through new employment developments; and
- Commercial Growth through new retail development.

4.1.3 The Bridgend LDP: Pre-Deposit Proposals was published for public consultation for six week period from 12th February 2009 until 31st March 2009.

4.1.4 The results of the consultation exercise on the Bridgend LDP: Pre-Deposit Proposals were subsequently reported to the LDP Steering Group on the 24th September 2009 and Council on the 9th October 2009. In response to the representations received a number of Actions were identified that required further development of the evidence base underpinning the plan. In respect of population, housing and employment the following specific actions were identified:

- Reference to, and the implications of, the new 2006-based household projections will be included in the Deposit LDP; and
- The Council acknowledges that there is currently an apparent incompatibility between the employment forecasts in the LDP Trend Based Growth option (produced by the Chelmer Population & Housing Model) , and the employment forecasts undertaken by Cambridge Econometrics for Bridgend County Borough Regeneration Strategy “Fit for the Future”. Further work is being undertaken to examine these relationships. Details of the outcome of this work will be included in the Deposit LDP.

- 4.1.5 As noted, during the consultation exercise of the Pre-Deposit Proposals the Welsh Assembly Government (WAG) released its own population and household projections for Bridgend County Borough, which show stronger population and household growth than was proposed in the LDP Preferred Strategy. In this respect WAG planning policy, as set out at the time in paragraph 9.2.2 Housing Ministerial Interim Policy Statement 01/2006 Housing, stated that national household projections form the starting point for assessing housing requirements. It is for local planning authorities to consider the appropriateness of the projections for their area, based upon all sources of local evidence, including the need for affordable housing identified by the Local Housing Market Assessment (LHMA).
- 4.1.6 Local planning authorities are advised that they have the ability to deviate from the Assembly Government's household projections if they have robust evidence and policy context. They can also undertake their own policy-based projections, but they must justify their reasons for doing so and explain the rationale behind their own projections.
- 4.1.7 In addition to the above the general economic environment had worsened since the projections used in the Pre-Deposit Proposals were prepared. Therefore the link between housing provision, population and employment needed to be considered in further detail and reassessed to respond to the issues raised.

## **4.2 Examination of alternative Population Projections for Bridgend County Borough**

- 4.2.1 In response to the representations received at the Pre-Deposit Proposals and the significant changes to the national, regional and local context Bridgend County Borough Council (BCBC) commissioned Cambridge Econometrics (CE) to further strengthen and develop the evidence base underpinning the LDP. The particular focus of the study was to reassess the link between planned dwellings provision, population and employment targets.
- 4.2.2 The Examining Alternative Demographic and Labour Market Projections Study was tasked with providing BCBC with a deeper understanding of the underlying trends for population and employment in the County Borough. The study initially reviewed the alternative demographic projections for Bridgend and the assumptions underpinning them. It then considered the implications of the housing numbers proposed on the LDP Pre-Deposit Proposals for population in Bridgend given the latest demographic trends and reviewed them alongside projections for employment in the Borough. It also considered the population and employment trends in neighbouring local authorities and the possible impact of these upon Bridgend. Finally, it drew together the implications of these analyses for housing and employment related policy in Bridgend.

#### 4.2.3 This required:

- assessing the sources of variation in the various population, household and labour force projections that exist for BCBC;
- understanding the impact that incorporating the 2006-based projections of trends in average household size have on the dwellings-led scenarios produced by Chelmer;
- re-assessing the prospects for underlying employment growth locally given current views on the nature of the recession and subsequent recovery; and
- examining the labour market prospects in neighbouring economies.

#### 4.2.4 The **Examining Alternative Demographic and Labour Market Projections Study** can be viewed at the following web address:

<http://www.bridgend.gov.uk/web/groups/public/documents/report/081513.pdf>

#### 4.2.5 The projections examined represented the range that was available both around the time of the LDP's Pre-Deposit Proposal and at the time of the production of the report. The projections that were examined were:

- BCBC Chelmer-based projections used in the LDP Pre-Deposit Proposals;
- Welsh Assembly Government (WAG) 2006-based population / household projections;
- CE population projections for Bridgend and for Wales (prepared in July 2009)
- Latest Chelmer Model standard short-term migration projection for Bridgend; and
- Bridgend BCBC Chelmer-based projections used in the LDP Pre-Deposit Proposals using updated model;

#### 4.2.6 The differences in resulting population levels, that the projections produce, are illustrated in Table 1 below, whilst Table 2 illustrates the number of dwellings implied by the projections examined.

	Thousands				
	2006	2011	2016	2021	2026
BCBC 'trend-based' projections	131.6	134.6	137.7	141.4	
WAG 2006-based projections	132.6	136.8	141.4	146.0	150.1
Chelmer (current short-term migration)	132.6	137.7	142.7	147.5	152.0
CE (July 2009)	132.6	137.0	140.6	144.6	148.4
BCBC 'trend-based' projections (using updated model)	132.6	135.5	138.6	142.4	146.6

	2006-2011	2011-2016	2016-2021	Total for 2006-2021	Annual Requirement (whole units)
<i>Additional dwellings requirement</i>					
BCBC 'trend-based' projections	2,700	2,700	2,700	8100	540
WAG 2006-based projections	3,709	3,950	3,725	11384	759
Chelmer (current short-term migration)	3,387	3,341	3,006	9734	649
CE (July 2009)	1,939	2,681	4,379	8999	600
BCBC 'trend-based' projections (using updated model)	2,700	2,700	2,700	8100	540

### **Prospects for Employment in Bridgend County Borough**

4.2.7 The Bridgend LDP Pre-Deposit Proposals included projections of employment produced by Cambridge Econometrics (CE). These economic projections were produced as an input to the work undertaken by SQW Consulting for BCBC on a regeneration strategy for the Borough – Fit for the Future. The projections were prepared in the first half of 2007 although the study reported in June 2008. The

projections were therefore prepared at around what has turned out to be the peak in the economy, before the onset of the credit crisis and ensuing global recession.

