Strategic Planning Research Unit
A specialist team within DLP Planning Ltd

For and on behalf of
Chorley Council, Preston City Council and South Ribble Borough Council

Central Lancashire Housing Study Update

Prepared by
Strategic Planning Research Unit
DLP Planning Ltd
Sheffield

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Strategic Planning Research Unit

Prepared by:	Kirsten Ward BSc (Hons) MA PhD MRTPI Associate Director
Checked by:	Jon Goodall MA (Cantab) MSc Director
Approved by:	Jon Goodall MA (Cantab) MSc Director
Date: December 2024	Office: Sheffield

Strategic Planning Research Unit

V1 Velocity Building
Ground Floor
Tenter Street
Sheffield
S1 4BY

Tel: 01142 289190

Broad Quay House (6th Floor)
Prince Street
Bristol
BS1 4DJ

Tel: 01179 058850

4 Abbey Court
Fraser Road
Priory Business Park
Bedford
MK44 3WH

Tel: 01234 832740

Strategic Planning Research Unit

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0.0 EXECUTIVE SUMMARY

a) Background and Policy Context

0.1 This Housing Study Update has been prepared on behalf of the Central Lancashire authorities (Chorley Council, Preston City Council and South Ribble Borough Council) to provide an updated assessment of housing need which reflects recently published evidence, including 2021 Census data and updated mid-year estimates on population growth. The Housing Study Update also reflects the revised plan period, which has been extended to 2041.

0.2 This Housing Study Update has been prepared in the context of the December 2023 version of the NPPF (NPPF2023) against which it is proposed the emerging Local Plan will be submitted and examined, following Regulation 19 consultation.

0.3 The Central Lancashire authorities therefore seek to ensure that future housing needs are met in accordance with the NPPF2023. This includes considering situations in which there may be justification for determining that housing need exceeds the result of the NPPF2023 Standard Method - such as demographic trends and market signals justifying an alternative approach (NPPF2023, paragraph 67).

0.4 In the Part 1 Preferred Options (Regulation 18) document for Central Lancashire which was consulted on between December 2022 and February 2023, Policy Direction 11 set a minimum target of 20,010 net additional dwellings over the period 2023-2038, equivalent to 1,334 dwellings per year. This requirement was distributed across the three authority areas, as set out in Policy Direction 12.

b) Demographic Trends and Market Signals

0.5 As set out in Section 3, demographic trends and market signals, including increasing house prices and affordability ratios, are likely to be key factors in supporting continued demand for housing, and in-part work together with past levels of development to illustrate why housing need in Central Lancashire may exceed the minimum Standard Method.

c) Scenario Definition

0.6 Using the POPGROUP model, nine scenarios have been configured, using the latest demographic information. Analysis and presentation of these scenarios as part of this Housing Study Update responds to the requirements of national policy and guidance in circumstances where it would be appropriate to explore alternatives to the Standard Method.

0.7 The range of scenarios identified reflects Planning Practice Guidance which states that Councils are required to use evidence to demonstrate that any alternative approach to the Standard Method adequately reflects current and future demographic trends and market signals (ID: 2a-015-20190220).

0.8 All scenarios have been run to a 2041 forecast horizon and continue to use the 2014-based household formation rates. This is because there are no new official household projections supported by policy and guidance and therefore continued use of the 2014-based projections is consistent with the PPG that underpinned NPPF2023 (ID: 2a-005-20190220).

0.9 The inputs used to develop each of the alternative growth scenarios are detailed in **Appendix 1**.

d) Standard Method Local Housing Need (LHN)

0.10 The **Local Housing Need (LHN)** as calculated using the Standard Method is the benchmark scenario developed using a 'dwelling-led' configuration of the POPGROUP model. This scenario helps determine whether the Standard Method adequately reflects each district's current and future demographic trends and market signals or whether an alternative

approach would be more appropriate.

e) Demographic-led Scenarios

0.11 Using the latest Mid-Year Population Estimate (MYE) components of change data (to 2021/22), four 'alternative trend' scenarios have been developed, using different migration histories from which to calibrate future growth assumptions. These **demographic-led scenarios ('PG' scenarios)** are based on a continuation of short-term (5-year), medium-term (10 years) and long-term (21-year) migration histories. The final PG-5yr-10yr scenario is based on a continuation of a 5-year internal migration trend combined with a 10-year international migration trend.

f) Employment-led Scenario

0.12 An **employment-led scenario** has also been developed using the latest economic activity rates derived from the 2021 Census alongside jobs growth forecasting data from Cambridge Econometrics (CE) which has been used to model the future labour force and population growth profile.

0.13 In developing the employment-led scenario, a commuting ratio sensitivity has also been applied (as in the Housing Study 2022). This sensitivity applies an adjustment to the Census-based commuting ratio in each year of the forecast so that future jobs growth is provided under a **1:1 commuting ratio**. This means that for every new job created in each district it is assumed that there is a resident worker available to fill it and so there is no absolute change in levels of in-commuting or out-commuting. The 1:1 employment-led scenario principally affects the location of homes relative to jobs in Central Lancashire by seeking to provide homes closer to workplace locations in accordance with the principles of the Standard Method.

0.14 As economic activity rates are forecast to increase in the future, this means that in principle the dwelling-equivalent figures for the **employment-led scenarios** could support higher jobs growth than indicated by the forecast. This is an important source of potential flexibility, particularly in respect of the ability to accommodate other known employment-generating developments which it has not been possible to directly input into the modelling. This includes, for example, National Cyber Force which is planned in South Ribble but for which few details regarding the scale and catchment of the workforce are currently available.

g) Scenario Outputs

0.15 The following table summarises the outputs for each scenario for Central Lancashire as a whole for the period 2023 to 2041.

0.16 The lowest dwelling growth outcome is provided by the **SNPP-2014 scenario** at 705 dwellings per annum (dpa). This is followed by the current **dwelling-led LHN benchmark scenario** which results in a dwelling need of 944 dpa and compares with a previous LHN figure of 988 dpa (Housing Study 2022).

0.17 The alternative migration trend scenarios range from between 899 dpa under the **PG-Long-Term scenario** to 1,313 dpa under the **PG-5yr scenario**, which represents the highest growth outcome of all nine scenarios.

0.18 For Central Lancashire as a whole, household growth outcomes are generally highest under the employment-led scenarios. The main **Employment-led scenario** has a dwelling growth output of 1,275 dpa and the **Employment-led (CR 1-to-1) scenario** which incorporates the 1:1 commuting ratio sensitivity adjustment has a slightly lower output of 1,237 dpa.

Central Lancashire - Scenario Outputs, 2023–2041

Scenario	Change 2023 - 2041				Average per year		
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Employment
PG-5yr	35,715	9.3%	23,891	14.7%	2,107	1,313	1,080
Employment-led	34,575	9.0%	23,275	14.4%	2,061	1,275	894
Employment-led (CR 1-to-1)	33,088	8.6%	22,622	14.0%	1,978	1,237	894
PG-5yr-10yr	30,728	8.0%	22,139	13.6%	1,860	1,212	888
PG-10yr	23,266	6.1%	18,609	11.5%	1,467	1,006	624
SNPP-2018	21,630	5.7%	15,815	10.0%	1,077	847	484
PG-Long-Term	20,961	5.5%	16,759	10.3%	1,288	899	618
Dwelling-led LHN	20,863	5.4%	17,543	10.8%	1,376	944	470
SNPP-2014	17,275	4.6%	13,353	8.5%	383	705	167

Source: Edge Analytics

h) Recommended Scenario

0.19 Based on an evaluation of the updated scenarios, presented in Section 5, the recommended (or preferred) housing need scenario is the **Employment-led (CR 1-to-1) scenario** which corresponds to an equivalent 1,237 dwellings per annum.

0.20 The housing need presented in this scenario is higher than the LHN baseline scenario of 944 dpa but is better aligned with past levels of total housing delivery and forecast levels of employment growth, and as such accords with appropriate circumstances set out in PPG for justifying an alternative assessment of housing need that exceeds the result of the Standard Method.

0.21 Whilst the overall need identified under this scenario is slightly lower than recent dwelling completion rates, it more closely aligns with average recent completions figures than any of the other tested scenarios. It also continues to align closely with the existing Core Strategy requirement for each authority that was previously tested and found sound at examination.

0.22 The parameters of this scenario are also most similar (and very closely aligned) to those that supported the recommended alternative assessment of housing need equivalent to 1,344 dpa provided by the Housing Study 2022. There is therefore no reason in principle why the justification for this benchmark scenario as the recommendation for plan-making under national policy and guidance should not carry forward directly into this Update.

0.23 This scenario assumes that future jobs growth is provided for under a **1:1 commuting ratio** i.e., for every new job created in a district there is a worker available to fill it. This scenario therefore assumes no change in absolute levels of in-commuting or out-commuting alongside meeting the forecast additional jobs growth. This is consistent with the PPG which includes in the justification for its affordability adjustment increasing opportunities for people to live near where they work (ID: 2a-006-20190220).

0.24 The following table provides a breakdown of what this scenario means for each authority in terms of assumed population change, household change, net migration, employment and dwellings equivalent.

Employment-Led Housing Need Scenario Summary

Area	Change 2023 - 2041				Average per year		
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Employment
Central Lancashire	33,088	8.6%	22,622	14.0%	1,978	1,237	894
Chorley	11,638	9.7%	7,229	14.2%	952	410	305
Preston	10,521	6.9%	8,423	13.7%	235	441	295
South Ribble	10,930	9.7%	6,970	14.1%	791	386	295

i) Next Steps

0.25 The recommended housing need scenario from this Housing Study Update is the **Employment-led (CR 1-to-1) scenario** which provides a total housing need figure for the whole Central Lancashire Local Plan area of 1,237 dwellings per annum. This is the sum of individual housing need figures for the constituent local planning authorities.

0.26 In accordance with the PPG under which this Plan will be examined (ID: 2a-013-20201216), once this housing need figure has been agreed it will then be for the Central Lancashire authorities to determine how much of the overall need can be accommodated within Central Lancashire, and whether each district can accommodate its own need in full, before determining the housing requirement(s) for the plan area and each individual authority area.

0.27 It is recommended that an updated assessment of the size, type, and tenure of housing needed for different groups in Central Lancashire is considered as part of this process and used to inform policy-based decisions about the amount of housing to be planned for in each district.

0.28 The final housing requirement or requirements set in the Joint Local Plan may be different to the relative proportions within the recommended dwelling need scenario, depending on the Councils' further assessment of policy-on and plan-making considerations.

0.29 The findings and recommendations of this Housing Study Update report can therefore be used to inform the preparation of planning policies including through exploring and identifying options for addressing housing need across the three authorities, and then setting out a preferred approach.

1.0 INTRODUCTION

1.1 DLP Planning and Edge Analytics were appointed by the Central Lancashire Authorities (Chorley Council, Preston City Council and South Ribble Borough Council) to undertake a Housing Study Update for the area. The objective of the study is to update the previously identified level and proportional distribution of future housing needs across Central Lancashire, published in September 2022 for the period 2023 to 2038. This Housing Study Update will provide a robust and up to date evidence base to inform the emerging Central Lancashire Local Plan.

1.2 This Housing Study Update is required to provide an updated assessment of housing need which reflects recently published evidence, including 2021 Census data and updated mid-year estimates on population growth. The Housing Study Update will also reflect the revised plan period, which has been extended to 2041.

1.3 This Housing Study Update will provide robust evidence to assist the Councils in planning for an appropriate level of housing across the Joint Local Plan area. The updated housing need scenarios presented in this study have considered local needs and growth requirements, including taking account of future prospects for jobs growth.

a) National Policy Context

i) *National Policy and Guidance Applicable to the Housing Study*

1.4 In December 2024, the Ministry of Housing, Communities and Local Government (MHCLG) published a revised National Planning Policy Framework (NPPF2024). Annex 1 of NPPF2024 sets out transitional arrangements for implementing the policies in this latest version of the NPPF. It is our understanding that the Central Lancashire Local Plan will be submitted for examination on or before 12th March 2025 and under the provisions of paragraphs 234 and 235 of Annex 1 can therefore be examined under the previous December 2023 version of the NPPF (NPPF2023). This Housing Study Update has therefore been prepared in the context of the December 2023 version of the NPPF against which it is proposed the emerging Local Plan will be submitted and examined.

1.5 Paragraph 20 of the NPPF2023 identifies that making sufficient provision for housing (including affordable housing) should be set out in strategic policies providing for the overall strategy in terms of the scale, pattern, and quality of development (to ensure outcomes support beauty and placemaking).

1.6 Planning Practice Guidance (PPG)[1] assists in terms of the evidence-gathering requirements for plan-making to build up a clear understanding of housing needs in the area. In summary, this approach encompasses:

- Definition of the Housing Market Area (HMA) most appropriate for the preparation of planning policies;
- Establishing the overall housing need; and
- Identifying the housing needs of different groups

1.7 These steps are reflected in paragraphs 61 to 63 of the NPPF2023.

1.8 Paragraph 61 of the NPPF2023 states that strategic policies for determining the minimum number of homes needed should be informed by a local housing need assessment, conducted using the Standard Method provided in national Planning Practice Guidance. This method provides an advisory starting point for establishing the housing requirement for the area. Exceptional circumstances, such as particular demographic characteristics, may justify

[1] PPG ID: 61-039-20190315

alternative approaches to assessing housing need, which should also consider current and future demographic trends and market signals. Additionally, any housing needs that cannot be met within neighbouring areas should be taken into account when establishing the amount of housing to be planned for.

1.9 Paragraph 62 outlines that the Standard Method incorporates an uplift for certain cities and urban centres, as specified in national planning guidance. This uplift should be accommodated within those cities and urban centres, except in cases where voluntary cross-boundary redistribution agreements are in place or where it would conflict with the policies outlined in the NPPF2023.

1.10 Paragraph 63 emphasises the importance of assessing the size, type, and tenure of housing needed for various groups within the community. These groups include but are not limited to, those in need of affordable housing, families with children, older people (including those in need of retirement housing, housing-with-care, and care homes), students, people with disabilities, service families, travellers, renters, and individuals interested in commissioning or building their own homes.

1.11 Paragraph 67 (NPPF2023) also sets out that the requirement may be higher than the identified housing need if, for example, it includes provision for neighbouring areas, or reflects growth ambitions linked to economic development or infrastructure investment within the overall requirement, relevant strategic policies should provide for the identification of a housing requirement for designated neighbourhood areas that reflects the overall strategy for the pattern and scale of development and any relevant allocations.

ii) *Recent Changes to National Policy and Requirements for Plan-Making*

1.12 As noted above, a new National Planning Policy Framework (NPPF2024) was published on 12th December 2024. This introduces significant changes to the way local housing need is calculated. These changes are part of the government's commitment to deliver 1.5 million new homes over the next five years and to support economic growth across all regions of the country. Key changes include:

- Making the Standard Method for assessing housing needs mandatory, requiring local authorities to plan for the resulting housing need figure.
- Implementing a new Standard Method calculation to considered to better reflect the Government's overall ambitions for housebuilding.
- Removing the urban uplift and caps previously applied to the Standard Method.
- Strengthening the expectation that applications on brownfield land will be approved and that plans should promote an uplift in density in urban areas.
- Introducing the concept of 'grey belt' land within the Green Belt, to be considered for development through both plan and decision-making processes.

1.13 The outcome of the new Standard Method calculation for the Central Lancashire authorities is as set out in the table below.

Table 1 Standard Method Housing Requirements for Central Lancashire

Constituent Council	Standard Method (NPPF2023)	New Standard Method (NPPF2024)
Preston	269	662
South Ribble	169	546
Chorley	506	601
Total	**944**	**1,809**

1.14 While the new Standard Method suggests a higher housing need than the NPPF2023 Standard Method figure, it is important to note that preparation of the Housing Study Update

reflects the Councils' timetable for plan-making and relationship with transitional arrangements in Annex 1 of the NPPF2024, with the intention being to submit the plan for examination on or before 12th March 2025.

1.15 The Central Lancashire authorities therefore seek to ensure that future housing needs are met in accordance with the December 2023 version of the NPPF. This includes considering situations in which there may be justification for determining that housing need exceeds the result of the NPPF2023 Standard Method - such as demographic trends and market signals justifying an alternative approach. The approach taken in this Update notes that the Standard Method calculated in accordance with the December 2023 version of the NPPF identifies the minimum number of homes expected to be planned for.

b) Study Scope and Structure

1.16 This report addresses the first two bullet points of the PPG (61-039-20190315) summarised above, relating to definition of the HMA and the objective assessment of housing need, comprising the sum of individual figures for the constituent local planning authorities. The approach utilises the starting point provided by calculation of local housing need using the Standard Method alongside an assessment of other relevant evidence.

1.17 The findings and recommendations of this Housing Study Update report can, therefore, be used to support the proposed planning policies or help with any amendments that need to be made by exploring and identifying options for addressing housing needs across the three authorities, ensuring these policies address the updated housing need.

1.18 The outputs and recommendations in this report should be considered by the Central Lancashire authorities in setting out housing requirement and distribution policy options when preparing the Central Lancashire Local Plan. The approach to preparing this Housing Study considers previous evidence and the outcome of earlier plan-making stages (including relevant consultation responses) to ensure that the most recent understanding of issues is fully considered.

1.19 The structure of this Central Lancashire Housing Study Update is as follows:

- **Section 2 - Context and Background to this Housing Study Update**

  This section considers the relevant background to plan-making and existing evidence relating to the assessment of housing need and potential distribution options in Central Lancashire. This includes a review of the previous Housing Study for Central Lancashire that informed the Regulation 18 consultation for the Central Lancashire Local Plan in December 2022 – February 2023.

- **Section 3 – Current Housing Market and Demographic Profile**

  This section presents an update of the current housing market in Central Lancashire, including recent housing completions trends, house prices and affordability. It also presents an overview of the current demographic profile of the constituent Central Lancashire Authorities and the plan area as a whole, including reflecting recent trends in components of population change.

- **Section 4 – Growth Scenarios**

  This section uses the analysis in preceding chapters to define and undertake scenario testing of alternative approaches for the assessment of local housing need in order to determine whether these are appropriate for the circumstances in Central Lancashire. These scenarios also summarise the relationship between forecast economic and employment growth in terms of reflecting the requirement for labour supply and demand as part of the local housing need assessment.

- **Section 5 – Justification for Alternative Approaches to Assessing Housing Need in Central Lancashire**

  This section sets out the justification for applying alternative approaches for assessing housing need in Central Lancashire. This is explored in the context of national policy and guidance for joint plan-making[2] together with setting out the circumstances for considering alternative approaches where it may be appropriate to plan for a higher housing need figure than the Standard Method indicates[3]. This section also provides consideration of whether there is an additional need identified through the requirements set out as part of City Deal for Preston and South Ribble, noting that this need is aspirational and tied to the delivery of key infrastructure across those areas in order for development to be realised.

- **Section 6 – Next Steps**

  This section summarises the recommended housing need scenario and the next steps for the Central Lancashire authorities to develop a preferred approach to the Joint Local Plan[4].

[2] PPG ID: 2a-013-20201216
[3] PPG ID: 2a-010-20201216
[4] PPG ID: 61-034-20190315

2.0 CONTEXT AND BACKGROUND TO THIS HOUSING STUDY UPDATE

2.1 This section provides context to the Housing Study Update by summarising the findings from the initial Housing Study. It reflects on the policies outlined in the Regulation 18 Preferred Options consultation, and acknowledges the feedback and comments received during the Regulation 18 consultation process, particularly focusing on housing need and distribution-related questions.

a) Central Lancashire Housing Study (2022)

2.2 The initial Housing Study, commissioned by the Central Lancashire authorities, provided a comprehensive assessment of housing needs to inform the development of the Joint Local Plan. Through a rigorous analysis of demographic trends and economic indicators, the study identified the minimum Local Housing Need (LHN) for each authority, ensuring that communities have access to suitable housing options.

