Shropshire Local Development Framework

Strategic Housing Market Assessment (SHMA)

Update 12th March 2014

Shropshire Council
Shirehall
Abbey Foregate
Shrewsbury
SY2 6ND

Contents

Appendices

Index of tables

Index of maps

Index of figures

Index of charts

Executive Summary

1. Introduction and Context

Purpose

The amount, distribution and mix of housing in Shropshire for the plan period 2006-2026 has been established by the Core Strategy, which was adopted in March 2011. This SHMA provides the latest housing information at the time of publication of the Site Allocations and Management of Development (SAMDev) Plan. It will be updated when key evidence is published later in 2014, notably when the ONS publish their 2014 population and household projections.

This document provides information to inform both the SAMDev Plan and also the next Local Plan. The latter will replace and roll forward the current Shropshire Core Strategy with a Local Plan that takes Shropshire forward to 2036.

Housing Market Areas

While it is understandable that residents seek housing information about their town or village, in reality housing market areas are defined by the area within which people will search for a new home, and by the distance that most are prepared to commute. While the report does contain some information for Shropshire's 18 market towns, the best approximation of housing market areas is that provided by the Core Strategy spatial zones, namely North West Shropshire, North East Shropshire, Central Shropshire, East Shropshire (which has strong commuting links with Telford & Wrekin and the conurbation) and South Shropshire (some links with Herefordshire and Powys).

2. Key Influences and Drivers

Population and commuter flows

Shropshire is highly varied. The south has particularly high proportions of retired people while the north and Shrewsbury have the highest levels of young people. Over 77% of residents work in the county. Those who commute out are dominated by relatively short journeys to neighbouring Telford & Wrekin Borough, Wrexham and Powys. By far the greatest flows are to and from Telford & Wrekin Borough.

Employment and housing

The county's housing stock is dominated by detached and semi-detached, owner-occupied properties. A significant proportion are under-occupied, with the majority of Shropshire's households being 1 and 2 person in size while the housing stock is dominated by 3 and 4 bedroomed properties. The most under-occupied households also tend to be the older households. With an ageing population and an ever higher proportion of older, smaller households, there is a need for more smaller 1 and 2 bedroom properties and there may be an increasing demand for these smaller properties in the future.

Key drivers

Key drivers of Shropshire's housing market are an ageing demographic and its impact on the number, size and nature of households; the inter-relationship between homes and jobs, both within the county and with neighbouring areas; and the affordability of housing. Each of these is explored in more depth below.

3. Housing Stock and Supply

Housing Stock, comparative costs and affordability

Shropshire has a high proportion of housing that is owned outright, exceeding 40% in a number of towns. The amount of 'affordable housing', comprised of social rented properties (13.5%) and shared ownership properties (0.6%) is very limited, so many households rent privately (14.9%). An average household income of £23,000 is required to afford the average entry-level private rented property, making this tenure substantially more affordable than the £31,500 average household income required to buy a starter property.

By comparing local incomes with local housing costs it is possible to estimate the proportion of households in each town who can afford each tenure. Lower average incomes lead to low affordability in towns such as Ludlow, while higher average incomes in towns such as Albrighton, Bridgnorth and Shifnal make housing much more affordable in those towns. Across Shropshire as a whole, only 50% of households can afford private rented properties and only 32% can afford entry-level home ownership, based on their current household income.

Housing market strength

House prices vary greatly across the county, with the highest prices found in the south and the lowest prices in the northern towns. Rural areas invariably have average higher average prices than the towns within them. In part the higher rural prices reflect larger properties, and a wider range that includes very low values as well as some of the highest values.

Housing developments are more viable in the parts of Shropshire with higher house prices, as sales values are the most significant variable in determining development viability. Development is generally more economically viable in the south of the county and least viable in the northern towns.

Market signals and affordability ratio

Shropshire has a higher ratio of house prices to earnings than the average for England, at 7.62 times median earnings compared to the national average of 6.74. Shropshire's ratio dipped more than the national average in response to the housing market crash of 2008-2010, but since 2011 has been slowly increasing once again. A comparison of ratios by town reveals that the most affordable towns in Shropshire are Albrighton and Shifnal (4.2 and 4.3 times median incomes respectively) while the least affordable towns are Bishops Castle and Church Stretton (8.9 and 7.8 times median incomes respectively).

Market Deliverability

The growth in housing stock is expected to be 1.0% per annum across Shropshire as a whole over 2006-2026, with a slightly higher rate of 1.1% across its towns. However the rate for each town varies, from 0.4% average growth per annum in Broseley to 2.2% growth per annum for Ellesmere, relative to the number of existing homes in each town. There is some evidence to suggest that the market favours delivery in towns where the affordability ratio is lower.

Supported Housing

Shropshire has an ageing population. Between 2010 and 2030 the number of people aged 65 and over in Shropshire is estimated to increase by 39,200 (63%) while the number of people aged 85 and over will increase by 12,100 (144%). The number of additional care home places required in Shropshire is by 2030 is projected to be 2,896 beds. A further 956 additional units of extra care dwellings are also projected to be needed, which at the rate of 56 units per extra care scheme would equate to around 17 extra care developments.

4. Affordable Housing Needs

Housing Register

All those registered for social housing in Shropshire were asked to re-register in November 2013, leading to a highly accurate list of 2,644 households who are actively seeking affordable housing at present. The majority need one bedroom properties, reflecting the considerable impact of the recent Welfare Reform Act. To clear the backlog of those waiting on the Housing Register over a five year period would require 529 social lettings per annum.

Incomes and affordability

The largest group in housing need are the 'in-betweeners' who cannot access either social rented or market housing. On average, among households with no historic housing equity only 50% can afford private rented housing and only 32% can afford entry level owner occupied housing in Shropshire.

Overall housing need

Core Strategy policy CS1 plans for 33% of housing in Shropshire to be affordable over the plan period 2006-2026. An updated estimate of housing need confirms that this figure remains valid. There are around 688 new households per annum unable to afford market housing, 771 homeless applications (of which 243 were accepted) and a backlog of 529 per annum waiting for affordable housing amounting to a total need for 1,928 affordable homes per annum. After deducting the 991 social housing re-lets per annum, the outstanding need for affordable housing is estimated to be between 469 and 997 dwellings per annum (34% - 72% of Shropshire's annualised housing requirement).

5. Population and Households

Population

The population of Shropshire has grown from 266,871 people in 1991 to 306,129 in 2011. The 2011 based sub-national population projections predict the population will reach 322,300 people by 2021.The means that if the projections come true the population would have grown by 21% since 1991.The growth has been led by net migration into Shropshire. This means Shropshire needs a healthy economy, good availability of housing and a robust infrastructure to sustain this level of population growth.

More importantly the number of households has grown at a substantially faster rate, 24% since 1991. From 104,468 households in 1991 to 129,674 in 2011, they are projected to increase to over 130,000 by 2021. Social factors such as divorce and separation and income levels making home ownership affordable have influenced this growth.

Telford and Wrekin has been the origin of the greatest number of migrants (12%) into Shropshire in the last five years from within the UK. Nearly 8% of migrants are arriving from Welsh local authorities with 5.4% arriving from Powys. As would be expected most of the migrants arrive from Wales, the West Midlands and Cheshire, however there is evidence of over 300 moves each from Cornwall, Leeds, Swindon and Wiltshire.

Migration

Net international migration levels are lower in Shropshire compared to the national and regional averages. Despite low levels, the evidence shows that overall international migration levels are rising in Shropshire and predominantly follow national trends. However, short term estimates from the Office of National Statistics show fluctuations in international migration since 2008.

Evidence suggests that a large number of international migrants are from the European Union, and the EU Accession States. As the global recession begins to improve and the European Union expands, this rise is likely to continue or increase in future years.

The presence of greater numbers of overseas migrant workers can have an impact on housing needs in Shropshire as people often have different housing needs in terms of size, type of house required and affordability. There can also be an impact on local schools and other services.

It is not always clear how long migrants are staying for, or if they are staying on a permanent basis. Evidence suggests that migrants are staying longer and bringing their families.

Household Change

It is clear from the 2011 Census that average household size has continued to fall with more people having to or choosing to live alone. A major contributory factor is the ageing of the population and the consequences of bereavement. The 2011 based household projections estimate that households where the reference person is aged over 85 years will experience growth of nearly 42% in only ten years since 2011 Census.

The growth in the average number of rooms per household to 6 rooms and the evidence that the majority of one person households live in properties of this size raises challenges for families, the voluntary and public sector to support independent living through suitable housing options.

Evidence from the Census shows concealed families to be a small but growing household type in Shropshire. Almost half of all concealed families were couples with no children. The number of lone parent households has increased by nearly a quarter between 2001 and 2011, with 61% containing dependent children. The 2011 based household projections estimate that this household type will experience the greatest level of growth out of all household types

6. Population, Household and Labour Force Projections

Population Projections

Comparison of the five population projections which have been run demonstrates that the population growth in Shropshire is driven by net in migration. Natural change projections show a major decline in Shropshire's population as deaths continue to significantly outnumber births. Only projections which factor in migration trends produce growth in the total population.

- Projection B uses both the Internal and International migration estimates from the ONS 2010 based Sub National Population Projections to 2035 (Office for National Statistics) and based on more recent trends has probably overestimated the level of migration in the long-term, subsequently leading to a larger population growth. An overall growth of 11%.

- Projection A uses Internal migration figures calculated for Shropshire using a linear trend based on 10 year's data from the Mid-Year Estimates Components of Change

(2002-2012) and results in a lower population growth of 4% but one more in line with expectations.

Shropshire has an increasingly elderly population with numbers in the 85 years and over age group continuing to rise throughout the life of all five population projections.

Household Projections

Household growth based on the five projections is significantly higher than the population growth. It should be noted that even using the projections produced for comparison purposes (Natural Change and Nil Migration) which show a decline in population the household numbers increase by 10% and 9% respectively.

The growth in household numbers is due to the increase in "One Person Households" and this is true across all five projections.

In both Projections A and B, over 50% of households where the household reference person is aged 85 years and over are "One Person Households".

Also of interest is the increase in the number of "One Family & No Others: Couple: No Dependent Children" households. The increasingly elderly population in Shropshire, and the fact that male life expectancy is increasing will have an impact on these numbers.

Labour Force Projections

The Shropshire labour force is ageing rapidly. Unless economic activity rates amongst the 65 and overs rise significantly, the ratio between those who are participating in the labour market and those who are not will fall. According to all of the labour force projections included within this report, none of which factor in future changes in participation; the overall rate of economic activity amongst all those aged 16 and over will decline. Only according to Projection B will population growth be sufficient to sustain the current size of the labour force.

Socio-economic factors suggest that economic activity rates amongst the 65 and overs will rise, but even if they do not, those above the current retirement age will account for an increasing share of the total labour force over the next two decades.

7. Conclusions

Based on interim projections, the number of households in Shropshire is expected to increase by between 20% to 30% over the 25 years 2011-2036. These projections will be refined when the ONS publish national 25 year projections later in 2014. In the meantime, the mid-point of the growth estimates remains around 1% growth per annum in Shropshire's households, which is not dissimilar to the Core Strategy. The deliverability of this level of growth is explored in the market assessment chapter of the SHLAA report.

1. Introduction and Context

Previous work

1.1 Shropshire's housing requirements for 2006-2026 are established in the Shropshire Core Strategy (adopted March 2011) as around 27,500 dwellings plus an additional 1,000 dwellings if needed for returning military personnel. This is based on robust evidence undertaken by Alan Holmans and Alex Fenton at the Cambridge Centre for Housing and Planning Research[1] in April 2009 using the Office of National Statistics (ONS) 2006-based household projections.

1.2 Core Strategy Policy CS1 sets the amount and spatial distribution of housing, while Policy CS10 provides phasing and Policy CS11 guides the mix and type of housing to be provided. These policies provide the strategic framework for the Site Allocations and Management of Development (SAMDev) Plan, which seeks to apply these strategic policies in allocating land for development.

1.3 A detailed Strategic Housing Market Assessment (SHMA) was undertaken jointly with Herefordshire Council in 2008, providing evidence of the operation of the housing markets and housing needs. This underpins both planning and housing strategies for Shropshire and Herefordshire Councils. It was balanced with viability evidence from the Shropshire Affordable Housing Viability Study (AHVS) 2010, resulting in a target of 33% affordable housing across the plan period in Core Strategy policy CS1.

The SHMA Update

1.4 The Core Strategy acknowledged that the world does not stand still, and in paragraph 4.5 it states that various changes, including revised household projections, may mean that the Core Strategy figures may need to be revised in the future. As the National Planning Guidance (NPPG) states, key evidence should be updated to reflect the most recent information available and if necessary, the plan adjusted in light of this information (Local Plans section paragraph 14). Since the Core Strategy was adopted, we have had the 2011 census; more recent ONS mid-year projections; in-house work on a local housing market assessment; publication of an updated Shropshire Viability Study (May 2013); and publication of the NPPF and associated Guidance (NPPG). All these are reflected in this SHMA 2014 update.

1.5 This study uses the latest information at the time of publication of the SAMDev Plan. A further update will be published when the following awaited key publications are available:

[1] ShropsEV20: "Housing demand and need in the West Midlands: 2009 revision to regional estimates for 2006 to 2026" Alan Holmans and Alex Fenton, Centre for Housing and Planning Research, Department of Land Economy, University of Cambridge, April 2009

- The ONS 2014 population projections (expected June 2014);
- The ONS 2014 household projections (expected late 2014).

Purpose

1.6 The SAMDev Plan covers the period 2006-2026. Whatever the outcome of the SAMDev Plan examination, it is anticipated that Shropshire will have to update its housing requirements for the period to 2031 or to 2036 in the near future. The SHMA therefore provides updated figures for the following plan periods:

a) 2006-2031 (to take Shropshire's LDF[2] to 2031); and
b) 2016-2036 (to inform a new Local Plan to replace the Core Strategy)

1.7 The study must meet the requirements of the NPPF, in particular paragraphs 50, 158 & 159. It will inform the Council's duty to "plan for a mix of housing based on current and future demographic trends, market trends and the needs of different groups in the community" and should "identify the size type tenure and range of housing that is required in particular locations, reflecting local demand" (NPPF para 50). The study methodology must also meet the requirements of the process criteria set out in the DCLG's national planning practice guidance (NPPG) at http://planningguidance.planningportal.gov.uk/blog/guidance/.

NPPF paragraph 159 states:

"Local planning authorities should have a clear understanding of housing needs in their area. They should: prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries. The Strategic Housing Market Assessment should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which:

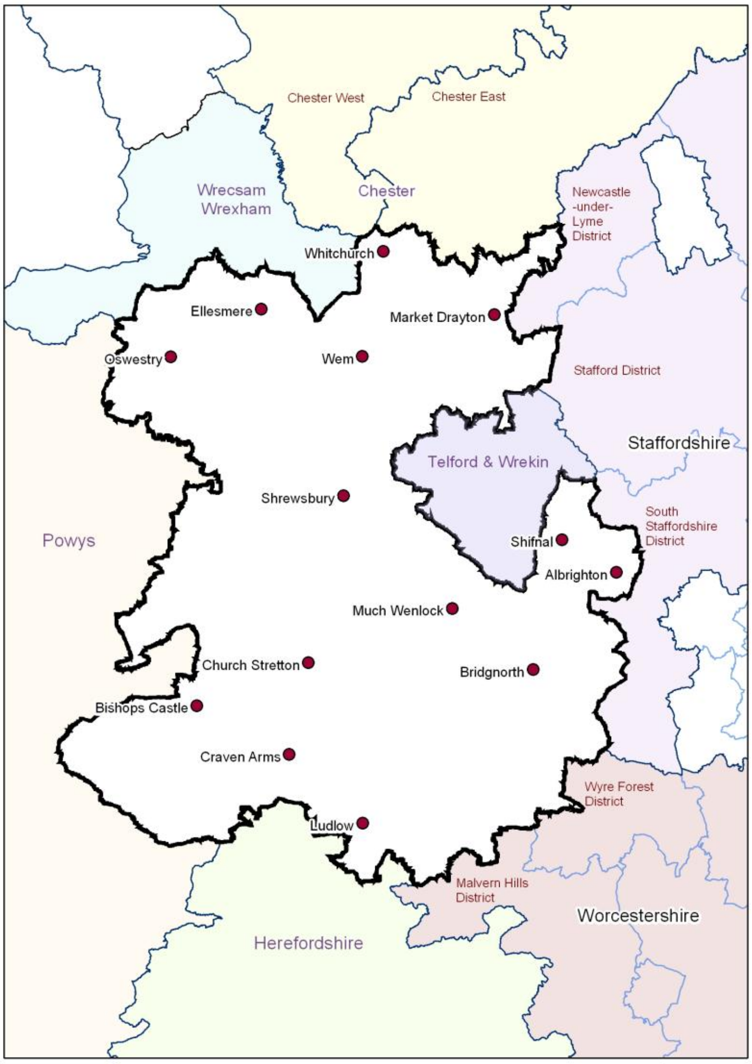
— meets household and population projections, taking account of migration and demographic change;
— addresses the need for all types of housing, including affordable housing and the needs of different groups in the community (such as, but not limited to, families with children, older people, people with disabilities, service families and people wishing to build their own homes); and
— caters for housing demand and the scale of housing supply necessary to meet this demand"

[2] Local Development Framework (LDF) comprised of the two development plan documents, the Core Strategy DPD and the Site Allocations and Management of Development (SAMDev) DPD.

Shropshire's context and housing market areas

1.8 Shropshire Unitary Council was formed in April 2009 from the five district/borough Councils of North Shropshire DC, Oswestry BC, Shrewsbury & Atcham BC, Bridgnorth DC and South Shropshire DC. Shropshire includes 18 market towns and an extensive rural area. Functionally it has strongest ties with Telford, as the largest single commuting destination, but also has flows of people with Wales, Cheshire, Stoke, the Black Country and Worcester. Commuting flows are covered in more detail in section 2.2.

Map 1.1: Shropshire in context



1.9 For timetabling and other reasons the unitary authorities of Shropshire, Herefordshire, Telford & Wrekin, Cheshire East, Cheshire West and Chester and Powys have all completed their latest SHMAs independently. Nevertheless cooperation between the authorities has been good on housing and other fronts, and regular cross-boundary discussions are expected to continue as part of fulfilling the statutory Duty to Cooperate.

1.10 Housing market areas are by their nature fairly large, as they are defined as the area in which most residents work and would consider moving house. Shropshire's five former districts (plus Telford & Wrekin district) are a reasonable proxy for the main housing markets in the county. They are reflected to a considerable degree in the Core Strategy's five spatial zones, namely NW, NE, Central, East and South Shropshire.

1.11 The SHMA 2008 provided information by the five districts, with a further breakdown into twelve sub-areas as shown in the second column of figure 1.2 below. A range of other alternatives have been considered, with those employed in this report in columns 3 and 4 below.

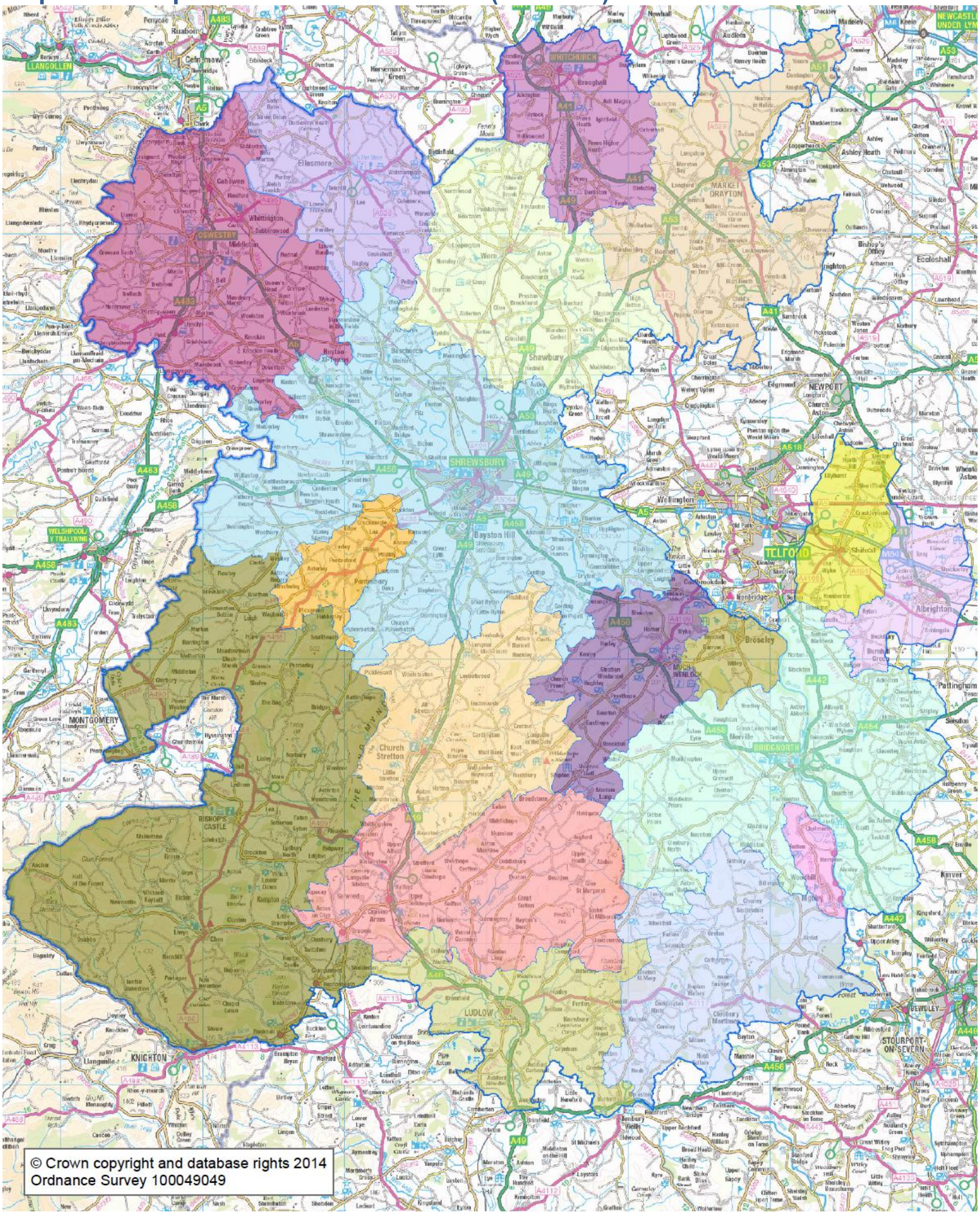
Table 1.1: Alternative local housing market areas

5 Housing market areas 2008	12 Sub-areas, SHMA 2008	18 Place Plan areas	5 housing market areas 2014
Oswestry Borough Council area	Oswestry Town; Oswestry Rural; Hordley, Baschurch & Kinnerley	Oswestry	NW Spatial Zone (includes Ellesmere)
North Shropshire District Council area	Ellesmere & Wem; Whitchurch; Market Drayton; North Shropshire Rural;	Ellesmere Wem Whitchurch Market Drayton	NE Spatial Zone (excludes Ellesmere)
Shrewsbury & Atcham BC area	Shrewsbury Town; Shrewsbury Rural	Shrewsbury Minsterley & Pontesbury	Central spatial zone
South Shropshire District Council area	Central Shropshire Ludlow & rural	Church Stretton Craven Arms Ludlow Cleobury Mortimer Bishops Castle	South Shropshire spatial zone
Bridgnorth District Council area	Bridgnorth, Albrighton, Broseley & Shifnal	Shifnal Albrighton Bridgnorth Highley Broseley Much Wenlock	East Shropshire spatial zone