- 4.2.8 The impact of the recession means the number of jobs now predicted for 2021 is some way below that projected in 2007, although the long-term growth prospects are little-changed. The current projections project an overall fall of 600 jobs over 2006-21 compared to an increase of 3,850 additional jobs indicated in the 2007-based projections. The principle reason for the lower net additional jobs is the impact of the recent recession and the weak recovery that is now projected. Employment in Bridgend is now projected to have fallen in 2008 and further year-on-year falls are expected to 2011. However, in the 2015-21 period, the underlying rate of employment growth projected now is not very much different from that in the 2007-based projections (0.3% pa compared to 0.4% pa now).
- 4.2.9 The pattern of employment change over 2006-21 as a whole differs from that of the earlier projections, though again it is informative to consider the period 2006-12 separately from 2012 onwards, when the economy is likely to have adjusted towards its long term prospects. The pattern of growth in the long term is similar to that projected in the 2007-based projections, with strong growth in financial & business services and distribution, hotels & catering, and further falls in manufacturing employment. The main difference between the two sets of long-term projections is that the underlying growth in employment in government & other services has been greatly revised downwards.

**TABLE 3: EMPLOYMENT PROJECTIONS FOR BRIDGEND**

	Thousands				Growth, 2006-21	
	2000	2006	2012	2021	(Thousands)	(% pa)
Agriculture etc	0.3	0.4	0.3	0.3	-0.1	-1.9
Mining & quarrying	0.1	0.2	0.1	0.1	-0.1	-4.5
Manufacturing	12.4	10.1	9.3	8.5	-1.6	-1.2
Electricity, gas & water	0.0	0.1	0.0	0.0	-0.1	-100.0
Construction	2.7	5.7	3.6	3.9	-1.8	-2.4
Distrib, hotels & catering	12.5	13.6	12.5	13.6	0.0	0.0
Transport & comms	1.8	1.8	2.0	2.1	0.3	1.0
Financial & bus. services	5.4	7.9	9.6	11.1	3.2	2.3
Government & other services	19.8	23.3	22.4	22.9	-0.4	-0.1
Total	55.1	63.0	60.0	62.4	-0.6	-0.1

## **Key Findings**

- 4.2.10 Cambridge Econometrics drew out a number of key points from the analysis. Initially they noted that the alternative demographic projections reviewed varied in vintage and in methodology, covering both trend-based projections and dwelling-led projections. They concluded that it is not the case that one approach is inherently 'better' or 'worse' than the other.
- 4.2.11 The trend-based projections and dwelling-led projections are two different ways of thinking about future developments, and each assumes different responses that need to be tested locally. Dwellings-led projections assume that all housing constructed will be occupied, while trend-based projections assume that the associated housing demand will be met.
- 4.2.12 Comparing the previous preferred dwellings allocation of 540 new dwellings pa with the implications from the WAG 2006-based projections of approximately 780 new dwellings per annum is not a direct 'like for like' comparison.
- 4.2.13 Cambridge Econometrics considers the CE projections to be the more robust trend-based projections. The approach used by CE to produce its district projections seeks to take the strengths of the pure trend-based projections developed in a detailed demographic model and to refine them through a link to economic activity. In this case through population projections for Wales that are informed by relative economic prospects. To this extent they consider the CE projections to be more robustly based than the Chelmer / WAG trend projections.
- 4.2.14 The population outcome of the CE (July 2009) projection would result in 9,000 additional households between 2006-21. Equating increases in households to dwellings, this equates to an annual increase in dwellings of 600 pa over the period. The projection indicates the largest number of additional dwellings would be required over 2016-21 at around 880 pa, with much lower numbers required in the preceding period.
- 4.2.15 Employment in Bridgend in 2021 is projected to be below that in 2006, and there is a realistic risk that the gap will be lower than indicated. Demographic projections using latest underlying trends and employing the assumptions for additional housing set out in the LDP's preferred growth option (net annual increase of 540 dwelling over 2006-21) indicate little change in the size of the labour force in Bridgend to 2021, and so are broadly in line with the employment prospects.
- 4.2.16 The changing industrial structure of employment in Bridgend will result in fewer manufacturing-related jobs and more managerial, professional and associate-professional-type jobs. The likely increase in local opportunities of higher value jobs may mean Bridgend is able to retain more of those who currently commute out of the district, thereby further increasing its ability to meet its employment growth.

## **Implications for the Deposit LDP**

- 4.2.17 In terms of population, housing and employment, the key findings from the study had the following land-use policy implications for the LDP's Preferred Strategy

and the Deposit LDP, which in order to be 'sound' should be founded on an up-to-date information base and accommodate the anticipated level of future development.