2.3 Consultation with key stakeholders, including Local Authority Housing Officers, property agents, and social housing providers, highlighted the importance of addressing various housing needs, including affordable housing and housing for specialist groups. This consultation shed light on potential gaps in housing provision, emphasising the need for evidence-based approaches to policy development.

2.4 The application of the Standard Method, as outlined in the National Planning Policy Framework (NPPF), formed the basis for calculating the minimum LHN for each authority. According to this calculation, the minimum LHN figures for Chorley, Preston, and South Ribble set out in the Housing Study (2022) stood at 521, 266, and 176 dwellings per annum (dpa) respectively. Notably, these figures were lower than the average net completions observed over the last five years at the time of writing, indicating a potential shortfall in the result of the Standard Method as a measure of housing demand.

2.5 To address this disparity, various housing need scenarios were explored, taking into account factors such as employment forecasts, migration patterns, and demographic changes. Among these scenarios, the employment-led projection emerged as the preferred option. An evaluation of this scenario also indicated a closer alignment with demographic trends and past rates of housing delivery together with a stronger relationship to the adopted Core Strategy and City Deal in terms of patterns of development expected to meet housing needs. With a total housing need for Central Lancashire of 1,334 dpa, this scenario offered a balanced approach to meeting housing demand while supporting economic development objectives.

2.6 The findings of the initial Housing Study served as a crucial foundation for the development of the Joint Local Plan Preferred Options, guiding the development draft policies and the housing requirement distribution to ensure that Central Lancashire's housing needs are effectively addressed.

b) Part 1 Preferred Options – Regulation 18

2.7 The Regulation 18 consultation ran from 9th December 2022 to 24th February 2023, where people were invited to comment on the Part 1 Preferred Options Document for Central Lancashire.

2.8 The housing strategy outlined in the Regulation 18 document for Central Lancashire focuses on addressing the growing needs of existing and future communities and businesses within the area.

2.9 To ensure the Local Plan supports the required number of homes, Policy Direction 11 set a minimum target of 20,010 net additional dwellings over the period 2023-2038, equivalent to 1,334 dwellings per year. This requirement is distributed across the three authority areas,

with each local authority being required to monitor delivery rates annually to ensure overall housing needs are met.

2.10 Policy Direction 12 established an indicative distribution of the overall housing requirement, specifying the annual housing requirement for each authority from 2023 to 2038. Chorley, Preston, and South Ribble each have their respective annual housing requirements, contributing to an overall target. A breakdown of this is shown in Table 2 below.

Table 2 Policy Direction 12: Distribution of Housing Requirement[5]

Authority	Annual Housing Requirement 2023-2027	Annual Housing Requirement 2028-2032	Annual Housing Requirement 2033-2038
Preston	600	500	400
South Ribble	400	450	500
Chorley	334	384	434
Total	**1,334**	**1,334**	**1,334**

Source: Central Lancashire Part1 Preferred Options (2022)

2.11 These policies aim to ensure adequate housing provision, flexibility, and sustainability within Central Lancashire, addressing the needs of diverse communities while supporting economic growth and competitiveness.

c) Responses to Regulation 18 Consultation

2.12 During the Regulation 18 consultation period for the Central Lancashire Local Plan, held from 19th December 2022 to 24th February 2023, stakeholders were encouraged to offer their feedback on the outlined preferred options. Throughout this period, a total of 928 respondents participated, contributing an average of 160 comments per question. Questions 24 and 25 were focused on housing policies, specifically Policy Direction 11 and Policy Direction 12, addressing the scale of housing growth and the indicative distribution of housing requirements.

2.13 From the comments that were received, several key points emerged which are detailed below:

Question 24 - Policy Direction 11 (Scale of Housing Growth)

- The council should consider allocating more housing within Chorley borough consistently across the plan period, rather than adopting a phased approach favouring Preston initially and Chorley/South Ribble later.
- It is recommended that the council explores circumstances that warrant deviations from the Standard Method number when determining housing requirements.
- Housing figures should be adjusted to reflect recent completions, incorporate considerations for affordable housing needs, and account for existing build rates.
- The council should address the necessity for adequate housing and amenities to mitigate the housing shortage and facilitate prosperity in this part of the Plan Area.
- Considerations should be made regarding changes in employment when assessing housing requirements.
- The council should avoid using a 1:1 jobs to housing growth ratio for predicting housing needs.

[5] https://centrallocalplan.lancashire.gov.uk/media/1194/central-lancs-part-1-prefererd-options-final-dec-22.pdf

- Remove penalties in housing figures for Chorley linked to Buckshaw developments.
- Ensure comprehensive considerations, including the implications of future labour demand associated with the proposed National Cyber Force campus, are incorporated into the plan, aligning with Policy Directions 11 and 14 or introducing a separate Policy Direction.

Question 25 - Policy Direction 12 (Indicative Distribution of Housing Requirements)

- Respondents queried why the housing requirements have been redistributed from Preston to Chorley/South Ribble, given employment is primarily focused in Preston.
- The council should address concerns regarding the proposed stepping-down of housing trajectory figures for Preston, ensuring a consistent increase annually.
- Review housing figures, especially in Chorley/South Ribble, to ensure an optimal balance and alignment with requirements.
- Coordinate the distribution of housing in Chorley with proposed allocations in Astley, Buckshaw, and Chorley North East consistent with addressing housing need in full.
- Justify deviations from the Standard Method in housing distribution, focusing on affordability and local economic considerations.
- Ensure adequate consideration is given to local housing needs, affordable housing requirements, balance between jobs and homes, spatial strategy, urban capacity, and sustainable site availability in determination of housing requirements.
- Each authority should meet the Standard Method as a minimum before considering additional increases.
- Align figures with conclusions from the Central Lancashire Housing Study, potentially increasing Preston's figures to accommodate growth to 500 dpa throughout the Plan Period.
- Simplify housing figures by establishing a single minimum figure for each authority.

Question 52 – Other Comments

- The council should address concerns regarding the lack of substantial evidence supporting the high housing targets and consider alternative holistic calculation approaches rather than a straight-line method for determining housing allocations based on housing need.

3.0 CURRENT HOUSING MARKET AND DEMOGRAPHIC PROFILE

3.1 This section presents an update of the current housing market in Central Lancashire, including recent housing completions trends, house prices and affordability. It also presents an overview of the current demographic profile of the constituent Central Lancashire Authorities and the plan area as a whole, including reflecting recent trends in components of population change.

a) Past Completions Rates

3.2 Dwelling completions (net additional dwellings as reported by the Councils) in Central Lancashire, in general, have fluctuated over the past ten years. Total completions across Central Lancashire have risen since 2020/2021, with 2022/2023 being the highest rate of delivery in South Ribble and highest in 2023/24 for Preston. Delivery in Chorley peaked in 2014/2015 and has shown a generally declining trend since.

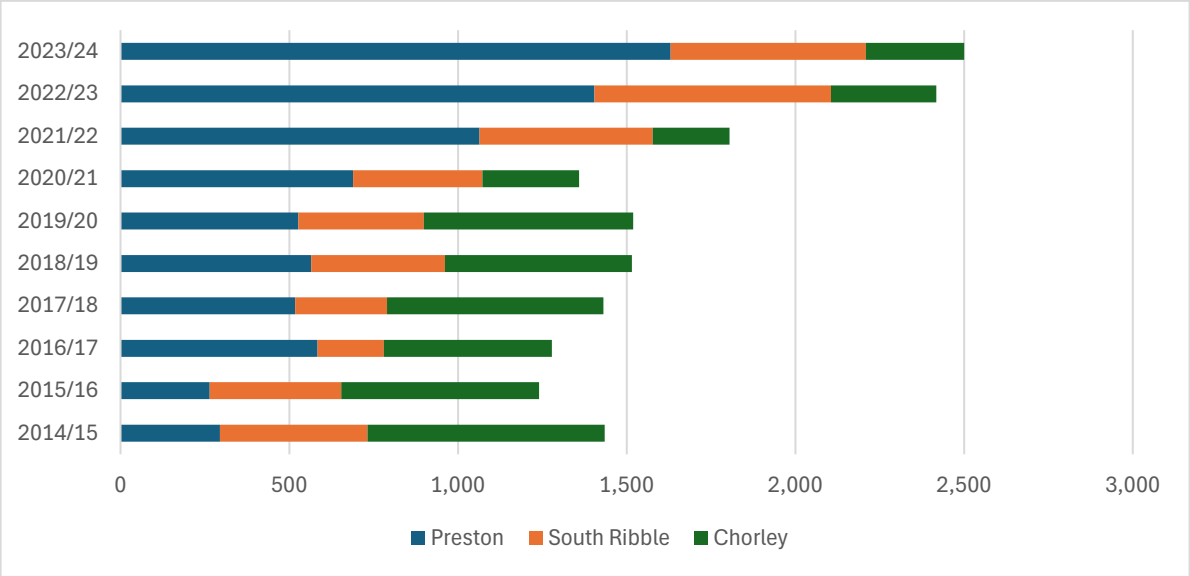
Table 3 Dwelling completion rates in Central Lancashire 2013-2024

Authority	2013 / 2014	2014 / 2015	2015 / 2016	2016 / 2017	2017 / 2018	2018 / 2019	2019 / 2020	2020 / 2021	2021 / 2022	2022 / 2023	2023 / 2024
Preston	142	488	282	791	634	785	828	828	1,064	1,405	1,630
South Ribble	346	486	371	237	312	437	412	424	513	701	580
Chorley	582	723	597	517	661	573	640	306	228	309	291
Central Lancashire Total	**1,070**	**1,697**	**1,250**	**1,545**	**1,607**	**1,795**	**1,880**	**1,558**	**1,805**	**2,415**	**2,501**

Source: Council Authority Monitoring Reports NB: Single figure reported for 2019-2021, therefore 2019/2020 and 2020/2021 figures for Preston are averaged across the two years.

3.3 As shown in both Table 3 and Figure 1 (using Government statistics for net additional dwellings in Live Table 122), Preston has experienced a steady increase in housing completions in recent years, culminating in a significant peak of 1,630 completions in 2023/24. South Ribble also witnessed an overall rise in completions, with notable peaks in 2014/2015 and 2018/19, reaching 700 completions in 2022/2023. However, Chorley's completion rates, while initially higher to 2014/2015 and 2015/2016, have shown a gradual decline in recent years, dropping to 228 in 2021/2022, followed by a slight increase thereafter.

Figure 1 Central Lancashire annual dwellings completions by authority (2014/15 to 2023/24)



Source: MHCLG Live Table 122

3.4 From the housing completions data, an average (mean) completions figure has been calculated over both a 10-year and a 5-year period across Central Lancashire, shown in Table 4.

3.5 Looking at the 10-year mean delivery, Preston has recorded an average of 754 net additional dwellings per year (dpa), 424 dpa in South Ribble, and 472 dpa in Chorley. This indicates that, on average, Preston has been the most active in terms of housing completions over the past decade, followed by Chorley and then South Ribble.

3.6 However, there are variations when looking instead at the 5-year mean delivery and illustrating the impact of short-term trends. Preston delivered substantially higher net additional dwellings for this period with an average of 1,063 completions per year, followed by South Ribble with 510 dpa, and Chorley with 348 dpa. This suggests that Preston's strong performance is concentrated amongst shorter-term trends in recent years, while South Ribble has also shown an improvement compared to its 10-year average. On the other hand, Chorley's 5-year average remains below its 10-year average, indicating a decline in recent delivery rates.

Table 4 Average Housing Delivery by Central Lancashire Authority

Authority	10-Year Mean Delivery	5-Year Mean Delivery
Preston	754	1,063
South Ribble	424	510
Chorley	472	348
Total	**1,650**	**1,920**

Source: MHCLG Live Table 122

3.7 The trends summarised above are consistent with historically uneven patterns of housing delivery across Central Lancashire. The volatility of factors affecting short-term trends in housing completions illustrates that the robustness of these measures is likely to be more limited in terms of providing a standalone alternative for assessing housing need.

3.8 This is reinforced by having regard to more historic short-term delivery trends and particularly by the high degree of volatility within and between individual Councils when the earlier 2014/15 to 2019/20 and preceding 2006/07 to 2013/14 periods are compared in more detail.

3.9 Table 5 sets out the average housing delivery over four time periods since 2001/02. The most recent five year period (2019/20 to 2023/24) compares with the totals discussed above. When compared directly against the previous five years mean net additions were 58% lower in Preston and 28% lower overall across Central Lancashire yet in Chorley average completions were over 70% greater than those recorded most recently.

3.10 The most recent five-year period is significantly greater than any of the earlier recorded periods when comparing the Central Lancashire and individual Preston totals but is not the peak rate for South Ribble comprises the lowest rate for Chorley. Notwithstanding significant volatility in the intervening period, rates are closest to those recorded in the 2001-2006 period.

3.11 The average delivery for Central Lancashire as a whole was 1,920 dpa, which was higher than any previously assessed period and most similar to the initial 2001/02 to 2005/06 series.

Table 5 Average Net Additional Housing Delivery by Central Lancashire Authority

Authority	Average Annual Net Dwellings 2001/02 - 2005/06	Average Annual Net Dwellings 2006/07 - 2013/14	Average Annual Net Dwellings 2014/15 – 2018/19	Average Annual Net Dwellings 2019/20 – 2023/24
Preston	569	305	445	1063
South Ribble	515	229	338	510
Chorley	519	448	596	348
Total	**1604**	**982**	**1380**	**1920**

Source: MHCLG Live Table 122

3.12 The reliability of past build rates as an indicator of need is further hampered by the use of net additional dwelling statistics that record other factors affecting changes to stock that may not form part of longer-term trends. This can include demolitions contributing to troughs in activity (particularly between 2006 and 2014) and levels of activity relating to conversion and Change of Use (including Permitted Development Rights) potentially contributing to shorter-term peaks. Discounting these factors, the more significant impact on volatility in trends relates to the specific impact of new development and differences in where this has been delivered by time period and location across Central Lancashire.

3.13 Government housebuilding statistics in Live Table 253 capture new dwellings completed. This does not record all net changes in stock or capture all new completions due to the methodology for data collection (often excluding a higher proportion of flatted schemes). Live Table 253 thus produces lower overall averages than net additional dwelling reporting. However, this allows a more representative comparison of the level and location of new development activity and changes over time. The table below illustrates that these data only slightly reduce the volatility between constituent Councils since 2006, demonstrating the significant impact of fluctuations in new development.

Table 6 New Dwellings Completed by Council and Time Period

Authority	New Dwelling Completions 2006/07 - 2013/14	New Dwelling Completions 2014/15 – 2018/19	New Dwelling Completions 2019/20 – 2023/24
Preston	388	400	895
South Ribble	244	293	440
Chorley	455	508	328
Total	**1087**	**1202**	**1663**

Source: MHCLG Live Table 253

3.14 While Buckshaw Village in Chorley is a significant contributor to short-term past trends in Chorley the delivery of North West Preston is the key source of recent high housing delivery. This follows the delivery of key infrastructure delivered through the City Deal.

3.15 While Central Lancashire has, and will continue, to see the delivery of land allocated for housing (now or in the future) the impact of these sites will not necessarily be of the same scale as North West Preston or Buckshaw Village. Locations and timeframes for delivery would also be anticipated to cause further volatility in completion trends. Demographic trends and market signals are likely to be key factors in supporting continued demand for housing, and in-part work together with past levels of development to illustrate why housing need may exceed the minimum Standard Method result based on a particular time period. This supports looking at these factors together rather than placing reliance on relatively unreliable short-term trends in build rates as a justified alternative to the Standard Method for any one time period or constituent Council.

b) Median Housing Sales Prices

3.16 The data presented in Figure 2 shows the trends in median house prices across Chorley, Preston, and South Ribble from 1997 to 2023.

3.17 In Chorley, house prices have generally followed an upward trajectory, with significant increases observed particularly from 2003 onwards. There was a notable spike in prices from around 2002 to 2004, with prices almost doubling during this period. From 2005 to 2016, prices remained relatively stable before experiencing another notable increase from 2016 to 2023, reaching a peak of £205,000 in 2023.

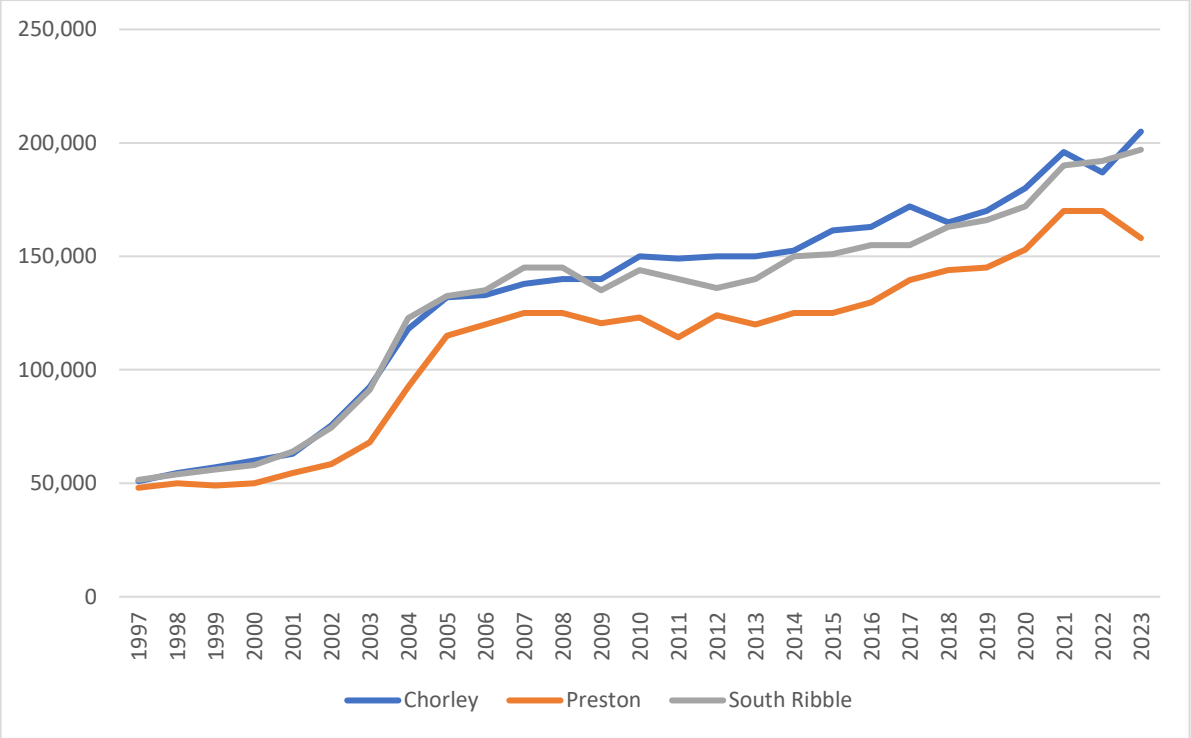
3.18 Chorley historically tends to have the highest median house prices compared to Preston and South Ribble. This trend is evident in the data, with Chorley consistently recording higher median house prices over the years. From 1997 to 2023, Chorley's median house prices have generally been higher compared to Preston and South Ribble, which may in part reflect pull factors in this part of the housing market area including access to amenities, countryside and good transport and labour market links to job opportunities in Central Lancashire and Greater Manchester.

3.19 In Preston, house prices have shown a generally upward trend over the years, with fluctuations in between. Prices saw significant growth from 2003 to 2005, followed by a relatively stable period until around 2016. Another notable increase occurred from 2016 to 2019, with prices peaking at £170,000 in 2022 before slightly decreasing in 2023 to £158,000.

3.20 Preston often has more affordable housing compared to Chorley and South Ribble. While still experiencing overall upward trends, Preston's median house prices have typically been lower than those of Chorley and South Ribble. This makes Preston a more accessible option for homebuyers seeking relatively more affordable housing within Central Lancashire as well as partly reflecting higher levels of demand in the private rented sector.