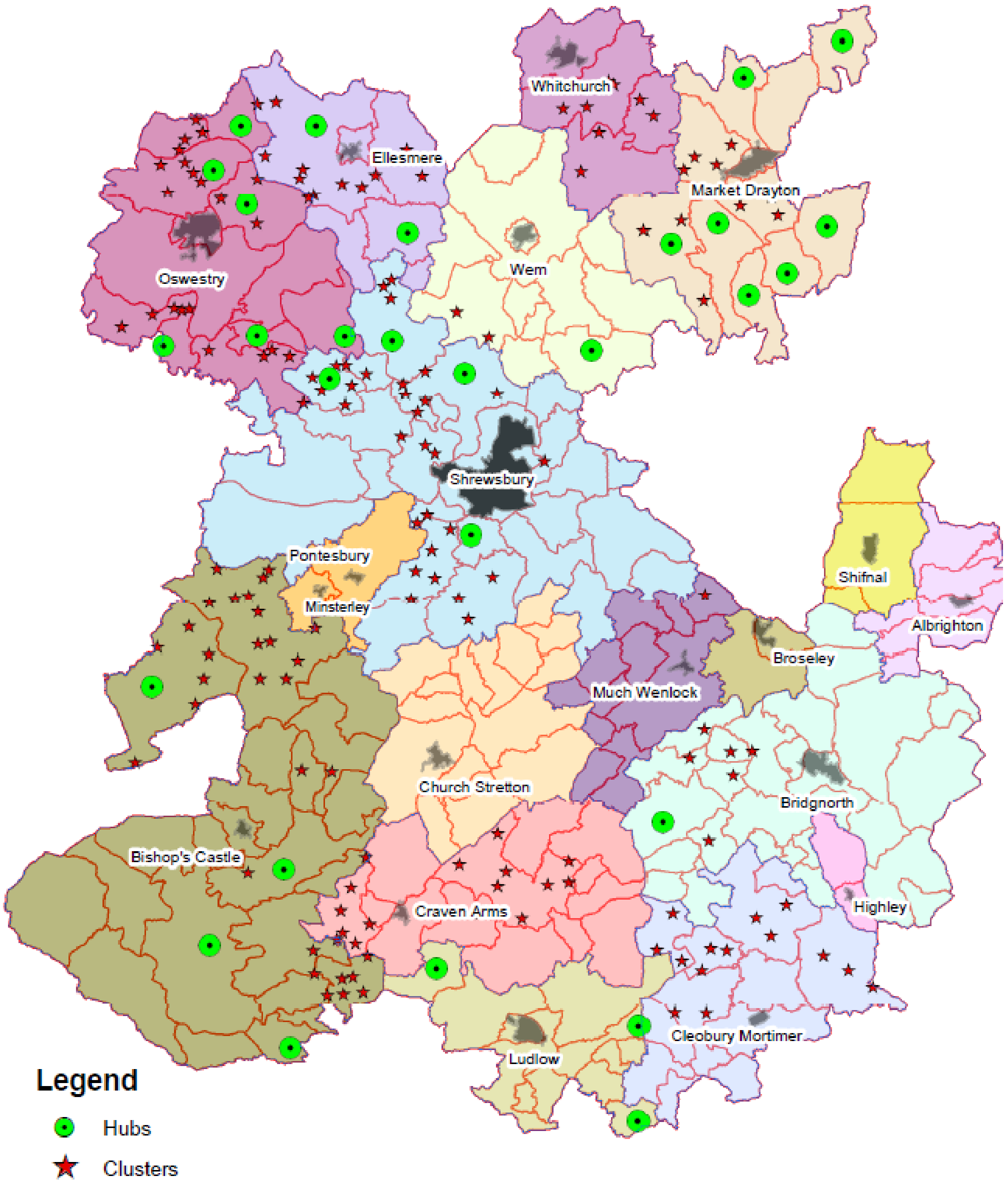
1.12 In 2010 Shropshire Council applied 13 local housing market areas, formed from combinations of the 26 Local Joint Committees areas that were formed in 2009 to provide key interactions between the new Unitary Council and Shropshire's constituent parishes. The Local Joint Committees are now being replaced by new geographical groups of parishes, using the eighteen Place Plan areas representing the hinterlands of Shropshire's eighteen market towns (figures 1.3 and 1.4).

1.13 The 12 sub-areas suggested by the 2008 SHMA, the 13 sub-areas based on the Local Joint Committees, and the 18 Place Plan areas are all problematic as a basis for housing market information. While local information can be useful, and is provided later in this report for the Place Plan areas, the fact is that most households' housing search will cover a wider area than any of these geographies.

Map 1.2: Shropshire's Place Plan areas (OS base)



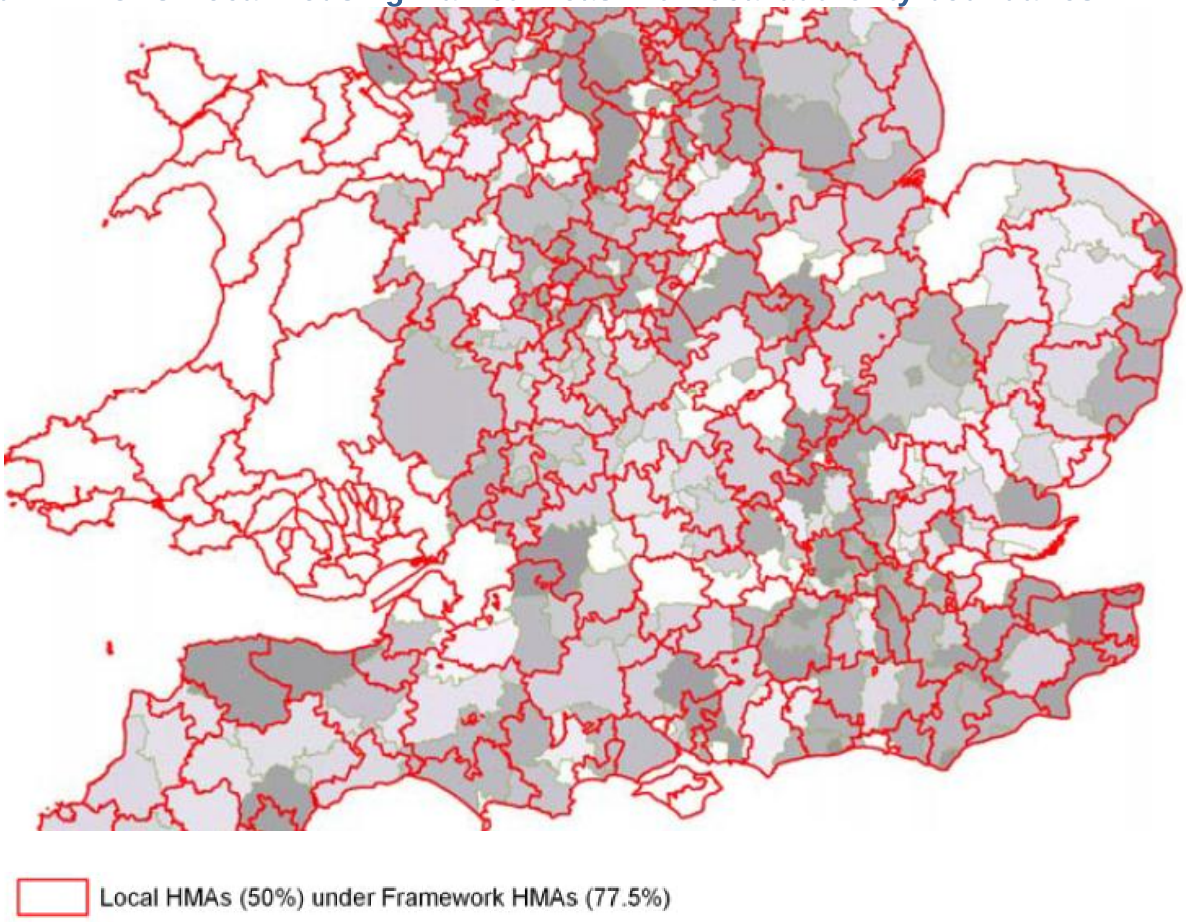
Map 1.3: Place Plan areas with towns and hub and cluster villages



1.14 The Department of Communities and Local Government produced an authoritative report on the "Geography of housing market areas" (Nov 2010)[3]. This sought to define an upper tier of framework housing market areas defined by commuting self-containment (77.5% self-containment). Nested within these were lower tier local housing market areas, defined by migration patterns (50% self-containment). The results with local authority boundaries shaded are shown in figure 1.5 below.

[3] https://www.gov.uk/government/publications/housing-market-areas The map is from Figure 12 in DCLG Paper C

Map 1.4: DCLG Local Housing Market Areas with local authority boundaries



1.15 The DCLG report suggests that Shropshire's five former districts can be broken down into five local housing market areas:

- Central and NE Shropshire (Shrewsbury, Wem, Whitchurch, Market Drayton, Minsterley & Pontesbury, Church Stretton, Craven Arms)
- North West Shropshire (Oswestry & Ellesmere)
- West Shropshire (Bishops Castle)
- South Shropshire (Ludlow, Cleobury Mortimer)
- East Shropshire (Much Wenlock, Broseley, Bridgnorth, Shifnal, Albrighton, Highley)

1.16 It is also possible to form cross-boundary housing market areas, shared with neighbouring authorities particularly Telford & Wrekin, Herefordshire and Powys Councils. Furthermore, market prices and development viability (pages 24-40) suggest yet another grouping. However for the SHMA's role in informing the emerging plan, the spatial zones contained in the Core Strategy still provide the most practical approximation of housing market areas, and it is therefore this geography that is used.

1.17 The housing market areas that are most inter-linked with neighbouring authorities are East Shropshire, with ties to Telford and the West Midlands conurbation, and South

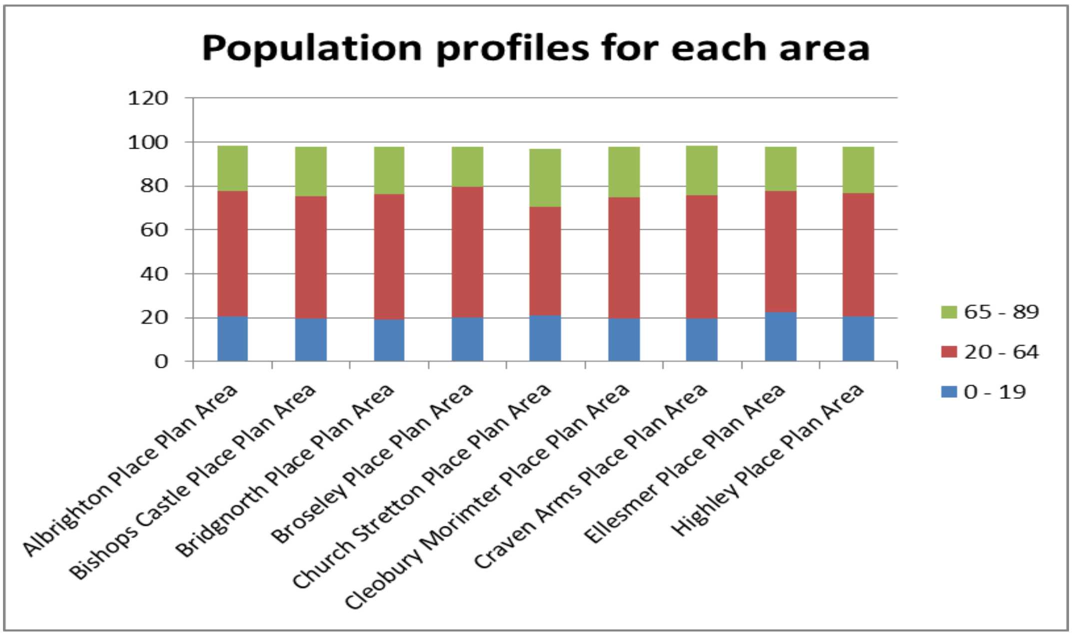
Shropshire, which overlaps with the northern Herefordshire and Powys housing areas. The East Shropshire area is particularly influenced by commuting patterns, while South Shropshire is strongly influenced by in-migration, often by retirees. These key cross-regional drivers are addressed in section 2.

2. Key Influences and Drivers

Population

2.1 Shropshire is highly varied. The south has particularly high proportions of retired people, with the highest proportions found in the Church Stretton, Ludlow & Much Wenlock areas. The north and Shrewsbury have the highest levels of young people aged 19 and under, headed by Market Drayton and Ellesmere. The working age population (20-64) ranges between 49% and 60% of the total population, with the highest proportions found in Broseley, Shifnal and Shrewsbury.

Chart 2.1 Population profiles by Place Plan area



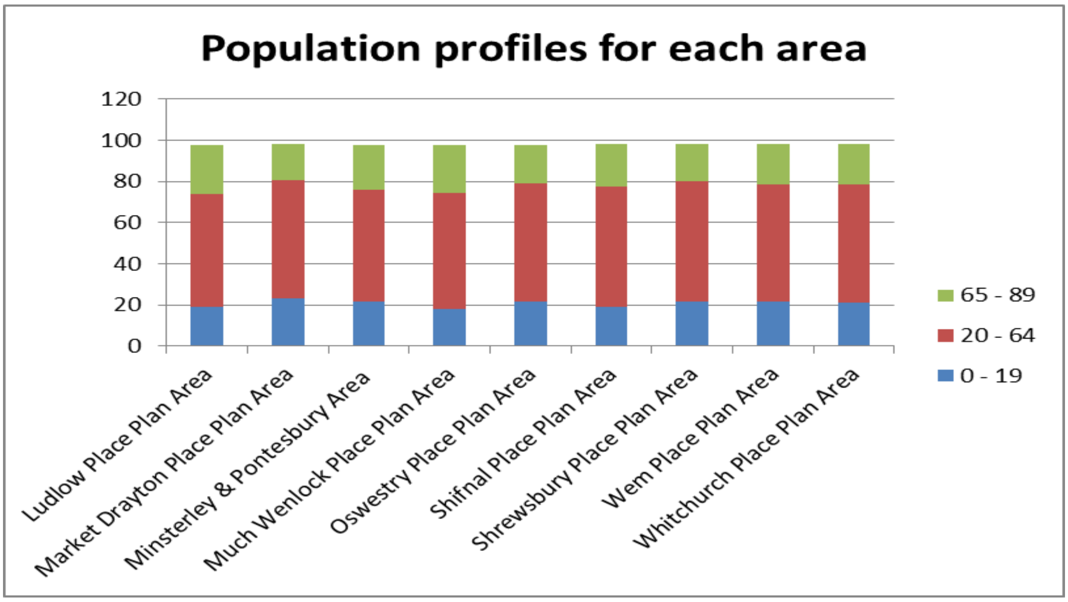


Table 2.1: Population breakdown by Place Plan areas

% Population by age	Albrighton Place Plan Area	Bishops Castle Place Plan Area	Bridgnorth Place Plan Area	Broseley Place Plan Area	Church Stretton Place Plan Area	Cleobury Morimter Place Plan Area	Craven Arms Place Plan Area	Ellesmere Place Plan Area	Highley Place Plan Area
0 - 4	5.2	4.1	4.3	5.1	3.6	4	4.7	4.6	5.1
5 - 9	4.8	5.2	5	4.6	4.1	4.6	4.6	5	5.1
10 - 14	5.5	5.7	5.3	5.6	5.9	6.6	5.8	6.7	6
15 - 19	4.9	4.5	4.3	4.5	7.3	4.4	4.3	6.1	4.2
20 - 24	9.7	4	4.5	4.9	3.3	4.6	5	4.6	4.9
25 - 29	5.6	3.6	4.4	4.2	3.1	3.9	4.2	3.8	5
30 - 44	17.7	15.1	18.2	18.7	13.7	15.2	16.5	17.2	16.7
45 - 59	18.5	23.5	22.1	23	20.9	23.1	22.4	22.2	21.4
60 - 64	5.9	9.5	8.3	8.9	8.6	8.5	8.4	7.3	8.4
65 - 74	11.2	13.1	12.8	11.1	14.2	14.6	12.4	11.3	13.7
75 - 84	7.2	7.5	6.9	6.1	9.4	6.7	7.8	6.9	6
85 - 89	1.9	1.9	1.8	1.3	2.7	1.6	2	1.9	1.5

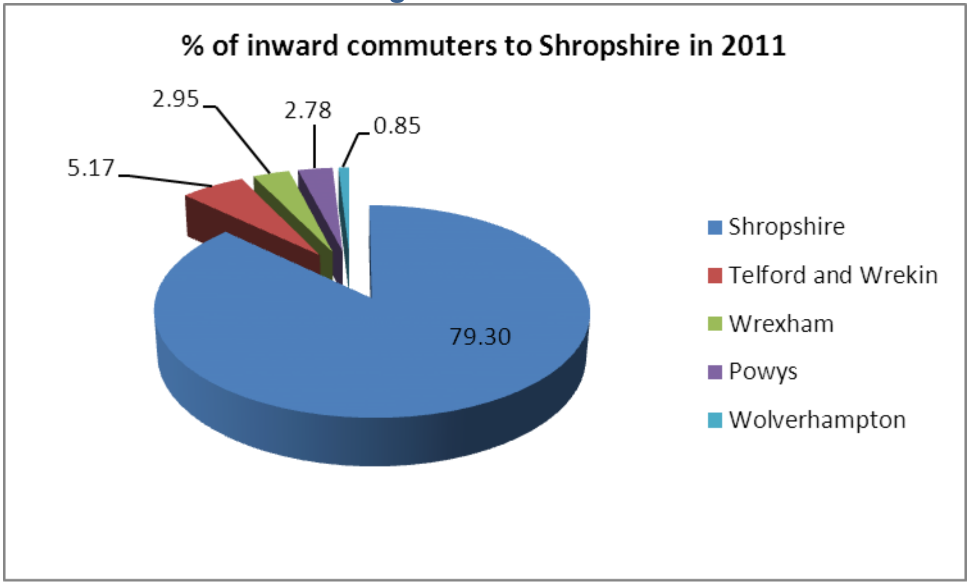
% Population by age	Ludlow Place Plan Area	Market Drayton Place Plan Area	Minsterley & Pontesbury Place Plan Area	Much Wenlock Place Plan Area	Oswestry Place Plan Area	Shifnal Place Plan Area	Shrewsbury Place Plan Area	Wem Place Plan Area	Whitchurch Place Plan Area
0 - 4	4.8	6.2	5.4	4.3	5.3	4.6	5.6	4.8	5.5
5 - 9	4.9	5.4	5.5	4.5	5.2	4.6	5.3	5.4	5.3
10 - 14	5.5	5.7	5.2	5.5	6	5.6	5.9	6.4	5.8
15 - 19	4	5.7	5.3	3.9	5.2	4.1	5	5	4.7
20 - 24	5	6.4	4.7	3.9	5.8	5.2	5.8	5.2	5.2
25 - 29	4.8	5.5	4.7	3.1	5.3	5	5.8	5.1	5.4
30 – 44	16.3	18.6	15.7	15.7	18.9	18.8	19.2	18.2	18.8
45 – 59	20.9	20.3	22.3	22.6	20.6	21.8	20.7	21.6	20.8
60 – 64	7.4	6.9	7.3	10.7	6.9	7.9	6.5	6.9	7.1
65 – 74	13.2	10.2	11.5	13	10.4	12	10	11.1	10.3
75 – 84	8.7	5.6	7.6	8.3	6.4	7	6.3	6.7	7.1
85 – 89	2.2	1.6	2.2	2.1	1.8	1.4	1.8	1.6	1.9

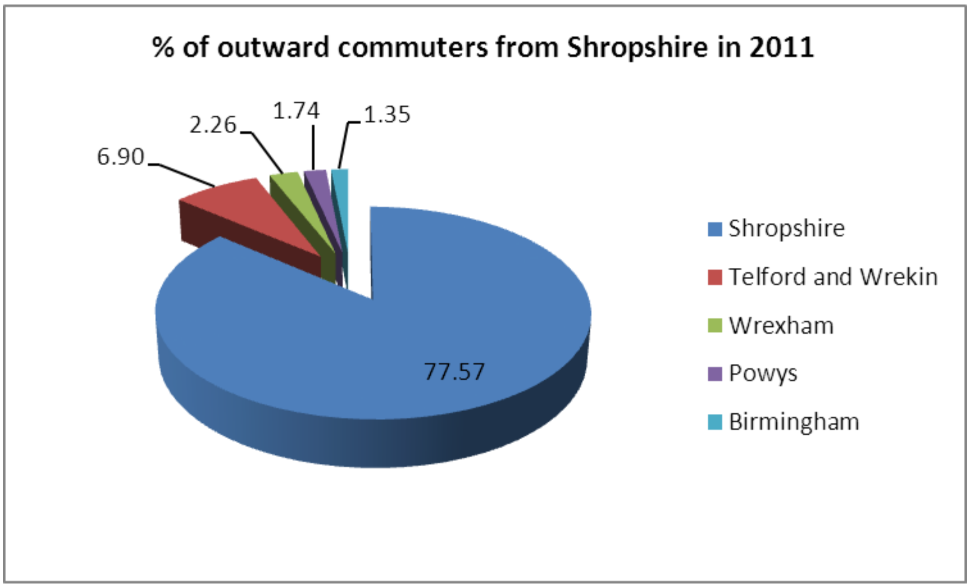
Source: 2011 census

Commuter flows

2.2 The following graphs show the commuting flows with neighbouring counties. A large proportion of the population lives and works within Shropshire, but nevertheless there are clear links with Telford as the main area for both inward and outward commuting, followed closely by Wrexham and Powys.