- 4.2.18 Notwithstanding the assessment that the existing level of housing growth as proposed in the Pre-Deposit Proposals, of 540 dwellings pa, is broadly in line with economic prospects; CE's projected population up to 2021 of 144,600, which implies an average house-building requirement between 2006 and 2021 of 9,000 or 600 dwellings per annum would take the strengths of the pure trend-based projections developed in any detailed demographic model and refine them through a link to economic activity.
- 4.2.19 The future economic context of the LDP is very different to that envisaged at the time of the Pre-Deposit Proposals, with employment growth overall not expected to be as strong as previously projected. This will impact on the scale, character and timing of future employment land provision and allocations in the LDP. The Deposit LDP should reflect this change in economic context, taking account of sectoral changes and changes to the underlying industrial base brought about through the recession.

### **4.3 Projections used in the Bridgend Deposit Local Development Plan**

#### **CE's 2009-based population projections**

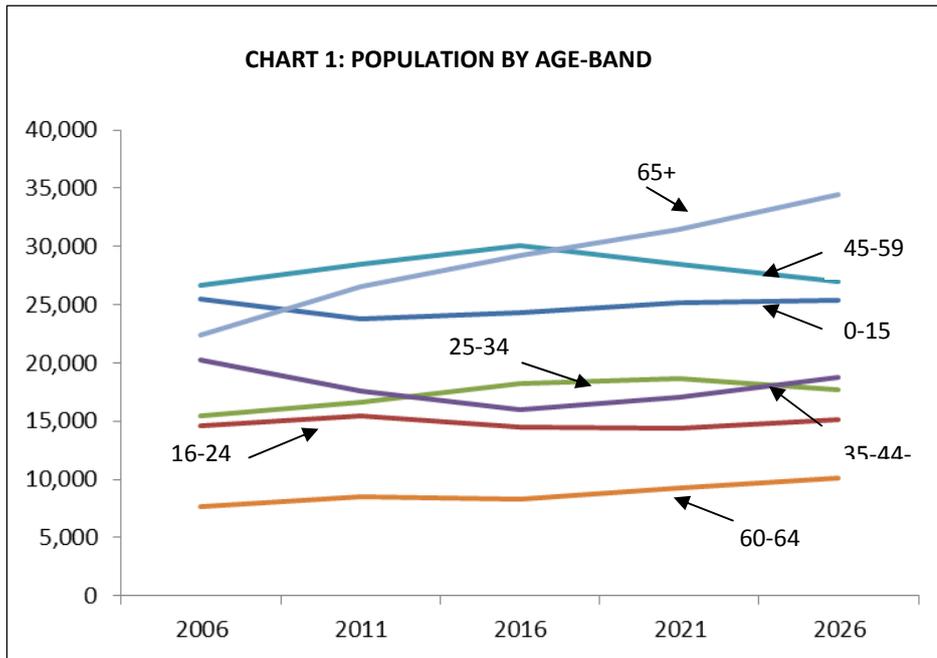
- 4.3.1 CE's district-level population projections are produced to accompany CE's district-level employment projections. The method:
- takes account of trend-based projections for the locality published national statistical offices and departments.
  - results in projections consistent with independent forecasts for population in the nations and regions of the UK published by Cambridge Econometrics.
- 4.3.2 CE's district level population projections are constructed by applying the growth rates from the ONS sub-regional population projections by district to the ONS's current mid-year population estimates by district, for seven summary age groups; 0-15, 16-24, 25-34, 35-44, 45-59, 60-64, 65+, and then scaling these initial district estimates to CE's published population forecast for the relevant region (in this case Wales).
- 4.3.3 CE's population forecasts for Wales result from CE's regionalised model of the UK economy in which the population of Wales is determined by underlying trends in births and death rates as well as the impact of the relative performance of the Wales economy on net migration (the prospects for growth in Wales shown in Table 5 is expected to lead to net migration of 7,000 pa of working-age into Wales). In particular, migration by those of working age is influenced by the economic performance of the region in relation to other regions, relative house prices and relative wages. The underlying trends in birth and death rates are

taken from the latest ONS projections for Wales. CE's projections of the population of Wales and the other nations and regions of the UK are in turn made consistent with overarching projection for UK population, based on the latest projections published by the Government's Actuaries Department (GAD).

- 4.3.4 Compared with the ONS migration assumptions for Wales, CE's view on migration is for net in-migration of 6,000-7,000 pa, this is lower than is assumed in WAG projections. This is an important factor differentiating CE's forecasts of future population in Wales from those of WAG and hence for Bridgend.
- 4.3.5 This approach therefore seeks to take the strengths of the detailed methods used to produce the official projections, such as the detailed analysis of underlying trends in mortality and birth rates (and the relative attraction of areas to immigration) and to augment them with a view of overall migration into Wales that is informed by the prospects for the relative performance of the Welsh economy. The Council believes that this makes them more 'robust' than purely trend-based projections.
- 4.3.6 Table 4 shows the population of Bridgend implied by CE's 2009-based projections. Under these projections the population of Bridgend rises from 132,600 in 2006 to 144,600 by 2021 and 148,420 in 2026, an increase of 0.5% pa over the period. The rate of increase is initially higher than this at 0.7% pa over 2006-2011. Over the remainder of the period it fluctuates between 0.4% pa and 0.6% pa. CE's underlying forecast for Wales has the population increasing from just less than 3m in 2006 to almost 3.2m in 2021, an increase of around 0.5% pa.