3.21 In South Ribble, the pattern is comparable to that of Chorley and Preston, with overall increasing house prices over the years. From 2003 to 2005, there was a substantial rise in prices, followed by a period of stability until around 2016. Prices then experienced another notable increase, reaching £197,000 in 2023.

Figure 2 Trends in House Prices (£) from 1997 to 2023 (yearly data ending in September)



Source: ONS Median House Price

c) Affordability Ratio

3.22 The affordability ratio, which represents the ratio of median house prices to median gross annual workplace-based earnings, provides insights into the housing affordability challenges faced by residents in Central Lancashire over the past decade, as shown in Table 7 and Figure 3 below.

Table 7 Ratio of median house price to median gross annual workplace-based earnings by local authority district, Preston, South Ribble and Chorley 2010 to 2023

Local Authority	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Chorley	6.24	6.46	6.21	6.44	6.3	6.65	6.87	6.91	6.61	6.83	6.56	7.16	6.34	6.88
Preston	4.71	5.08	5.38	5.04	5.33	5.08	4.9	5.39	5.21	5.31	5.7	6.06	5.66	5.33
South Ribble	6.55	6.05	5.89	5.96	6.54	6.31	6.28	6.12	6.58	5.81	5.58	6.3	6.11	5.93

Source: ONS House price to workplace-based earnings ratio

3.23 In Chorley, the ratio has shown fluctuation, starting at 6.24 in 2010 and reaching a peak of 7.16 in 2021, before dropping slightly to 6.88 in 2023. These ratios indicate that housing affordability in Chorley has been consistently challenging, with median house prices outpacing median earnings.

3.24 Similarly, in Preston, the affordability ratio has fluctuated, with a range from 4.71 in 2010 to

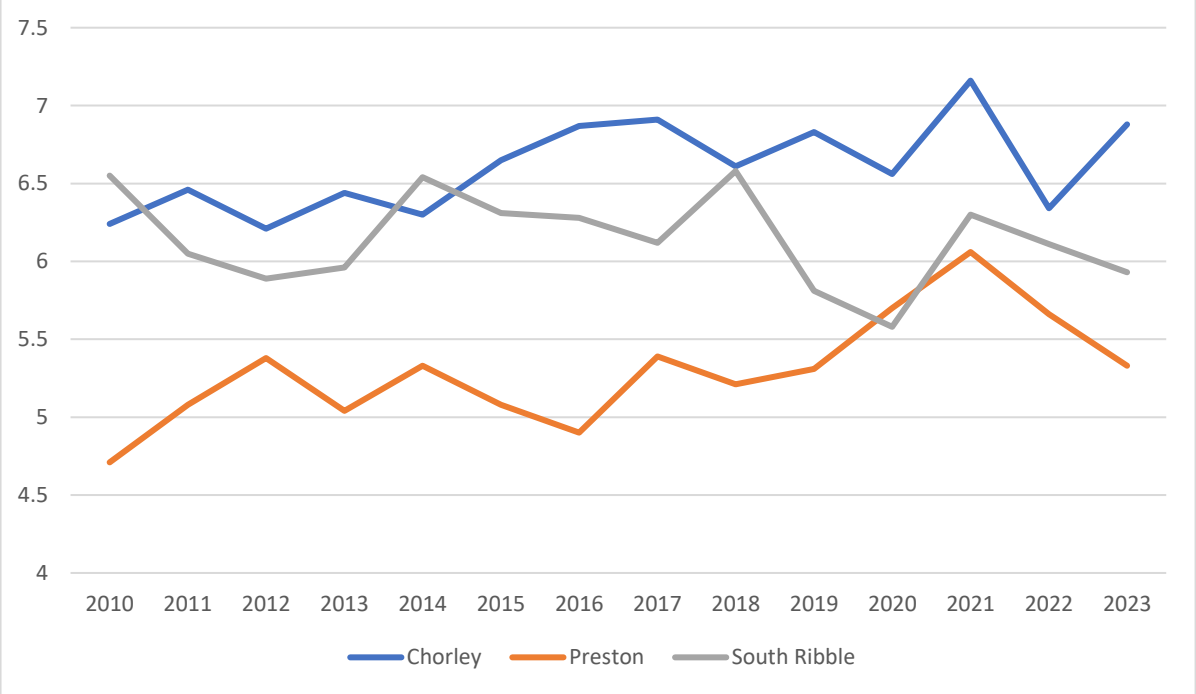
6.06 in 2021. Although Preston generally maintains a lower affordability ratio compared to Chorley, it still indicates affordability challenges for residents. The relationship between house prices and workplace-based earnings since 2021 has, however, resulted in year-on-year falls in the affordability ratio, which may in-part correspond to the performance of the local economy and generally supports an increase in opportunities for people to live close to their place of work.

3.25 In South Ribble, the affordability ratio has also varied, ranging from 5.58 in 2020 to 6.55 in 2010. Despite experiencing fluctuations, South Ribble generally exhibits higher affordability ratios compared to Preston but lower than Chorley. The relationship between house prices and workplace-based earnings since 2021 has, however, resulted in year-on-year falls in the affordability ratio but to a more limited extent than observed in Preston.

3.26 The affordability ratios in all three districts consistently exceed the threshold of 4, indicating a lack of affordability of housing for sale according to many mortgage lenders' criteria. This underscores the pressing need to address housing supply issues to improve affordability and ensure access to housing for residents across Central Lancashire.

3.27 Furthermore, mortgage lenders are subject to regulatory limits imposed by the UK's Financial Conduct Authority (FCA), which restrict the issuance of mortgages exceeding 4.5 times an individual's income. Ratios exceeding 4 are considered increasingly unaffordable. The Standard Method incorporates an uplift based on the degree to which the affordability ratio surpasses this threshold, highlighting the importance of addressing housing affordability concerns in Central Lancashire.

Figure 3 Ratio of median house price to median gross annual workplace-based earnings by local authority district, Preston, South Ribble and Chorley 2010 to 2023



Source: ONS House price to workplace-based earnings ratio

4.0 GROWTH SCENARIOS

4.1 This section uses the analysis in preceding chapters to define and undertake scenario testing of alternative approaches for the updated assessment of local housing need in order to determine whether these are appropriate for the circumstances in Central Lancashire. These scenarios also summarise the relationship between forecast economic and employment growth in terms of reflecting the requirement for labour supply and demand as part of the local housing need assessment.

4.2 Edge Analytics has used POPGROUP (PG) technology to develop a range of demographic scenarios for each of the Central Lancashire authorities. In the following paragraphs, the scenarios are defined. Further information on the POPGROUP methodology, data inputs and assumptions can be found in **Appendix 1**.

a) Local Housing Need

4.3 The Local Housing Need (LHN) figures for the Central Lancashire authorities are based on the government's Standard Method, underpinned by the 2014-based household projections, which are linked to the 2014-based subnational population projections.

4.4 In the Dwelling-led scenario, the government's Standard Method has been used to calculate the Local Housing Need (LHN) figures, as shown in Table 8 below.

Table 8 Central Lancashire LHN using Standard Method Calculation

	Chorley	Preston	South Ribble
Step 1: Baseline			
Households 2024	52,688	60,091	48,756
Households 2034	56,975	62,576	50,266
Change	4,287	2,485	1,510
Household Growth per year	***429***	***249***	***151***
Step 2: Affordability Adjustment			
Median house price	£205,000	£158,000	£197,000
Median workplace-based earnings	£29,778	£29,626	£33,241
Affordability Ratio	6.88	5.33	5.93
Adjustment factor	1.18	1.08	1.12
Uncapped Housing Need	***506***	***269***	***169***
Step 3: Cap the level of increase			
Local Plan Adopted in Last 5 years?	No	No	No
Cap to Apply	600	348	211
Capped Growth	***506***	***269***	***169***
Step 4: Cities & Urban Centres Uplift			
Urban Uplift	n/a	n/a	n/a
Final LHN	**506**	**269**	**169**
Proportional Split of Central Lancs Total	**54%**	**28%**	**18%**
Central Lancs Total		**944**	

4.5 The latest 2018-based projections result in a higher level of population growth for each of the Central Lancashire authorities, due to a different balance between the drivers of growth (natural change, internal, and international migration) compared to the 2014-based projections (see Section 2 of the Housing Update Study, September 2022).

4.6 These differences are the result of the different historical time periods from which the projections draw their assumptions (as well as methodological changes made by ONS in the latest round of projections). The 5-year period preceding the 2014-based projections shows a lower level of population growth, likely influenced by lower housing completion rates over this time particularly at Preston and South Ribble.

4.7 It is therefore important to consider the LHN figures within the wider demographic context, using the latest population statistics to establish whether (a) the LHN as calculated using the Standard Method adequately reflects each district's current and future demographic trends and market signals, and (b) whether calculating housing need using an alternative approach would better reflect each district's current and future demographic trends and market signals. It is also important to assess the size of each district's resident labour force, the level of jobs growth forecast, and whether more housing (than the Standard Method identifies) is required to support this.

b) Background to Scenario Definition

4.8 This section should be read alongside Section 7(b) of the original Housing Study, which provides important background to the range of scenarios presented below. The context for exploring alternatives to the calculation of local housing need in Central Lancashire is fundamentally unchanged since the preparation of the original Study. Changes to Paragraph 67 of the National Planning Policy Framework in December 2023 reinforce the circumstances where housing need is likely to exceed that generated by the Standard Method.

4.9 The criteria and inputs to scenario generation for this Update remain broadly as defined by the original Study. To understand if housing need might be higher than that suggested by the Standard Method, in accordance with PPG, this report and the scenario modelling has therefore considered the following key demographic and market signals information for the three Central Lancashire authorities, including:

- Housing completion trends (net additional dwellings) (as shown in Section 3(a))
- Economic growth forecasts and the balance between labour demand and supply (including commuting flows)
- Total population change
- Population age profile change
- Components of population change since 2001, including:
    - Natural change (births / deaths)
    - Net internal migration (between Central Lancashire and elsewhere in the UK, and between the Central Lancashire authorities)
    - Net international migration (migration to/from overseas)

4.10 Further details of these inputs are summarised in this report together with the Assumptions Note prepared by Edge Analytics (**Appendix 1**). In assessing the relevance of these inputs it is important to consider the findings and recommendations of the original Housing Study.

4.11 The 2022 Study recommended an alternative approach identifying a need higher than using the Standard Method and determined which alternative scenarios it could be considered adequately reflect current and future demographic trends and market signals. With reference to national policy and guidance it is important to state that alternative approaches to the Standard Method which are justified on this basis can be considered sound as they will have

exceeded the minimum starting point (ID: 2a-015-20190220).

4.12 It therefore remains a fundamental starting point for this Study, further reinforced by the availability of more recent information including population and household estimates, that the result of the Standard Method (LHN) baseline, including application of the affordability uplift, results in a calculation of annual dwelling need for Central Lancashire (as a standalone HMA) that only goes part-way to matching realistic alternative assumptions for demographic growth assessed over different time periods. It is therefore justified to explore alternative scenarios in greater detail including their relationship with market signals.

4.13 It is also critically important to understand the background to scenario definition with reference to the approach to plan-making in Central Lancashire and the consultation undertaken based on the recommendations of the 2022 Study.

4.14 The PPG supports the context that local housing need assessments may cover more than one area. Any different method explored within this context is expected to generate a figure for housing need within the defined area that should be at least the sum of the local housing need for each local planning authority within the area (ID: 2a-013-20241212).

4.15 The scenarios recommended for further exploration within the 2022 Study satisfied (and continue to satisfy) this criterion in terms of producing annual dwellings figures exceeding the total result of the Standard Method calculation for the Central Lancashire authorities. By definition, this supports exploring the extent to which alternative realistic assumptions for demographic growth impact upon the overall housing need figure for Central Lancashire, together with the sum generated by alternative approaches applied to each constituent Central Lancashire authority.

4.16 It is important that this wider context for scenario definition and the basis for the recommendation of the original Study is recognised in evaluating new information. In principle there is a high level of consistency between previous and current inputs to relevant scenarios, particularly in the context of the relevant inputs to assess market signals and assumptions for future employment growth.

i) *Forecast Employment Growth and Economic Activity Rates*

4.17 Table 9 below compares the latest employment jobs growth forecast with the jobs growth forecast that informed the Housing Study 2022. Both of these forecasts are from Cambridge Econometrics (CE) and have been analysed over the period 2023-2036 and, where possible, 2023-2041 (the new plan period). The use of the period 2023-2036 for the purposes of comparing with the previous Housing Study 2022 reflects that the CE forecasts available for that report had an end date of 2036.

4.18 For the original analysis period (2023-2036), the latest CE forecast (HS2024) show a slightly more pessimistic expectation of total (and average annual) jobs growth over this period across all three authorities, particularly in the early years. This is most likely due to the impacts of inflation and labour market constraints. In Preston in particular the total jobs growth in the latest CE forecast (HS2024) is 20% lower for the period 2023-2036 than the original CE forecast (HS2022).

Table 9 Jobs Growth Employment Forecast (excluding double-jobbing)

		2023-2036			2023-2041		
		Total Change	CAGR	Annual Average	Total Change	CAGR	Annual Average
Chorley	HS 2022	4,467	0.7%	344	N/A	N/A	N/A
	HS 2024 Update	4,259	0.7%	328	5,675	0.6%	315
Preston	HS 2022	5,148	0.4%	396	N/A	N/A	N/A
	HS 2024 Update	4,127	0.3%	317	5,493	0.3%	305
South Ribble	HS 2022	4,938	0.6%	380	N/A	N/A	N/A
	HS 2024 Update	4,158	0.6%	320	5,492	0.6%	305

Source: Cambridge Econometrics

4.19 Economic activity rates are the proportion of the population that is actively involved in the labour force, either employed or unemployed and looking for work. The economic activity rates applied in the scenario modelling for this Housing Study Update are those derived from the 2021 Census data. These economic activity rates show that since the 2011 Census there has been a decrease in economic activity in all age groups under 55 years in each authority, which has been primarily linked to higher levels of post-16 education and training and the ongoing impacts of the Covid-19 pandemic.

4.20 The latest economic activity rates derived from the 2021 Census are used alongside the CE forecasting data to model the future labour force and population growth profile under an 'employment-led' scenario. As set out in the **Appendix 1**, an OBR report published in November 2023 suggests that labour force participation rates may return to unsuppressed levels by between 2026 and 2029.

4.21 Therefore, as there is the possibility of economic activity rates increasing in the future it means that in principle the dwelling-equivalent figures for 'employment-led' scenarios using those assumptions could support higher jobs growth than indicated by the forecast. This is an important source of potential flexibility, particularly in respect of the ability to accommodate other known employment-generating developments which it has not been possible to directly input into the modelling. This includes, for example, National Cyber Force which is planned in South Ribble but for which few details regarding the scale and catchment of the workforce are currently available.

ii) *Commuting Ratios*

4.22 One of the assumptions used to underpin the employment-led scenarios is the commuting ratio, as set out in **Appendix 1**. A commuting ratio greater than 1.00 indicates that the size of the resident workforce exceeds the level of employment available in the area, resulting in a net out-commute. A commuting ratio of less than 1.00 indicates that employment in the area exceeds the size of the labour force, resulting in a net in-commute.

4.23 Since the previous Housing Study 2022 was prepared, updated commuting ratios based on the 2021 Census data have been published. This new information from the 2021 Census has been reviewed together with the most recent data for estimates of workplace-based employment and revised population data to re-evaluate the derived commuting ratios that were applied in the Housing Study 2022.

4.24 As shown in Table 10, in 2021 Central Lancashire as a whole had a commuting ratio of approximately 1.00. However, due to the timing of the 2021 Census which took place during the Covid-19 pandemic when many people were furloughed and home-working was more common, the 2021 Census commuting ratios are not considered a reliable reflection of current commuting patterns. Table 10 shows 40% of people in Central Lancashire mainly

worked at or from home during the 2021 Census. For this reason, the 2011 Census commuting ratios (rather than the 2021 Census ratios) have been applied in each scenario in this Housing Study Update and are fixed throughout the forecast period.

Table 10 Commuting Ratio based on 2021 Census Data

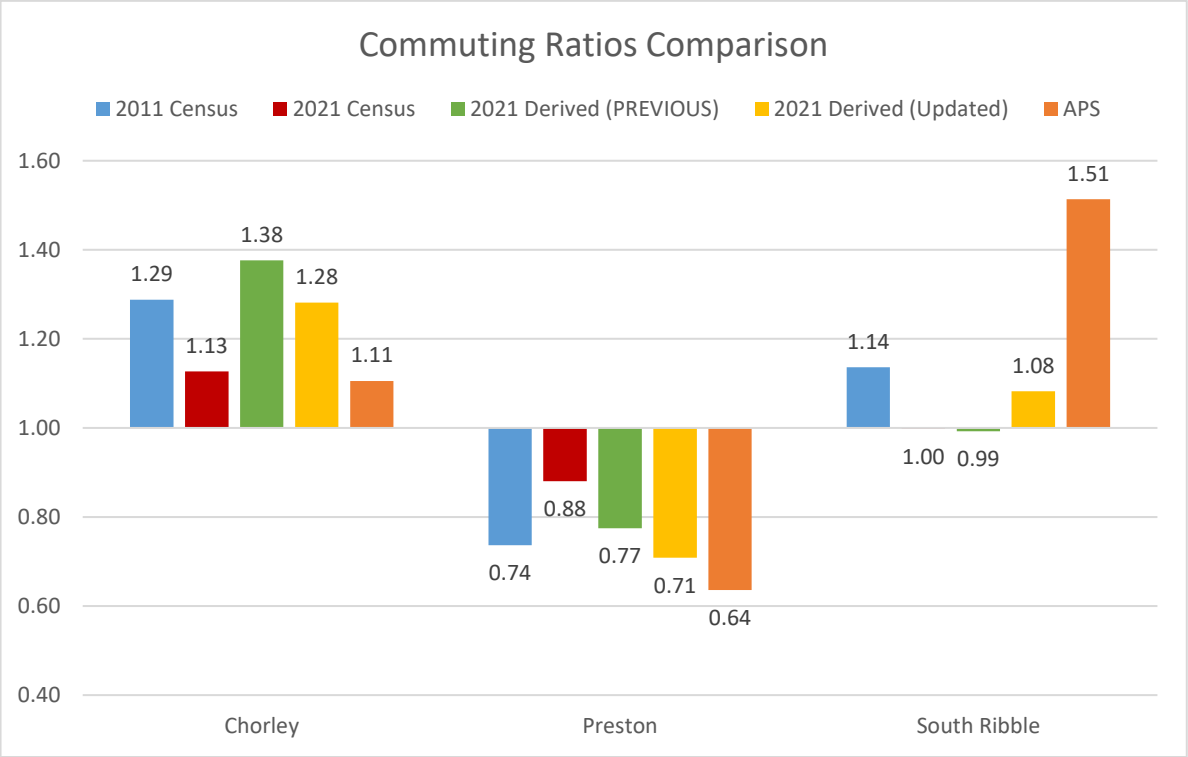
	2021	
	People	**% of Total Working in LA**
Live and work in Central Lancashire	75,535	42%
Mainly working at or from home, No fixed place	72,633	40%
Other (including offshore installation, working outside the UK)	490	
In-Commute to Central Lancashire	33,110	18%
Out-Commute from Central Lancashire	29,930	
Total Working in Central Lancashire	181,278	
Total living in Central Lancashire (and working)	178,588	
Net Commuting Outflow	-3,180	
Commuting Ratio	0.985	

Source: Census 2021

4.25 A summary comparison of the 2011 Census and 2021 Census commuting ratios is provided in the text and Figure 4 below:

- **Chorley:** The 2011 Census commuting ratio looks broadly realistic. It doesn't generate the workplace employment figure of 48,000 recorded on NOMIS but this was likely anomalously high. The 1.38 commuting ratio in the Housing Study 2022 was potentially slightly high due to lower actual population growth recorded to 2021, and there has been employment growth locally relative to the 2010/11 base. Nonetheless jobs growth has been modest and population growth at the 2011 commuting ratio has increased the absolute net out-commute since 2011.
- **Preston:** The 2011 Census commuting ratio seems broadly appropriate. The 2021 Census commuting ratio does not generate a good approximation for total employment and likely reflects remote working in services sector. The derived workplace employment figure exceeds CE forecast employment and may not have been matched by an actual increase in in-commuting from elsewhere, although there would still be prospects to increase actual employment growth without increased in-commuting, for example via economic activity rates. The Annual Population Survey (APS) does not support any real improvement to the 2011 Census commuting ratio.
- **South Ribble:** The 2021 Census commuting ratio appears unreliable and likely captures a disproportionate level of home-working to reduce the commuting ratio, whereas the previously derived workplace employment figure appears to reflect anomalies in official employment estimates. The latest derived calculation corrects for this (corresponding to a reduced total figure for workplace-based employment thus a higher commuting ratio) and appears to give the best match to the CE employment forecast with limited improvement since 2011. Use of the 2011 Census commuting ratio position would be equally appropriate and consistent with relatively modest changes in total employment since 2011.