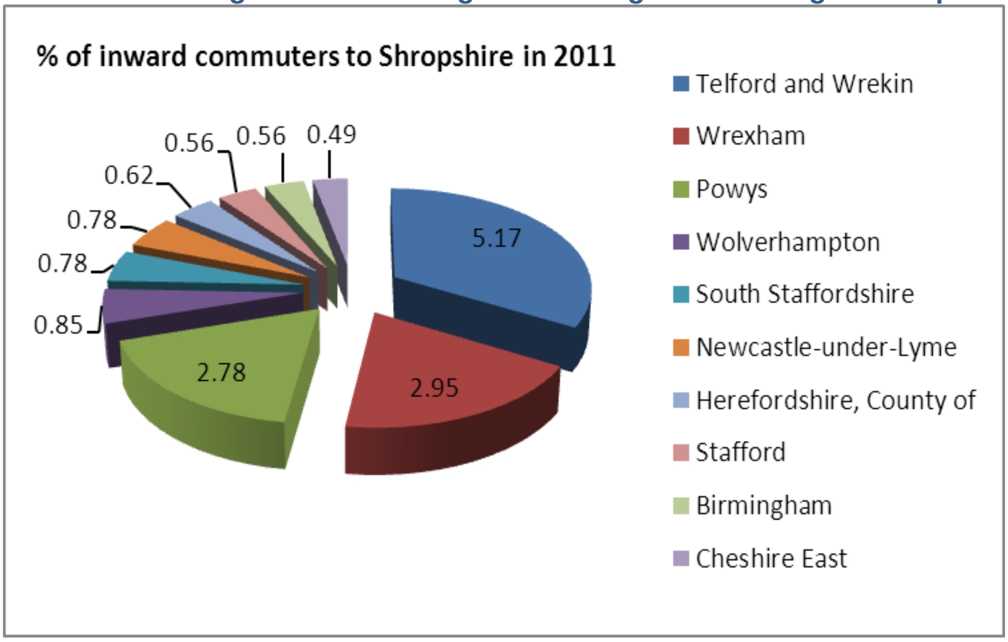
Chart 2.2 Total commuting flows

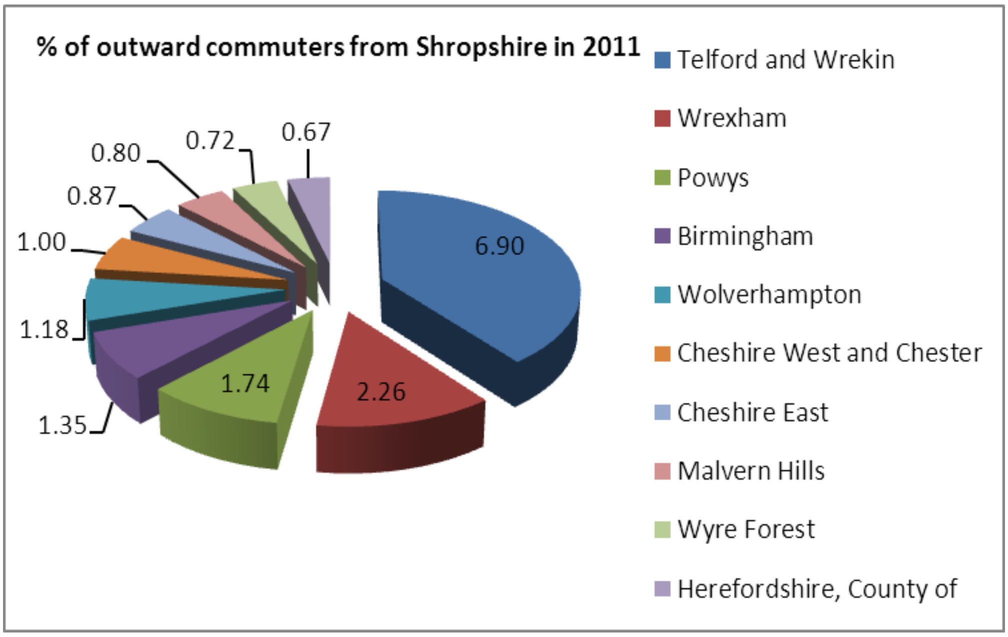




(Source: Annual population survey commuter flows, Local Authorities in Great Britain, 2010 – 2011) www.ons.gov.uk/commuting2011/asp-commuting-data

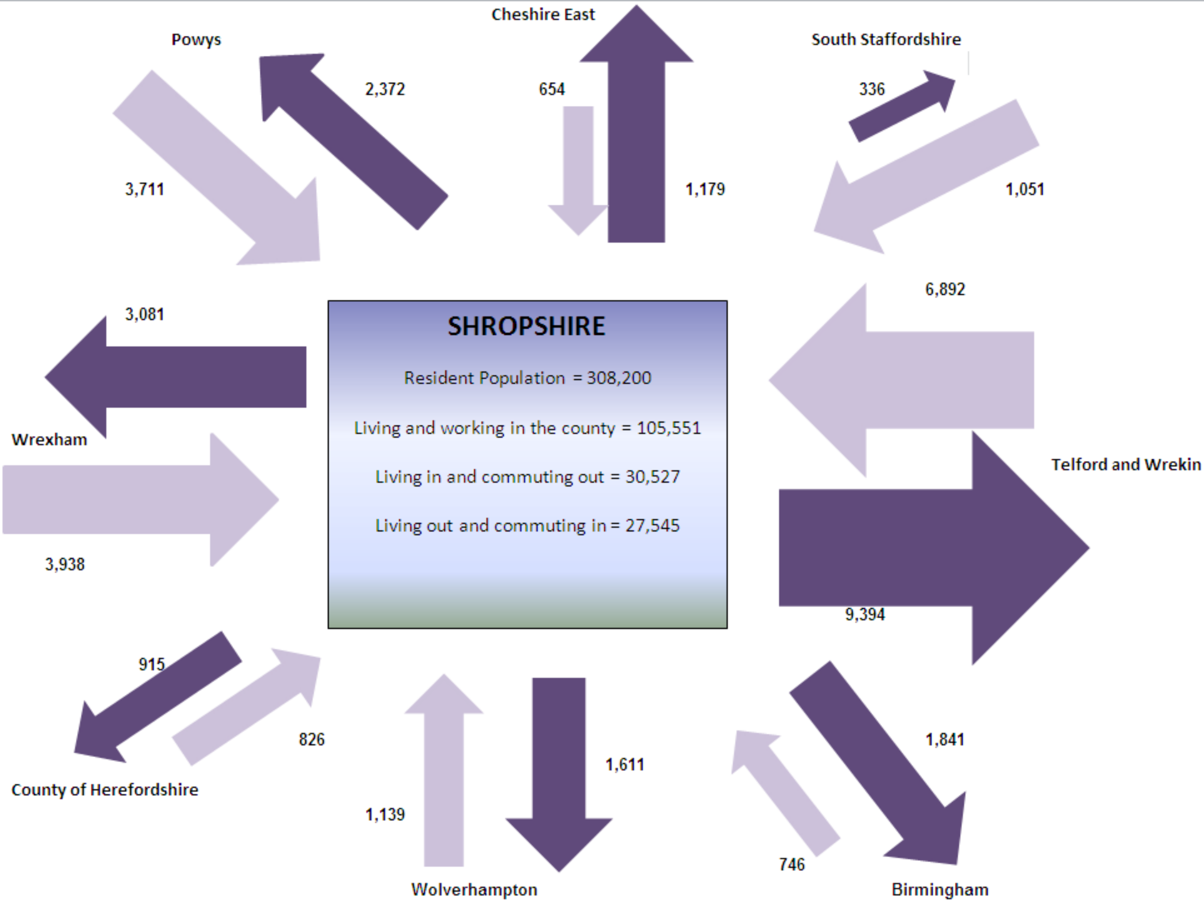
Chart 2.3 Commuting flows excluding those living and working in Shropshire





(Source: Annual population survey commuter flows, Local Authorities in Great Britain, 2010 – 2011) www.ons.gov.uk/commuting2011/asp-commuting-data

Chart 2.4 Main commuting flows by local authority

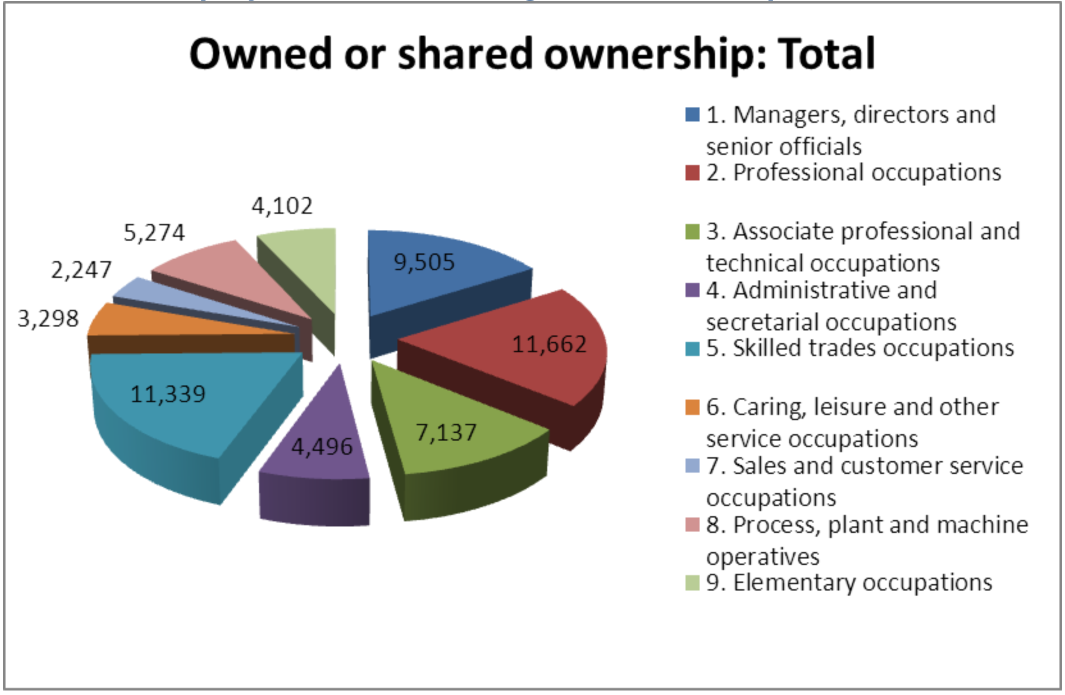


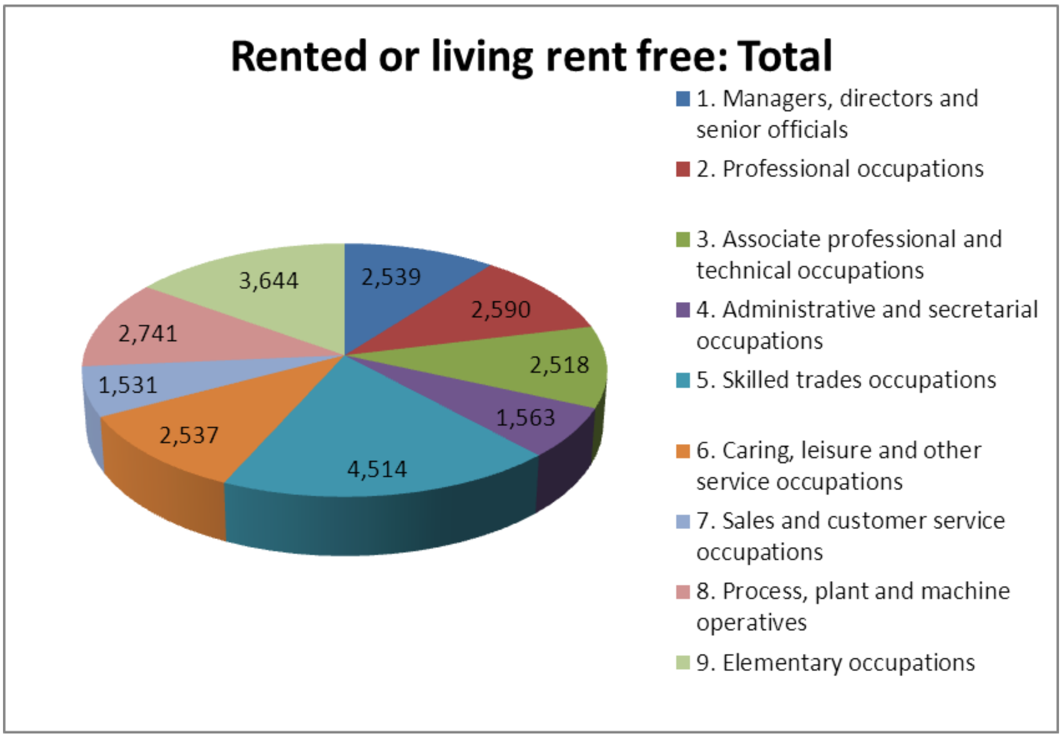
2.3 Chart 2.4 shows the commuting links with neighbouring counties highlighting current trends. The key link is with Telford where 9,394 of the Shropshire population commute out and 6,892 commute in from Telford, reflecting the attractiveness but also the higher prices of housing in Shropshire and the abundance of jobs in Telford. There are clear links with Wales; the combined commuting total of those commuting to Powys and Wrexham is 5,453 while 7,649 commute in. The third greatest flow is eastward, with a total of 3,452 commuting to Birmingham and Wolverhampton. There is a need for attractive housing to more closely match where people work and thereby reduce commuting, and similarly a clear need for employment land allocations to provide suitable employment opportunities locally.

Employment and housing

2.4 Chart 2.5 profiles the main occupations of those living within Shropshire. The graphs are split by those who own their own property and those living in rented accommodation. Those owning their own home have more of a tendency to work in professional occupations, managerial positions and technical occupations. For those who rent, there are a higher number of people working in elementary occupations, plant and machine operatives and elementary occupations.

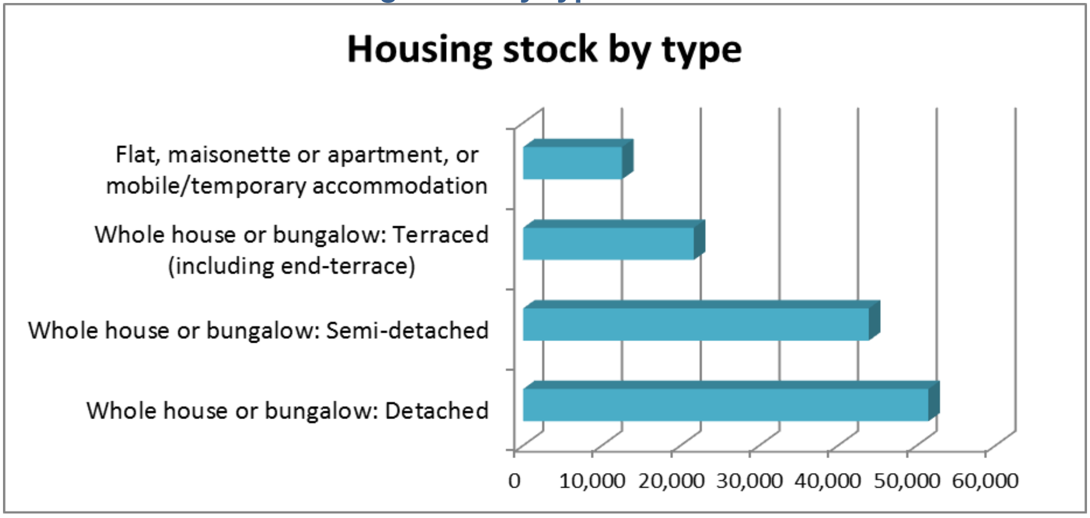
Chart 2.5 Employment and housing tenure in Shropshire





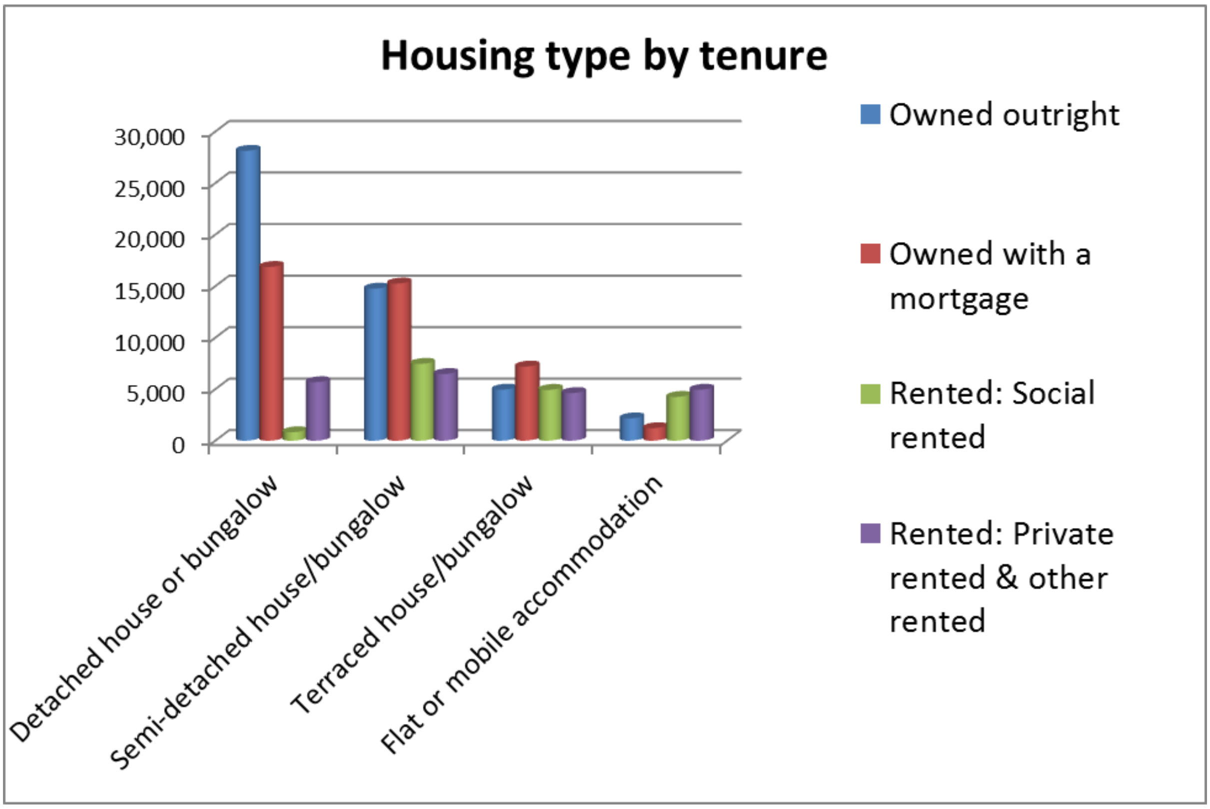
2.5 Shropshire's current housing stock is dominated by detached and semi-detached, owner-occupied properties. 69.8% of the population live in properties which they own outright or with a mortgage, and only 30.1% live in rented accommodation.

Chart 2.6 Current housing stock by type



Source: 2011 Census ONS Crown Copyright Reserved

Chart 2.7 Current housing stock by type and tenure



Source: 2011 Census ONS Crown Copyright Reserved

2.6 Shropshire's housing tends to be larger than required for the number of people in the household. The dominant size of households occupying larger properties is the 2 person household. Under-occupation is dominated by those who have paid off their mortgage (chart 2.9), so it is reasonable to assume that under-occupation is dominated by older households. The housing profile reflects the ageing demographic of Shropshire, and the higher proportion of retired households relative to families.

Table 2.2 Size of dwellings against size of households

Household Size	Total no. properties	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms
All households	129,674	9,900	32,547	56,371	30,856
1 person in household	37,540	7,441	13,631	12,711	3,757
2 people in household	49,377	2,217	13,698	22,212	11,340
3 people in household	19,083	205	3,506	10,025	5,347
4 or more people in household	23,674	127	1,712	11,423	10,412

Chart 2.8 Tenure of under-occupied properties

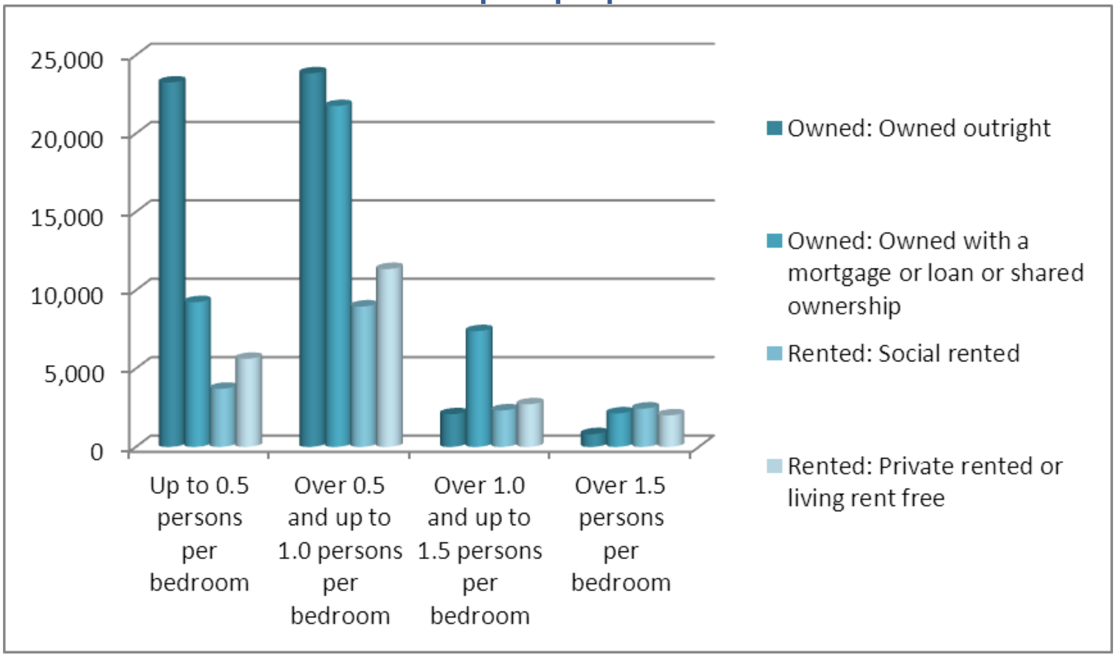
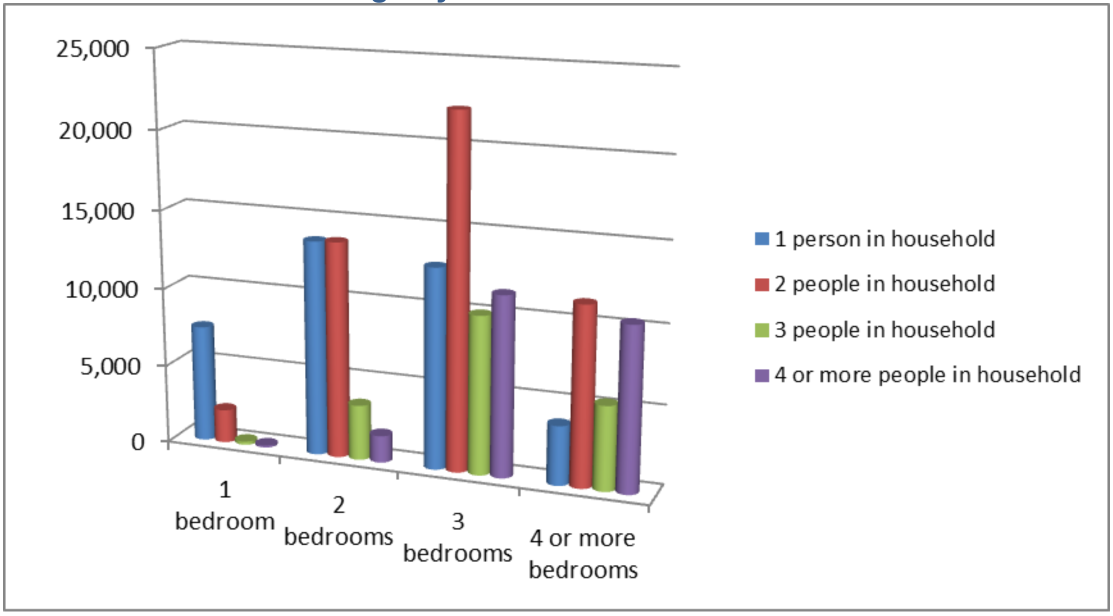


Chart 2.9 Size of dwellings by size of households



2.7 At present there is only a small amount of 1 bedroom properties, at 7.6% of the current housing stock. Both demographic and affordability pressures suggest that there is a need for more 1 and 2 bedroom properties and there may be an increasing demand for these smaller properties in the future.

Employment-related development

2.8 In an ideal world, housing development would match areas with a growing economy. While this ideal is difficult to achieve, the economy remains a key driver of the housing market.

2.9 The amount of employment-related development planned for Shropshire over 2006-2026 is shown in tables 2.3 and 2.4. The north east has the highest level of economic growth, with 94ha of land scheduled for employment purposes between 2013 and 2018. Key market towns within this area are Market Drayton and Whitchurch, which also have clear commuting links with Cheshire East. Overall north east Shropshire has the highest employment land supply within the county, with 123ha of land.

2.10 By comparison, southern and eastern areas of the county both have the lowest employment land supply. Eastern Shropshire has clear commuting links with the West Midlands, with people travelling from Shropshire to Wolverhampton and Birmingham. Southern Shropshire is considered to be a much more self-contained area.

2.11 Out of the 18 place plan areas in Shropshire, Shrewsbury, Whitchurch, Market Drayton and Oswestry are the four main areas for economic growth, accounting for 68.2% of the Strategic Land Supply across the whole of Shropshire between 2006 and 2026.