	2006	2011	2016	2021	Thousands 2026
Total population	132.6	137.0	140.6	144.6	148.4

- 4.3.7 Chart 1 below shows the breakdown of this total population for Bridgend by broad age-band. This shows that much of the future increase in total population in Bridgend is expected to come from the 65+ age-band. Bridgend is no different from most other local authorities in this respect and this trend reflects the increasing life-expectancy evident throughout the UK. In 2006 those aged 65+ made up just fewer than 17% of total population. By 2026 this proportion is expected to increase to a little more than 23%. The proportion of the total population accounted for by those aged 0-15 is projected to decline relatively sharply to 2011. However, it then levels off and remains at around 17% of the total population to 2026.



### Employment

4.3.8 Cambridge Econometrics' population projections are partially based on their view of economic prospects as this affects the attractiveness of an area to population. Table 5 compares the employment prospects for Bridgend, Wales and the UK.

**TABLE 5: EMPLOYMENT PROSPECTS FOR BRIDGEND**

	1990-2000	2000-2006	2008-2012	2012-2015	2015-2021
Bridgend	0.6	2.3	-1.7	0.6	0.4
Wales	-0.1	1.6	-1.4	0.8	0.5
UK	0.1	1.0	-1.1	0.5	0.5

% pa

4.3.9 The underlying data on which the employment projections are based is the employment data (number of jobs) from the Annual Business Inquiry (ABI) although several adjustments are made to the data to produce data consistent with the latest employment estimates for Wales provided to CE by ONS.

- ABI data on employees jobs for all districts in Wales are scaled to the latest June-based estimates  
-This scaling is undertaken separately for each sector and status by sector and is necessary because the ABI data are not revised as frequently as the quarterly estimates of employment in Wales published by ONS.
- Estimates of self-employment by sector in the district are made  
-Rates of self-employment as a proportion of employees in employment by sector in Wales are applied to local estimates of employees in employment in the sector.

4.3.10 The projections for Bridgend have been produced using a version of CE's Local Economy Forecasting Model (LEFM) calibrated to the locality. These baseline projections employ the same methodology as was used to develop the previous 2007-based projections used in previous analysis carried out for BCBC, namely the rationale that the past performance of a sector locally relative to the performance of the sector in Wales as a whole indicates its future relative performance. Note that this method does not mean that the future growth in employment in an industry in Bridgend will be at the same rate as seen in the past. This will depend whether the underlying prospect for growth in the industry in Wales is in line with past trends. For those services that mainly serve the local population, the baseline projection is developed by relating per capita employment growth in the local area to its counterpart in the UK as a whole.

4.3.11 Table 6 shows the sectoral prospects for employment growth. The pattern of growth in the long term is for strong growth in financial & business services and distribution, hotels & catering, and further falls in manufacturing employment. However, the expectation in these projections was for a fall in employment of about 600 over the period 2006-2021.

<b>TABLE6: EMPLOYMENT PROJECTIONS FOR BRIDGEND</b>						
	Thousands				Growth, 2006-21	
	2000	2006	2012	2021	(Thousands)	(% pa)
Agriculture etc	0.3	0.4	0.3	0.3	-0.1	-1.9
Mining & quarrying	0.1	0.2	0.1	0.1	-0.1	-4.5
Manufacturing	12.4	10.1	9.3	8.5	-1.6	-1.2
Electricity, gas & water	0.0	0.1	0.0	0.0	-0.1	-100.0
Construction	2.7	5.7	3.6	3.9	-1.8	-2.4
Distrib, hotels & catering	12.5	13.6	12.5	13.6	0.0	0.0
Transport & comms	1.8	1.8	2.0	2.1	0.3	1.0
Financial & bus. services	5.4	7.9	9.6	11.1	3.2	2.3
Government & other services	19.8	23.3	22.4	22.9	-0.4	-0.1
<b>Total</b>	<b>55.1</b>	<b>63.0</b>	<b>60.0</b>	<b>62.4</b>	<b>-0.6</b>	<b>-0.1</b>

## **Households**

- 4.3.12 CE's household projections for Bridgend are part of a consistent set of projections for each unitary authority projections in Wales. In general terms the local household projections are calculated by:
- applying assumptions for average household size locally to the population projections
  - scaling the resulting estimates of households by local authority to the households forecast for Wales
- 4.3.13 Historical estimates for the number of households by unitary authority are taken from published data. Given the population estimates, this provides an estimate of average size of households locally.
- 4.3.14 An initial estimate for future average household size in a locality are made by applying the growth in average household size from the most recent relevant projections published by a statistical office or government department. For CE's July 2009 projections for local authorities in Wales, these trend projections were the 2006-based projections from the Welsh Assembly Government.
- 4.3.15 Applying these estimates for average household size in a locality to the population projections for the area gives an initial estimate of households by locality. These initial estimates for the number of households locally are scaled to CE's forecasts for the nations and regions of the UK. For Bridgend this means that household totals for local authorities are scaled to be consistent with CE's household forecasts for Wales.
- 4.3.16 The contextual forecast for total households in Wales is derived from the projected population according to projected level an assumed level of the average household size. Historical data of the average household size are calculated from data on population and the number of households. These data are projected over the forecast period by applying official projections of the average household size.