Figure 4 Central Lancashire Commuting Ratios Comparison



Source: ONS; APS; Census 2021; Census 2011; Cambridge Econometrics; SPRU Analysis

4.26 This Housing Study Update has therefore concluded that, for each constituent Central Lancashire authority, commuting ratios as calculated by the 2011 Census provide the most robust starting point for a future forecast trend as they continue to reflect existing characteristics

4.27 Another important point to note in respect of the above analysis is that based on both 2011 and 2021 Census data, Central Lancashire retains high levels of workplace-based (70%) and residence-based self-containment (72%). It is therefore appropriate to conclude that Central Lancashire remains a standalone FEMA. While not reassessed in detail within this Update it is also reasonable to conclude the Central Lancashire remains defined as a self-contained Housing Market Area.

4.28 In developing the employment-led scenarios in this Housing Study Update, a commuting ratio sensitivity has also been applied (as in the Housing Study 2022). This sensitivity applies an adjustment to the Census-based commuting ratio in each year of the forecast so that future jobs growth is provided under a 1:1 commuting ratio. This means that for every new job created in each district it is assumed that there is a resident worker available to fill it and so there is no absolute change in levels of in-commuting or out-commuting. The 1:1 employment-led scenario principally affects the location of homes relative to jobs in Central Lancashire by seeking to provide homes closer to workplace locations in accordance with the principles of the Standard Method.

iii) *Short-Term Demographic Trends and International Migration*

4.29 It is important to note the background to the 2022 Housing Study and evaluation of the Standard Method in Central Lancashire particularly in terms of its relationship with the official 2014-based projections and the past trends of population and dwelling growth in each constituent Central Lancashire Council which informs them. The relatively short-term nature of trends captured within these projections is one factor in explaining why these depart more

substantially from recent evidence of market signals and demographic change.

4.30 It should, however, be noted that demographic-led scenarios produced for this Housing Study Update may equally be affected by short-term trends and the effects of these may affect the constituent Central Lancashire Councils to different degrees. This Housing Study Update considers new and revised demographic data released since preparation of the 2022 Study and illustrates particularly how changes to inputs to short-term projected trends can lead to significant differences in results. These demographic trends are represented in the 'PG' scenarios, as described in section (c) below.

iv) *2014-based Subnational Household Projections*

4.31 The scenarios produced in the Housing Study Update continue to apply 2014-based household formation rates. It is relevant to note the methodology of the first Housing Study, and reference to the Council's previous evidence base, as continuing to support the conclusion that no adjustment to the 2014-based household formation rates is deemed necessary in exploring justified alternatives to the Standard Method in Central Lancashire. Paragraph 2.44 (bullet 3) of the 2022 Study notes, with reference to the Central Lancashire Strategic Housing Market Assessment (Preston, South Ribble and Chorley Councils) (GL Hearn, September 2017):

"Household formation rates within the 2014-based projections were explored in detail. Growth in the Black and Minority Ethnic (BME) population was considered to account for the change in household formation rates in younger households, rather than simply affordability factors, and therefore no justification was identified for making an adjustment to take account of this (paragraphs 4.47 – 4.63)."

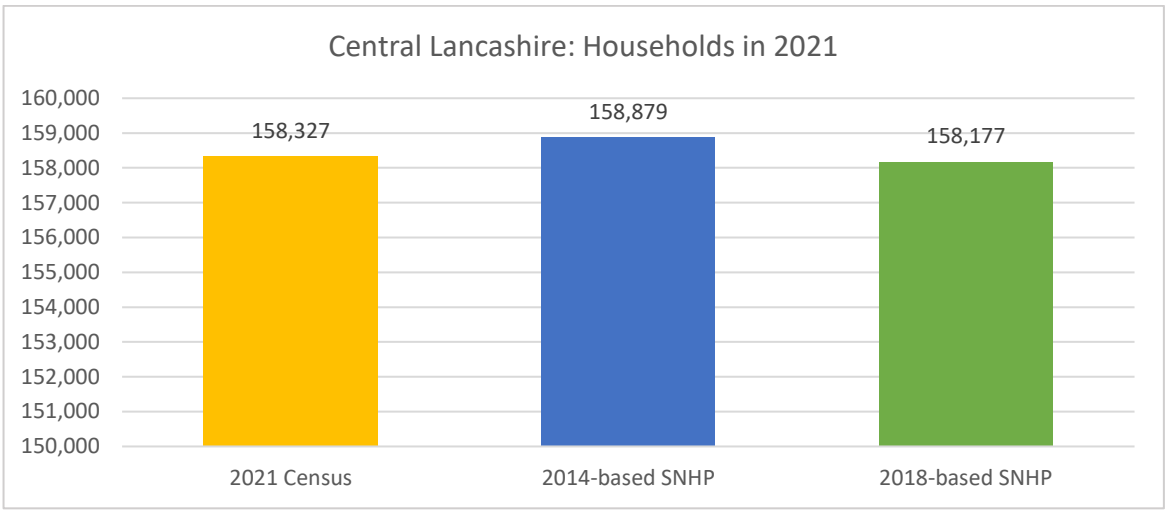
4.32 No new data has been published would significantly affect analysis of inputs to the 2014-based household projections (principally Census 2011 information in response of household characteristics). In terms of continuing to apply the unadjusted 2014-based formation rates the above conclusions therefore remain robust.

4.33 More recently published data, including outputs from the Census 2021, should be considered in the context that there are no new official household projections supported by policy and guidance. More recent information could indicate constraints such as worsening affordability or a shortage of homes close to where people want to work and live, thus potentially constraining rates of household formation, but this would not further affect pre-existing 2014-based household formation rates before these factors became more acute. Continued use of the 2014-based projections is therefore consistent with the PPG that underpinned NPPF2023 (ID: 2a-005-20190220).

4.34 In terms of the assessment of demographic trends and other factors, the PPG under which the Plan will be examined also stated that the use of any more recently published projections, which might otherwise reflect more recent data including constraints to household formation, will not be considered to be following the Standard Method (PPG ID: 2a-015-20190220). Scenarios showing further constraints to household formation beyond the rates projected in the 2014-based series would therefore be tested rigorously at Examination.

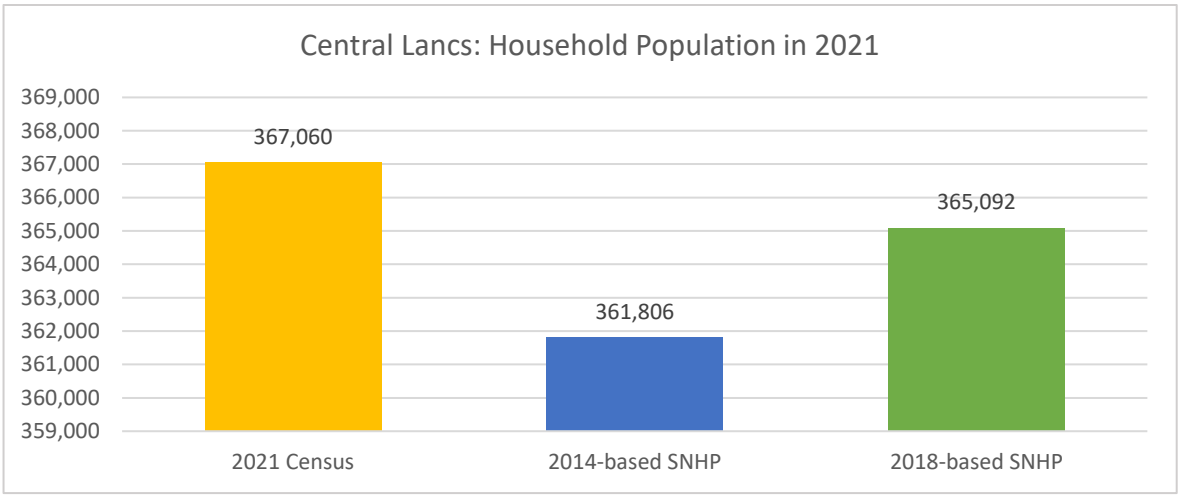
4.35 For the purposes of the Housing Study Update, and more recent data in Central Lancashire, it is more relevant to note that for the sum of the constituent Councils levels of household population growth have exceeded that projected in the 2014-based series, while the projected total households is broadly similar (particularly accounting for higher vacancy recorded in the Census 2021). This is shown in Figure 5 and Figure 6 below.

Figure 5 Comparison of Household Totals – Projected and Estimates



Source: Census 2021; MHCLG; SPRU Analysis

Figure 6 Comparison of Household Population Totals – Projected and Estimates



Source: Census 2021; MHCLG; SPRU Analysis

4.36 This indicates that there have been no overarching constraints to growth already exceeding the Standard Method starting point. A range of further indicators demonstrate that the output of estimates of total households being marginally below the projected 2021 total in the 2014-based projections is unlikely to be a function of further constraints to household formation in younger 25-34 and 35-44 age groups.

4.37 Closer analysis of Census 2021 data illustrates, for example, that in Preston the total number of households headed by minority ethnic groups has continued to increase between 2011 and 2021. This includes a particularly pronounced increase in the 35-44 headship group. This is consistent with the conclusions of the 2017 SHMA in terms of the 'ageing on' of a relatively younger and more diverse population impacting on household formation. This is shown in Table 11.

Table 11 Households by Age Group and Ethnicity 2001, 2011 and 2021 - Preston

	Black, Asian, Mixed and Other Ethnic Groups			White (British / Irish)		
	2001	2011	2021	2001	2011	2021
Preston						
Aged 25 to 34 years	3,747	7,008	8,363	15,403	13,064	12,708
Aged 35 to 44 years	2,654	4,803	8,175	15,980	13,991	10,622
Aged 45 to 54 years	1,857	2,938	5,517	13,875	15,188	12,742
Aged 55 to 64 years	1,135	1,819	3,098	11,109	12,433	13,748
Aged 65 years and over	1,193	1,622	2,571	17,750	17,624	18,305

Source: Census 2021; MHCLG; SPRU Analysis

4.38 For Chorley and South Ribble, where total households have very closely matched the total projected in the 2014-based series, it is relevant to note that this has not resulted in any meaningful fall in gross formation rates for 25-34 or 35-44 age groups. Instead, the main effect on total households is generated by slightly lower than projected growth in the elderly population.

4.39 This further has the effect of reducing formation rates where there are fewer very elderly households generally assumed to be living alone. This is offset by an increase in younger households, with these principally living as couples. This indicates that other characteristics of household formation – such as multi-adult households and adult children living with older parents – that would prevent household reference people being captured in estimates for younger age groups have not occurred at levels differing significantly with the 2014-based projections. This is shown in Table 12 below, noting also that the Coronavirus pandemic is likely to have impacted most significantly on housing choices for younger age groups.

Table 12 Difference in Households and Household Population versus 2014-based Projections – Chorley and South Ribble (2021)

Census 2021 Difference vs HH-14 Households	Total	Aged 24 years and under	Aged 25 to 34 years	Aged 35 to 49 years	Aged 50 to 64 years	Aged 65 years and over
Total	-648	-397	-315	629	1839	-2404
Living in a couple	1072	-171	411	735	1265	-1168
Single	-283	-188	-565	-34	631	-127
Previously Married	-1437	-38	-161	-72	-57	-1109

Census 2021 Difference vs HH-14 Household Population	Total	Aged 24 years and under	Aged 25 to 34 years	Aged 35 to 49 years	Aged 50 to 64 years	Aged 65 years and over
Total	-1,583	-2,436	-409	1,154	753	-645
Living in a couple	1,019	-442	27	1,182	233	19
Single	-1,663	-1,918	-201	169	425	-138
Previously Married	-939	-76	-235	-197	95	-526

Source: Census 2021, MHCLG; SPRU Analysis

4.40 Finally overcrowding has also not significantly worsened in Central Lancashire when measured by the rooms standard and ethnic group. Within England the number of persons with an occupancy rating of -1 is around 11% of the overall total household population,

increased from 8% (+1.4 million people) since 2011. Within Central Lancashire rates are lower, as shown below and even accounting for the more diverse population characteristics in Preston. Rates of overcrowding have also seen less percentage increase since 2011 compared to wider averages.

Table 13 Comparison of Overcrowding – Persons by Ethnic Group (Rooms Standard)

Occupancy Rating -1 or less (rooms)	England		North West		Central Lancashire	
	2021		2021		2021	
	Persons	% of Ethnic Group	Persons	% of Ethnic Group	Persons	% of Ethnic Group
White: Total	3,357,768	7%	395,040	6%	17216	5%
Mixed or Multiple Ethnic Groups	279,233	17%	21,539	13%	830	11%
Asian, Asian British or Asian Welsh	1,351,121	25%	173,725	29%	7,106	21%
Black, Black British, Black Welsh, Caribbean or African	717,320	31%	46,100	27%	599	14%
Other ethnic group	319,909	26%	25,330	23%	692	20%
Total	**6,025,351**	**10.9%**	**661,734**	**9.1%**	**26,443**	**7.2%**

Source: Census 2021; SPRU Analysis

4.41 A range of indicators therefore continue to support use of the unadjusted 2014-based household formation rates for scenario testing.

c) Scenario Definition

4.42 Using the POPGROUP model, nine scenarios have been configured, using the latest demographic information. Analysis and presentation of these scenarios as part of this Housing Study Update responds to the requirements of national policy and guidance in circumstances where it would be appropriate to explore alternatives to the Standard Method. The justification for this is provided by the contents of this report, read as a whole, and specifically with reference to the background for plan-making outlined in the Introduction to this report.

4.43 The range of scenarios identified reflects Planning Practice Guidance which states that Councils are required to use evidence to demonstrate that any alternative approach to the Standard Method adequately reflects current and future demographic trends and market signals (ID: 2a-015-20190220). The scenarios identified also allow further exploration of the qualification of the Standard Method provided by the PPG (ID: 2a-010-20201216) where it is recognised that the output of the calculation will not reflect changing economic circumstances or other factors that may impact upon demographic behaviour. The range of scenarios tested in this Housing Study Update also allow exploration of the relationship between levels of housing delivery and any difference compared to the Standard Method calculation.

4.44 The benchmark scenario is linked to the government's Standard Method **Local Housing Need (LHN)** figures for each of the authorities, developed using a 'dwelling-led' configuration of the POPGROUP model.

4.45 In a dwelling-led scenario, population growth is linked to the annual increase in the number of dwellings. The relationship between dwelling growth and population growth is determined by three key assumptions: a household to dwelling conversion factor (dwelling vacancy rate), communal population assumptions (accounting for the population not living in households, e.g., those living in student halls of residence or residential care homes), and household

headship rates. Internal (domestic) migration is used to balance between population and dwelling growth; if the resident population is insufficient in size and structure to populate the additional dwellings, a higher level of net in-migration will result. Further detail on the assumptions used to inform each of the scenarios is outlined in **Appendix 1**.

4.46 Using the latest MYE components of change data (to 2021/22), four 'alternative trend' scenarios have been developed, using different migration histories from which to calibrate future growth assumptions. These **'PG' scenarios** are based on a continuation of short-term (5-year), medium-term (10 years) and long-term (21-year) migration histories. The final PG-5yr-10yr scenario is based on a continuation of a 5-year internal migration trend combined with a 10-year international migration trend. In each scenario, the 'unattributable population change' (UPC) adjustment is included within the historical international migration profile, as this is the component of change with which UPC is most likely associated.

4.47 Drawing on the jobs forecast data, produced by Cambridge Econometrics for the Lancashire LEP, an **'Employment-led' scenario** has been configured. In an employment led scenario, the annual change in the level of employment is used to derive a labour force and population growth profile, using key assumptions relating to economic activity rates, unemployment and commuting[6]. Internal (domestic) migration is used to balance between population and employment growth; if the resident population is insufficient in size and structure to support the defined employment growth, a higher level of net in-migration will result. An additional sensitivity scenario has been produced, in which the commuting ratio assumptions of the Employment-led scenarios have been adjusted on the assumption that future jobs growth is provided for under a **1:1 commuting ratio** (as described in section 4(b)(ii) above).

4.48 Detail on the assumptions used to develop these scenarios are outlined in **Appendix 1**. A summary of the scenario definitions in provided below in Table 14. Note that all scenarios have been run to a 2041 forecast horizon.

[6] As POPGROUP uses a people-based measure of employment, to account for those individuals with more than one job, a 3.5% 'double-jobbing' adjustment has been applied to the jobs forecast, derived from APS data.

Table 14 Central Lancashire Scenario Definition for Housing Study Update

SNPP-2018	Replicates the government's 2018-based *principal* subnational population projection (SNPP), using historical population evidence up to its 2018 base year and replicating the official projection thereafter.
SNPP-2014	Replicates the government's 2014-based SNPP, using historical population evidence up to its 2014 base year and replicating the official projection thereafter.
PG-5yr	Uses a 2022 base year, with migration assumptions calibrated from a 5-year historical period (2017/18–2021/22). The UPC adjustment is included within the international migration component of the MYEs (2001/02–2020/21). Fertility and mortality assumptions are derived from a 5-year historical period.
PG-10yr	Uses a 2022 base year, with migration assumptions calibrated from a 5-year historical period (2012/13–2021/22). The UPC adjustment is included within the international migration component of the MYEs (2001/02–2020/21). Fertility and mortality assumptions are derived from a 5-year historical period.
PG-5yr-10yr	Uses a 2022 base year, with internal migration assumptions calibrated from a 5-year historical period (2017/18–2021/22) and international migration from a 10-year period (2012/13–2021/22). The UPC adjustment is included within the international migration component of the MYEs (2001/02–2020/21). Fertility and mortality assumptions are derived from a 5-year historical period.
PG-Long-Term	Uses a 2022 base year, with migration assumptions calibrated from a 21-year historical period (2001/02–2021/22). The UPC adjustment is included within the international migration component of the MYEs (2001/02–2020/21). Fertility and mortality assumptions are derived from a 5-year historical period.
Employment-led	Population growth is driven by growth in the level of employment, derived from the latest Central Lancashire LEP jobs forecasts, adjusted to account for double jobbing (from ONS APS). Employment growth targets are applied from the 2022 MYE onwards. Migration, fertility, and mortality assumptions are consistent with the PG-10yr scenario.
Employment-led 1-to1	Assumptions aligned with the Employment-led scenario but with an alternative commuting ratio profile applied. From the scenario base year, the 2011 Census commuting ratio has been adjusted so that future jobs growth is provided for under a 1:1 commuting ratio.
Dwelling-led LHN	Population growth is driven by growth in the number of dwellings, as defined by the Standard Method LHN figures for each authority (Chorley = 506, Preston = 269, South Ribble = 169). Dwelling growth targets are applied from the 2022 MYE onwards. Migration, fertility, and mortality assumptions are consistent with the PG-10yr scenario.

d) Scenario Outputs

4.49 Except where official published subnational population projections (SNPPs) retain unadjusted totals for the projected population, the relevant scenarios from the Housing Study 2022 have been re-based to reflect information from the Census 2021 and in all cases the scenario assumptions apply re-scaled household headship rates corresponding to the Census 2021 household total. The exception to this is where the 2014-based subnational household projections are illustrated in isolation as the 'as published' totals.