Table 2.3 Planned employment development by spatial zone

Location	Completed Development	Portfolio of Land	Windfall Allowance
North West	8	62	20
North East	17	94	13
Central	28	73	11
South	8	35	12
East	6	31	10

Table 2.4 Planned employment development by town

STRATEGIC EMPLOYMENT LAND SUPPLY

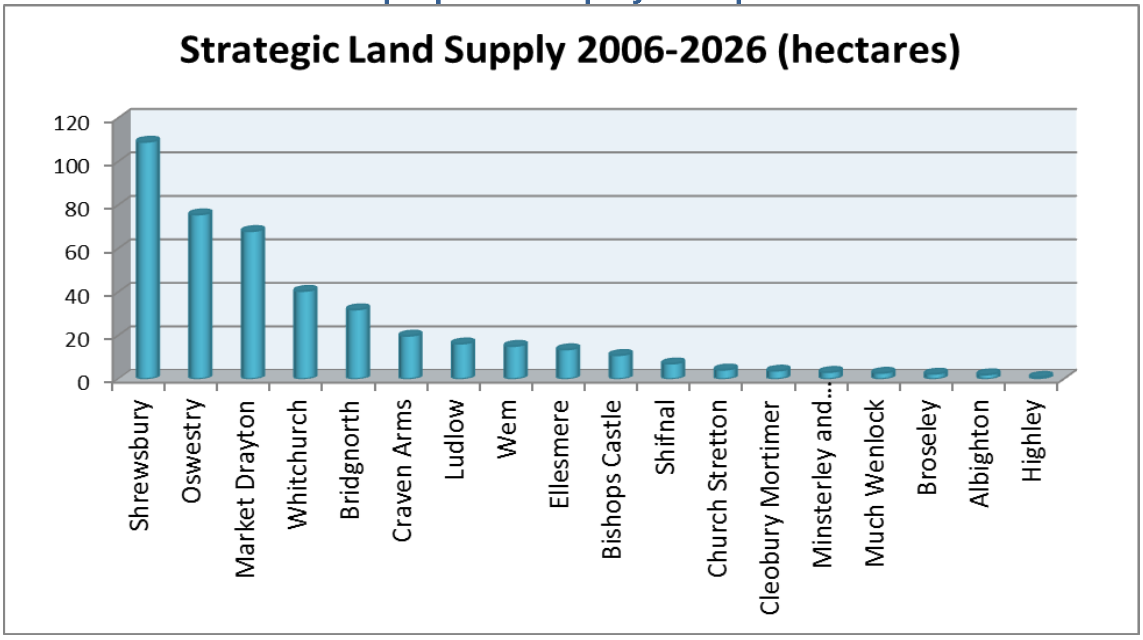
LOCATION	Completed Development 2006 - 2013	PORTFOLIO OF LAND & PREMISES 2013 - 2018				Windfall Allowance 2013 - 2026	STRATEGIC LAND SUPPLY 2006 - 2026
		Employment Sites	Committed Sites	Allocated Sites	ALL SOURCES		
							HECTARES
SHROPSHIRE	**67**	**46**	**81**	**169**	**296**	**66**	**429**
North West	**8**	**14**	**-**	**48**	**62**	**20**	**91**
Oswestry	6.8	13.8	-	39	53	16	75.6
Ellesmere (W)	1.7	0.4	-	9	9.6	4.0	15.3
North East	**17**	**15**	**43**	**35**	**94**	**13**	**123**
Market Drayton (W) (D)	4.1	11.5	30.3	16	58	6.0	67.9
Whitchurch (W) (D)	8.2	1.6	10.6	15	27	5.0	40.4
Wem (W)	4.5	2.1	2.5	4	9	2.0	15.1
Central	**28**	**8**	**21**	**44**	**73**	**11**	**112**
Shrewsbury (W)	26.6	7.8	21.2	43	72	10	109
Minsterley & Pontesbury	1.1	-	0.28	0.7	1.0	1.0	3.1
South	**8**	**6**	**8**	**22**	**35**	**12**	**56**
Ludlow	4.0	1.4	0.5	8.3	10	2.0	16.2
Bishops Castle	2.4	0.4	4.1	-	5	4.0	10.9
Craven Arms (W) (D)	1.1	3.7	3.5	10.5	18	2.0	20.8
Church Stretton	0.4	-	-	1.8	1.8	2.0	4.2
Cleobury Mortimer	0.6	0.1	-	1.0	1.1	2.0	3.7
East	**6**	**4**	**8**	**20**	**31**	**10**	**47**
Bridgnorth (W) (D)	3.2	3.7	5.5	14.8	24.0	5.0	32.2
Shifnal (W)	2.0	-	-	4	4.0	1.0	7.0
Much Wenlock	-	-	1.7	-	1.7	1.0	2.7
Broseley	0.3	-	-	1.25	1.3	0.75	2.3
Highley	0.15	-	0.6	-	0.6	-	0.8
Albrighton	-	-	-	-	0.0	2.0	2.0

(W) - Indicates sites preferred for Recycling and Environmental Industries

(D) - Indicates sites dedicated to single occupier

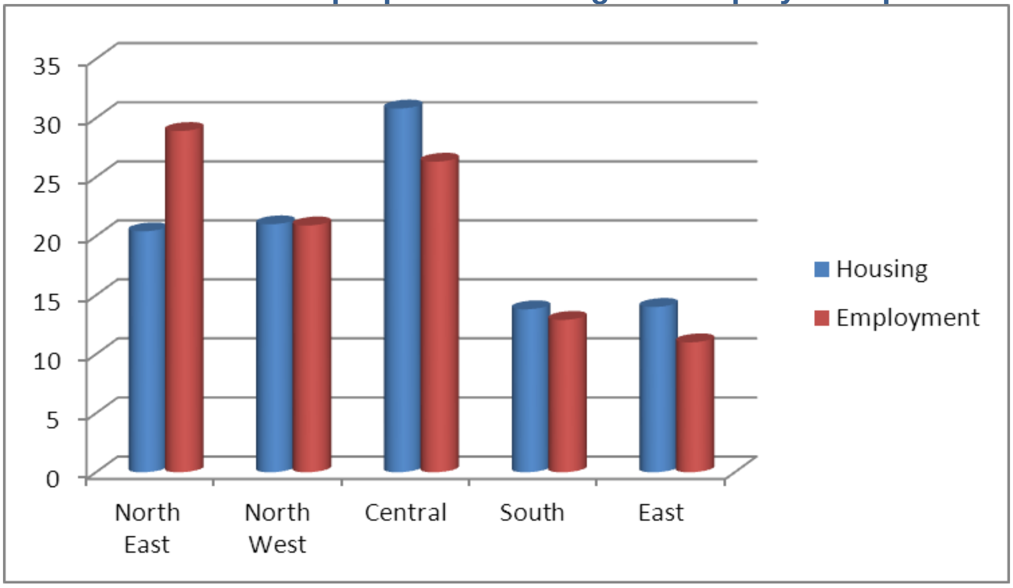
Source: SAMDev Plan March 2014

Chart 2.10 SAMDev Plan proposed employment provision



2.12 The proportion of housing allocations compared with the proportion of employment land allocations within each spatial zone is shown in chart 2.11. These figures include completed and committed builds, as well as windfall allowance. The main difference is within the north east where 28.9% of land has been allocated for employment and only 20.4% allocated for housing. The North West and south have a more balanced approach to housing and employment allocations. The central area shows a higher level of housing allocations with 26.3% of allocations already built and a further 45.6% allocated through the SAMDev plan. However the central area has a large portfolio of employment land with 65% of allocations to be built between 2013 and 2018.

Chart 2.11 SAMDev Plan proposed housing and employment provision



Key Drivers

2.13 The key drivers of demography and employment have been introduced in this chapter, and are explored in more detail in the following chapters. The ageing population is the primary driver in Shropshire, leading not only to older households but also smaller households mis-matched in larger family homes. There is a need for a larger number of suitable, high quality, smaller homes. As will be covered in section 3, there is also a need for more retirement dwellings and care homes.

2.14 While an aim of good planning is to achieve balanced towns, in practice there is always some mis-match between housing and employment. Commuting flows are a good proxy for measuring the degree of mismatch. These demonstrate that many people are choosing to live in Shropshire and commute to Telford, with smaller numbers commuting eastwards to Wolverhampton and Birmingham and north-westwards to Powys and Wrexham. In part this may reflect the relative attractiveness of Shropshire as a place to live, but it also points to the need for more quality, well-paid jobs in Shropshire.

2.15 The counter-flow of in-migrants to jobs in Shropshire suggests that at least some of this flow may be related to the relative affordability of housing. People are travelling into Shropshire for work from places with lower housing costs, such as Powys, Wrexham, Cheshire and Telford, suggesting that Shropshire needs to address the affordability of its housing. The relative ratio of house prices to wages is explored in more detail in section 3.

2.16 In summary, key drivers of housing requirements in Shropshire are:

- Demography
- The economy
- The affordability of housing

2.17 As in any market economy, the housing industry responds imperfectly to these key drivers. Deliverability is constrained by the availability of finance, the cost and availability of land, amongst other factors. The response of the housing industry to these key drivers is addressed in the Market Assessment chapter of the Strategic Housing Land Availability Assessment (SHLAA) 2014 and in the Shropshire Viability Study 2013.

3. Housing Stock and Supply

Housing stock

3.1 Shropshire's housing stock at the time of the 2011 census is shown in table 3.1 below. A more detailed tenure breakdown is available by households (ie. occupied dwellings only) in table 3.2. This provides a useful backdrop against which individual towns can be compared (table 3.3).

Table 3.1 Shropshire's Housing Stock, 2011 census

Tenure	no. 2011	% stock
Local Authority Dwelling Stock	4,240	3.1%
Registered Providers (Housing Association)	13,458	9.9%
Other Public Sector Dwelling Stock	819	0.6%
Owner Occupied and Private Rented Dwellings	117,060	86.3%
Energy Efficiency of Private Sector Housing: Average SAP Rating	50	
LA Dwellings that Fall Below the 'Decent Home Standard'		20.50%
Total Dwelling Stock, Shropshire	135,570	

Table 3.2 Household tenure

Households in Shropshire, 2011	No.	% households
Owned; Owned Outright	49,998	38.6%
Owned; Owned with a Mortgage or Loan	39,690	30.6%
Shared Ownership (Part Owned and Part Rented)	830	0.6%
Social Rented; Rented from Council (Local Authority)	6,458	5.0%
Social Rented; Other Social Rented	10,990	8.5%
Private Rented; Private Landlord or Letting Agency	17,013	13.1%
Private Rented; Employer of a Household Member	777	0.6%
Private Rented; Relative or Friend of Household Member	1,203	0.9%
Private Rented; Other	428	0.3%
Living Rent Free	2,287	1.8%
All Households	129,674	100.0%

3.2 A high proportion of dwellings (38.6%) are owned outright, reflecting Shropshire's older demographic and the fact that many older households have paid off their mortgage. In towns that have a particularly high proportion of older households, the proportion of housing stock that is owned outright is exceptionally high, reaching 44% in Minsterley & Pontesbury and 54.5% in Church Stretton.

3.3 Nearly 20% of housing is private rented in a number of Shropshire's towns, including Bishops Castle, Ellesmere, Oswestry and Whitchurch. Towns with particularly high proportions of social rented properties include Craven Arms, Broseley and Shifnal.

Table 3.3 Household tenure by town

	Social rent	Shared ownership	Private rent	Mortgaged	Owned outright
Albrighton	16.5%	0.5%	13.0%	28.2%	41.8%
Bishops Castle	16.8%	0.8%	20.3%	19.0%	43.1%
Bridgnorth	11.9%	0.3%	16.7%	31.8%	39.3%
Broseley	19.1%	0.9%	12.5%	31.1%	36.4%
Church Stretton	10.3%	1.1%	12.2%	22.0%	54.5%
Cleobury Mortimer	15.5%	1.4%	14.2%	29.6%	39.2%
Craven Arms	22.6%	2.2%	16.5%	24.3%	34.4%
Ellesmere	13.2%	0.9%	19.4%	28.2%	38.3%
Highley	15.3%	0.3%	15.2%	29.7%	39.5%
Ludlow	17.5%	1.1%	16.1%	22.5%	42.8%
Market Drayton	15.6%	0.8%	15.8%	32.4%	35.4%
Minsterley & Pontesbury	13.1%	0.5%	11.6%	30.8%	44.0%
Much Wenlock	16.3%	0.6%	17.9%	22.6%	42.6%
Oswestry	17.0%	0.5%	18.4%	31.5%	32.7%
Shifnal	18.7%	0.5%	15.7%	32.0%	33.2%
Shrewsbury	16.1%	0.6%	16.6%	33.3%	33.4%
Wem	13.7%	0.6%	16.3%	30.5%	38.8%
Whitchurch	15.4%	0.9%	20.2%	30.7%	32.8%
Shropshire	13.5%	0.6%	14.9%	30.6%	38.6%

Source: 2011 Census

Comparative housing costs and affordability

3.4 The costs of different housing tenures in each of Shropshire's 18 key centres is shown in table 3.4 below. Please note the county-wide average includes rural areas. In most (but not all) cases it is cheaper to rent than to have a mortgage. Shared ownership, where a housing association part rents, part sells, an affordable property is cheaper than a standard mortgage but often more expensive than renting privately. It is however considered to be 'affordable housing'.

3.5 In practice, social rent may not be available to an applicant, unless they are in a priority category. Shared ownership may likewise not be available, unless an applicant meets both the mortgage provider's lending criteria *and* the housing association's criteria.

Table 3.4 Comparative monthly housing costs in Shropshire's main towns

monthly cost	Social rent (3 bed price)	Shared ownership (25% owned)	Private rent (30th percentile)	Mortgaged (entry level, 15th percentile)	Mortgaged (median, 50th percentile)	Owned outright
Albrighton	£282	£494	£595	£599	£821	£0
Bishops Castle	£315	£611	£395	£693	£1,014	£0
Bridgnorth	£282	£534	£475	£659	£887	£0
Broseley	£282	£481	£525	£570	£799	£0
Church Stretton	£315	£710	£467	£626	£1,178	£0
Cleobury Mortimer	£315	£504	£475	£595	£836	£0
Craven Arms	£315	£409	£510	£475	£679	£0
Ellesmere	£261	£403	£450	£481	£669	£0
Highley	£282	£403	£422	£488	£669	£0
Ludlow	£315	£461	£475	£557	£765	£0
Market Drayton	£261	£430	£475	£541	£715	£0
Minsterley & Pontesbury	£274	£521	£495	£627	£865	£0
Much Wenlock	£282	£687	£664	£785	£1,140	£0
Oswestry	£261	£396	£450	£491	£659	£0
Shifnal	£282	£492	£550	£608	£816	£0
Shrewsbury north	£274	£412	£525	£552	£684	£0
Shrewsbury south	£274	£525	£495	£603	£872	£0
Wem	£261	£449	£475	£554	£745	£0
Whitchurch	£261	£428	£450	£470	£712	£0
Shropshire (all areas) average	£279	£515	£485	£588	£856	£0

Sources: Rents - Rightmove 2013; Owner occupied - Land Registry transactions 2009-2012; Shared ownership assumes rental of 2.75% Registered Provider's equity and 25 year repayment mortgage on the owner's share of the equity, applying mortgage rates at mid 2013;.

3.6 The monthly housing costs in table 3.4 can be converted into household income necessary to afford each tenure, as shown in table 3.5. Costs vary significantly between Shropshire's towns.

3.7 It is not possible to provide such a detailed breakdown for Shropshire's hub and cluster settlements, as the villages tend to have insufficient records for statistically robust results. However, by aggregating village figures, information about house prices by rural areas is provided in table 3.10.

Table 3.5 Household income required to afford different tenures

	Shared ownership (25% owned)	Private rent (30th percentile)	Mortgaged (entry level*)	Mortgaged (median)
Albrighton	£19,778	£28,560	£32,110	£43,971
Bishops Castle	£24,430	£18,960	£37,118	£54,286
Bridgnorth	£21,351	£22,800	£35,286	£47,500
Broseley	£19,245	£25,200	£30,519	£42,818
Church Stretton	£28,384	£22,416	£33,521	£63,107
Cleobury Mortimer	£20,144	£22,800	£31,893	£44,786
Craven Arms	£16,373	£24,480	£25,460	£36,371
Ellesmere	£16,115	£21,600	£25,786	£35,829
Highley	£16,115	£20,232	£26,152	£35,829
Ludlow	£18,421	£22,800	£29,857	£40,986
Market Drayton	£17,214	£22,800	£28,968	£38,271
Minsterley & Pontesbury	£20,859	£23,760	£33,599	£46,346
Much Wenlock	£27,469	£31,848	£42,044	£61,071
Oswestry	£15,858	£21,600	£26,274	£35,286
Shifnal	£19,669	£26,400	£32,571	£43,700
Shrewsbury north	£16,481	£25,200	£29,586	£36,643
Shrewsbury south	£20,985	£23,760	£32,300	£46,686
Wem	£17,946	£22,800	£29,654	£39,900
Whitchurch	£17,139	£21,600	£25,148	£38,136
Shropshire (all areas) average	£20,619	£23,280	£31,486	£45,871

Source: table 3.4 converted into annual household income using the following multipliers: shared ownership - cost equal to 30% household income; private rented – cost equal to 25% income; mortgaged – mortgage equivalent to 3.5 times income.

3.8 Household incomes also vary considerably across Shropshire. Table 3.6 provides the mean household income in 2013, by town, while table 3.7 gives the spread. The combination of housing costs and household incomes enables us to estimate what percentage of households can afford each tenure, by town. The results are shown in table 3.8.

Table 3.6 Mean household incomes, 2013

Parish	Average Income per household
Albrighton	£42,201
Bishop's Castle	£26,442
Bridgnorth	£40,425
Broseley	£32,628
Church Stretton	£33,664
Cleobury Mortimer	£40,382
Craven Arms	£29,372
Ellesmere	£30,677
Highley	£26,474
Ludlow	£28,131
Market Drayton	£35,126
Minsterley	£26,973
Much Wenlock	£41,112
Oswestry	£30,395
Pontesbury	£37,146
Shifnal	£41,296
Shrewsbury North	£30,522
Shrewsbury South	£36,808
Wem	£31,916
Whitchurch	£32,381
Shropshire average	£34,108

Source: Axicom income data 2013

Table 3.7 Spread of household incomes by town

	% hholds <£20,000	% hholds £20,000 - £24,999	% hholds £25,000 - £29,999	% hholds £30,000 - £34,999	% hholds £35,000 - £39,999	% hholds £40,000 - £49,999	% hholds £50,000 +
Albrighton	36.8%	6.5%	9.6%	8.8%	5.8%	12.2%	20.4%
Bishop's Castle	58.7%	7.4%	7.3%	8.6%	4.5%	5.2%	8.2%
Bridgnorth	34.9%	7.2%	8.6%	8.8%	5.7%	12.5%	22.2%
Broseley	45.6%	7.4%	8.6%	7.7%	7.6%	10.6%	12.5%
Church Stretton	46.2%	6.1%	6.3%	7.8%	5.5%	9.1%	19.0%
Cleobury Mortimer	39.4%	5.3%	6.1%	7.1%	4.4%	11.7%	25.9%
Craven Arms	51.1%	7.0%	12.3%	6.4%	3.4%	10.5%	9.3%
Ellesmere	48.4%	8.5%	6.7%	8.2%	5.4%	8.9%	13.8%
Highley	52.2%	8.2%	9.8%	8.0%	3.9%	10.2%	7.6%
Ludlow	50.9%	8.3%	9.2%	6.7%	6.0%	8.3%	10.6%
Market Drayton	41.4%	7.2%	10.0%	9.1%	6.0%	10.5%	15.8%
Minsterley	40.4%	9.4%	15.4%	9.3%	9.8%	8.6%	7.1%
Much Wenlock	33.6%	4.7%	8.4%	8.2%	5.4%	13.8%	25.9%
Oswestry	47.5%	7.7%	9.6%	8.2%	6.1%	8.3%	12.7%
Pontesbury	34.8%	6.3%	10.8%	7.0%	7.9%	11.9%	21.2%
Shifnal	35.4%	6.3%	8.2%	8.7%	7.6%	11.6%	22.2%
Shrewsbury North	45.9%	8.0%	10.7%	8.9%	6.5%	9.0%	10.8%
Shrewsbury South	39.8%	7.0%	8.5%	8.3%	7.1%	11.7%	17.6%
Wem	48.4%	7.4%	8.5%	8.1%	5.2%	10.0%	12.4%
Whitchurch	45.4%	8.4%	9.9%	7.5%	5.2%	10.1%	13.5%
Shropshire	43.2%	7.4%	9.2%	8.2%	6.3%	10.4%	15.4%

Source: Axicom income data 2013

3.9 The percentage of households able to afford different tenures (based on current household income only) reveals the relative affordability of each town in Shropshire. If ability to afford entry-level private rent is taken as the measure of affordability, the most affordable towns in Shropshire *relative to local incomes* are Shifnal and Bridgnorth. The least affordable *relative to local incomes* are Bishops Castle and Ludlow. Much of this is explained by average local incomes, which are higher on average in the east and lower on average in the south.

Table 3.8 Percentage local households able to afford each tenure

	Shared ownership (25% owned)	Private rent (30th percentile)	Mortgaged (entry level*)	Mortgaged (median)
Albrighton	63%	47%	47%	33%
Bishops Castle	34%	41%	18%	8%
Bridgnorth	65%	58%	40%	22%
Broseley	54%	47%	38%	23%
Church Stretton	41%	54%	34%	19%
Cleobury Mortimer	61%	55%	49%	38%
Craven Arms	61%	42%	42%	23%
Ellesmere	62%	52%	43%	28%
Highley	60%	48%	40%	22%
Ludlow	49%	41%	32%	19%
Market Drayton	68%	51%	41%	26%
Minsterley & Pontesbury	60%	50%	33%	14%
Much Wenlock	62%	53%	40%	26%
Oswestry	63%	53%	45%	27%
Shifnal	65%	58%	41%	34%
Shrewsbury north	71%	46%	35%	26%
Shrewsbury south	54%	53%	45%	23%
Wem	60%	44%	36%	22%
Whitchurch	62%	55%	46%	24%
Shropshire (all areas) average	55%	50%	32%	15%

Source: derived from the household incomes required and the Axicom incomes data in tables 3.5 and 3.7

3.10 It is not possible to apply this method for social rent, as eligibility for social rent is based on the qualifying criteria of ‘priority housing need’ rather than income. Similarly properties that are owned outright usually reflect historic factors (eg. the occupants have paid off their mortgage after 30 years) or inheritance. These two tenures are therefore not shown in table 3.8.

Housing market strength

3.11 An analysis of house prices across Shropshire shows marked differences across the county, as shown in table 3.10 below. The data is based on nearly 8,500 house transactions registered with the Land Registry over the period January 2009 to September 2012, broken down by town/key centre and five rural areas.

3.12 The rural areas are comprised of the rural hinterlands for the Place Plan areas shown in table 3.9 below. The rural areas have the widest range of house prices, shown by the highest standard deviation scores. The rural areas include some of the cheapest and some of the most expensive homes in Shropshire.