### **Implications for Dwellings**

- 4.3.17 CE's projections do not contain projections for dwellings directly. The dwelling numbers associated with CE's population and household projections are implied from the change in the number of households and the assumption is that there is a one-to-one relationship between the increase in households and the increase in dwellings. Where households and dwellings are not assumed to be equal this is usually for one of two reasons: (1) there are shared dwellings (more than one household in a dwelling) and/or (2) there are vacant dwellings.
- 4.3.18 Implicit in equating the increase in households with the increase in dwellings is an assumption that the number of vacant dwellings will not alter from their current level (which given the increase in the households means that the number of vacant properties as a proportion of the total number of dwellings will fall) and the number of shared dwellings will also remain unchanged. Table 7 shows the implied dwellings requirement resulting from CE's population and household projections.

	2006	2011	2016	2021	2026
CE household projections	57,403	59,342	62,023	66,402	68,668
Total dwellings requirement	57,403	59,342	62,023	66,402	68,668
Additional dwellings requirement		2006-2011	2011-2016	2016-2021	2021-2026
		1,939	2,681	4,379	2,266

4.319 The total dwellings requirement is expected to increase from about 57,400 in 2006 to about 68,700 in 2026, representing an increase of just less than 1% pa. For the 20-year period as a whole this implies an annual house-building requirement of about 563 pa. There is a clear peak in the growth of households between 2016 and 2021.

#### **Household size**

4.3.20 CE's 2009 household projections employ the trend in average household size from WAG's 2006-based projections before the local area projections are scaled to Wales. The final estimates of average household size for Bridgend can be seen in Table 8 below. The average household size drops by about 6 per cent over the period from 2006 to 2026 and is 2.18 at the end of the LDP Plan period of 2021.

4.3.21 From this it is evident that the peak in the house-building requirement between 2016 and 2021 is the sharp decline in average household size over this five-year period.

4.3.22 This sharp decline, as well as the continued decline in average household size over the Plan period and up to 2026, is reflective of broader societal changes applicable not only to Bridgend, such as a larger proportion of people living alone and an ageing population.

	2006	2011	2016	2021	2026
Average hhld size	2.31	2.31	2.27	2.18	2.16

#### **4.4 Population & Housing Requirement Conclusions and Relationship with Latest Assembly Government Projections**

- 4.4.1 Since the development of the CE 2009 population projections WAG have published their 2008 Based Population and Household Projections. The results of which in population terms is 144,526 for Bridgend by 2021. This is more consistent with CE's 2009 population projection of 144,600. This more recent data partly reinforces the validity for basing Bridgend's Housing requirement on CE's analysis of adopting a dwelling requirement of 9000 dwellings (600 pa) between 2006 – 2021.
- 4.4.2 The CE assessment is justified, given that it is based on a sound source of local evidence as advised by PPW, in the form of a detailed assessment of the local labour market within Bridgend and its economic prospects. On the basis of the evidence presented in this paper and CE's 2009 Projections this represents sound evidence for deviating from WAG's most up-to-date Household and Population estimates.
- 4.4.3 PPW also require Local Authorities when determining their own dwelling forecasts that it must also take account of the area's need for affordable housing. The level of need determined by the LHMA far exceeds the 600 dwelling average annual build rate for the LDP period. The LHMA figure is 1514 new affordable houses per year, which is an entirely unrealistic level of development.
- 4.4.4 However, adopting the CE figure of 600 dwellings per annum should be seen as ambitious in the current climate – especially given the historical trend in building rates which stands at 525 (see Appendix 1) dwellings per annum averaged over the past 15 years. In this respect the Council's stance should be seen as being highly proactive in its endeavour to provide for the affordable housing needs of its residents, given that a completion rate of more than 600 dwellings per annum has only been achieved 5 times in the past 15 years. This level of development being achieved in the context of unconstrained availability of a readily available supply of housing land, as evidenced by Bridgend having a consistent and agreed supply of land always in excess of the minimum 5 years by TAN 1.

## 5.0 Housing Land Supply

### 5.1 Introduction

5.1.1 The strategic role of the LDP in relation to housing is to ensure that sufficient residential land is made available to meet the future anticipated population growth over the Plan period up to 2021. The estimate of need is based on the housing requirement figure discussed in Section 4 above. This Section describes how the estimates provided there have been used to estimate the total housing land allocations required in the Plan.

5.1.2 In order to identify the amount of land the Council will be required to allocate for housing in the LDP, existing information on housing commitments and allowances for windfall sites, small sites and demolitions have been identified. This section will explain the methodology for these calculations and identify how much land will be required in order to meet the proposed growth.

5.1.3 As outlined in Section 4, the LDP requires 9000 new dwellings be accommodated in the County Borough during the 15 year LDP period from 2006 to 2021. However, 1537 units have already been built between 2006 and 2009 as detailed in the respective Joint Housing Land Availability Studies. This equates to the first 3 years of the LDP period; consequently, **the residual requirement set out in the deposit Bridgend LDP is 7463 dwellings up to 2021.**

Year	Completions
Housing Completions 2006 – 2007*	635 dwellings
Housing Completions 2007 - 2008	514 dwellings
Housing Completions 2008 - 2009	388 dwellings
Total	1537 dwellings

Source: 2009 Bridgend County Borough Joint Housing Land Availability Study

\* Completions are for the 9 month period 30th June 2006 –31st March 2007.

5.1.4 In order to identify the amount of land the Council has been required to allocate for housing in the LDP, existing information on housing commitments and allowances for windfall sites, small sites and demolitions have been identified. This Background Paper will explain the methodology for these calculations which supports the Housing Supply figures in the deposit LDP.