4.50 The starting point for the scenarios in 2023 is not identical due to differences in the scenario assumptions applied from 2021 onwards. Where applicable to generating the 2023 starting point for comparison for each scenario the most recent 2022 Mid-Year Population Estimates are utilised as a base except where unadjusted population trends from published subnational population projections are retained. Relevant assumptions for projected trends by component of change (births, deaths, migration) are also applied from 2022 onwards together with relevant dwelling-led or employment-led constraints.

4.51 For the dwelling-led Local Housing Need scenario this has the effect that the constrained dwelling figure generated by the Standard Method and applied from 2022 onwards results in

lower population and household growth than has been observed recently or at levels generated by applying projections based on past trends. The starting point for dwelling-led LHN comparisons from 2023-2041 is therefore likely to be lower than will be recorded in official estimates in future.

4.52 The 2014-based subnational household projections (and the 2014-based subnational population projections that inform them) provide the starting point to derive the dwelling-led Local Housing Need scenario presented as part of this Study due to their application at step 1 of the Standard Method. However, direct comparisons between the 2014-based projections and outputs of the dwelling-led LHN scenario are not appropriate on a like-for-like basis.

4.53 The dwelling-led LHN scenario evaluates the demographic impact and consequences for change in households if that equivalent dwelling figure was delivered at this moment in time from a 2022 base with the most recently available information regarding demographic trends and other relevant inputs including dwelling vacancy.

4.54 This is not the same as applying the step 2 affordability adjustment under the Standard Method to the assumptions specific to the 2014-based projections. For similar reasons comparisons can be illustrated between the published outputs from the 2014-based household projections and other scenarios presented by this Study for the period 2023 to 2039 (the final year for the 2014-baed series as published) for information purposes. However, there is a significant amount of information subsequent to that used to generate the 2014-based assumptions therein to indicate that these inputs are unlikely to correspond to current demographic trends.

i) *Scenario Outputs for Central Lancashire*

4.55 A summary of the outputs for each scenario for Central Lancashire as a whole is presented in Table 15 below for the period 2023 to 2041. The differences in outputs between the scenarios reflect the projected demographic change and consequences for household formation and equivalent dwelling numbers under the different assumptions employed, as outlined above and in **Appendix 1**.

4.56 The lowest dwelling growth outcome is provided by the **SNPP-2014 scenario** at 705 dwellings per annum (dpa). This is followed by the current **dwelling-led LHN benchmark scenario** which results in a dwelling need of 944 dpa and compares with a previous LHN figure of 988 dpa (Housing Study 2022).

4.57 The alternative migration trend scenarios range from between 899 dpa under the **PG-Long-Term scenario** to 1,313 dpa under the **PG-5yr scenario**, which represents the highest growth outcome of all nine scenarios.

4.58 For Central Lancashire as a whole, household growth outcomes are generally highest under the employment-led scenarios, which is a reflection of the higher levels of employment growth driving higher levels of net migration and changes to the population age structure than observed solely within demographic trend-based projections. Both employment-led scenarios result in dwelling growth outcomes that are higher than LHN and the scenarios based on the official projections series (SNPP-2014 and SNPP-2018). The main **Employment-led scenario** has a dwelling growth output of 1,275 dpa and the **Employment-led (CR 1-to-1) scenario** which incorporates the 1:1 commuting ratio sensitivity adjustment has a slightly lower output of 1,237 dpa.

Table 15 Central Lancashire - Scenario Outputs, 2023–2041

Scenario	Change 2023 - 2041				Average per year		
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Employment
PG-5yr	35,715	9.3%	23,891	14.7%	2,107	1,313	1,080
Employment-led	34,575	9.0%	23,275	14.4%	2,061	1,275	894
Employment-led (CR 1-to-1)	33,088	8.6%	22,622	14.0%	1,978	1,237	894
PG-5yr-10yr	30,728	8.0%	22,139	13.6%	1,860	1,212	888
PG-10yr	23,266	6.1%	18,609	11.5%	1,467	1,006	624
SNPP-2018	21,630	5.7%	15,815	10.0%	1,077	847	484
PG-Long-Term	20,961	5.5%	16,759	10.3%	1,288	899	618
Dwelling-led LHN	20,863	5.4%	17,543	10.8%	1,376	944	470
SNPP-2014	17,275	4.6%	13,353	8.5%	383	705	167

Source: Edge Analytics

ii) *Scenario Outputs by Authority*

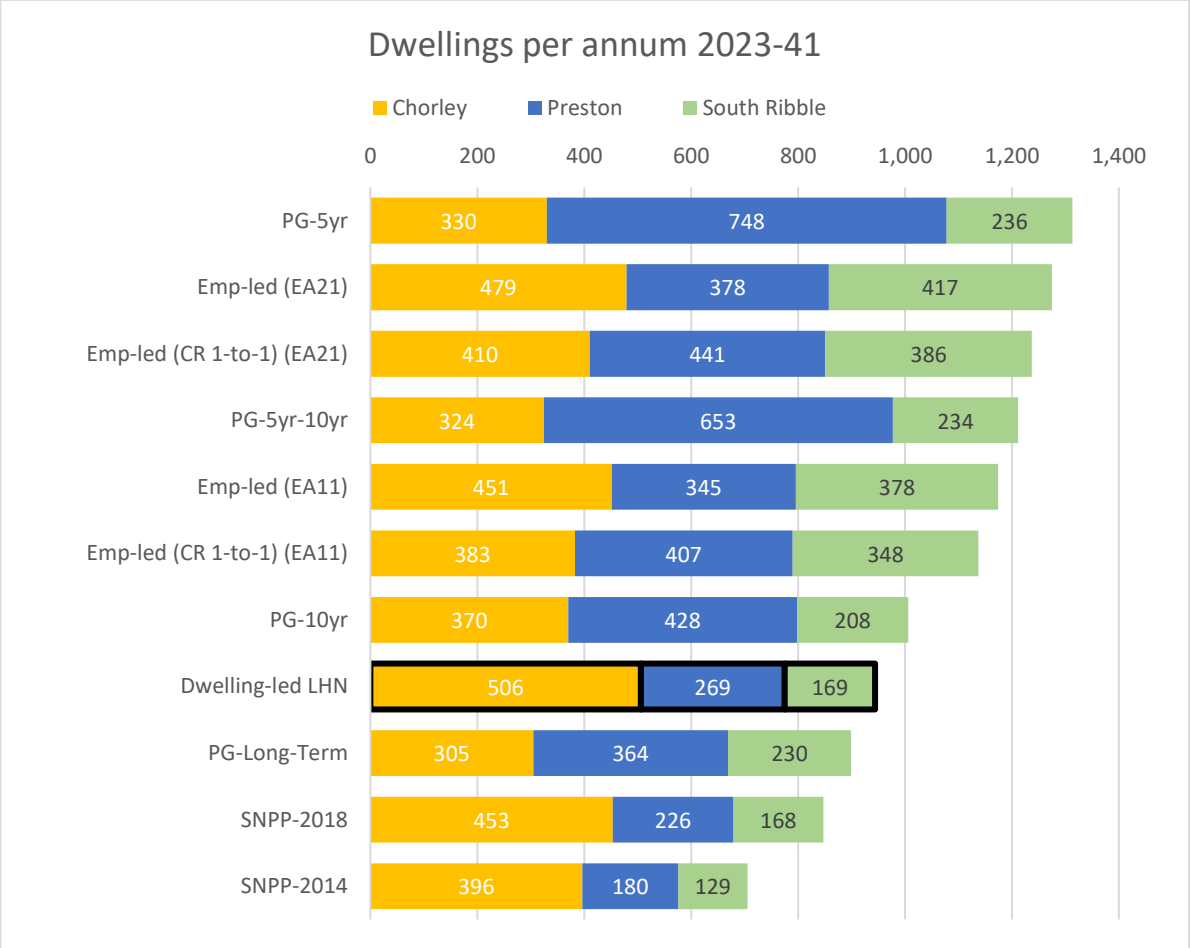
4.59 When viewed at a local authority level, the pattern of annual equivalent dwelling change under each of the scenarios is generally more heavily weighted towards Preston and Chorley. This is due to a combination of factors, which do not impact upon each scenario evenly, but can broadly be attributed to projections of demographic change using both short-term and long-term trends being greater in both authorities than in South Ribble and differences in forecast labour demand relative to the effects of an ageing population impacting on net growth in households and projected trends in labour supply. The effect of the latter points in terms of labour demand and labour supply (based on demographics of the population) disproportionately affects Chorley in terms of the equivalent household and dwelling growth associated with providing for a given level of employment growth. In practice this means that very similar annual forecast changes in employment in Chorley and South Ribble translate to a larger number of equivalent dwellings per annum in the former.

4.60 As shown below in Table 16 and Figure 7, Preston has the highest identified housing need output of all three authorities under the **PG-5yr**, **Employment-led (CR 1-to1)**, **PG-5yr-10yr**, **PG-10yr** and **PG-Long-Term** scenarios. The identified housing need output for Chorley is highest under the remaining four scenarios (**Employment-led**, **SNPP-2018, Dwelling-led LHN** and **SNPP-2014**). This is a similar pattern to the output of the original Housing Study 2022.

Table 16 Summary of Scenario Outputs by Central Lancashire Authority

Scenario	Dwellings per year		
	Chorley	Preston	South Ribble
PG-5yr	330	748	236
Employment-led	479	378	417
Employment-led (CR 1-to-1)	410	441	386
PG-5yr-10yr	324	653	234
PG-10yr	370	428	208
SNPP-2018	453	226	168
PG-Long-Term	305	364	230
Dwelling-led LHN	506	269	169
SNPP-2014	396	180	129

Figure 7 Summary of Scenario Outputs by Central Lancashire Authority



iii) *Comparisons of Alternative Trend-Based Projections*

4.61 Looking more closely at the comparison between the alternative migration trend scenario outputs by local authority, as shown in Table 17 below, illustrates the volatility of trends in population change. A comparison with the Housing Study 2022, which is required to reflect release of the Census 2021 and takes account of revisions to official Mid-Year Population

Estimates together with capturing more recent factors affecting population change since its publication but in principle reflects a relatively short period of time, illustrates the difficulty of relying on these trends only to inform alternative assessments of housing need.

4.62 Under these alternative migration trend scenarios within this Update the shorter-term 5 year trend (**PG-5Y**) shows a particularly high housing need output for Preston compared with the outputs of the Housing Study 2022 (equivalent to a 74% increase in annual dwelling change). This compares to +22% in South Ribble and -31% in Chorley. To a lesser extent the fact that this significant difference in outcomes from short-term trend-based projections also forms part of the inputs to all other PG scenarios means that these affect the comparison of all outputs considered relative to the 2022 Housing Study. While the output of the **PG-5Yr** scenario in this update compares more closely with employment-led outputs than in the 2022 Housing Study when assessing scenarios based on the sum of projections for the constituent Central Lancashire authorities it is not reasonable to conclude that demographic trend-based projections would in themselves provide a justified alternative measure of housing need.

4.63 Within this Update it is now the case that the dwelling need figure is also highest for Preston, followed by Chorley and then South Ribble for each 'PG' scenario. This was not the case for outputs from the same scenario assumptions in the 2022 Study. An important part of the reason for changes in the comparison of PG scenarios is that for Chorley the dwelling need figure for each 'PG' scenario in this Housing Study Update is lower than the equivalent scenario outputs presented in the Housing Study 2022. This is principally driven by the much lower output for annual dwelling change under the PG-5Y scenario.

4.64 Conclusions on the reliability of longer-term trends (**PG-10Y** and **PG-Long-Term**) to be in principle more robust and offset the volatility of short-term effects must be balanced against points that to a greater or lesser extent they may still be heavily affected by other factors affecting demographic change (including the timing and overall supply of housing). A further scenario has been developed (**PG-5yr-10yr**) which is based on a continuation of a 5-year internal migration trend combined with a 10-year international migration trend. This is considered to be a more realistic assumption of projected demographic trends particularly for Preston taking into account short-term effects on official estimates of international migration.

4.65 In assessing the outputs of longer-term trend-based scenarios there remains a risk that these will be disproportionately affected by short-term trends (and short-term effects associated with levels of housing delivery) in Preston. Across both Chorley and South Ribble scenario outcomes also indicate that population and household growth based on market signals would need to exceed either short-term or long-term trends.

Table 17 Alternative Migration Trend ('PG') Scenario Outputs Summary (Dwellings Per Year)

	PG-5Y		PG-5yr-10yr		PG-10Y		PG-Long-Term	
	2022 Study	This Study	2022 Study	This Study	2022 Study	This Study	2022 Study	This Study
Chorley	477	330	N/A	324	445	370	350	305
Preston	431	748	N/A	653	329	428	429	364
South Ribble	194	236	N/A	234	171	208	240	230
Total	1102	1314	N/A	1211	945	1006	1019	899

Source: Edge Analytics

5.0 JUSTIFICATION FOR ALTERNATIVE APPROACHES TO ASSESSING HOUSING NEED IN CENTRAL LANCASHIRE

a) Introduction

5.1 The analysis and presentation of scenario outputs set out in preceding sections demonstrates that a range of indicators continue to comprehensively support the conclusion that housing need within Central Lancashire exceeds the result of the Government's Standard Method. The scope to evaluate those scenarios that represent justified alternatives to the calculation of local housing need using the Standard Method is likewise substantially similar to that presented in the 2022 Housing Study.

5.2 The justification for selecting any alternative scenario must be considered accounting for the review undertaken to ensure data for relevant inputs including those related to demographic and household change, economic activity and commuting assumptions are sufficiently robust and up-to-date. Having undertaken this exercise, the outputs from the **Employment-led (CR 1-to-1) scenario** prepared for this Housing Study Update provide the benchmark to compare alternative scenarios. This scenario corresponds to an equivalent 1,237 dwellings per annum.

5.3 The parameters of this scenario are most similar (and very closely aligned) to those that supported the recommended alternative assessment of housing need equivalent to 1,344 dpa provided by the Housing Study 2022. There is no reason in principle why the justification for this benchmark as the recommendation for plan-making under national policy and guidance should not carry forward directly into this Update.

5.4 This section considers whether there is any change in local circumstances or assumptions that inform the assessment of alternatives to the Standard Method in Central Lancashire that would warrant a review of the justification for scenario selection and the overall recommendations of the Housing Study Update.

5.5 This should be viewed in the context of the overall scope for the Housing Study Update and the preceding analysis. It is reasonable that the scope for this Update to reach an alternative recommendation is relatively narrower as part of this exercise.

5.6 This Update reinforces that exceptional circumstances have not been identified that would support the exploration of any scenario that would result in a lower figure than the result of the Standard Method when considered on the basis of the sum of individual figures for the constituent local planning authorities in Central Lancashire. This conclusion is consistent with an assessment of need covering more than one area in accordance with the PPG (ID: 2a-013-20241212).

5.7 Realistic assumptions for demographic growth, and resultant trends in household formation and composition considered in accordance with the 2014-based household projections, strongly indicate projected change greater than that provided by the starting point for the Standard Method calculation. However, the recommendations of the 2022 Housing Study also reflect, in accordance with the PPG, why trend-based projections should not be considered in isolation and do not form part of a standalone recommendation on alternatives to the Standard Method.

b) Review of Reasonable Alternative Scenarios

5.8 Trend-based projections have been historically volatile in Central Lancashire and are unlikely to accurately capture all circumstances to be considered in assessing actual housing need. The express reference to factors including growth ambitions related to economic development in Paragraph 67 of the December 2023 version of the NPPF reinforces the selection of scenarios and recommendations of the original Housing Study 2022. National

policy currently places greater weight on considerations extending beyond trend-based projections.

5.9 The outputs of trend-based scenarios produced for the Housing Study Update should therefore be evaluated in this context. In circumstances where these scenarios demonstrate greater volatility either in terms of the total sum for Central Lancashire or the proportional split by constituent authority this would further indicate that they may be attached less weight in influencing the overall recommendations of the Study.

5.10 Reflecting the narrower scope to consider trend-based projections as part of the Housing Study Update the following bullets correspond to housing need scenarios included or excluded as reasonable alternative policy options relative to the Housing Study 2022:

Included:

- Standard Method (LHN) Baseline
- POPGROUP 5-Year with 10-year International Migration Trend
- Employment-led Projection (2011 Commuting Ratios held constant)
- Employment-led Projection (CR2011 with 1:1 commuting for new jobs)

Excluded

- POPGROUP 5-Year (see Table 17 and principally reflecting the impact of recent estimates of international migration. The more recent volatility in the proportional split of housing delivery across Central Lancashire is also a factor potentially impacting upon short-term trends (see below))
- POPGROUP Long-Term (see Table 17 confirming that taking account of changes to fertility, mortality and the long-term effect of patterns of migration (and the potential effect of longer-term fluctuations in housing delivery and barriers to supply) the output of this scenario falls below the result of LHN for Central Lancashire. This scenario therefore cannot be considered a justified alternative to the Standard Method).
- Dwelling-Led Based on Average 5-Year Delivery by Constituent Central Lancashire Council

5.11 The presentation of these scenarios is summarised in Table 18 below.

Table 18 Alternative Housing Need Scenario Outcome Comparisons

Scenario	Average Annual Housing Need			Total	Proportional Split		
	Chorley	Preston	South Ribble		Chorley	Preston	South Ribble
LHN Baseline	506	269	169	944	54%	28%	18%
POPGROUP 5-Year (10yr International Migration)	324	653	234	1,212	27%	54%	19%
Employment-Led Projection (2011 Commuting Ratio)	479	378	417	1,275	38%	30%	33%
Employment-Led Projection (1:1 commuting for new jobs)	410	441	386	1,237	33%	36%	31%
Excluded							
POPGROUP 5-Year	330	748	236	1,313	25%	57%	18%
POPGROUP Long-Term	305	364	230	899	34%	41%	26%
Average net completions (last 5 years) (2019-2024)	355	1,151	526	2,032	17%	57%	26%
Average net completions (Housing Need Study 2022 Reporting)	575	712	390	1,677	34%	43%	23%

5.12 The PG-5yr-10yr scenario partly adjusts for uncertainties with the recent estimates for the international migration component of change and is therefore a preferred trend-based scenario. However, the impact of other effects, including projecting forward recent revisions to official estimates (including fertility and migration), would produce a proportional split that looks markedly different to the sum of totals for the constituent Central Lancashire authorities over longer-term trend-based scenarios.

5.13 In terms of evaluating trend-based scenarios more generally, market signals suggest that a proportional split of growth more in-keeping with longer-term past trends would be likely to occur, notwithstanding that long-term demographic trends alone would not generate equivalent population and household change consistent with forecast labour demand.

5.14 The most robust evidence of commuting trends is that due to the strong economic linkages in the FEMA the realisation of labour demand as forecast within the employment-led scenario would result in a more even proportional split of housing need across Central Lancashire. This would include substantial commuting between the constituent Councils. There would be some scope to enhance levels of sustainability in terms of a greater proportion of people living closer to workplaces in Preston. Conversely short-term demographic trends appear to be below those required to satisfy forecast labour demand in Chorley and South Ribble.

5.15 For Preston the short-term demographic trend is one that has been influenced by other factors including pent-up housing supply and international migration and is not necessarily a trend that can be robustly projected over the plan period. The proportional split for trend-

based scenarios considered in isolation for Preston would not therefore ensure that market signals would be met in full or in a sustainable split for the remainder of Central Lancashire based on total forecast labour demand for the Plan Area.

5.16 Volatility in average dwelling completions also reinforces this. While average net completions in Preston and South Ribble have remained relatively constant, recent short-term delivery trends in Chorley have had a negative effect on total average net completions in Central Lancashire compared to the Housing Study 2022. This should be viewed in the context of historically uneven patterns of housing delivery.