Table 3.9 Rural areas groupings

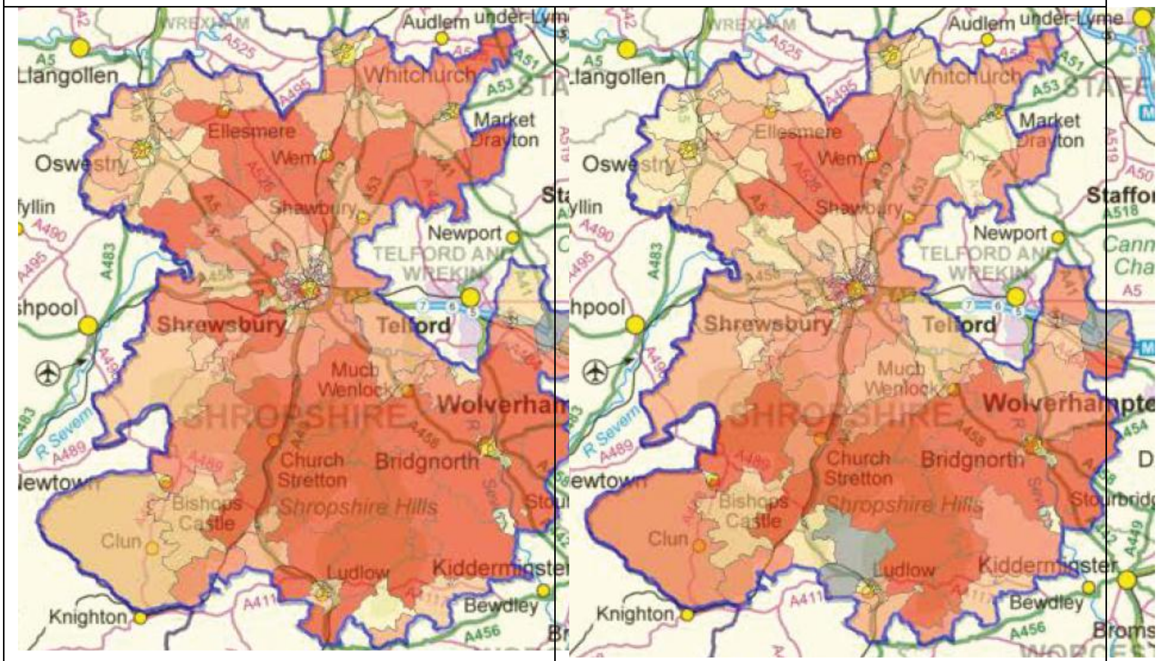
Rural area	Hinterlands of Place Plan areas:
Rural central	Shrewsbury; Minsterley & Pontesbury
Rural east	Much Wenlock, Broseley, Bridgnorth, Highley, Albrighton, Shifnal
Rural north east	Wem, Whitchurch, Market Drayton
Rural north west	Oswestry, Ellesmere
Rural south	Bishops Castle, Church Stretton, Craven Arms, Ludlow, Cleobury Mortimer

Table 3.10 House prices by area

Town or rural area	standard deviation (sd)	sd below mean	mean	sd above mean	no. records
Albrighton	£65,869	£109,627	£175,496	£241,366	82
Bishops Castle	£78,125	£129,295	£207,420	£285,545	50
Bridgnorth	£83,862	£117,121	£200,983	£284,845	501
Broseley	£57,879	£109,793	£167,671	£225,550	126
Church Stretton	£126,783	£127,890	£254,672	£381,455	171
Cleobury Mortimer	£73,170	£103,141	£176,311	£249,480	81
Craven Arms	£71,359	£89,669	£161,029	£232,388	64
Ellesmere	£60,914	£90,953	£151,868	£212,782	121
Highley	£52,570	£86,191	£138,761	£191,331	64
Ludlow	£96,310	£79,269	£175,579	£271,889	451
Market Drayton	£56,106	£96,946	£153,051	£209,157	324
Minsterley & Pontesbury	£71,561	£117,928	£189,489	£261,050	81
Much Wenlock	£101,067	£149,968	£251,036	£352,103	99
Oswestry	£66,835	£81,765	£148,601	£215,436	593
Rural Central	£127,844	£118,317	£246,161	£374,005	673
Rural East	£142,751	£146,680	£289,431	£432,183	353
Rural North East	£121,860	£131,139	£253,000	£374,860	553
Rural North West	£121,675	£80,452	£202,128	£323,803	638
Rural South	£145,126	£145,111	£290,236	£435,362	472
Shifnal	£69,428	£103,733	£173,161	£242,589	191
Shrewsbury North	£68,470	£82,180	£150,650	£219,120	793
Shrewsbury South	£105,523	£92,513	£198,036	£303,559	1529
Wem	£56,775	£99,057	£155,831	£212,606	220
Whitchurch	£65,076	£85,708	£150,784	£215,860	235

3.13 House prices alone can be misleading. Larger homes will cost more than smaller ones, and therefore prices must be adjusted for the types of property. This is done by converting house prices in price per square metre. Map 3.1 illustrates the impact this has on the results.

Map 3.1 Shropshire Prices Average by unit and by m^2



Avg price (overall) current	Avg price per square metre
>? 302,196.02 (43)	>? 1,964.93 (30)
262,646.78 - 302,196.01 (20)	1,819.04 - 1,964.92 (36)
223,097.52 - 262,646.77 (34)	1,673.14 - 1,819.03 (47)
183,548.26 - 223,097.51 (50)	1,527.24 - 1,673.13 (44)
143,999.01 - 183,548.25 (49)	1,381.35 - 1,527.23 (38)
<? 143,999.00 (35)	<? 1,381.34 (34)
No value	No value

Source: Hometrack, HDH Planning & Development 2012

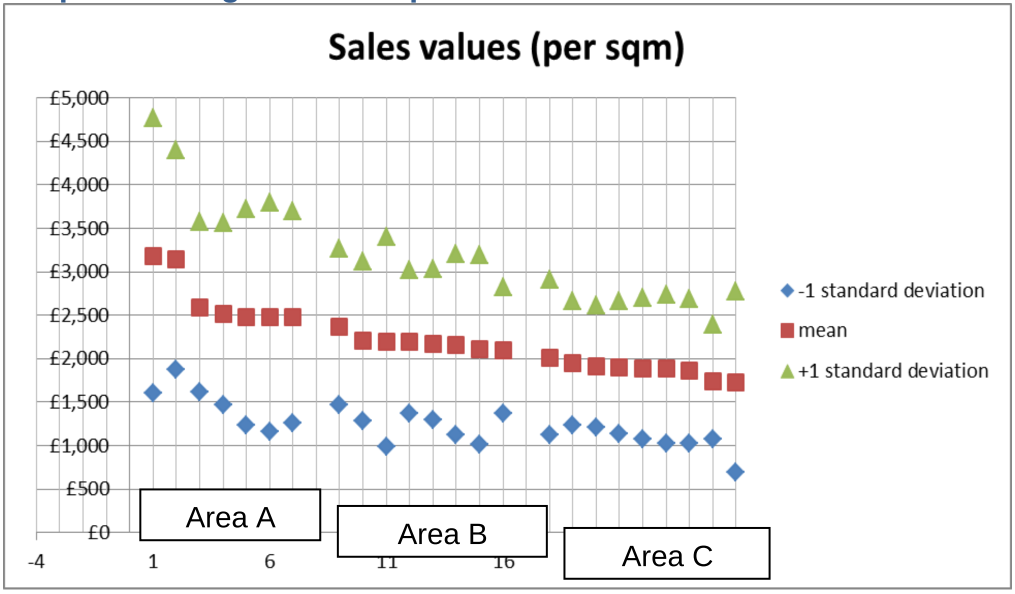
3.14 To convert the house prices in table 3.10 into sales values per square metre in table 3.11 we have assumed used the average floor areas for urban areas and village centres given in the English Housing Survey, of 80 sqm in towns and 117 sqm in villages. It is apparent that most towns have lower values than their surrounding rural area. While there is in very broad terms a division between north, central and south Shropshire in terms of house prices, the urban/rural division overlays this to provide a more complex picture. The Shropshire Developer Panel was consulted on these results as part of consultation on the Shropshire Viability Study 2013, and concur that they reflect the real differences between towns in Shropshire, and between the towns and the surrounding villages.

Table 3.11 House prices per square metre, highest to lowest

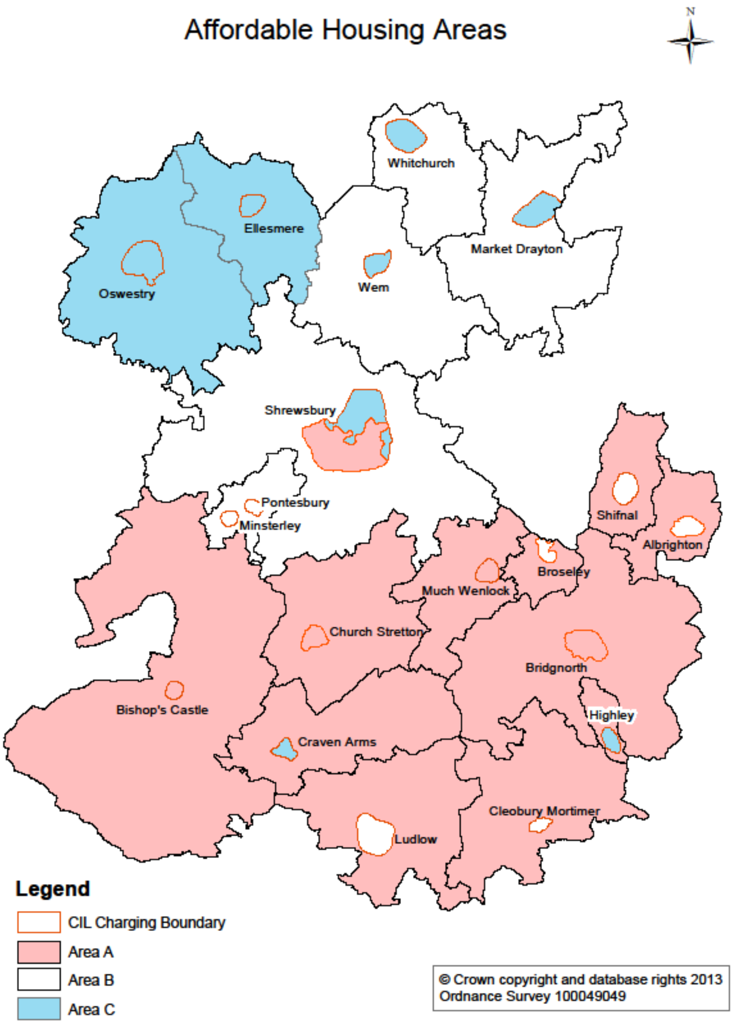
Area	map ref		-1 standard deviation	mean	+1 standard deviation
A	1	Church Stretton	£1,599	£3,183	£4,768
	2	Much Wenlock	£1,875	£3,138	£4,401
	3	Bishops Castle	£1,616	£2,593	£3,569
	4	Bridgnorth	£1,464	£2,512	£3,561
	5	Rural South	£1,240	£2,481	£3,721
	6	Shrewsbury South	£1,156	£2,475	£3,794
	7	Rural East	£1,254	£2,474	£3,694
B	9	Minsterley & Pontesbury	£1,474	£2,369	£3,263
	10	Cleobury Mortimer	£1,289	£2,204	£3,119
	11	Ludlow	£991	£2,195	£3,399
	12	Albrighton	£1,370	£2,194	£3,017
	13	Shifnal	£1,297	£2,165	£3,032
	14	Rural North East	£1,121	£2,162	£3,204
	15	Rural Central	£1,011	£2,104	£3,197
	16	Broseley	£1,372	£2,096	£2,819
C	17	Craven Arms	£1,121	£2,013	£2,905
	18	Wem	£1,238	£1,948	£2,658
	19	Market Drayton	£1,212	£1,913	£2,614
	20	Ellesmere	£1,137	£1,898	£2,660
	21	Whitchurch	£1,071	£1,885	£2,698
	22	Shrewsbury North	£1,027	£1,883	£2,739
	23	Oswestry	£1,022	£1,858	£2,693
	24	Highley	£1,077	£1,735	£2,392
	25	Rural North West	£688	£1,728	£2,768

3.15 Table 3.11 and graph 3.1 illustrate the variability of house prices across Shropshire. The grouping into Areas A, B and C are illustrated on map 3.1. House prices are the most significant factor influencing the viability of development, and consequently these groups correspond to the division of Shropshire into areas with high viability (area A), medium viability (area B) and low viability (area C).

Graph 3.1 Range of house prices



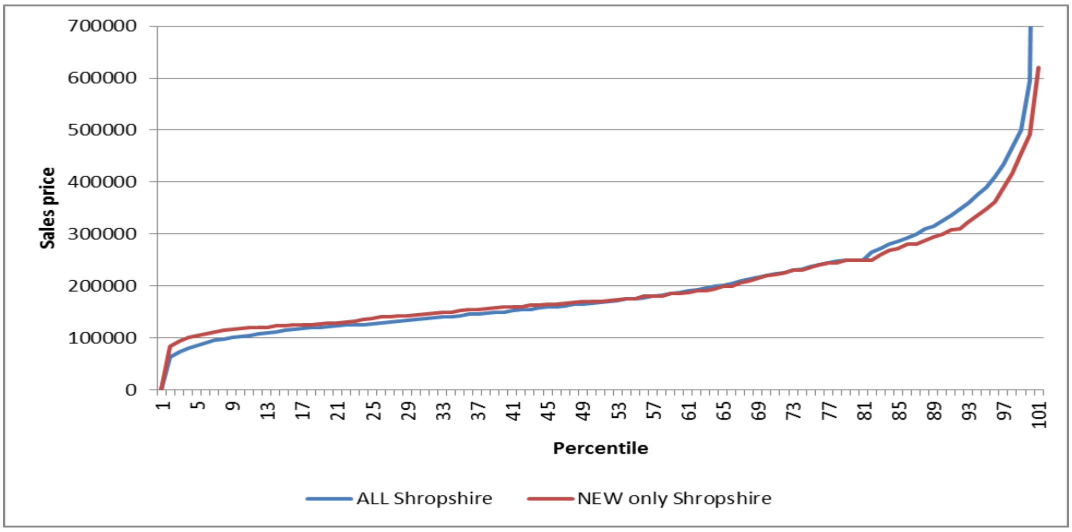
Map 3.2 Housing Viability Zones, based on house prices



Source: Shropshire Viability Study May 2013.

3.16 An analysis of how new house prices differ from second-hand house prices revealed that new build prices are generally higher at the bottom of the market but lower at the top end of the market, as shown in graph 3.2 and table 3.12 below.

Chart 3.2
Comparison of the spread of new and second-hand house prices



Source: Land Registry data for all Shropshire house purchase transactions, Jan 2009-Sept 2012

Table 3.12 New build/2nd hand comparison

	2nd hand properties	New build properties
Lower quartile	£128,000	£139,995
Median	£168,000	£170,000
Upper quartile	£240,000	£239,996
Mean for all areas	£200,475	£196,866
Mean for towns only	£177,229	£185,234
Mean for rural areas	£265,595	£238,120

Source: 8,479 Land Registry transactions Jan 2009 – Sep 2012

3.17 The types of new homes being built varies between rural areas and the towns, as illustrated by table 3.13 below. In rural areas more large properties are built, with 64% being 3+ bedrooms compared to only 42% in towns.

Table 3.13 Proportion of completed new build dwellings 2007-12

	1-bed flat	2+bed flat	2-bed house	3-bed house	4+bed house
Rural (defined as all outside of the market towns)	2%	4%	30%	34%	30%
Towns only	14%	27%	17%	26%	16%
Shropshire average 2007-2012	9%	19%	21%	29%	22%

Source: PLUMS team, Shropshire Council. The data is also available in the Development Trends Annual Monitoring Reports for 2008, 2009, 2010, 2011 & 2012, available on the Shropshire Council website.

Market signals and affordability ratio

3.18 The ratio of house prices to earnings shown in table 3.14 below gives a good indication of the general affordability of market housing. Shropshire is less affordable than the England average, and significantly less affordable than neighbouring Telford & Wrekin and Cheshire East and Cheshire West. It is, however, more affordable than Herefordshire.

Table 3.14 Ratio of house prices to earnings at 2012, sorted by LQ ratio

	Ratio lower quartile house prices to LQ earnings ***DCLG table 576***	**Ratio median house prices to median earnings** ***DCLG table 577***
Telford & Wrekin	5.78	5.67
Cheshire East	6.51	6.68
England	6.59	6.74
Cheshire West & Chester	6.69	6.53
Shropshire	**7.75**	**7.62**
Herefordshire	8.64	8.72

Source: https://www.gov.uk/government/statistical-data-sets/live-tables-on-housing-market-and-house-prices Tables 576 & 577

3.19 The graphs below show how affordability has changed over time. After the house price boom 2004-2007 followed by a drop in 2008, the affordability of housing in Shropshire has been fairly stable.

Chart 3.3 Affordability ratio comparisons: lower quartile ratios

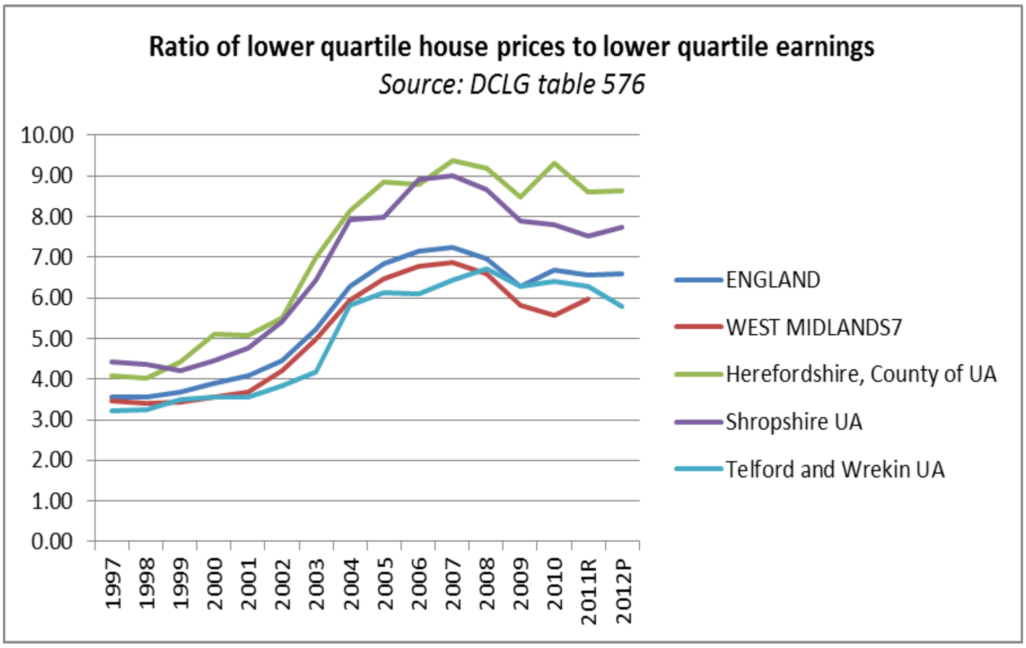


Chart 3.4 Affordability ratio comparisons: median ratios

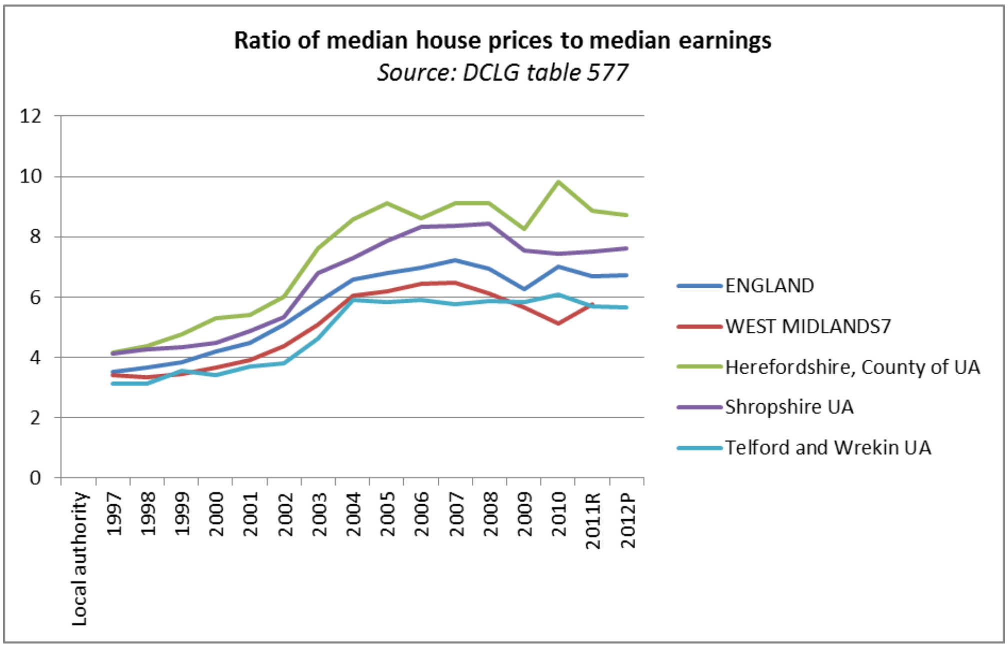
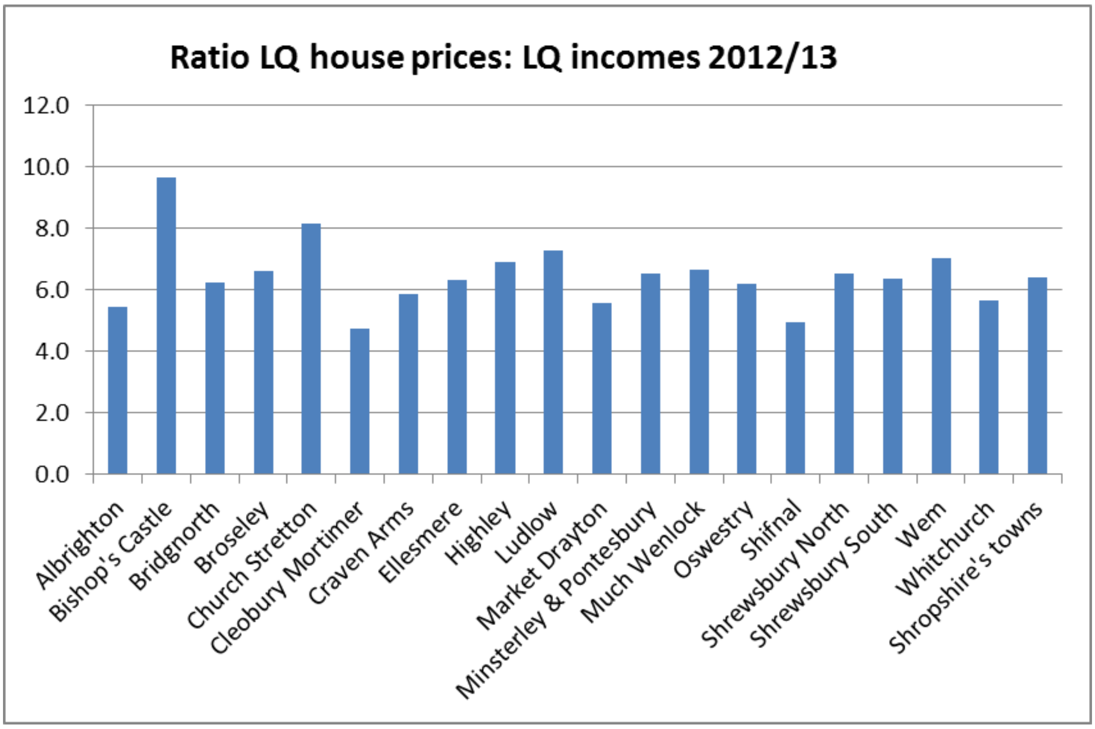


Chart 3.5 Affordability ratio, by town



Source: table 3.15

Table 3.15 Town specific ratios of house prices to earnings

	AXICOM INCOME DATA		HOUSE PRICES		RATIO PRICES:INCOME	
	Median Income	Lower Quartile income	median price (50th centile)	Lower Quartile price (25th centile)	Ratio LQ house prices: LQ incomes	Ratio median house prices: median incomes
Albrighton	£38,438	£24,989	£162,000	£136,250	5.5	4.2
Bishop's Castle	£22,417	£15,449	£200,000	£149,000	9.6	8.9
Bridgnorth	£35,905	£23,444	£175,000	£146,500	6.2	4.9
Broseley	£29,338	£19,962	£157,750	£132,125	6.6	5.4
Church Stretton	£29,664	£20,585	£232,500	£167,500	8.1	7.8
Cleobury Mortimer	£37,853	£26,342	£165,000	£124,995	4.7	4.4
Craven Arms	£26,950	£18,721	£134,000	£109,500	5.8	5.0
Ellesmere	£28,063	£17,109	£132,000	£108,000	6.3	4.7
Highley	£22,647	£15,506	£132,000	£107,000	6.9	5.8
Ludlow	£24,138	£16,511	£151,000	£119,975	7.3	6.3
Market Drayton	£31,533	£21,524	£141,000	£120,000	5.6	4.5
Minsterley & Pontesbury	£30,704	£21,053	£170,750	£137,750	6.5	5.6
Much Wenlock	£38,369	£25,425	£225,000	£169,500	6.7	5.9
Oswestry	£26,758	£17,738	£130,000	£109,950	6.2	4.9
Shifnal	£37,759	£26,188	£161,000	£130,000	5.0	4.3
Shrewsbury North	£27,064	£18,365	£135,000	£120,000	6.5	5.0
Shrewsbury South	£32,497	£21,161	£172,000	£135,000	6.4	5.3
Wem	£27,636	£17,470	£147,000	£122,875	7.0	5.3
Whitchurch	£28,743	£18,647	£140,500	£105,150	5.6	4.9
Shropshire's towns	£30,340	£20,220	£169,000	£129,164	6.4	5.6

Source: Axicom income data 2013; Land Registry transactions 2009-2012

3.20 Please note that the above data does not include any rural or village locations. Comparing affordability between Shropshire's towns, the least affordable towns are Bishop's Castle, Church Stretton and Ludlow (largely due to high house prices in these areas), while the most affordable towns are Cleobury Mortimer, Shifnal and Albrighton (largely due to higher household incomes in these areas).