5.1.5 In respect of the housing supply, this is made up of the following elements:

- **Allocated Housing Sites**
- **Windfall Allowance**
- **Small Site Allowance**
- **Demolitions Allowance**

## 5.2 Allocated Housing Sites

5.2.1 The Council has reassessed its existing housing commitments using as a starting point the most recent and agreed Joint Housing Land Availability Study for 2009. The new housing allocations within the LDP include:

- Sites with planning consent / approved subject to signing of S106 agreement / developments subject of pre-application negotiation at April 2009;
- Regeneration Development Sites;
- Sites with an approved Development Brief / Development Framework;
- New sites that have been identified as suitable for residential development or for a mix of uses, including housing, as a result of a robust candidate site / development site assessment process.

5.2.2 A list of these sites included as allocations in the LDP are contained in Appendix 2 and Table 9 illustrates the amount of new housing land allocated in the LDP by area.

<b>Strategic Regeneration Growth Areas (SRGA)</b>	<b>Housing Units on Allocations (2009)</b>	<b>% of Housing Allocations</b>
Bridgend	2959	<b>40</b>
Maesteg / Llynfi Valley	501	<b>7</b>
Porthcawl	1506	<b>21</b>
Valleys Gateway	1194	<b>16</b>
Outside SRGAs	1203	<b>16</b>
<b>TOTAL</b>	<b>7363</b>	<b>100</b>

**Table 9 Distribution of Housing Sites across LDP areas**

## 5.3 Allowance for Windfall Sites

5.3.1 'Windfall Sites' are defined as sites with a capacity of 10 or more units that are not specifically allocated for housing. In order to assess the likely contribution that such sites can make to the housing land supply, it has been necessary to monitor such sites coming forward under the respective Policies in the Ogwr

Borough Local Plan and the Bridgend Unitary Development Plan. However, in line with the with small sites allowance (Para 5.1.6), only the total number of completed units has been monitored, rather than the number of units with planning consent. This is considered to provide a more realistic estimate of the contribution that 'Windfall Sites' make to the overall housing land supply.

<b>Table 10: Windfall Completions 1994/95-2008/09</b>		
	<b>Year</b>	<b>WINDFALL COMPLETIONS</b>
<b>Adopted Ogwr Local Plan – Policy H12</b>		
1	1994/95	17
2	1995/96	11
3	1996/97	0
4	1997/98	5
5	1998/99	32
6	1999/2000	93
7	2000/2001	31
8	2001/2002	18
9	2002/2003	44
10	2003/2004	156
<b>Adopted Bridgend Unitary Development Plan – Policies H3 &amp; H4</b>		
11	2004/2005	1
12	2005/2006	2
<b>Bridgend LDP</b>		
13	2006/2007*	102
14	2007/2008	86
15	2008/2009	52

Source: Information obtained from Joint Housing Land Availability Studies: 1995 to 2009  
 Completions are for the 9 month period 30th June 2006 –31st March 2007.

<b>Table 11 Average Windfall Site Completions</b>		
15 year average (1994/2009)	650 units / 15 years	43.3 units = 43 units

5.3.2 Given the above it is not unreasonable to expect a further contribution of 45 dwellings per annum coming forward on 'Windfall Sites' during the LDP period up to 2021. Therefore, over the remaining 12-year Plan period, it has been projected that **540 dwellings** will be developed on windfall sites.

#### **5.4 Allowance for Small Sites**

5.4.1 'Small Sites' are defined as those accommodating less than 10 dwellings. The number of units completed on sites of less than 10 units is recorded as part of the annual Joint Housing Land Availability Study (JHLAS). Such sites are closely monitored and make an important contribution to the overall supply, introducing an important element of choice and flexibility into the housing market.

5.4.2 Table 12 details completions on small sites, including net additional housing units by conversions, over a 15 year period between 1995 and 2009. These figures

are published as part of Annex 2, Table E of the JHLAS and are therefore an agreed set of figures between the Study group.

<b>Table 12: Small site completions 1994/95 to 2008/9</b>		
	<b>Year</b>	<b>SMALL SITE COMPLETIONS</b>
1	1994/95	11 UNITS
2	1995/96	52 UNITS
3	1996/97	53 UNITS
4	1997/98	32 UNITS
5	1998/99	97 UNITS
6	1999/2000	65 UNITS
7	2000/2001	65 UNITS
8	2001/2002	75 UNITS
9	2002/2003	50 UNITS
10	2003/2004	43 UNITS
11	2004/2005	86 UNITS
12	2005/2006	92 UNITS
<b>Bridgend LDP</b>		
13	2006/2007*	87 UNITS
14	2007/2008	97 UNITS
15	2008/2009	62 UNITS

Source: 2009 Bridgend County Borough Joint Housing Land Availability Study

\* Completions are for the 9 month period 30th June 2006 –31st March 2007.

<b>Table 13: Average Small Site Completions</b>		
5 year average (2004/2009)	424 units / 5 years =	84.8 units = 85 units
10 year average (1999/2009)	722 units / 10 years =	72.2 units = 70 units
15 year average (1994/2009)	967units / 15 years =	64.5 units = 65 units

5.4.3 Given the above, over a period of 15 years up to 2009, the average number of small sites developed per annum is 65 units; Therefore over the remaining 12-year Plan period it has been projected that **780 dwellings** will be developed on small sites.