5.17 Although provision in accordance with the most recent five-year average would slightly exceed the dwelling equivalent figure for market signals under employment-led scenarios this should be viewed in the context of levels of supply in South Ribble that have been consistently below those associated with future forecasts for labour demand locally. Average dwelling completions have also recently fallen below forecast demand for employment growth in Chorley.

5.18 Recent trends in supply in Preston will not necessarily be sustained in the longer-term and include short-term impacts of delivery that reflect features such as higher vacancy rates and levels of flatted development. Recorded levels of delivery do not in isolation necessarily correspond to supporting a more sustainable proportional split of homes to accommodate the expected pattern of economic development across Central Lancashire.

c) Justification for Recommended Employment-Led Scenario

i) *Overview*

5.19 Based on this evaluation of updated scenarios the recommended (or preferred) option therefore remains the **Employment-led CE (CR 2011 1-to-1) projection**. The justification for this is set out below.

5.20 At a total of 1,237 dpa, the housing need presented in this scenario is higher than the LHN baseline scenario of 944 dpa but is better aligned with past levels of total housing delivery and forecast levels of employment growth, and as such accords with appropriate circumstances set out in PPG for justifying an alternative assessment of housing need that exceeds the result of the Standard Method.

5.21 While the demographic effects of this scenario are different to long-term projected trends the alternative realistic assumptions for demographic growth provided as part of employment-led scenarios are similar to longer-term projected trends when comparing the totals for each constituent Council as a proportion of the Central Lancashire total.

5.22 Whilst the overall need identified under this scenario is slightly lower than recent dwelling completion rates, it more closely aligns with average recent completions figures than any of the other tested scenarios. It also continues to align closely with the existing Core Strategy requirement for each authority that was previously tested and found sound at examination.

5.23 A number of assumptions and adjustments have been applied in order to derive the housing need figures set out in this scenario. Most notably, this scenario assumes that future jobs growth is provided for under a **1:1 commuting ratio** i.e., for every new job created in a district there is a worker available to fill it. In practice, this assumes that each Central Lancashire authority provides sufficient growth in the resident labour force (adjusted for unemployment rates) so an increase in the number of jobs is matched on a 1:1 basis by the increase in resident workers in each constituent area.

5.24 The NPPF2023 also states that plans should *"provide a positive vision for the future of each area"* (paragraph 15) and should *"be prepared positively, in a way that is aspirational but deliverable"* (paragraph 16) and should make sufficient provision for both housing (including

affordable housing) and employment (paragraph 20(a)).

5.25 This scenario therefore assumes no change in absolute levels of in-commuting or out-commuting alongside meeting the forecast additional jobs growth (which otherwise occurs when commuting ratios are held constant).

5.26 In the **Employment-led CE (CR 2011 1-to-1)** scenario, it is assumed that for every new 'job' created in the relevant area, there is a resident worker available to fill it i.e., each Central Lancashire authority provides sufficient growth in its resident workforce so that the total growth in employed people is matched on a one-to-one basis by growth in workers resident in each authority area. The 1:1 scenario assumes that additional homes will be needed in the districts where additional jobs are created. In other words, the scenario assumes that all future employees will either need housing in the district where they work or already live there (i.e. there will be a sufficient resident workforce to support the jobs growth forecast by CE).

5.27 It is apparent from the analysis that this has not been achieved as part of recent delivery trends and that the objective would not be best addressed by planning for the result of the Standard Method (including its provision of an uplift at step 3 in accordance with the previous PPG). Reliance on the Standard Method outputs has the potential to make travel patterns even less sustainable by increasing inter-district commuting.

5.28 Testing of the 1:1 scenario enables consideration of changing economic circumstances (based on the relevant Cambridge Econometrics employment forecast) and the potential impact of these forecasts in the context of demographic trends (including those resulting partly from recent levels of housing delivery) in a way that cannot be achieved using inputs to the Standard Method or by holding commuting ratios constant in all years of the projection. The 1:1 projection will assist in redressing the commuting balance between the three authorities and will not rely on any absolute increase in additional in-commuting to Central Lancashire from elsewhere. This is consistent with the PPG that underpinned the NPPF2023 for the purposes of considering alternatives to the Standard Method (ID: 2a-010-20201216).

5.29 This is considered more consistent with the PPG under which the Plan will be examined, and the underlying objectives of the calculation of the Standard Method, which includes in the justification for its affordability adjustment increasing opportunities for people to live near where they work (ID: 2a-006-20190220).

ii) *Review of Assumptions Applicable to Updated Employment-Led Scenarios*

5.30 The review of scenario assumptions for the purposes of the Housing Study Update reinforces the justification for this scenario using the most robust data available taken from the 2011 Census. It remains appropriate that this scenario reduces net additional in-commuting to Preston and net out-commuting from Chorley, leading to a change in the relative proportions of housing need. For Chorley and Preston there is no reliable data to indicate that commuting ratios have changed substantially since 2011 and it remains the case that any increase in absolute number of out-commuters from Chorley may partly be a function of higher rates of housing deliver during the previous decade.

5.31 For South Ribble the recommended scenario reflets that the authority is a generator of net out-commuters based on 2011 Census data as there is limited evidence that this trend has reversed in the last decade. Therefore, even with lower levels of housing delivery this would indicate an increase in absolute out-commuters principally to Preston. The 1:1 scenario corresponds to an increase in housing need to support forecast demand for economic development and it is reasonable to conclude that the additional labour supply associated with this would facilitate an increase in the proportion of people living and working locally.

5.32 The Housing Study Update has utilised the most recent Cambridge Econometrics forecast and has applied Economic Activity Rates based on the 2021 Census, which reinforce the

robustness of the market signals component for alternatives to the Standard Method and justification for the 1:1 commuting ratio. Specifically, the more conservative economic activity rates (thus equating to greater equivalent changes in population and households for a given level of employment growth) mean that the overall impact of holding commuting ratios constant and the absolute numbers of in-commuters or out-commuters increasing would be greater.

5.33 In terms of forecast employment growth this is expected to be achieved relatively evenly across Central Lancashire with employment growth of 305 per annum in Chorley versus 295 per annum in Preston and South Ribble (see Table 22 below).

iii) *Effects of the 1:1 Commuting Ratio for Future Employment Growth*

5.34 Updated net commuting flows to/from each authority in 2011 and modelled in 2023 are shown in Table 19. These flows are then converted to commuting ratios. A commuting ratio larger than 1 indicates a net out-commute, and less than 1 a net in-commute. Reflecting population and employment growth since 2011, application of a constant commuting ratio (which appears justified by the latest evidence) would indicate an absolute increase in net out-commuters of 1,578 in Chorley and 725 in South Ribble, offset by 1,396 further in-commuters to Preston making up part of the growth in the workplace-based population.

Table 19 Summary of Net Commuting Flows and Commuting Ratios

LPA		2011	2023 (using 2011 ratio)	2041 (using 2011 ratio)	2041 (using 1:1 ratio for future jobs)
Chorley	**Net Flow**	-12,042	-13,015	-14,593	-13,015
	Ratio	1.29	1.29	1.29	1.26
Preston	**Net Flow**	23,008	25,081	26,477	25,081
	Ratio	0.74	0.74	0.74	0.75
South Ribble	**Net Flow**	-6,279	-6,713	-7,438	-6,713
	Ratio	1.14	1.14	1.14	1.12

Source: ONS; Cambridge Econometrics; Annual Population Survey; SPRU Analysis

5.35 The net effect of these changes would equate to only absolute net additional outflows of 907 persons, reflecting the high degree of self-containment in Central Lancashire. However, this would nevertheless reflect circumstances where the distribution of homes has not necessarily been well-aligned to employment growth particularly based on the sum of changes by constituent Council.

5.36 Comparing with the range of scenarios summarised in Table 18, planning to hold the 2011 Commuting Ratios constant would negate the differences in the jobs forecast, with Chorley producing the highest total for housing need (478dpa). This partly reflects that scenario generating an absolute increase in out-commuters that would be expected to support employment growth elsewhere.

5.37 For Preston, use of constant 2011 Commuting Ratios would yield housing need only slightly higher than the Long-Term scenario but substantially below the Five-Year demographic trend (378dpa versus 364dpa or 748dpa). This illustrates the volatility of trend-based projections. However, use of the ratio to generate an absolute increase of in-commuters taking up part of the net additional employment growth would depart from recent past trends (including those associated with the recent upturn in delivery that is supporting increased population growth) at the expense of reinforcing potentially unsustainable commuting patterns.

5.38 Use of the 1:1 commuting ratio lowers the commuting ratio for Chorley and South Ribble over the forecast period, compared to a slight increase in Preston. This results in a higher dwelling need in Preston (441 dpa), with the remainder of the need split more evenly between Chorley and South Ribble (410 and 386 dpa respectively).

5.39 The 1:1 scenario therefore assumes no change in absolute levels of in-commuting or out-commuting alongside meeting the forecast additional jobs growth (which otherwise occurs when commuting ratios are held constant). This scenario reduces net additional in-commuting to Preston and net out-commuting from Chorley, leading to a change in the relative proportions of housing need at least partly attributable to previous trends in housing delivery between the Central Lancashire authorities (i.e., out-commuting from Chorley has increased since 2011 due to fewer new homes provided close to employment growth elsewhere in Central Lancashire). South Ribble does not experience any increase in in-commuting to meet baseline employment growth, which necessitates a significant uplift on previous delivery levels.

5.40 The 1:1 commuting ratio adjustments that have been applied to this scenario are considered to be preferable to the employment-led projection that uses the constant Census 2011 commuting ratio (see comparison of outputs in Table 19 above) for the reason that this assumes a more sustainable pattern of commuting by assuming that each new job is filled by someone living within the same authority, rather than exacerbating existing patterns of commuting in which more people commute out of Chorley or South Ribble and into Preston for work.

5.41 Under this recommended scenario, the need for housing is therefore assumed to be met in the same district as where the jobs are expected to be located.

iv) *Provision for Sensitivity and Flexibility within Employment-Led Scenarios*

5.42 The employment-led scenarios prepared as part of this Housing Study Update incorporate a range of updated information relative to the Housing Study 2022. While forecasts for labour demand in Central Lancashire has been relatively consistent over this period the wider context reflects continued economic uncertainty. Inflationary pressures, the continued effects of Brexit and Coronavirus and global events including the Russia-Ukraine war have generally imposed downward pressure on growth. For the purposes of future jobs growth forecasts constraints upon supply chains, labour market participation, unemployment and labour supply may translate into a weaker longer-term outlook that may not necessarily be reflective of future changes.

5.43 These constraints do not appear to have disproportionately affected forecast growth in Central Lancashire. For the purposes of this Update and the Council's separately prepared evidence base to assess the need and supply for employment land the baseline Cambridge Econometrics forecasts provided by the Local Enterprise Partnership are considered a robust starting point. Given the similarity of compound rates of employment growth to those used in the Housing Study 2022 and noting that the baseline forecast reflects a positive outlook relative to past trends, this is considered to be appropriate in terms of reflecting the market signals component of alternatives to the Standard Method.

5.44 This Housing Study Update is also consistent with the same forecasts applied to labour demand scenarios in the Council's evidence base for economic development – The Central Lancashire Employment Land Study – Land Supply and OAN Update 2024 (BEGroup, June 2024). The forecasts are summarised in more detail at paragraphs 3.18 to 3.22 of that document. Paragraph 3.8 of the BEGroup Report notes:

"The [labour demand] methods discussed above are 'Policy Off' in that they make no allowance for any major public sector programmes which might generate jobs above the baseline. The 2017 and 2019 Central Lancashire Employment Land Studies incorporated

'Policy On' Scenarios considering the extra jobs estimated to be created by the Samlesbury Enterprise Zone and City Deal programmes in Preston and South Ribble. However, the Enterprise Zone jobs estimates are now 13 years old and the City Deal estimates a decade old, with most City Deal projects now at least partly implemented. While there are other strategic projects proposed in Central Lancashire, at this time, most notably the development of the National Cyber Security Centre at Samlesbury, there are no clear forecasts of the jobs growth resulting from these schemes which could inform a Policy On forecast. For this reason, a Policy On Scenario, relating to any active local programme is not undertaken here"

5.45 Care needs to be taken with such scenario modelling, particularly where there may be other elements of a baseline forecast that appear more positive than reasonable prospects for change that will be experienced in practice. The labour market implications of any revision to forecasts for employment growth should also be treated with caution. While future growth may impact upon the workplace population of an area it could have a significantly different relationship with the local area in terms of commuting patterns, sources of labour and the residence-based location of future employees (for example levels of home-working). Any adjustment to forecast assumptions should therefore be considered in terms of their overall net effect on the baseline, which is substantially outside the scope of this Housing Study Update.

5.46 For employment-led housing need scenarios it is, however, relevant to evaluate the extent to which variations in labour demand could be accommodated within the dwellings equivalent figure taking into account relevant inputs. These inputs include Economic Activity Rates, commuting flows and the assumptions for components of demographic change that provide overall patterns of population growth associated with given employment levels.

5.47 The employment-led scenarios comprise the sum of separate outputs for each constituent Council both in terms of forecast job growth and derived assumptions for the dwellings equivalent figure. In practice it is extremely unlikely that the effect of any changes would be felt evenly, and it may be the case that an upward change in the forecast for jobs growth in one area could be offset by downward changes elsewhere (either in terms of employment levels or a reduction in the dwellings equivalent figure due to changes in other inputs such as increased economic activity rates).

5.48 Paragraphs 3.68 – 3.69 of the BEGroup Report also usefully draw the distinction between labour-demand scenarios (including those deployed for the employment-led scenarios in this Study) and for labour supply scenarios as following two incompatible models. In short, labour demand intends to measure the overall demand for jobs in Central Lancashire and makes some allowance for population growth. This is not the same as labour supply, which aims to indicate the maximum 'supply' of new workers which ideally need to be accommodated in the Central Lancashire economies.

5.49 In practice, therefore, the extent to which the employment-led scenario in this Housing Study Update would be responsive to future changes and any additional population growth would necessarily correspond to increases in actual labour demand is impossible to measure precisely. However, a substantial degree of flexibility and robustness has been established by utilising the more recent lower Economic Activity Rates from the Census 2021. The assumptions for the 1:1 commuting ratio also mean that while the outcomes of forecast growth may differ the starting point for dwellings equivalent figures look to establish more sustainable patterns of development in terms of the relationship between jobs and homes. This is illustrated below.

5.50 Table 20 demonstrates that if dwellings equivalent figure for the baseline forecast levels of employment growth were derived using 2011-based Economic Activity Rates the result would be a total figure for Central Lancashire of between 92% and 95% of the sum of the

constituent totals for the recommended scenario. The difference based on the 1:1 commuting ratio provides the more robust breakdown of this comparison as it reflects a match between the availability of additional workers resident in locations based on forecast levels of job creation. This better reflects the overall justification for more sustainable travel-to-work patterns and is generally consistent with the relatively even proportional split of labour demand.

5.51 It is reasonable to forecast that in circumstances where forecast employment growth might be expected to exceed the baseline scenario this would in-part be facilitated by an increase in Economic Activity Rates (i.e., above the 2021-based figures from the recommended scenario). It is also reasonable to anticipate that to facilitate additional jobs growth beyond the baseline forecast, population and household change would respond to increased evidence of labour demand such as through changes in migration flows to occupy the supply of properties available.

5.52 On this basis satisfying the recommended dwellings equivalent figure of 1,237 dpa as part of the alternative assessment of housing need could accommodate additional job creation beyond the 895 jobs per annum figure currently associated with this scenario.

Table 20 Comparison of Dwellings Equivalent Figures for 2011-based Economic Activity Rate Scenarios

	2011-based Economic Activity Rates				Recommended Scenario
	Employment-led (CR2011)		Employment-led (CR 1-to-1)		
	Dwellings	% of Recommended Scenario Dwelling Growth	Dwellings	% of Recommended Scenario Dwelling Growth	Dwellings
Central Lancs	**1,174**	95%	**1,137**	92%	**1,237**
Chorley	451	110%	383	93%	410
Preston	345	78%	407	92%	441
South Ribble	378	98%	348	90%	386

5.53 Table 21 takes forward this analysis using demographic trend-based scenarios. While the proportional split of the **PG-5yr-10yr** scenario is not a robust match for the distribution of labour demand based on market signals the total employment growth (888 versus 895 jobs per annum) are very similar for the given assumptions for population and household change. However, if the 2011-based Economic Activity Rates are applied to the same projected population and households, total employment would potentially be 115% greater than under the recommended scenario.

Table 21 Comparison of Equivalent Trend-Based Employment Growth Levels

	2011-based Economic Activity Rates		2021-based Economic Activity Rates		Recommended Scenario (2021-based EARs)
	PG-5yr-10yr				Employment-led (CR 1-to-1)
	Employment	% of Recommended Scenario Dwelling Growth	Employment	% of Recommended Scenario Dwelling Growth	Employment
Central Lancs	**1,027**	115%	**888**	99%	**894**
Chorley	185	61%	163	53%	305
Preston	728	247%	645	219%	295
South Ribble	114	39%	81	27%	295

5.54 Alternatively, if the job number for employment-led scenarios is correct but economic activity rates improve, the implications for population and dwelling change may be less than currently assumed under these derived scenarios. One outcome of dwelling provision in accordance with these scenarios in the event of lower population growth could be support for increased rates of household formation and greater turnover in the property market relative to the total of existing and newly forming households.

5.55 The implications of this could be to reduce current absolute in-commuting and out-commuting flows with greater availability in the property market relative to total labour demand. All other things being equal this would enhance the opportunities for those wishing to live close to their place of work. This could further reinforce a more sustainable relationship between jobs and homes particularly in Chorley and South Ribble. In these authorities the 1:1 commuting ratio has the effect of reducing the dwellings equivalent figure.

5.56 Given the relatively even distribution of economic activity and forecast labour demand across Central Lancashire addressing the market signals component of alternatives to the Standard Method would still generate projected population and household change in excess of past trends. A reduction in the absolute number of in-commuters to satisfy these market signals as a proportion of the labour market, which could be facilitated by an increase in Economic Activity Rates locally and a resultant dwellings equivalent figure in excess of expectations for those who would live and work locally under existing commuting dynamics, would further ensure the availability of homes is not a barrier to economic growth.

v) *Summary of Recommended Scenario*

5.57 The following table provides a breakdown of what this recommended scenario means for each authority in terms of assumed population change, household change, net migration, employment and dwellings equivalent.

Table 22 Employment-Led Housing Need Scenario Summary

Area	Change 2023 - 2041				Average per year		
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings	Employment
Central Lancashire	33,088	8.6%	22,622	14.0%	1,978	1,237	894
Chorley	11,638	9.7%	7,229	14.2%	952	410	305
Preston	10,521	6.9%	8,423	13.7%	235	441	295
South Ribble	10,930	9.7%	6,970	14.1%	791	386	295

6.0 NEXT STEPS

6.1 The recommended housing need scenario from this Housing Study Update is the **Employment-led (CR 1-to-1) scenario** which provides a total housing need figure for the whole Central Lancashire Local Plan area of 1,237 dwellings per annum. This is the sum of individual housing need figures for the constituent local planning authorities.

6.2 In accordance with the PPG under which this Plan will be examined (ID: 2a-013-20201216), once this housing need figure has been agreed it will then be for the Central Lancashire authorities to determine how much of the overall need can be accommodated within Central Lancashire, and whether each district can accommodate its own need in full, before determining the housing requirement(s) for the plan area and each individual authority area.

6.3 It is recommended that an updated assessment of the size, type, and tenure of housing needed for different groups in Central Lancashire is considered as part of this process and used to inform policy-based decisions about the amount of housing to be planned for in each district.

6.4 The final housing requirement or requirements set in the Joint Local Plan may be different to the relative proportions within the recommended dwelling need scenario, depending on the Councils' further assessment of policy-on and plan-making considerations.

6.5 The findings and recommendations of this Housing Study Update report can therefore be used to inform the preparation of planning policies including through exploring and identifying options for addressing housing need across the three authorities, and then setting out a preferred approach.