3.21 A case can be made for increasing the supply of housing in areas with a high ratio in response to an over-heated housing market, and also in areas with a low ratio, as offering sustainable communities in which housing affordability is at more acceptable levels. Areas with a low ratio are arguably more sustainable places for people to live in.

Market Deliverability

3.22 The ability of the market to deliver different types of housing is covered in more depth in the market assessment chapter of the Strategic Housing Land Availability Assessment (SHLAA) 2014.

3.23 Shropshire benefits from ongoing engagement with local developers through regular meetings of the Shropshire Developer Panel (appendix 1). It is apparent that the market swings between favouring smaller properties, reflecting the number of households in this category, and larger properties, reflecting financial factors including the ease of obtaining mortgages.

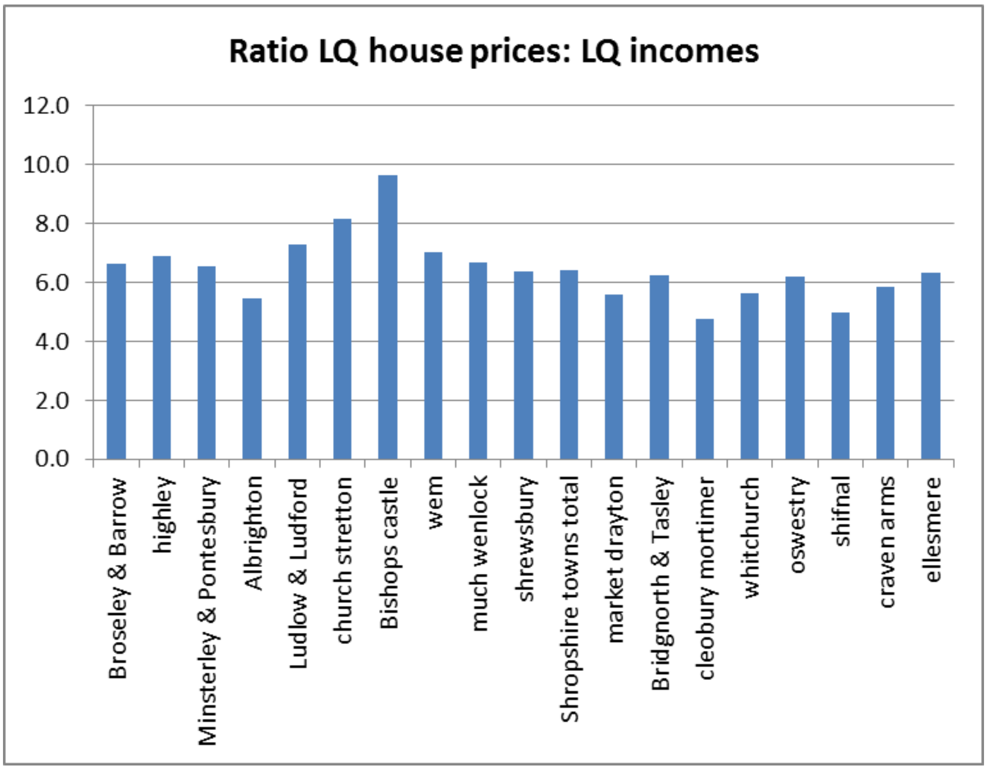
Table 3.16 Rates of growth in market towns and key centres

Parish, sorted by SAMDev Plan growth rate	2011 census dwellings	SAMDev housing reqmt 2006-26	SAMDev planned growth per annum	Ratio LQ house prices: LQ incomes
Broseley & Barrow	2529	200	0.4%	6.6
Highley	1653	200	0.6%	6.9
Minsterley & Pontesbury	2126	260	0.6%	6.5
Albrighton	1938	250	0.6%	5.5
Church Stretton	2350	370	0.8%	8.1
Ludlow & Ludford	5521	875	0.8%	7.3
Much Wenlock	1346	202	0.8%	6.7
Bishops castle	898	150	0.8%	9.6
Wem	2762	500	0.9%	7.0
Shrewsbury	32145	6500	1.0%	6.4
Market Drayton	5323	1200	1.1%	5.6
Bridgnorth & Tasley	6195	1400	1.1%	6.2
Cleobury Mortimer	1308	350	1.3%	4.7
Whitchurch	4454	1200	1.3%	5.6
Oswestry	7989	2600	1.6%	6.2
Shifnal	3139	1250	2.0%	5.0
Craven Arms	1205	500	2.1%	5.8
Ellesmere	1785	800	2.2%	6.3
Shropshire towns total	84666	18880	1.1%	6.4

Source: SAMDev Plan Technical Background Paper

3.24 The graph below re-orders chart 3.5 by the amount of growth planned for each town in the SAMDev Plan, with lowest rates at the left hand end of the graph and highest rates at the right hand end. It illustrates that towns with a higher amount of growth planned tend to have lower affordability ratios. This makes them more attractive to the market, as incomes are more generous in relation to house prices. However it also shows that low to mid rates of growth in areas with the highest affordability ratios is likely to worsen their affordability in relation to other towns in Shropshire.

Chart 3.6 Affordability ratio by town, ordered by rate of planned growth



Source: Chart 3.5 data sorted by the rates of growth in table 3.16

Supported Housing

3.25 Shropshire has an ageing population. Between 2010 and 2030 the number of people aged 65 and over in Shropshire is estimated to increase by 39,200 (63%) while the number of people aged 85 and over will increase by 12,100 (144%). The rate of increase varies across the county, with highest rates in Oswestry and Bridgnorth and lowest rates in Shrewsbury.

3.26 Shropshire Council's Older Persons' Housing and Care Statement 2014-17 and associated Extra Care Housing Framework seeks to help address the housing and related support needs of the increasing numbers of older people who are living in Shropshire's communities, working in partnership with developers, housing associations and other bodies. Key statistics from the Statement about emerging housing needs are summarised below. The Action Plan for the Older Persons' Housing and Care Statement includes a commitment that the Council will produce

"Market Position Statements" with additional detailed information about current and future demand for housing suitable for older people in the future.

3.27 The tables below detail the provision in 2010 of (a) care home accommodation and (b) other supported and sheltered housing (often known as 'retirement' or 'extra care' housing).

Table 3.17 Housing Provision of Nursing Care Bed Units 2010

Former district area	Nursing care			
	Local Authority	Private	Voluntary	All
Bridgnorth	0	144	15	**159**
North Shropshire	0	296	0	**296**
Oswestry	0	176	0	**176**
Shrewsbury & Atcham	0	253	0	**253**
South Shropshire	0	99	0	**99**
Shropshire total	**0**	**968**	**15**	**983**

Source: Elderly Accommodation Counsel, Key Data Report 2009 www.housingcare.org

Table 3.18 Provision of Housing Units for older people 2010

Former district area	Housing units				
	Rent			Sale	All
	LA	Other	Both		
Bridgnorth	156	36	192	134	**326**
North Shropshire	0	348	348	172	**520**
Oswestry	133	45	178	139	**317**
Shrewsbury & Atcham	0	864	864	245	**1109**
South Shropshire	0	307	307	235	**542**
Shropshire total	**490**	**1399**	**1889**	**925**	**2814**

Source: Elderly Accommodation Counsel, Key Data Report 2009 www.housingcare.org

3.28 The number of people aged 65 and over in Shropshire suffering from a limiting long-term illness is expected to increase from 27,739 people in 2010 to 46,731 people in 2030, while the number suffering from dementia is likewise expected to increase, from 4,351 in 2010 to 8,710 people aged 65 and over in 2030.

3.29 Detailed projections about expected numbers of people with health difficulties, by age and location, have led to the projections of housing requirements for (a) care homes and (b) extra care housing, as shown in tables 3.19 and 3.20 below. A more detailed breakdown by former district council areas can be found in the Older Persons' Housing and Care Statement 2014-17. The Statement also contains detailed projections for each of the former district council areas on the number of people likely to be affected by dementia and limiting long-term illness to 2030. For more details see the Statement on www.shropshire.gov.uk .

Table 3.19 Projected needs for care home places by age

	2010	2015	2020	2025	2030
People aged 65-74 living in a LA care home	20	23	24	24	27
People aged 75-84 living in a LA care home	31	36	43	52	54
People aged 85+ living in a LA care home	47	57	71	90	115
People aged 65-74 living in non LA care home	222	264	275	272	302
People aged 75-84 living in non LA care home	806	922	1,101	1,331	1,393
People aged 85+ living in non LA care home	1,498	1,819	2,247	2,836	3,656
Total population aged 65 and over living in a care home	**2,624**	**3,123**	**3,762**	**4,604**	**5,548**

Table 3.20 Projected total care home places by former council area

	2010	2015	2020	2025	2030
Former Bridgnorth District	371	463	581	735	909
Former North Shropshire District	563	677	790	1,002	1,187
Former Oswestry Borough	372	444	549	672	814
Former Shrewsbury & Atcham BC	886	1,044	1,219	1,450	1,723
Former South Shropshire District	406	478	573	714	861
Shropshire Total	**2,598**	**3,106**	**3,712**	**4,573**	**5,494**

3.30 In addition, evidence in the Council's draft Extra Care Commissioning Framework suggests the need for 672 units of Extra care accommodation in Shropshire by 2020, rising to 956 in 2030. Based on the expectation that schemes would be of approximately 45-60 units, it is anticipated that around 12 schemes would be required by 2020 and 17 by 2030.

Table 3.21: Prediction of Units of Extra Care Accommodation Required

	2020	2030
Bridgnorth district area	192	191
North Shropshire district area	192	187
Oswestry borough area	92	136
Shrewsbury & Atcham borough area	203	277
South Shropshire district area	115	165
Shropshire Total	**672**	**956**

Source: Draft Shropshire Council Older Persons' Housing and Care Statement 2014-17

4. Affordable housing needs

Housing Register

4.1 The total number of households on Shropshire's housing register reduced significantly from 7,574 in November 2013 to 2,644 due to a reregistration process in October/November 2013 designed to eliminate those who are no longer actively seeking social/ affordable housing. The 2,644 who are registered represents those households who are actively seeking social housing at present. A benefit of the recent re-registration process is that the Shropshire Housing Register can be regarded as a highly accurate indicator of the number of households in housing need.

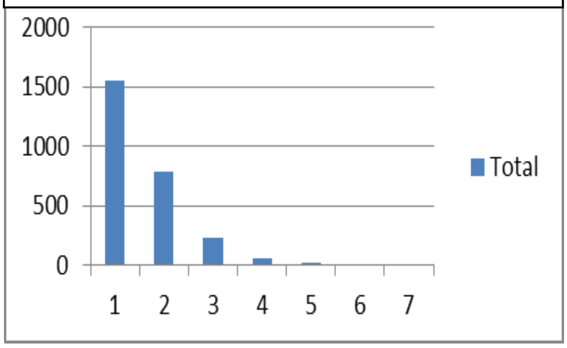
4.2 A disadvantage of the recent re-registration process is that it excludes from the register those who have 'given up' searching for whatever reason. The figure should be regarded as an under-estimate of true housing need, as anecdotal evidence is that many households who are in housing need but fall within the 'bronze' priority band 'give up' searching due to their very low chance of success. On average there are 42 bids received for every social rented property, rising to over 80 bids per property in some areas. Consequently the Housing Register can only provide part of the assessment of housing need. A complimentary method of estimating housing needs, based on financial affordability, is explored in the next section.

4.3 The majority of the households currently on the Shropshire Housing Register require one-bedroomed properties. The figures below show the 'bedroom entitlement' of households on the Housing Register, after applying the Welfare Reform Act's provisions. The Welfare Reform Act has shifted the housing need towards smaller properties.

Table 4.1: Housing Register

No. Bedrooms needed	No. households on Register Nov 2013
1	1545
2	789
3	230
4	58
5	17
6	3
7	2
Total	**2644**

Chart 4.1 Housing Register by number of bedrooms required



Source: Shropshire Homepoint Choice Based Lettings data

4.4 The households on the Housing Register are dominated by those currently in social housing, whether with housing associations who are members of Shropshire HomePoint (824 households) or with other housing associations (279) or another Council (50). In all, 43.6% of those registered are seeking a transfer to from an existing social property to a more suitable one.

4.5 Of the 56.4% on the register who are not currently in social housing, the largest group are renting privately (820, or 31% of the register). 13.8% (365) are living with family or friends whilst waiting for social housing.

Table 4.2 Households on Housing Register by current tenure

Current Tenure	No. households on register Nov 2013
Armed Forces	14
Home Owner	51
HomePoint Partner Tenants	824
Hospital/Nursing Home	7
Hotel/B&B	7
Living With Family/Friends	365
Lodger	16
Mobile Home/Caravan	29
NFA	118
Other	30
Other Housing Association	279
Prison/Remand Centre	1
Private Tenant	820
Temporary Accomodation	3
Tenant of Another Council	50
Tied Accomodation	27
Unknown	3
Total	**2644**

Source: Shropshire Homepoint Choice Based Lettings data

4.6 Over the financial year 2012/13 there was 991 social lettings across Shropshire. Of these, 236 were to households in ‘priority band’, 325 to households in ‘Gold’ band, 371 to ‘Silver’ band and 59 to ‘Bronze’ band. It remains to be seen how many households will join the revised HomePoint register each year, but at this rate of lettings it would take 2.7 years to clear those currently on the register. To provide housing for all those currently on the Housing Register over 5 years would require 529 lettings per annum.

4.7 A parish by parish breakdown of the number of households on the Housing Register and the number of lettings over the past four years are available in Appendix 2.

Incomes and affordability

4.8 Many households do not put themselves on the Shropshire housing register because they consider it unlikely that they will successfully obtain a social rented property, but they nevertheless cannot afford market housing. This growing category is sometimes called the ‘in-betweeners’, namely those who cannot access either social rented or market housing. This is the largest group in housing need in Shropshire. The cost to the public purse of housing allowance (formerly housing benefit) is enormous and it is a priority of the planning system to help address this need by making adequate provision of housing.

4.9 An assessment of the proportion of households who cannot afford market housing, based on current household income alone, is provided in table 4.3. This assessment does not take account of historic purchase prices, access to savings or inherited equity, so is generally only accurate for newly forming households. For households trying to pay for housing from their current household income alone, only 50% can afford private rented housing, and only 32% can afford entry level owner occupied housing.

4.10 Used as a proxy for newly forming households with no significant equity, table 4.3 shows that the least affordable areas are rural areas (not shown, but responsible for bringing down the average for Shropshire) and the southern towns of Ludlow, Bishops Castle, Church Stretton, Minsterley & Pontesbury. Some surprisingly unaffordable places, largely due to low local incomes, are Shrewsbury North, Wem and Broseley, with less than 39% of households able to afford entry level owner-occupancy.

Table 4.3 Estimated percentage households 2013 able to afford each tenure

Town or key centre	Shared ownership (25% owned)	Private rent (30th percentile)	Mortgaged (entry level*)	Mortgaged (median)
Albrighton	63%	47%	47%	33%
Bishops Castle	34%	41%	18%	8%
Bridgnorth	65%	58%	40%	22%
Broseley	54%	47%	38%	23%
Church Stretton	41%	54%	34%	19%
Cleobury Mortimer	61%	55%	49%	38%
Craven Arms	61%	42%	42%	23%
Ellesmere	62%	52%	43%	28%
Highley	60%	48%	40%	22%
Ludlow	49%	41%	32%	19%
Market Drayton	68%	51%	41%	26%
Minsterley & Pontesbury	60%	50%	33%	14%
Much Wenlock	62%	53%	40%	26%
Oswestry	63%	53%	45%	27%
Shifnal	65%	58%	41%	34%
Shrewsbury north	71%	46%	35%	26%
Shrewsbury south	54%	53%	45%	23%
Wem	60%	44%	36%	22%
Whitchurch	62%	55%	46%	24%
Shropshire (all areas) average	55%	50%	32%	15%

Source: derived from the household incomes required and the Axicom incomes data in tables 3.5 and 3.7

Overall housing need

4.11 Shropshire Core Strategy policy CS1 seeks 33% of Shropshire's housing over the plan period to be affordable housing. This was based on balancing the evidence from the SHMA 2008, the Local Housing Market Assessment (LHMA) 2010 and the results of the Shropshire Affordable Housing Viability Study 2010. The SHMA found a need for 1,585 affordable homes per annum (ie. over 100% of the annual requirement), while the LHMA (using a different methodology) found a need for between 1,268-1,776 affordable homes per annum. However, the Viability Study found that a maximum of 20% affordable housing was deliverable in the economic context in 2010. The plan judged that, over the plan period 2006-2026, an average of 33% affordable housing was the maximum realistic amount that could be delivered.

4.12 An update of the LHMA estimate of housing need is provided in table 4.4 below. The LHMA 2010 found that 50% of newly forming households could not afford entry level housing[4]. Taking the percentage who can afford entry level (30th percentile) private rents in table 4.3 above as today's equivalent figure, the percentage able to afford market housing in 2014 remains at 50%.

Table 4.4 Estimated housing need

Source of need	Notes	LHMA 2010	SHMA 2014
(a) Newly arising need from new households	Proportion unable to afford market housing x housing requirement (by Core Strategy and household projections figures)	688 – 737 pa (50% x 1,375 pa low; 50% x 1,474 pa high)	688 pa (50% x 1,375)
(b) newly arising need from households falling into need	The low estimate is those accepted as statutorily homeless, while the high estimate is homeless applications.	233 – 692 per annum (LHMA 2010)	243 – 771 per annum (2012/13 P1E figures)
(c) Backlog of existing need	Housing Register divided by 5 years	1,609 pa	529 pa
(d) no. of lets (properties available)	Turnover of all social housing stock in Shropshire	1,262 (2008/9 lets)	991 (2012/13 lets)
Housing need (a)+(b)+(c) – (d)	Estimated annual need for affordable housing	1,268 – 1,776 per annum	469 – 997 pa (34% - 72% of 1,390)

4.13 Table 4.4 provides a range of affordable housing need, depending on whether newly arising need is measured very strictly as those accepted as statutorily homeless (low estimate) or those presenting themselves as homeless, in other words, self-declared new housing need (high estimate). The requirement for all households on the Housing Register to re-register in November 2013 has dramatically reduced the estimated backlog of housing need to a third of its previous estimate, but this is likely to be an underestimate as with an average of 42 households bidding for each social property, many households unsurprisingly 'give up' on the Housing Register. Even the more conservative, low estimate of annual housing need is 469 dwellings per annum, amounting to 34% of the Core Strategy annualised requirement.

4.14 It is for the plan making process to balance housing needs and housing delivery. The Core Strategy policy CS1 figure of 33% of homes to be affordable over the plan period remains a balance between a higher level of objectively assessed need and the deliverability of development. An update of viability and deliverability in Shropshire is provided in the Viability Study 2013 and the Strategic Housing Land

[4] Entry level defined in the LHMA 2010 as the 15th quartile of properties for sale, which requires a similar income to that needed to afford median private rents.

Availability Assessment (SHLAA) 2014 respectively. Meanwhile the SHMA Update 2014 confirms that Shropshire's need for affordable housing remains high.

Population and Households – Shropshire

Introduction

5.1 Population and household change and the demographic / socio-economic characteristics of Shropshire's population are major determinants of housing need. For example the significant growth in the elderly population will require planning, housing, health and social care policies to ensure suitable housing is available to help people remain independent and living in their own homes for as long as possible. To obtain an understanding of Shropshire's population there are a number of sub-national population estimates and projections available. These are listed below;

- Census – providing a snap shot in time of population, household and socio-economic data to give a unique insight into how society is changing. (Source: Office for National Statistics).
- Mid-Year Population Estimates by age and gender (Source: Office for National Statistics).
- Sub-national Population Projections by Age and Gender (Source: Office for National Statistics)
    - 2008 based long-term projections 2033,
    - 2010 based long-term projections to 2035,
    - 2011 interim projections to 2021.

5.2 All the above estimates have strengths and weaknesses when considering population change in Shropshire. The 2008 and 2010 population projections are based on the 2001 Census data and are based on pre 2011 Census estimated trends in births, deaths and migration (the three components of population change). However they must be considered as they use growth rates that have been used in the 2011 interim projections and provide the base population to the most recent long-term sub-national household projections.

5.3 The Office for National Statistics (ONS) is currently consulting on the draft 2012 based sub-national projections to 2037, with a view to publishing the final projections in May 2014. These will form the basis of the 2012 based Household Projections (commissioned by Communities and Local Government (CLG)) which hopefully will be available towards the end of 2014.

5.4 In the absence of the ONS 2012 based projections, the Research and Intelligence Team at Shropshire Council have prepared some interim population; household and labour force projections. These are presented later in the SHMA and have been prepared for two reasons;

- The 2011 Census results showed that the ONS 2010 indicative population projections had underestimated the population of Shropshire by nearly 10,000 people or 3.2%. This is a significant difference and indicates that Shropshire has experienced higher levels of population and household growth in the last ten years than is reflected in the 2008, 2010 and 2011 based projections (uses pre-census assumptions).

- There are currently no long-term sub-national population projections that take into account the Census population count and the most recent trends in births, deaths and migration. In order to determine housing need in Shropshire robust population and household projections are fundamental.

5.5 The national ONS projections and the Shropshire Council projections are based on past trends in births; deaths and migration projected forward and do not take account of future house-building or labour market policies or other developments which might impact on population change. By developing the assumptions for births, deaths and migration this means the Council is well placed to move onto preparing scenario based forecasts later in the year.

Table 5.1: Comparison of Available Population Estimates and Projections for Shropshire

	ONS Estimates (1)	2008 Projections(2)	2010 Projections(3)	2011 Projections(4)
1991	268,700	~	~	~
2001	283,300	~	~	~
2008	300,500	290,700	~	~
2011	307,100	294,100	296,600	307,100
2012	308,200	295,400	298,400	308,400
2016	~	300,900	305,600	314,300
2021	~	308,700	315,000	322,300
2026	~	316,400	324,000	~
2031	~	322,700	331,500	~
2033	~	324,900	334,000	~
2035	~	~	336,300	~

1, 4 *– reflects 2011 Census population count* 2, 3 *– reflects 2001 Census population count*

Table 5.2: Comparison of Available Household Census Counts and Projections

	2008 Projections	2011 Projections	Census
1991	~	~	104,468
2001	~	~	117,300
2008	123,300	~	~
2011	126,700	130,100	129,674
2012	127,926	131,100	~
2016	132,900	134,800	~
2021	139,000	139,100	~
2026	144,800	~	~
2031	149,800	~	~
2033	151,500	~	~
2035	~	~	~

- *Sub-national Population Projections 2008, 2010 and 2011 Based.*
- *1991-2012 Mid-Year Population Estimates*
- *Sub-national Household Projections 2008 and 2011 based.*
- *1991, 2001, 2011 Censuses*

Source: Office for National Statistics Crown copyright reserved

5.6 Tables 5.1 and 5.2 illustrate the contrast in estimate between published data sources, for example in the year 2012 estimates ranged from 295,400 from the 2008 projections to 308,400 in the 2011 projections.