## **5.5 Allowance for Demolitions**

5.5.1 In order to determine the number of dwellings that will be required in the County Borough, the number of units lost as a result of demolitions and clearance schemes needs be considered. Information from annual returns submitted to the Welsh Assembly Government between 1996 and 2009 has been considered along with future planned demolitions up to 2014.

<b>Table 14: DEMOLITIONS</b>				
	<b>YEAR</b>	<b>LOCAL AUTHORITY</b>	<b>REGISTERD SOCIAL LANDLORD</b>	<b>PRIVATE SECTOR</b>
	1996/97	0	0	1
	1997/98	0	0	0
	1998/99	85	0	0
	1999/2000	134	0	0
	2000/2001	52	0	0
	2001/2002	137	0	0
	2002/2003	239	0	0
	2003/2004	35	0	0
	2004/2005	0	8	0
	2005/2006	0	108	0
<b>Bridgend LDP</b>				
1	2006/2007	0	2	0
2	2007/2008	0	0	0
3	2008/2009	0	0	0
<b>Source:</b>				
<b>Estimated Demolitions</b>				
4	2009/2010	0	48	0
5	2010/2011	0	39	0
6	2011/2012	0	10	0
7	2012/2013	0	10	0
8	2013/2014	0	5	0
<b>Source: Valleys 2 Coast (estimate of future demolitions)</b>				

<b>Table 15: Average Demolitions</b>		
<i>8 year average (2006/2014)</i>	<i>114 units /8 years =</i>	<i>14.25 units = 15 units</i>

5.5.2 There is no firm programme for the planned demolitions over the plan period; however V2C have provided an indicative demolition programme between 2006 and 2014. V2C confirms that apart from these programmed demolitions; their demolition programme is reducing and likely to remain low up until the end of the plan period. Similarly, Housing and Community Regeneration confirm that the availability of future funding to support private clearances is considered to be minimal for the foreseeable future. There is no information currently available on any other specific demolition programmes.

5.5.3 Given the above it is considered appropriate to estimate that 15 residential units will be demolished on an annual basis which represents 225 dwellings over the plan period.

## 5.6 Housing Calculation (2006 - 2021)

<b>Table 16: Housing Requirement</b>		
<b>A)</b>	<b>Housing Requirement 2006 - 2021</b>	<b>9000 dwellings</b>
B)	Housing Completions 2006-2007 (2007 JHLA)	635 dwellings
C)	Housing Completions 2007 – 2008 (2008 JHLA)	514 dwellings
D)	Housing Completions 2008 – 2009 (2009 JHLA)	388 dwellings
<b>E)</b>	<b>Housing Requirement 2009 - 2021</b>  A-B-C-D = E	<b>7463 dwellings</b>
<b>Housing Supply 2009 – 2021 (12 years of plan period remaining)</b>		
F)	Allocated Sites	7363 dwellings
G)	Windfall Allowance (10 or more dwellings) (45 per annum)	540 dwellings
H)	Small Site Allowance (9 or less dwellings) (65 per annum)	780 dwellings
I)	Demolitions (2006 -2021) (15 per annum)	- 225 dwellings
<b>J)</b>	<b>Total Housing Supply (up to 2021)</b>  F+G+H-I =J	<b>8458 dwellings</b>
<b>K)</b>	Balance  J-E=K	<b>+995 dwellings</b>

## 6.0 CONCLUSIONS

- 6.1 The 2009 based supply of 8458 dwellings exceeds the residential dwelling requirement for the LDP of 7463, allowing for flexibility, should any unforeseen risks in the delivery of sites manifest themselves. Notwithstanding this consideration all sites included in the LDP are considered deliverable.
- 6.2 With further reference to the need for Local Authorities to use the latest Welsh Assembly Government's Population and Housing Projections as a starting point for assessing housing requirements. It should be noted that CE's and the LDP's own requirement for an additional 9000 dwellings between 2006 – 2021 is below that of WAG's 2008 Based Household Projection for the same period. CE's household and dwelling requirement is approximately 1000 units lower.
- 6.3 However, given the in-built flexibility of the 2009 supply of housing of 8533 with 1070 units in excess of the 2009 residual requirement of 7463 dwellings, there is indeed sufficient scope to accommodate any anticipated higher level of growth, should the economic prospects and therefore attractiveness of the County Borough to immigrants substantially improve during the lifetime of the Plan more in line with WAG's trend based projections.



## **APPENDIX 1**



## APPENDIX 1

### Historical Housing Completions

Mid 1994 - 1995	Mid 1995 - 1996	Mid 1996 - 1997	Mid 1997 - 1998	Mid 1998 - 1999	Mid 1999 - 2000	Mid 2000 - 2001	Mid 2001 - 2002	Mid 2002 - 2003	Mid 2003 - 2004	Mid 2004 - 2005	Mid 2005 - 2006	Mid 2006 - 01 April 2007	April 2007 - 31 March 2008	April 2008 - 31 March 2009
608	499	429	292	686	586	678	573	396	460	652	474	635	514	388