APPENDIX 1 DEMOGRAPHIC FORECASTING ASSUMPTIONS NOTE (EDGE ANALYTICS)

Central Lancashire

DEMOGRAPHIC FORECASTING: ASSUMPTIONS NOTE

June 2024

EDGE ANALYTICS

Nexus | Discovery Way | University of Leeds | Leeds | LS2 3AA
0113 819 5087 | www.edgeanalytics.co.uk

ACKNOWLEDGEMENTS

Demographic statistics used in this report have been derived from data from the Office for National Statistics licensed under the Open Government Licence v.3.0.

1 INTRODUCTION

1.1 This note sets out the forecasting inputs and assumptions used in the development of the demographic scenarios for the three Central Lancashire authorities: Chorley, Preston and South Ribble.

1.2 POPGROUP forecasting technology (see Section 2) has been used to generate a range of scenarios, providing an update to scenarios generated by Edge Analytics in 2022. Since these scenarios were produced, there have been a number of data releases which have been used in the development of the scenarios described in this document. This includes:

- Post-2021 Census rebased intercensal (2012-21) mid-year population estimates (MYE) from the Office for National Statistics (ONS), providing an updated historical time-series from which to derive future migration, fertility and mortality assumptions.
- 2021 and 2022 MYEs.
- Employment forecasts from the Lancashire Local Enterprise Partnership (LEP).
- Data from the 2021 Census, including household figures, economic activity rates, commuting flows.
- Continued data releases from the ONS Annual Population Survey, providing updated workplace-based and residence-based employment data from which to derive commuting balances, and unemployment rates.

1.3 Regarding the rebased MYEs, these were released in November 2023. MYEs are produced annually by the ONS by 'rolling-on' the previous year's population estimate (Census or MYE), taking account of recorded births and deaths and estimates of internal and international migration. Following a Census, the intercensal MYEs are reviewed and, where necessary, adjusted ('rebased') to ensure that the Census estimates are adequately aligned.

1.4 The full 21-year MYE profile is illustrated for each of the three authorities in Figure 1. In both Chorley and South Ribble, the MYE were revised downwards, suggesting that the previous MYEs had over-estimated the scale of population growth between the 2011 and 2021 Censuses. In Preston, the MYEs have been revised upwards slightly.

1.5 The differences, or 'drift', between the rolled forward (previous) MYEs and the Census are expected; ONS addresses this through its post-Census reconciliation and rebasing exercise, reviewing each 'component of change' and adjusting these accordingly. The components of change are: natural change (the balance between births and deaths), internal (domestic) migration, and international (overseas) migration. At a national level, the majority of the difference in the previous and rebased MYEs is attributed to international migration flows over the decade, which have consistently been the most challenging aspect of population change to estimate.

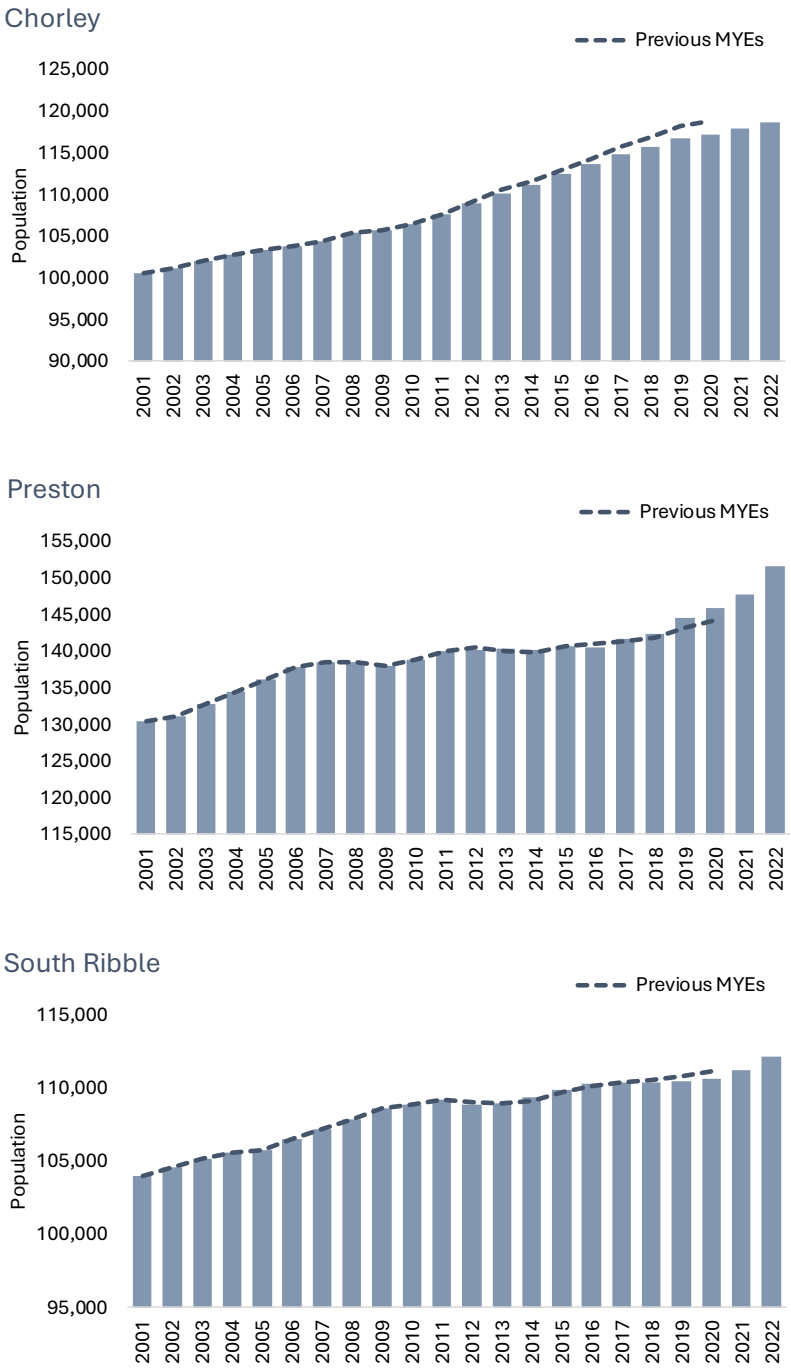


Figure 1: Central Lancashire MYE

1.6 At a regional and local authority-level, the misestimation of internal migration will also have contributed to the observed differences. Natural change is typically subject to limited revisions during the rebasing exercise as births and deaths are recorded in each year, although there have been some adjustments made to account for delayed births registrations due to the COVID-19 pandemic, and the late registration of some deaths referred to coroners.

1.7 Once all adjustments to the components of change are accounted for, there remains some residual differences between the rolled forward population estimates and the Census estimate. At a national

level, this is equivalent to -40,400 people, i.e. after applying the revised components of change, there were 40,400 more people in the rolled-forward population estimates than estimated at the Census. ONS considers it likely that this 'unattributable population change' (UPC) is associated with migration, either internal and/or international, although it does not assign it to any flow in particular.

1.8 The historical components of change (including UPC) are illustrated below in Figure 2.

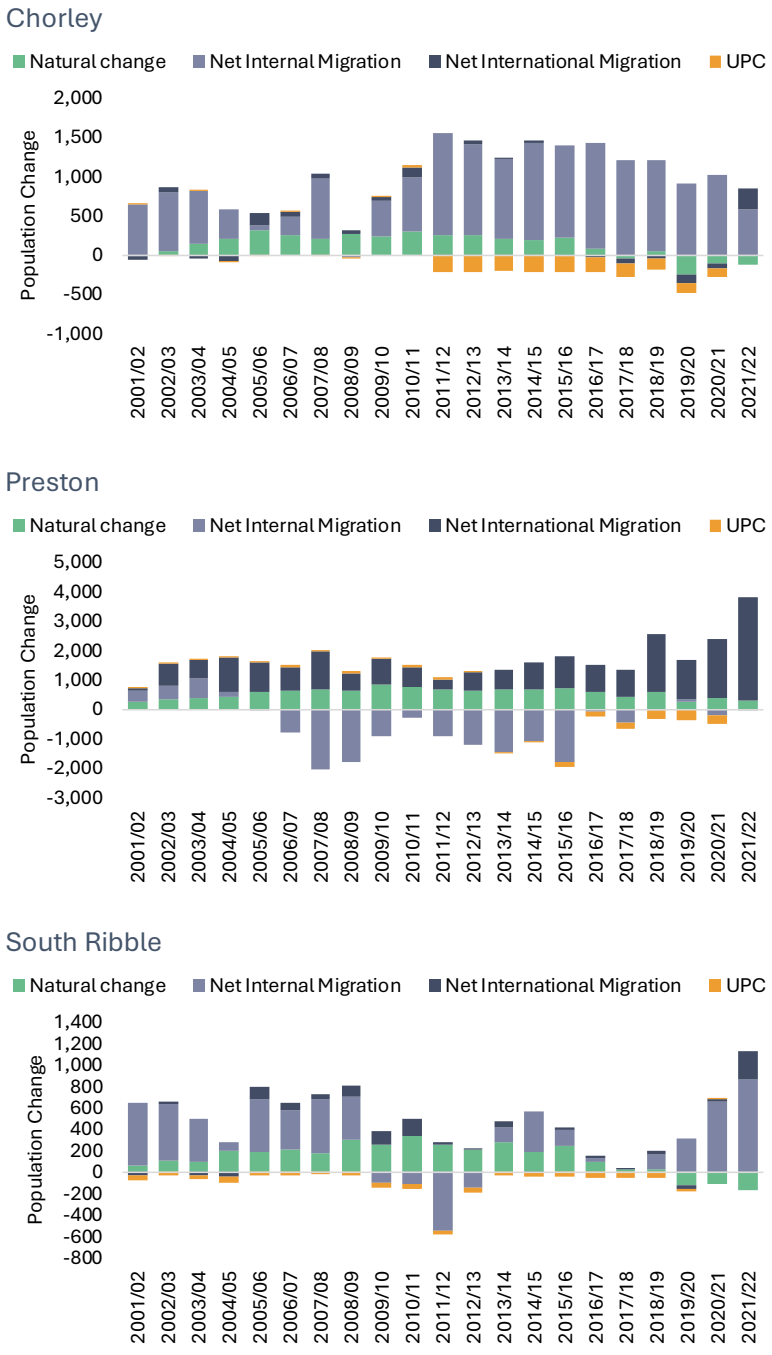


Figure 2: Central Lancashire Components of Change

2 SCENARIO DEVELOPMENT

POPGROUP

2.1 Using POPGROUP forecasting technology, a range of demographic growth scenarios have been developed for the three Central Lancashire authorities.

2.2 POPGROUP is a suite of demographic models used to derive forecasts of population, households, and labour force, for areas and social groups. The main POPGROUP model (Figure 3) is a 'cohort component' model, which enables the development of population forecasts based on births, deaths and migration inputs and assumptions.

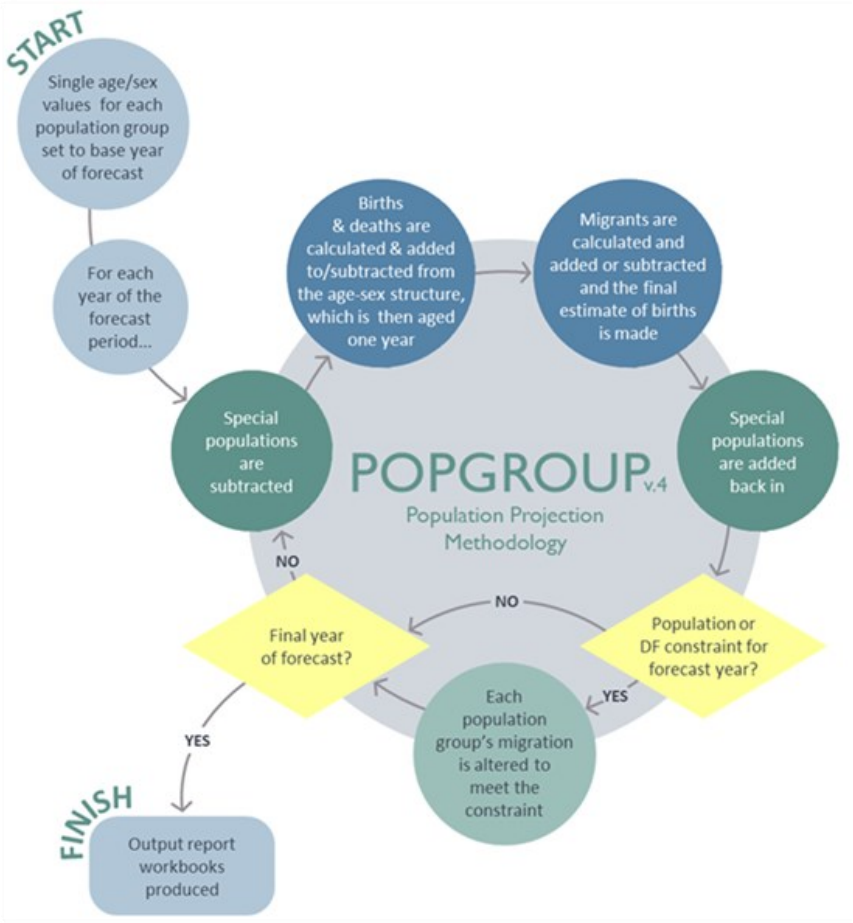
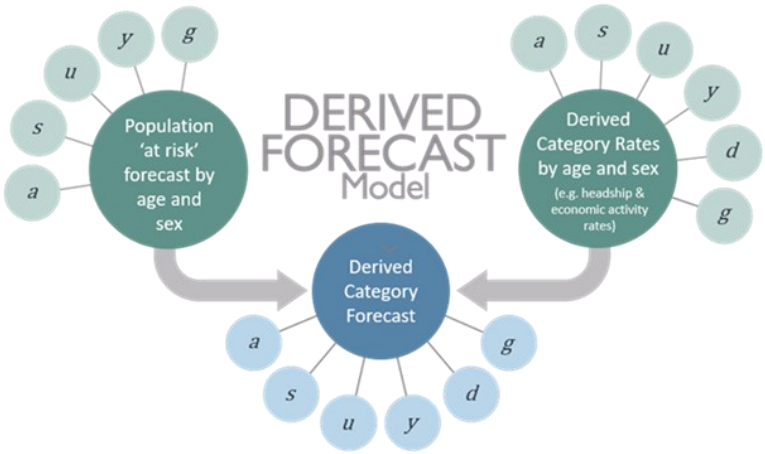


Figure 3: POPGROUP Population Projection Methodology

2.3 The Derived Forecast (DF) model sits alongside the population model (Figure 4) providing a household headship rate model for household and dwelling projections and an economic activity rate model for labour force and employment projections.



$$D_{a,s,u,y,d,g} = \frac{P_{a,s,u,y,g} \; R_{a,s,u,y,d,g}}{100}$$

D	Derived Category Forecast	y	Year
P	Population 'at risk' Forecast	d	Derived category
R	Derived Category Rates	g	Group (usually an area, but can be an ethnic group or social group)
a	Age-group		
s	Sex		
u	Sub-population		

Figure 4: Derived forecast (DF) methodology

Scenario Definition

2.4 The benchmark scenario is linked to the government's Standard Method Local Housing Need (LHN) figures for each of the authorities, developed using a 'dwelling-led' configuration of the POPGROUP model.

2.5 In a dwelling-led scenario, population growth is linked to the annual increase in the number of dwellings. The relationship between dwelling growth and population growth is determined by three key assumptions: a household to dwelling conversion factor (dwelling vacancy rate), communal population assumptions (accounting for the population not living in households, e.g., those living in student halls of residence or residential care homes), and household headship rates. Internal (domestic) migration is used to balance between population and dwelling growth; if the resident population is insufficient in size and structure to populate the additional dwellings, a higher level of net in-migration will result. Detail on the assumptions used are outlined in the section below.

2.6 Using the latest MYE components of change data (to 2021/22), three 'alternative trend' scenarios have been developed, using different migration histories from which to calibrate future growth assumptions. These '**PG**' scenarios are based on a continuation of short-term (5-year), medium-term (10-year) and long-term (21-year) migration histories. In each scenario, the UPC adjustment is included within the historical international migration profile, as this is the component of change with which UPC is most likely associated.

2.7 Drawing on the jobs forecast from the Lancashire LEP, an '**Employment-led**' scenario has been configured. In an employment-led scenario, the annual change in the level of employment is used to derive a labour force and population growth profile, using key assumptions relating to economic activity rates, unemployment and commuting.[1] Internal (domestic) migration is used to balance between population and employment growth; if the resident population is insufficient in size and structure to support the defined employment growth, a higher level of net in-migration will result. An additional sensitivity scenario has been produced, in which the commuting ratio assumptions of the Employment-led scenario have been adjusted on the assumption that future jobs growth is provided for under a 1:1 commuting ratio.

2.8 Detail on the assumptions used are outlined in the section below. A summary of the scenario definitions is provided below in Table 1. Note that all scenarios have been run to a 2041 forecast horizon.

Table 1: Central Lancashire scenario definition

SNPP-2018	Replicates the government's 2018-based *principal* subnational population projection (SNPP), using historical population evidence up to its 2018 base year and replicating the official projection thereafter.
SNPP-2014	Replicates the government's 2014-based SNPP, using historical population evidence up to its 2014 base year and replicating the official projection thereafter.
PG-5yr	Uses a 2022 base year, with migration assumptions calibrated from a 5-year historical period (2017/18–2021/22). The UPC adjustment is included within the international migration component of the MYEs (2001/02–2020/21). Fertility and mortality assumptions are derived from a 5-year historical period.
PG-10yr	Uses a 2022 base year, with migration assumptions calibrated from a 5-year historical period (2012/13–2021/22). The UPC adjustment is included within the international migration component of the MYEs (2001/02–2020/21). Fertility and mortality assumptions are derived from a 5-year historical period.
PG-5yr-10yr	Uses a 2022 base year, with internal migration assumptions calibrated from a 5-year historical period (2017/18–2021/22) and international migration from a 10-year period (2012/13–2021/22). The UPC adjustment is included within the international migration component of the MYEs (2001/02–2020/21). Fertility and mortality assumptions are derived from a 5-year historical period.
PG-Long-Term	Uses a 2022 base year, with migration assumptions calibrated from a 21-year historical period (2001/02–2021/22). The UPC adjustment is included within the international migration component of the MYEs (2001/02–2020/21). Fertility and mortality assumptions are derived from a 5-year historical period.
Employment-led	Population growth is driven by growth in the level of employment, derived from the latest Central Lancashire LEP jobs forecasts, adjusted to account for double jobbing (from ONS APS). Employment growth targets are applied from the 2022 MYE onwards. Migration, fertility, and mortality assumptions are consistent with the PG-10yr scenario.
Employment-led 1-to1	Assumptions aligned with the Employment-led scenario but with an alternative commuting ratio profile applied. From the scenario base year, the 2011 Census commuting ratio has been adjusted so that future jobs growth is provided for under a 1:1 commuting ratio.
Dwelling-led LHN	Population growth is driven by growth in the number of dwellings, as defined by the Standard Method LHN figures for each authority (Chorley = 506, Preston = 269, South Ribble = 169). Dwelling growth targets are applied from the 2022 MYE onwards. Migration, fertility, and mortality assumptions are consistent with the PG-10yr scenario.

[1] As POPGROUP uses a people-based measure of employment, to account for those individuals with more than one job, a 3.5% 'double-jobbing' adjustment has been applied to the jobs forecast, derived from APS data.

Scenario Inputs & Assumptions

Population

2.9 In each the **PG**, **Employment-led** and **Dwelling-led** scenarios, the projection base year is the 2022 ONS MYE, disaggregated by single year of age and sex. From 2022 onwards, future population counts are estimated by single year of age and sex, using the defined assumptions on fertility, mortality, and migration (as described below)

2.10 In the **SNPP-2014** and **SNPP-2018** scenario, the population base years (2014 and 2018 respectively) and growth trajectory thereafter are drawn directly from the official principal subnational population projections for each authority.