Population and Household Change (1991, 2001 and 2011 Census)

5.7 The Census results provide a long-term insight into population and household change in Shropshire. They illustrate that Shropshire's population has grown by 14.7% between 1991 and 2011, however household growth (24.1%) and growth in dwellings (23.5%) has far outstripped this. This will be due to additional factors such as the impact of divorce and separation and the choice and financial ability of people to form new households. Interestingly growth has slowed in Telford and Wrekin between 2001 and 2011 and Shropshire has experienced higher growth in population, households and dwellings.

Table 5.3: Intercensal Change – Population, Households, Dwellings

	Shropshire	Telford and Wrekin	England and Wales	West Midlands
Population 1991	266,871	139,516	49,890,277	5,150,187
Population 2001	283,174	158,325	52,041,916	5,267,308
Population 2011	306,129	166,641	56,075,912	5,601,847
% Change 1991-2001	6.1%	13.5%	4.3%	2.3%
% Change 2001-2011	8.1%	5.3%	7.8%	6.4%
% Change 1991-2011	14.7%	19.4%	12.4%	8.8%
Households 1991	104,468	52,430	19,877,272	1,996,467
Households 2001	117,302	63,769	21,660,475	2,153,673
Households 2011	129,674	66,608	23,366,044	2,294,909
% Change 1991-2001	12.3%	21.6%	9.0%	7.9%
% Change 2001-2011	10.5%	4.5%	7.9%	6.6%
% Change 1991-2011	24.1%	27.0%	17.6%	14.9%
Dwellings 1991	109,748	54,293	20,855,115	2,078,754
Dwellings 2001	122,162	65,521	22,481,305	2,224,651
Dwellings 2011	135,572	68,714	24,359,880	2,376,728
% Change 1991-2001	11.3%	20.7%	7.8%	7.0%
% Change 2001-2011	11.0%	4.9%	8.4%	6.8%
% Change 1991-2011	23.5%	26.6%	16.8%	14.3%

1991, 2001 and 2011 Censuses, Office for National Statistics. © Crown Copyright 2012
http://www.ons.gov.uk/ons/guide-method/census/2011/census-data/2011-census-data/index.html

Population Change (Revised Mid-Year Population Estimates 2001-2012)

5.8 The Office for National Statistics (ONS) publishes resident population estimates by local authority at the mid-point (30th June) each year. They are produced using the cohort component method and include people resident in an area for over 12 months. The components of change used in this method are natural change (births minus deaths) and net migration. The method uses the census resident population count as the base for ageing on the population every year.

5.9 The mid-year estimates are valuable as an insight into annual population change as they will reflect recent trends in the births, deaths and migration flows. For example nationally migration levels rose in 2004 and 2007 as further countries joined the European Union (not picked up in a decennial census). ONS use a range of data sources such as the register of births and deaths to measure population change.

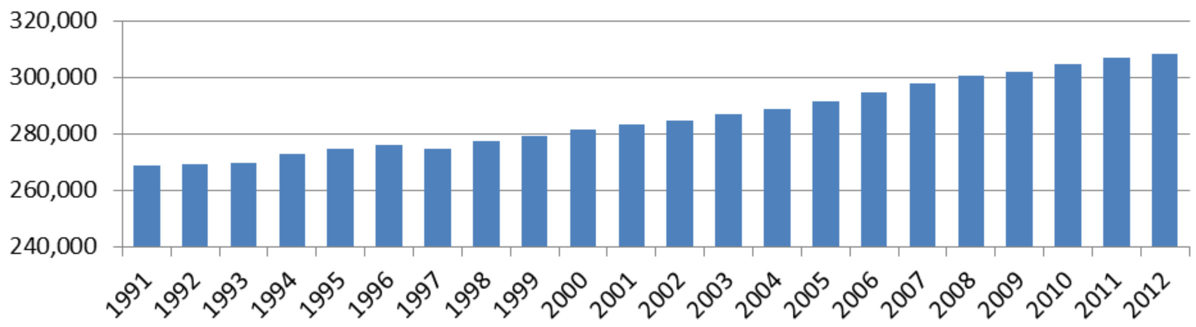
5.10 The 2012 mid-year population estimates show Shropshire to have a population of 308,200, representing an increase in population of 8.1% since 2001. This is above growth levels experienced regionally and nationally.

Table 5.4: Long-term Change in Population

	Shropshire	England	West Midlands
1991	268,700	47,875,000	5,229,700
1992	269,300	47,998,000	5,237,400
1993	269,800	48,102,300	5,245,900
1994	272,700	48,228,800	5,249,300
1995	274,500	48,383,500	5,256,900
1996	276,000	48,519,100	5,263,000
1997	274,700	48,664,800	5,262,300
1998	277,400	48,820,600	5,271,400
1999	279,300	49,032,900	5,272,000
2000	281,500	49,233,300	5,269,600
2001	283,300	49,449,700	5,280,700
2002	284,900	49,679,300	5,301,200
2003	286,900	49,925,500	5,325,500
2004	288,800	50,194,600	5,346,400
2005	291,500	50,606,000	5,380,700
2006	294,500	50,965,200	5,415,500
2007	297,600	51,381,100	5,451,900
2008	300,500	51,815,900	5,496,200
2009	302,100	52,196,400	5,528,000
2010	304,500	52,642,500	5,565,900
2011	307,100	53,107,200	5,608,700
2012	308,200	53,493,700	5,642,600
% Change			
1991-2001	5.4	3.3	1.0
2001-2012	8.1	7.6	6.4
1991-2012	14.7	11.7	7.9

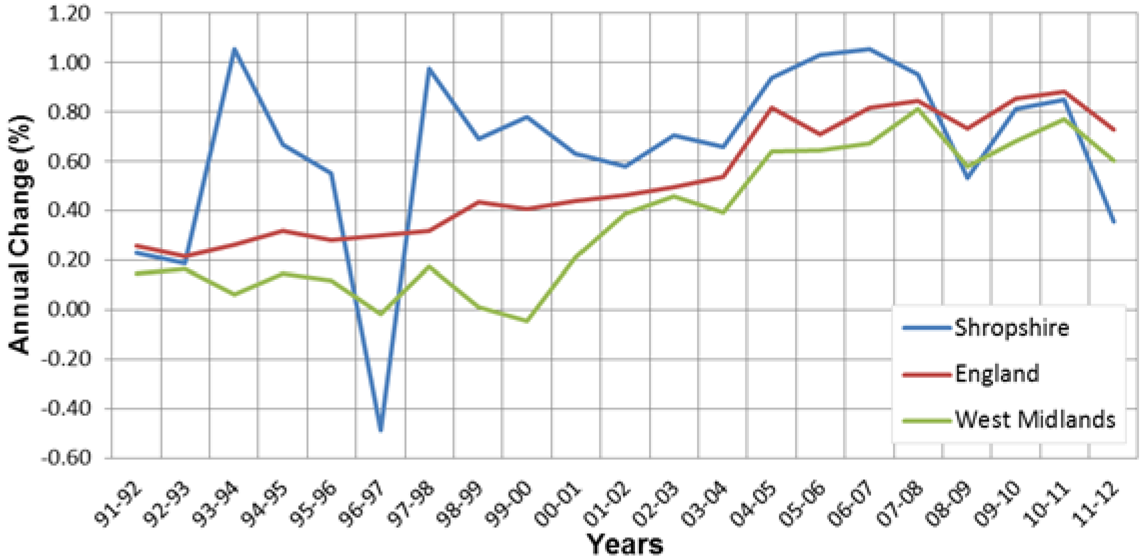
Source: 1991-2012 Mid-Year Population Estimates, Office for National Statistics. Crown copyright reserved. http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Population+Estimates
Note: Estimates are rounded to the nearest hundred to avoid people misinterpreting them as counts of population. Calculations are based on the unrounded estimates. Estimates 2002-2012 are based on the findings of the 2011 Census.

Chart 5.1: Shropshire Population Change 1991-2012



5.11 Chart 5.1 demonstrates that Shropshire has continued to grow annually at a rate above the West Midlands and England. The only exceptions were in 1996 to 1997 which is attributable to movements of armed forces and in 2008 to 2009.

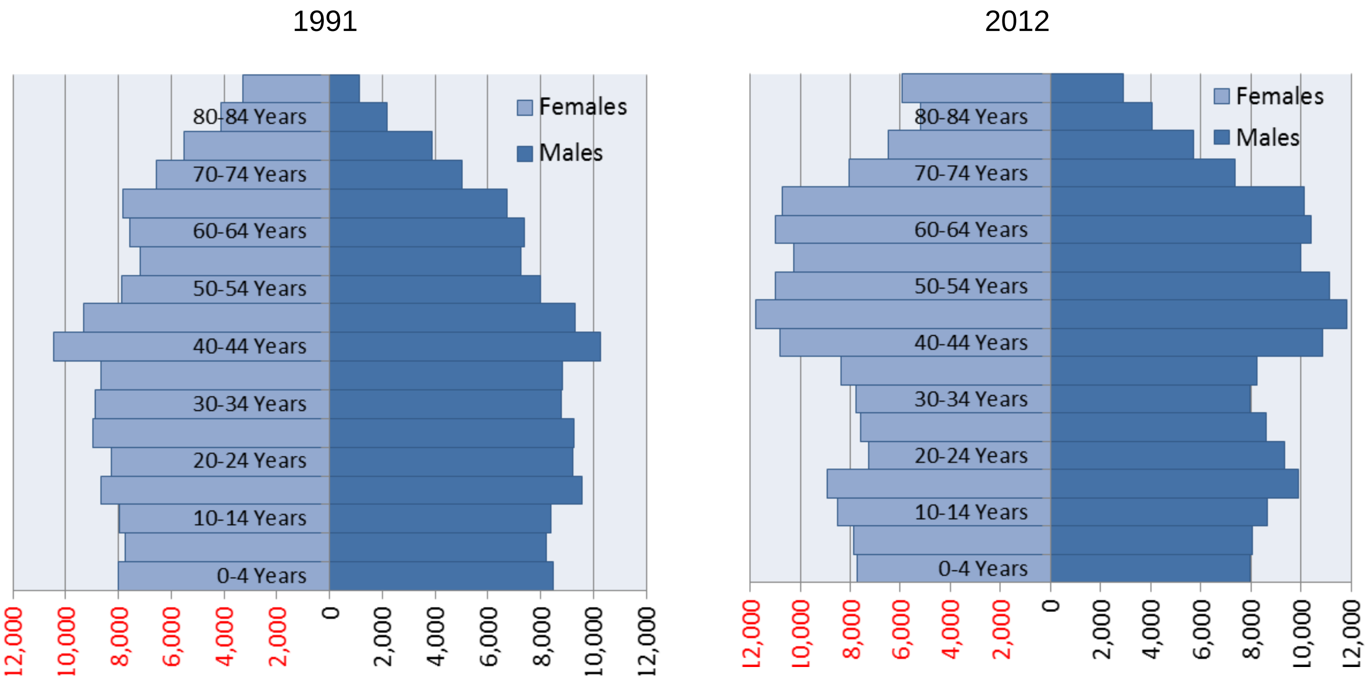
Chart 5.2: Annual Average Change Comparison



Population Age Structure

5.12 Shropshire has an age structure heavily weighted to the older age groups. This is being reinforced by Shropshire's attractiveness as a retirement destination. The population pyramids below illustrate Shropshire's mushroom like age structure in 2012, compared to 1991.

Chart 5.3: Comparison Population Pyramids for 1991 and 2012



Source Chart 5.2 and 5.3: ONS Mid-Year Population Estimates and Components of Change, 1991 and 2012.

Young Adults

5.13 Many young adults leave Shropshire to further their education and pursue employment elsewhere in their late teens and early twenties. This is evident in the 2012 age structure, although in young male adults this is disguised a little by the presence of armed forces in the County. It is difficult to prove but anecdotal evidence suggests many choose to return to Shropshire after graduating or when they choose to settle down. As young people represent the future of Shropshire it is important that homes, jobs and opportunities are accessible to them

Working Age

5.14 The working age population in Shropshire has continued to increase over the last twenty years fed by net in migration. The longevity of this trend is at risk as the population ages with 20.7% of the current population reaching 65 in the next fifteen years.

5.15 The 2012 population pyramid highlights the strength of the population aged over 40 years in Shropshire, peaking in the 45 to 49 year age group. This generation of people born before the early 1970's and before the mainstreaming of family planning now makes up 35.4% of the working age population and 56.9% of the total population.

Older People

5.16 The growth in the older population aged 65 to 84 years in Shropshire has been significant in the last twelve years (an increase of nearly 28%). The 'baby boomers' as this population group is often referred to, born after the close of WWII, now make up 18.7% of the total population. This population group is a mix of people who have lived and worked in Shropshire and people from elsewhere who have decided to relocate on retirement. The older population hugely support the voluntary sector in Shropshire.

Elderly Population

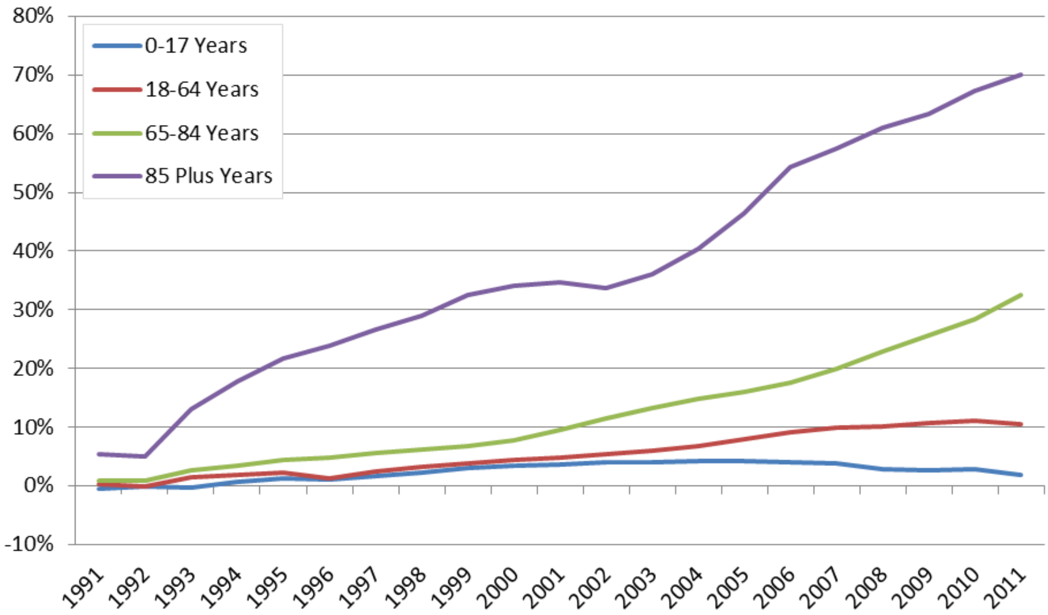
5.17 Since 1991 the elderly population has increased by nearly 100% in Shropshire and now represents 2.9% of the total population. Although healthier and more independent than in the past this population age group requires the most support from families and from the voluntary and public sectors. It is important that suitable housing is available to meet the needs of this population group whether this involves building new accommodation or helping people adapt their existing homes.

Table 5.5: Population Change by Broad Age Group

Broad Age Group	1991	2001	2012	% Change		
				1991-2001	2001-2012	1991-2012
0-17 Years	59,402	61,454	60,528	3.5%	-1.5%	1.9%
18-64 Years	163,080	170,481	181,204	4.5%	6.3%	11.1%
65-84 Years	41,783	45,103	57,639	7.9%	27.8%	37.9%
85 Years and Over	4,451	6,216	8,836	39.7%	42.1%	98.5%

Source: ONS Mid-Year Population Estimates, 1991-2012

Chart 5.4: Cumulative Population Change by Broad Age Group in Shropshire



5.18 Chart 5.4 shows the cumulative population change by broad age groups. It highlights that both the 65-84 years and the 85 plus year age groups have grown at a faster rate in the last ten years than in the 1990's. The 0 to 17 year old population has continued to grow but at a lesser rate in the last five years.

5.19 Chart 5.5 is included to give some context to the age structure in Shropshire by displaying it alongside the age structure of England and the West Midlands. The Chart shows that Shropshire has a significantly lower proportion of young people and working age population than England and the West Midlands. In contrast in the 65 to 84 year age group and the 85 years and over age group Shropshire has a strikingly higher proportion than England and he West Midlands.

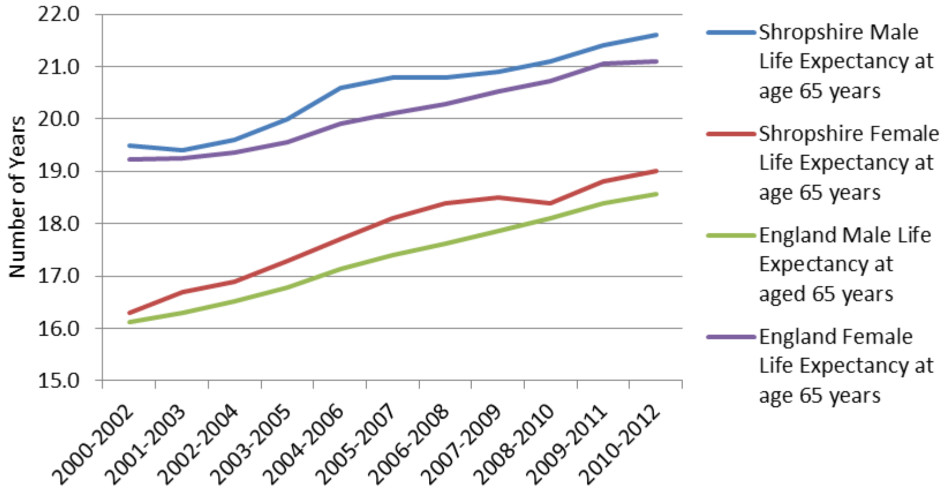
Chart 5.5: Mid 2012 Population Breakdown by Broad Age Group

Chart 5.4 and 5.4 Source: ONS Mid-year Population Estimates, 2012. Crown copyright reserved.

Life Expectancy

5.20 The Office of National Statistics prepares two sets of life expectancy estimates; one set looks at life expectancy at birth and the other life expectancy at 65 years. For the purpose of this report life expectancy at age 65 years has been selected. This shows that life expectancy in Shropshire at age 65 years has in only twelve years risen from 16.3 years to 19.0 years for males and 19.5 years to 21.8 years for females. Chart 5.6 below illustrates how life expectancy levels in Shropshire continue to be higher than the national average. This is a positive indicator for the Shropshire population and implies people are living healthier and for longer.

Chart 5.6: Life Expectancy at Aged 65 Years



Source: ONS Life expectancy at age 65 years by local areas in England and Wales, 2000-12

Components of Population Change

5.21 To understand what factors are driving population change in Shropshire is it is important to grasp the components of population change; natural change (births minus deaths) and net migration. The Office for National Statistics publishes components of change figures including births, deaths, internal and international migration. ONS use the following sources.

- Births and deaths – birth and death registrations supplied by ONS Vital Statistics.
- Internal migration – developed from the health service Patient Register and data from the Higher Education Statistics Agency on student moves.
- International (overseas) migration – ONS International Passenger Survey, Home Office data on Asylum Seekers and Visitor Switchers and moves between UK and Ireland from NISRA.

Natural Change

5.22 Charts 5.7 and 5.8 summarise recent trends in births, deaths and consequently natural change. Since 2002 the number of deaths in Shropshire has outnumbered new births, with the disparity particularly noticeable between 2002 and 2005. The linear live births trend line in Chart 5 shows a rising trend compared to a fairly stable linear trend for deaths. Until Shropshire reaches a point in time when births out-number deaths, the County will continue to lose population through natural change.

Chart 5.7: Births and Deaths – 2002-2012

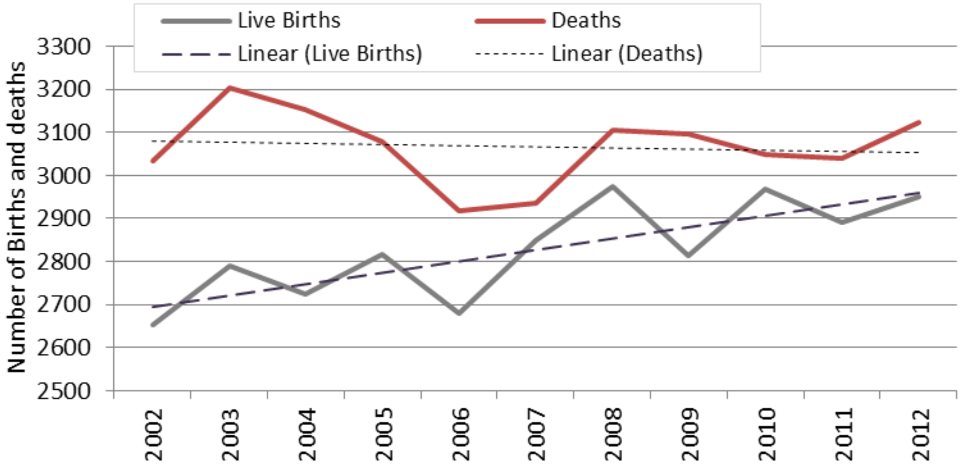
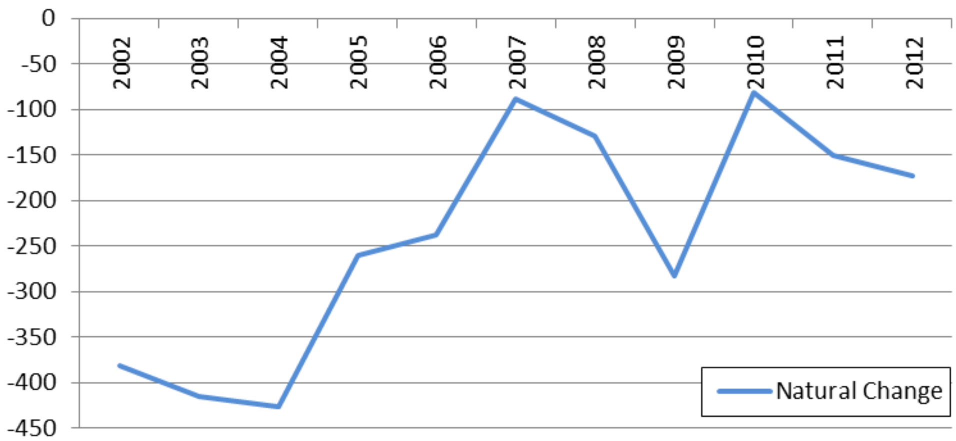


Chart 5.8: Natural Change (births minus deaths)



Migration

5.23 Unlike births and deaths, in the UK citizens are not required to register a change of address. This means a range of data sources are used to derive estimates of internal and international migration. Flows into and out of an area are estimated to calculate net migration. Charts 5.9 and 5.10 illustrate recent trends in internal and international migration.

Internal Migration

5.24 In migration has exceeded out migration in Shropshire during the 2002 to 2012 timeline. Flows in and out of Shropshire have remained fairly stable, both experiencing a similar trend. In migration fell to its lowest in 2008 to 2009. This means Shropshire has consistently gained population through positive net internal in migration.

International Migration

5.25 Shropshire experiences fairly low levels of international migration flows. Since 2003 Shropshire has continued to gain from international migration although levels have fallen between 2011 and 2012. Net international migration rose from 2004 possibly reflecting the accession countries joining the EU and peaked between 2006 and 2007.

Source: ONS Components of Change Figures 2002-2012. Crown copyright reserved.