Source: 2009 Bridgend County Borough Joint Housing Land Availability Study



## **APPENDIX 2**



## APPENDIX 2

Policy Reference	Site Name	Settlement	Units
<b>Bridgend Strategic Regeneration Growth Area</b>			
COM 1 (1)*	Parc Derwen	Bridgend	1500
COM 1 (2)*	North-East Brackla Regeneration Area	Bridgend	350
COM 1 (3)*	Parc Afon Ewenny Regeneration Area,	Bridgend	550
COM 1 (4)*	Coity Road Sidings	Bridgend	140
COM 1 (5)	South Wales Police, Cowbridge Road	Bridgend	130
COM 1 (6)	Land East of Masonic Hall, Coychurch Road	Bridgend	95
COM 1 (7)	Jubilee Crescent	Bridgend	40
COM 1 (8)	South of Joslin Road	Bridgend	34
COM 1 (9)	Brocastle Estate	Bridgend	30
COM 1 (10)	Waterton Manor	Bridgend	36
COM 1 (11)	Brackla Street	Bridgend	19
COM 1 (12)	Parc Farm, North East of Parc Derwen	Bridgend	14
COM 1 (13)	Waterton Lane	Bridgend	11
COM 1 (14)	6-10 Queen Street	Bridgend	10
<b>Maesteg &amp; the Llynfi Valley Strategic Regeneration Growth Area:</b>			
COM 1 (15)*	Maesteg Washery Regeneration Area	Maesteg	135
COM 1 (16)*	Ewenny Road	Maesteg	125
COM 1 (17)*	Coegnant Reclamation Site	Caerau / Nantyffyllon	100
COM 1 (18)	Crown Road	Maesteg	40
COM 1 (19)	Former Blaencaerau	Caerau	35

	Junior School		
COM 1 (20)	Y Parc	Maesteg	20
COM 1 (21)	Land South of Cwmfelin Primary School	Cwmfelin	20
COM 1 (22)	Llynfi Lodge	Maesteg	13
COM 1 (23)	Land Adj to 50 Heol Tywith	Nantyffyllon	13
<b>Porthcawl Strategic Regeneration Growth Area</b>			
COM 1 (24) *	Porthcawl Waterfront Regeneration Area	Porthcawl	1350
COM 1 (25)	Former Sea Bank Hotel Car Park	Porthcawl	60
COM 1 (26) *	Pwll-Y-Waun	Porthcawl	40
COM 1 (27)	Albert Edward Prince of Wales Court	Porthcawl	35
COM 1 (28)	MOT Centre Station Hill	Porthcawl	11
COM 1 (29)	The Nurseries, New Road	Porthcawl	10
<b>Valleys Gateway Strategic Regeneration Growth Area</b>			
COM 1 (30)*	Land West of Maesteg Road	Tondu	436
COM 1 (31)	Parc Tyn y Coed	Bryncethin	323
COM 1 (32)*	Ogmore Comprehensive School	Bryncethin	130
COM 1 (33)*	Gateway to the Valleys	Tondu	100
COM 1 (34)*	Former Christie Tyler Site	Brynmenyn	75
COM 1 (35)*	Bryncethin Depot	Bryncethin	50
COM 1 (36)	Land at Abergarw Farm	Brynmenyn	50
COM 1 (37)*	Glanyrafon	Tondu	30
<b>Those sites marked with an asterix * are included within regeneration mixed-use development schemes defined in Policy PLA3 of the LDP</b>			

<b>Policy Reference</b>	<b>Site Name</b>	<b>Settlement</b>	<b>Units</b>
COM 2 (1)*	Land SW of City Road	Bettws	80
COM 2 (2)	City Farm	Bettws	40
COM 2 (3)	R/O Heol Dewi Sant	Bettws	11
COM 2 (4)*	Land adjoining Cwm Ogwr Fach	Blackmill	43
COM 2 (5)	Cae Gleision, Broadlands	Bridgend	284
COM 2 (6)	Ysgol Bryn Castell	Bridgend	150
COM 2 (7)	Chelsea Avenue	Bridgend	110
COM 2 (8)	Llys Fitzhamon, Bridgend	Bridgend	41
COM 2 (9)	Cefn Glas Road	Bridgend	10
COM 2 (10)	Coed Parc	Bridgend	20
COM 2 (11)	Former Wildmill Boiler House	Bridgend	10
COM 2 (12)	Former Abercerdin School	Evanstown	11
COM 2 (13)	Former Goricon Site	Kenfig Hill	29
COM 2 (14)	Troed y Ton	Kenfig Hill	39
COM 2 (15)	Pant Yr Awel	Lewistown	19
COM 2 (16)	Ty Nant, Heol Llangeinor	Llangeinor	10
COM 2 (17)	Waunwen	Nantymoel	35
COM 2 (18)	Cwrt Colman Street	Nantymoel	21
COM 2 (19)	Heol y Fedwen / Haul Bryn	Nantymoel	11
COM 2 (20)	Marlas Farm	North Cornelly	48
COM 2 (21)*	Land at Gibbons Way	North Cornelly	45
COM 2 (22)	Ffordd yr Eglwys (land off)	North Cornelly	22
COM 2 (23)	Thomas Crescent (land adjacent)	North Cornelly	14
COM 2 (24)	South of Hendre Road	Pencoed	35
COM 2 (25)	2 Penprysg Road	Pencoed	12
COM 2 (26)*	Former Surgery Site, Coychurch Road	Pencoed	13
COM 2 (27)	Pencoed Primary School	Pencoed	10

COM 2 (28)	Land Rear of Ty Draw Close	Pyle	30
<b>Those sites marked with an asterix * are included within regeneration mixed-use development schemes defined in Policy PLA3 of the LDP</b>			