Births & Fertility

2.11 In the **SNPP-2014** and **SNPP-2018** scenarios, projected birth counts are applied from the respective base years to ensure consistency with the official projections.

2.12 In the **PG, Dwelling-led** and **Employment-led** scenarios, an area-specific and age-specific fertility rate (ASFR) schedule is derived from a 5-year history of historical births data (2017/18–2021/22). In combination with the 'population at risk' (i.e., all women between the age of 15–49), the ASFR assumptions provide the basis for the calculation of births in each year from 2022 onwards. Over the forecast period, the ASFR is adjusted to reflect the annual rate of change in the long-term fertility assumptions of the 2018-based SNPP.

Deaths & Mortality

2.13 In the **SNPP-2014** and **SNPP-2018** scenarios, projected counts of deaths by 5-year age group and sex are applied from the respective base years to ensure consistency with the official projections.

2.14 In the **PG, Dwelling-led** and **Employment-led** scenarios, an area-specific and age-specific mortality rate (ASMR) schedule is derived from a 5-year history of historical deaths data by sex (2017/18–2021/22). In combination with the 'population at risk' (i.e., the total population), these ASMR assumptions provide the basis for the calculation of deaths in each year of the forecast period. Over the forecast period, the ASMR is adjusted to reflect the annual rate of change in the long-term mortality assumptions of the 2018-based SNPP.

Internal Migration

2.15 In the **SNPP-2014** and **SNPP-2018** scenarios, projected counts of internal in- and out-migration by 5-year age-group and sex are applied from the respective base year to ensure consistency with the official projections.

2.16 Under the **PG** scenarios, an area and age-specific migration rate (ASMigR) schedule is derived from a defined number of years of historical internal migration data, which then determines the future number of internal in- and out-migrants for the remainder of the plan period. For the **PG-5yr** scenario, this is derived from the latest five years of historical data (2017/18–2021/22), for the PG-10yr scenario, a 10-year history is used (2012/13–2021/22), and for the **PG-Long-Term** scenario, the full twenty-one

years of historical data is used (2001/02–2021/22). In the **PG-5yr-10yr** scenario, internal migration assumptions are consistent with the PG-5yr scenario.

2.17 In the **Dwelling-led** and **Employment-led** scenarios, internal migration assumptions are consistent with the PG-10yr scenario.

International Migration

2.18 In the **SNPP-2014** and **SNPP-2018** scenarios, projected counts of international in- and out-migration by 5-year age-group and sex are applied from the respective base year to ensure consistency with the official projections.

2.19 Under the **PG** scenarios, future counts of international in- and out-migration have been derived from a defined number of years of historical international migration data. For the **PG-5yr** scenario, this is derived from the latest five years of historical data (2017/18–2021/22), for the PG-10yr scenario, a 10-year history is used (2012/13–2021/22), and for the **PG-Long-Term** scenario, the full twenty-one years of historical data is used (2001/02–2021/22). In the **PG-5yr-10yr** scenario, international migration assumptions are consistent with the PG-10yr scenario.

2.20 An ASMigR schedule of rates is derived from the relevant migration history and used to distribute the future counts by single year of age.

2.21 In the **Dwelling-led** and **Employment-led** scenarios, international migration assumptions are consistent with the PG-10yr scenario.

Households & Dwellings

2.22 The Census defines a household as, *"one person living alone, or a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room or dining area".* In POPGROUP, a dwelling is defined as a unit of accommodation which can either by occupied by one household or can be vacant.

2.23 The household and dwelling growth outcomes in the **SNPP**, **PG**, and **Employment-led** scenarios are estimated through the application of communal population statistics, household headship rates, and a household to dwelling conversion factor. These assumptions have been sourced from the 2021 Census, and the MHCLG 2014-based household projection model. In the **Dwelling-led** scenario, these assumptions are used to derive the level of population growth required to meet the defined dwelling-growth targets in each year of the forecast.

2.24 In the **PG**, **Dwelling-led** and **Employment-led** scenarios, the household headship rates have been rebased to take account of the 2021 Census household figure, following the original trend thereafter.

Communal Population Statistics

2.25 Household projections in POPGROUP exclude the population 'not-in-households' (i.e., the communal/institutional population). These data are drawn from 2021 Census. Examples of communal establishments include prisons, residential care homes, student hall of residence, and certain armed forces accommodation.

2.26 For ages 0–74, the number of people in each age-group 'not-in-households' is fixed throughout the forecast period. For ages 75–85+, the population 'not-in-households' varies across the forecast period depending on the size of the population.

2.27 The communal population statistics are therefore used to derive the size of the private household population in each scenario.

Household Headship Rates

2.28 A household headship rate is defined as the *"The proportion of individuals in a specific group considered the head of household. The variables defining each group are; geography, age group, sex and household type."*[2]

2.29 The household headship rates used in the POPGROUP modelling have been drawn from the MHCLG (now DLUHC) 2014-based household projection model, which is underpinned by the ONS 2014-based SNPP. The official household projections are derived through the application of projected headship rates to a projection of the private household population (i.e. the total population *minus* the communal population). The official household projection methodology used consists of two stages:

- **Stage One** produces the national and local authority projections for the total number of households by sex, age-group and relationship-status group.
- **Stage Two** provides the detailed 'household-type' projection by age-group, controlled to the previous Stage One totals.

2.30 In each POPGROUP scenario, the **Stage Two** headship rates from the 2014-based (HH-14) household projection model have been applied by age-group, sex and 'household type' (Table 2) to the private household population to derive the number and type of households.

2.31 The 2014-based headship rates (by age and type) have been 'rescaled', so that the 2021 Census household total is replicated in each of the three authorities, with the original trend in the headship rates applied thereafter. This is done to reflect the latest Census household estimate and does not alter the rate of change in household formation over time.

Table 2: MHCLG 2014-based Stage Two household type classification

MHCLG Category	Description
One person male	One person households: Male
One person female	One person: Female
Couple no child	One family and no others: Couple households: No dependent children
Cple+adlts no child	A couple and one or more other adults: No dependent children
One child	Households with one dependent child
Two children	Households with two dependent children
Three+ children	Households with three or more dependent children
Other households	Other households with two or more adults

Source: MHCLG

[2] MHCLG 2014-based Household Projections

Household to Dwelling Conversion Factor

2.32 The relationship between households and dwellings is modelled using a conversion factor derived from the 2011 and 2021 Censuses, using statistics on households (occupied household spaces) and dwellings (shared and unshared) (Table 3). The 2021 Census 'vacancy' rate is applied in 2021 and is then incrementally adjusted to return to the 2011 Census rate by 2031, fixed thereafter.

Table 3: Household to Dwelling Conversion Factors

Area	2011	2021
Chorley	96.05	95.73
Preston	95.40	93.78
South Ribble	96.64	96.03

Source: ONS

Local Housing Need

2.33 In the Dwelling-led scenario, the government's Standard Method has been used to calculate the Local Housing Need (LHN) figures (Table 4).

Table 4: Central Lancashire Standard Method Calculations

	Chorley	Preston	South Ribble
Step 1: Baseline			
Households 2024	52,688	60,091	48,756
Households 2034	56,975	62,576	50,266
Change	4,287	2,485	1,510
Household Growth per year	***429***	***249***	***151***
Step 2: Affordability Adjustment			
Median house price	£205,000	£158,000	£197,000
Median workplace-based earnings	£29,778	£29,626	£33,241
Affordability Ratio	6.88	5.33	5.93
Adjustment factor	1.18	1.08	1.12
Uncapped Housing Need	***506***	***269***	***169***
Step 3: Cap the level of increase			
Local Plan Adopted in Last 5 years?	No	No	No
Cap to Apply	600	348	211
Capped Growth	***506***	***269***	***169***
Step 4: Cities & Urban Centres Uplift			
Urban Uplift	n/a	n/a	n/a
Final LHN	**506**	**269**	**169**

Labour Force & Employment

2.34 In all scenarios, economic activity rates, an unemployment rate and a commuting ratio determine the link between population and employment growth. In the **Dwelling-led**, **SNPP** and **PG** scenarios, these assumptions are applied to the population growth trajectory to determine the size of the resident labour force and the level of employment in the area. In the **Employment-led** scenario, these assumptions are used to determine the level of labour force and population growth required to support the defined level of employment.

Economic Activity Rates

2.35 Economic activity rates are the proportion of the population that is actively involved in the labour force, either employed or unemployed and looking for work. Economic activity rates by five-year age group (ages 16–89) and sex have been derived from Census statistics for each authority.

2.36 Between the 2011 Census and the 2021 Census, there has largely been a *decrease* in economic activity for males and females in all age groups under 55 years in each authority (Figure 5). The reduction in the 16–19 age group across males and females is likely linked to a greater proportion of this age group staying in education/training beyond the age of 16. In the 55+ age groups for both males and females, economic activity rates have largely increased.

2.37 Whilst some of these changes are, to some extent, to be expected, it is important to note the impact that the COVID-19 pandemic had (and continues to have) on labour force participation rates. The Office for Budget Responsibility (OBR) has identified that during the pandemic, there was a rise in economic inactivity, particularly amongst the student age groups.[3] This trend was also observed seen across the younger ages (i.e. not just students).[4] The November 2023 OBR report suggests that this suppression in the participation rates is likely to continue until 2026 due to long-term sickness and retirement within the older age groups, but that rates may increase to 2029.[5]

2.38 There is also evidence to suggest that the way that people responded to the Census questions around labour force participation may have been impacted by furlough, which was introduced in March 2020 and ended in September 2021. Evidence suggests there were inconsistencies between the number of people who identified as "Temporarily away from work" in Census 2021 and other administrative data sources.[6]

[3] OBR July 2023 Fiscal risks and sustainability – July 2023
[4] IMF July 2023 The Recent Decline in United Kingdom Labor Force Participation: Causes and Potential Remedies
[5] OBR November 2023 Economic and fiscal outlook – November 2023
[6] ONS, July 2023 Labour market quality information for Census 2021.

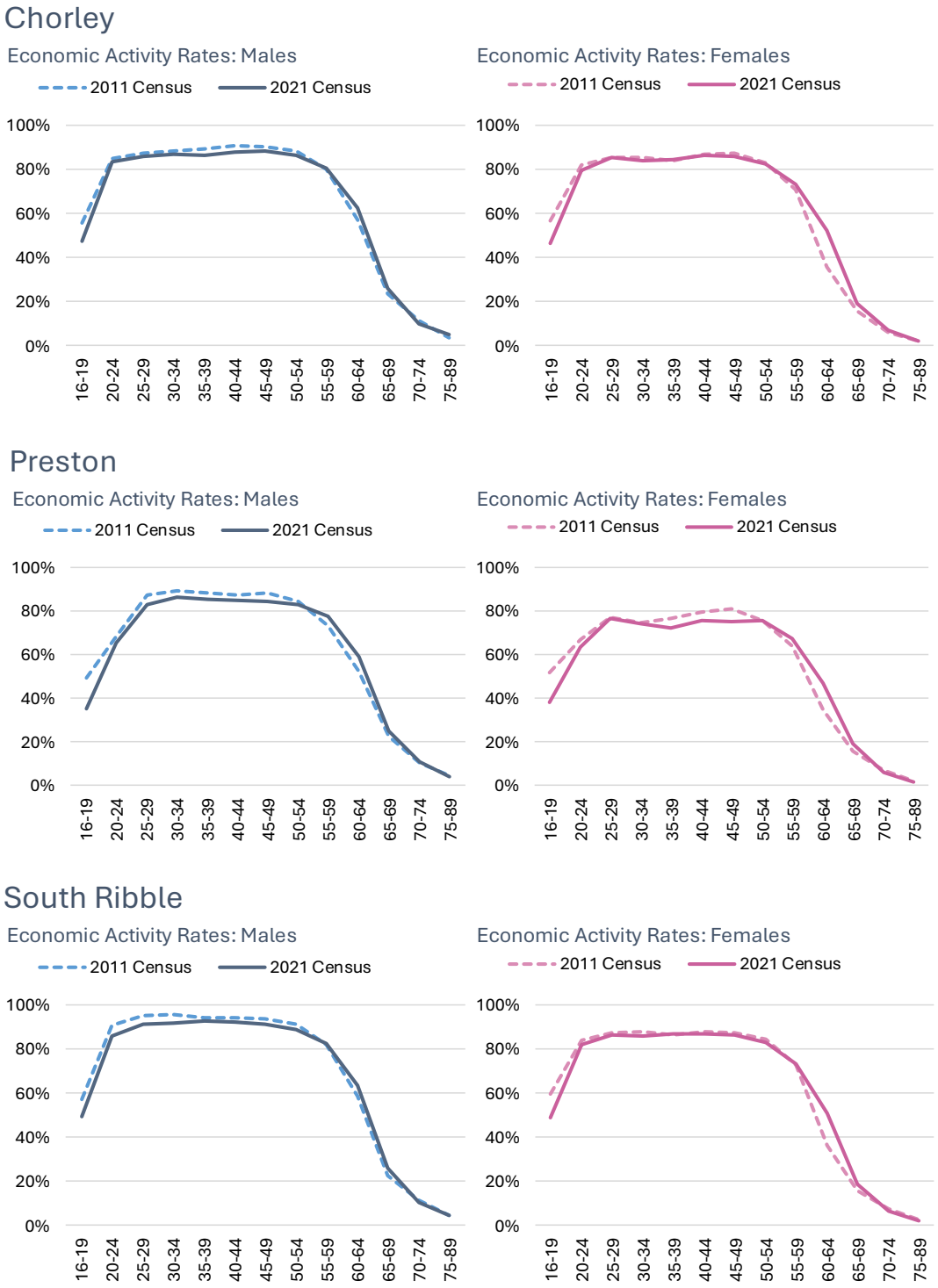


Figure 5: Central Lancashire Economic Activity Rates
Source: ONS

2.39 Due to the uncertainty around how representative the 2021 Census economic activity rates are of current participation levels, both sets of rates have been applied to each scenario. To account for future changes to the state pension age, adjustments have been applied to the economic activity rates, in line with the detailed 2018-based forecast from the OBR.[7] Within the latest OBR fiscal outlook

[7] OBR July 2018 Fiscal sustainability report – July 2018

analysis, there is no forecast of the economic activity rates by age; the latest such analysis to include this is from 2018. In the 2018 report, the OBR published its long-term labour force forecasts, including estimated changes to age and sex-specific economic activity rates. These were informed by age and sex-specific population projections and historical economic activity rates, whilst also accounting for the rising state pension age and its impact upon the economic activity rates of older age groups. Adjustments have been applied to all age groups to take account of these forecast changes.

Unemployment Rate

2.40 The unemployment rate (Figure 6) determines the proportion of unemployed people within the economically active population. Unemployment rates have been sourced from ONS model-based estimates (APS, 2023) and are fixed throughout the forecast period.

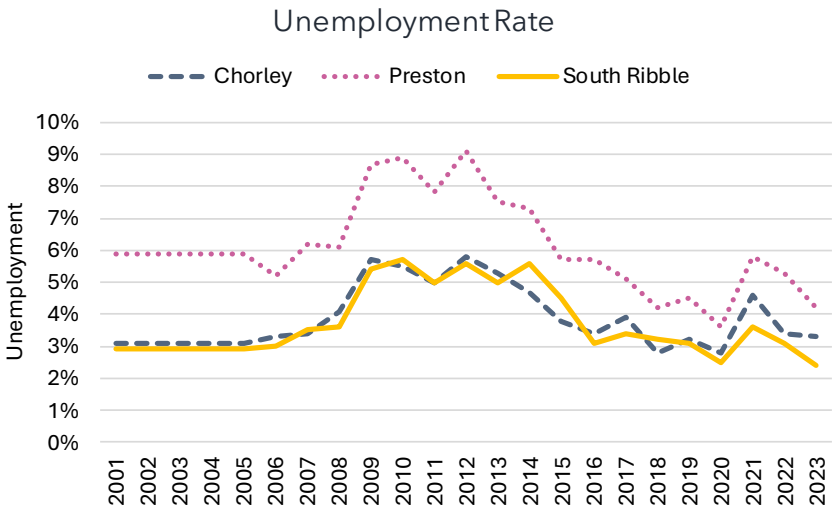


Figure 6: Central Lancashire Unemployment Rates
Source: ONS APS

Commuting

2.41 The relationship between employed residents and the level of employment in POGROUP is determined by the commuting ratio. A commuting ratio greater than 1.00 indicates that the size of the resident workforce exceeds the level of employment available in the area, resulting in a net out-commute. A commuting ratio of less than 1.00 indicates that employment in the area exceeds the size of the labour force, resulting in a net in-commute.

2.42 The 2011 and 2021 Census commuting ratios are compared in Figure 7. At the 2011 Census, the estimated commuting ratios for Chorley and South Ribble suggested a net out-commute, whereas for Preston there was a net in-commute. At the 2021 Census, the ratios suggest a reduced net out-commute from Chorley and a reduced net in-commute to Preston. In South Ribble, the 2021 Census figure was balanced. Due to the timing of the 2021 Census, taken during the COVID-19 pandemic and associated restrictions on the movement of people, it is possible that these latest figures do not reflect the current commuting balance due to the number of people that were furloughed or were working from home. In each scenario, the 2011 Census commuting ratios have therefore been applied, fixed throughout the forecast period.

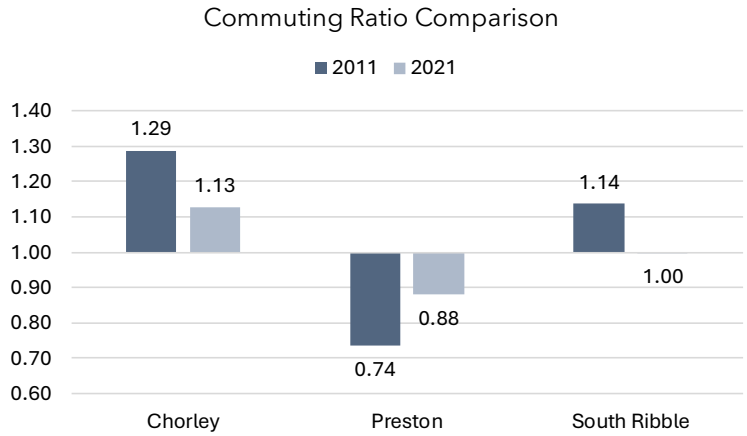


Figure 7: Central Lancashire commuting ratios
Source: ONS

2.43 For comparability with scenarios previously produced for the Central Lancashire authorities, a commuting ratio sensitivity has been applied to the Employment-led scenario. For each authority, the 2011 commuting ratio has been adjusted in each year of the forecast so that future jobs growth is provided for under a 1:1 commuting ratio (Table 5).

Table 5: Commuting Ratio Sensitivity

Area	2023 Commuting Ratio	2041 Commuting Ratio
Chorley	1.29	1.26
Preston	0.74	0.75
South Ribble	1.14	1.12

Source: ONS

Edge Analytics Ltd.

Nexus | Discovery Way | University of Leeds | Leeds | LS2 3AA

www.edgeanalytics.co.uk

BEDFORD
Planning / SDD / SPRU
bedford@dlpconsultants.co.uk

BRISTOL
Planning / SDD / SPRU
bristol@dlpconsultants.co.uk

EAST MIDLANDS
Planning/ SDD
nottingham@dlpconsultants.co.uk

LEEDS
Planning
leeds@dlpconsultants.co.uk

LIVERPOOL
Planning
liverpool@dlpconsultants.co.uk

LONDON
Planning
london@dlpconsultants.co.uk

MILTON KEYNES
Planning
miltonkeynes@dlpconsultants.co.uk

RUGBY
Planning
rugby.enquiries@dlpconsultants.co.uk

SHEFFIELD
Planning/ SDD / SPRU
sheffield@dlpconsultants.co.uk

RTPI
Chartered Town Planner

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