Chart 5.9: Internal Migration from within the UK

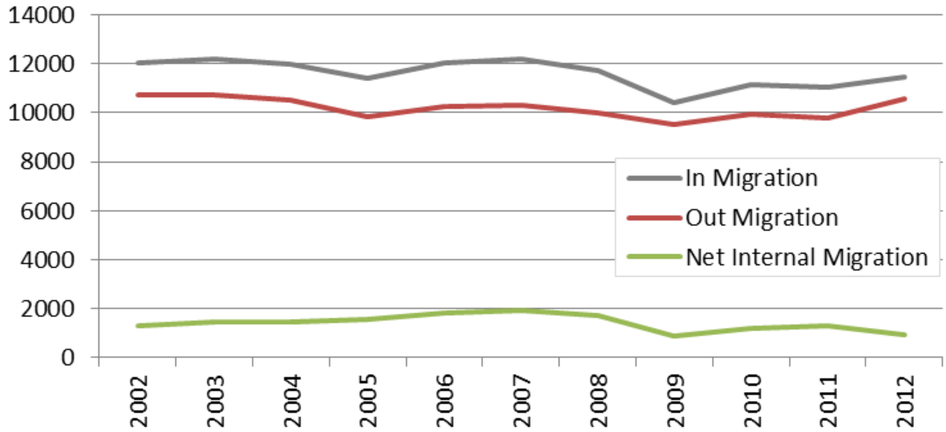
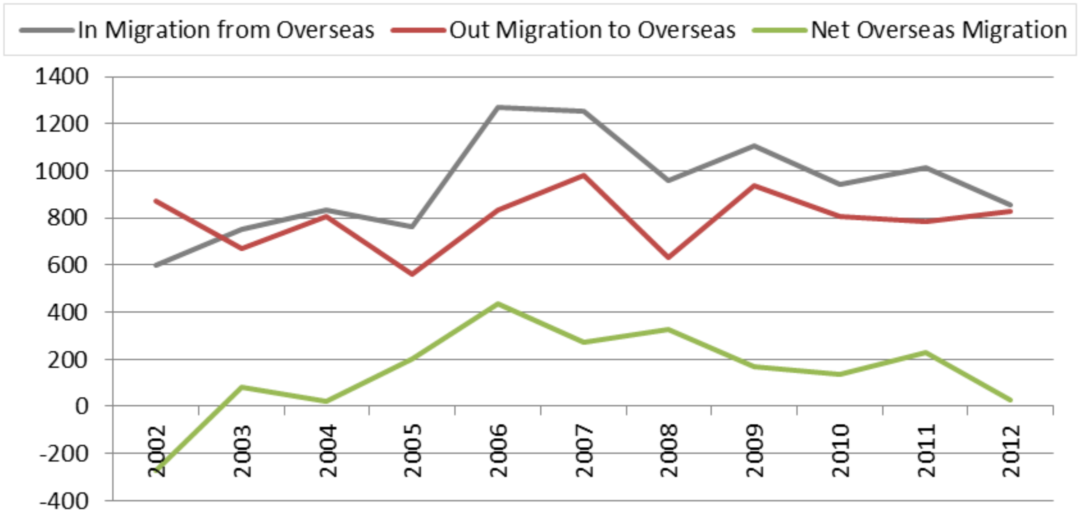


Chart 5.10: International Migration from overseas



Summary – Population Effect of Components of Change

5.26 Chart 5.11 summarises the impact of the components on population change in Shropshire. It clearly shows that all of Shropshire's growth in recent years has stemmed from net in migration of people.

Chart 5.11: Population Effect of Components of Change

(Source: Components of Change Estimates, Office for National Statistics)

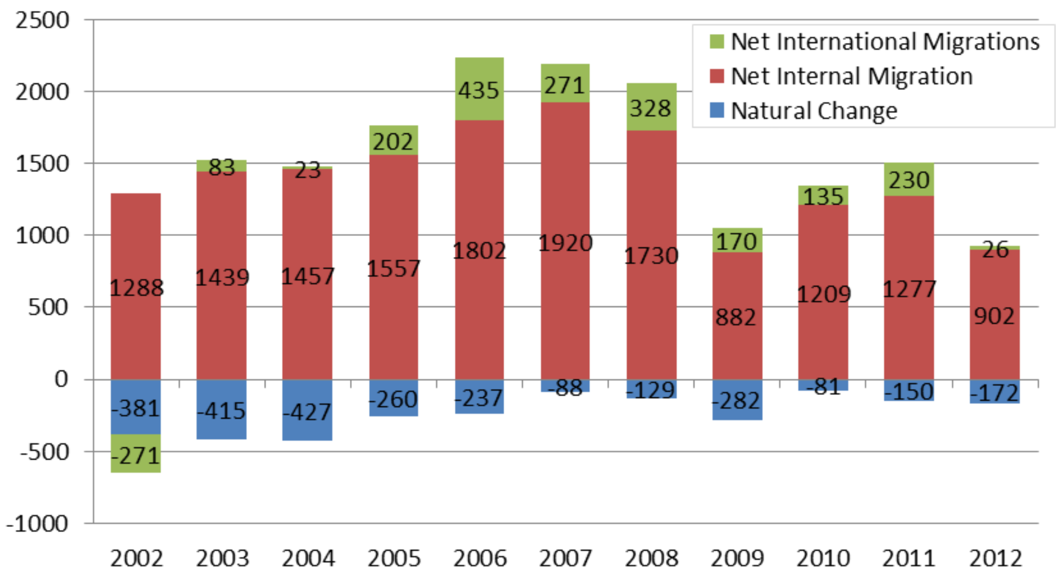
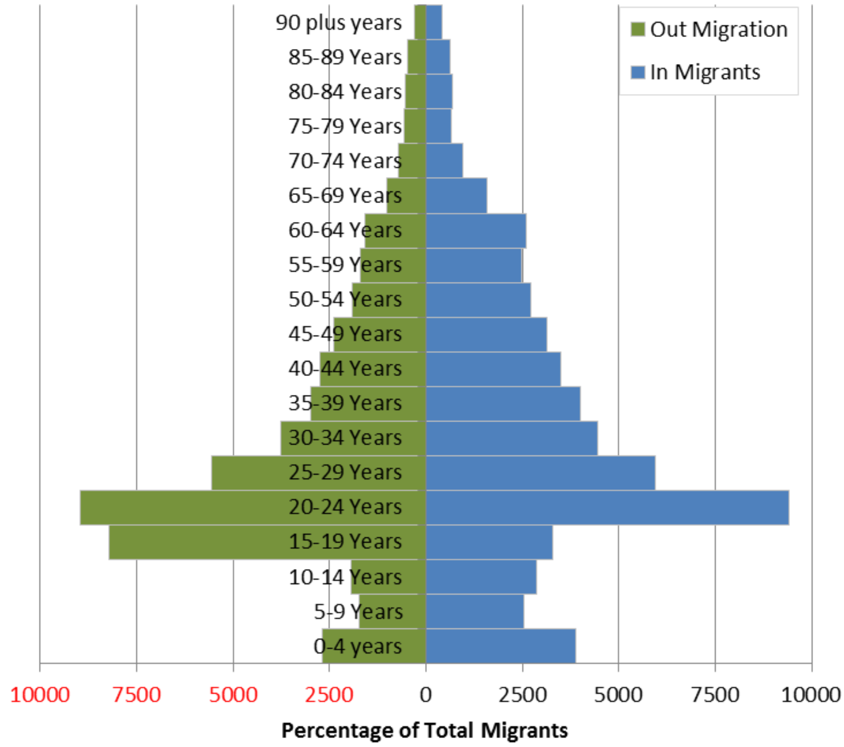


Chart 5.12: Age Structure of In and Out Migrants 2008-2012



Source: ONS Components of Change Figures Used in the preparation of the mid-year population estimates 2002 to 2012. Crown copyright reserved.
Please note this chart refers to the sum of a five year period.

Age Structure of In and Out Migrants

5.27 Chart 5.12 compares the age structure of in and out migrants over a five year period for Shropshire. It shows that there is only one population group (15 to 19 years) where we are losing more residents than we are gaining. As mentioned earlier in the report this is to be expected at an age when many young people leave to attend university elsewhere.

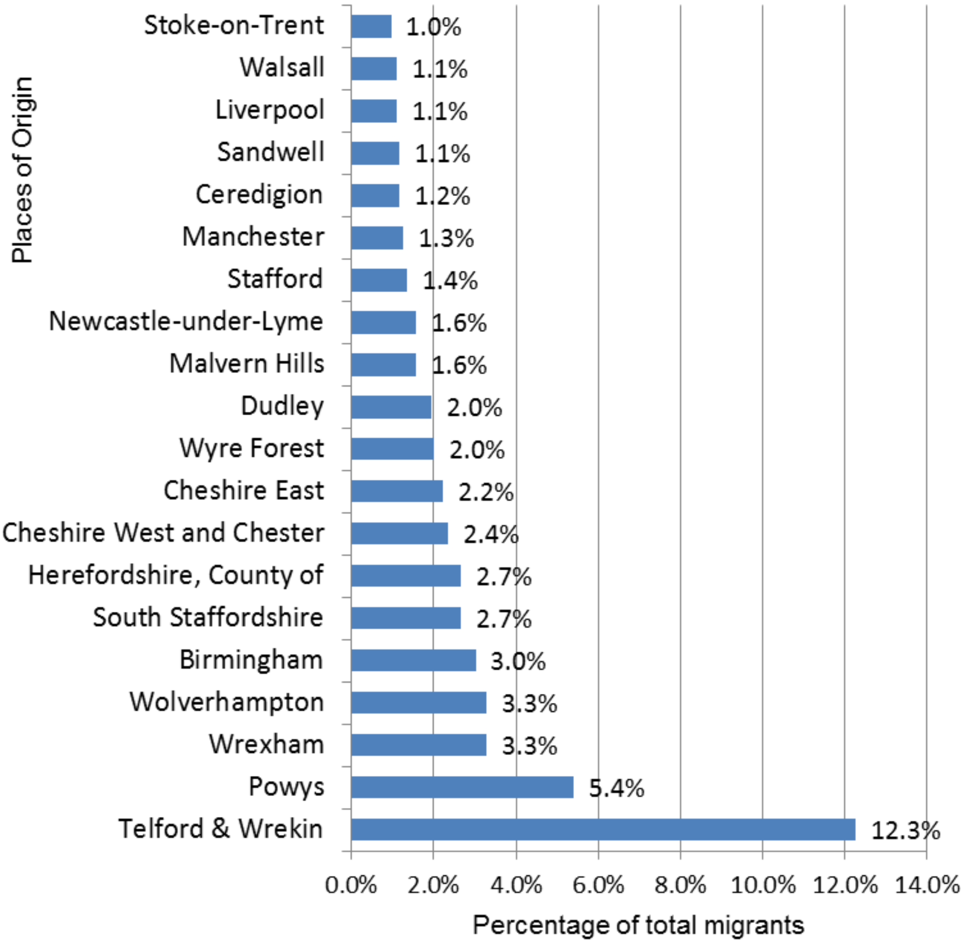
5.28 Over a five year period Shropshire gained 3,300 young people and lost 8,200 equating to a net loss of 4,900 young people. However at 20 to 29 years Shropshire gained 15,300 young people and lost 14,500 meaning Shropshire experienced positive net in migration of 800 people. This suggests young people are returning to Shropshire after further education.

5.29 Older people aged over 65 years represented 8.9% (5,000) of in migrants into Shropshire over the last five years compared to 7.2% (3,600) of out migrants. This means Shropshire has experience positive net migration of older people over the last five years. More specifically people aged 85 years and over represented 1.9% of in migrants and only 1.5% of out migrants, resulting in a net gain of 800 people.

5.30 The Office for National Statistics publishes migration estimates by studying patient moves between GP Practises, sourced from National Health administrative data. Chart 5.13 has involved looking at where migrants arriving in Shropshire have originated from in the last five years and working out a five year average. Local authorities of origin are ranked by the percentage of total migrants entering Shropshire.

5.31 Migration Flows into Shropshire – Origin

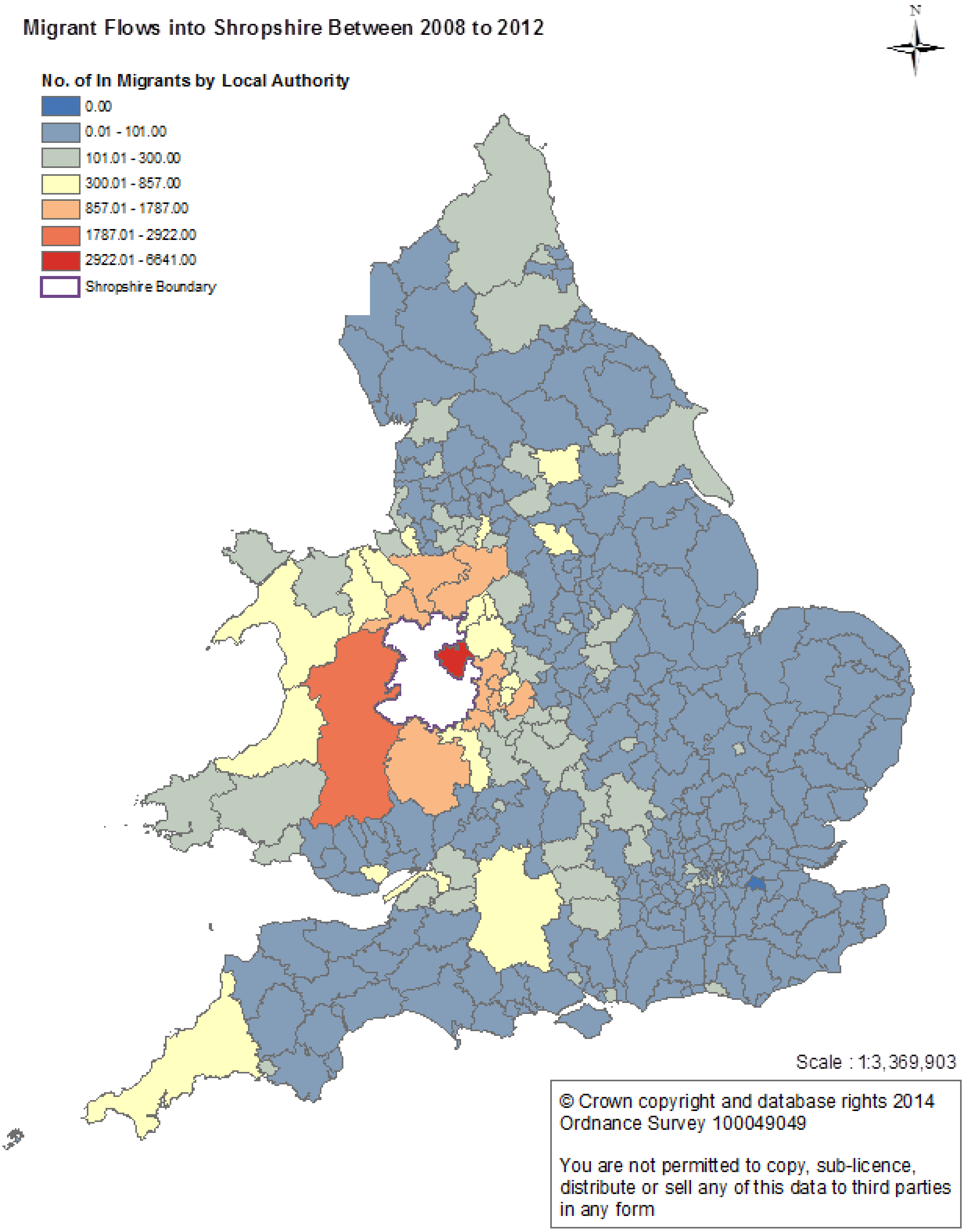
Chart 5.13: The Origin of Internal In Migrants into Shropshire Average Over Four Years



Source: ONS Migration Statistics Unit. Family Practitioner Patient Register in combination with the National Health Central Register and HESA data on student moves. These should be treated as estimates.

5.32 As would be expected all of Shropshire's neighbouring authorities appear in the top ten places of origin. However Telford and Wrekin Unitary Authority strikingly is the source of a large proportion of our migrants relative to Powys which is the next most popular source. The Chart also show evidence of Shropshire's strong links with Wales with 7.8 % of migrants arriving from Ceredigion, Wrexham and Powys.

Map 5.1



Source: ONS Migration Statistics Unit. Family Practitioner Patient Register in combination with the National Health Central Register and HESA data on student moves. These should be treated as estimates

5.33 Map 5.1, maps out the origin of migrants flowing into Shropshire over the last five years. It thematically maps the volume of total migrants for England and Wales local authority areas. Interestingly only one local authority has not been the origin of one or more migrants into Shropshire (Seven Oaks in Kent). The majority of migration has come from the west of England and Wales i.e. Cornwall and Swindon and Wiltshire.

Sub-national population projections 2011 based

5.34 The 2011 based sub-national population projections use the 2011 Census population base combined with adjusted pre 2011 Census growth rates and project forward the population of Shropshire to 2021. The projections estimate that between 2011 and 2021 the population of Shropshire will increase from 307,100 people to 322,300, representing an increase of 4.9%.

Table 5.6: Sub-National Population Projections: Change Comparison

	Shropshire	**England**	**West Midlands**
	All ages	All ages	All ages
2011	307,100	53,107,200	5,608,700
2012	308,400	53,585,500	5,647,500
2013	309,800	54,068,400	5,687,200
2014	311,300	54,548,600	5,726,800
2015	312,800	55,022,700	5,766,100
2016	314,300	55,486,600	5,804,600
2017	315,800	55,938,200	5,842,300
2018	317,400	56,383,100	5,879,600
2019	319,000	56,822,700	5,916,300
2020	320,600	57,257,900	5,952,700
2021	322,300	57,687,800	5,988,700
% Change			
2011-2021	4.9	8.6	6.8

Interim 2011 based sub national projections (post 2011 Census)

Source: Interim 2011-based sub-national population projections, Population Projection Unit, Office for National Statistics. Crown copyright 2012.

Notes: The interim 2011-based subnational population projections are an indication of the future trends in population by age and sex over the next 10 years. They are trend-based projections, which mean assumptions for future levels of births, deaths and migration are based on observed levels mainly over the 2006 to 2010 period, as used in the 2010-based subnational population projections. The 2011 base reflects the findings of the 2011 Census. Estimates are rounded to the nearest hundred to avoid people misinterpreting them as counts of population. Calculations are based on the unrounded estimates.

http://www.ons.gov.uk/ons/rel/snpp/sub-national-population-projections/Interim-2011-based/index.html

5.35 The population of Shropshire is projected to grow by 5% or 15,000 people between 2011 and 2021. In the short-term from 2011 to 2016 the population is projected to grow by 2% or 7,200 people.

Older Population

5.36 The age profile of the County is projected to change significantly between 2011 and 2021, with the very elderly population (85 plus) increasing by 44%, the 75-84 years population group by 37% and 65-74 years population group by 20%. It is this population group (65 plus) that generally requires the most support in terms of health and social care, which presents providers of services with the greatest challenges in the future.

Early Years

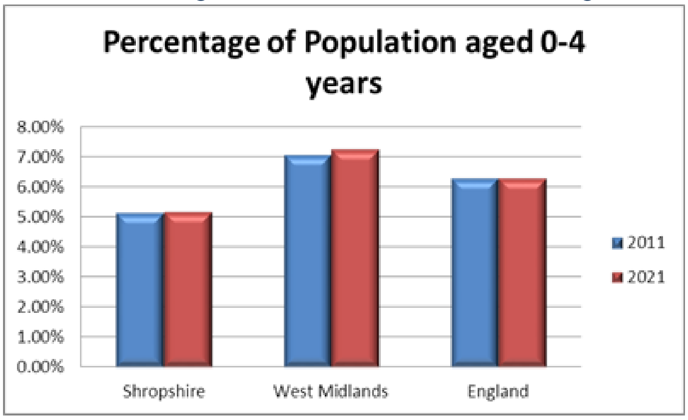
5.37 Despite an increase of growth between 2011 and 2016 for 0-4 years, the population of young people aged 5-24 years is projected to decline by 4,500 people. This age group requires a high level of support, particularly in education, as well as health and social care.

Table 5.7: 2011 Based Sub-National Population Projections by Age Breakdown

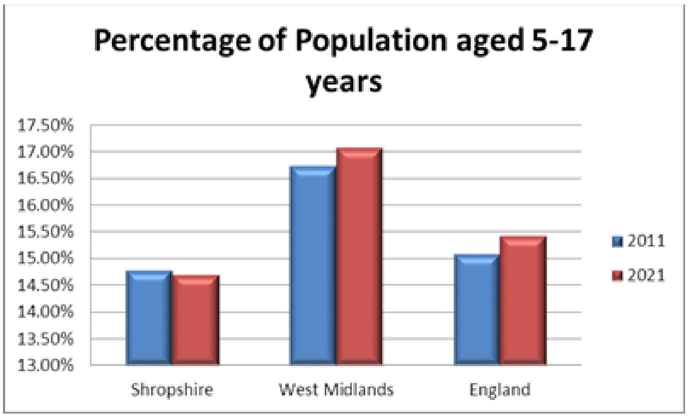
	2011 Base	2016	2021	Short-term change 2011-2016		Change 2016-2021		Long-term change 2011-2021	
				No.	%	No.	%	No.	%
0-4	15,700	17,600	16,600	1,800	11%	-900	-5%	900	5%
5-15	37,200	36,900	40,200	-300	-0.8%	3,300	9%	3,000	8%
16-24	32,200	28,000	25,700	-4,200	-13%	-2,200	-8%	-6,400	-20%
25-34	31,300	33,200	32,800	2,000	6%	-400	-1%	1,500	5%
35-49	63,200	57,800	54,000	-5,400	9%	-3,800	-7%	-9,200	-15%
50-64	63,600	66,400	70,000	2,800	4%	3,900	6%	6,700	11%
65-74	34,500	40,500	41,500	6,000	17%	1,000	2%	7,000	20%
75-84	20,800	23,600	28,600	2,800	13%	5,000	20%	7,800	37%
85+	8,600	10,300	12,400	1,700	20%	2,000	19%	3,800	44%
Total	307,100	314,300	321,800	7,200	**2%**	8,000	**3%**	15,000	**5%**

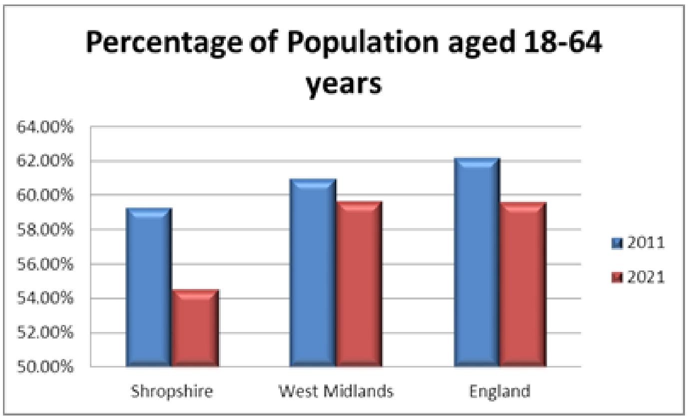
Source: ONS 2011-Based Sub-National Population Projections to 2021. Crown copyright 2013.
Please note: The projections are rounded to the nearest hundred to ensure they are not misinterpreted as a population count. Consequently the figures may not sum.
The figures are based at the mid-point of the year.

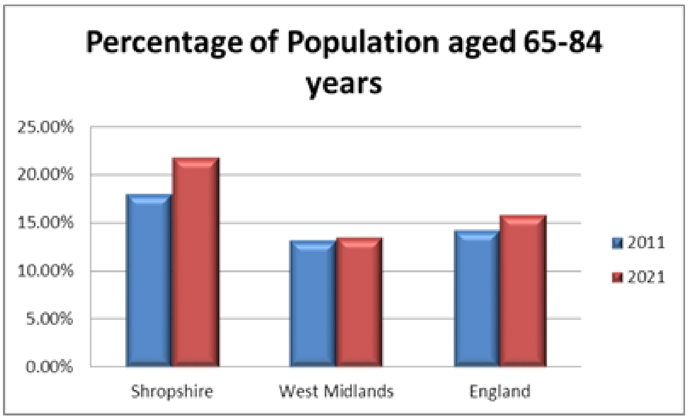
Charts 5.14: Age Structure: National and Regional Comparison

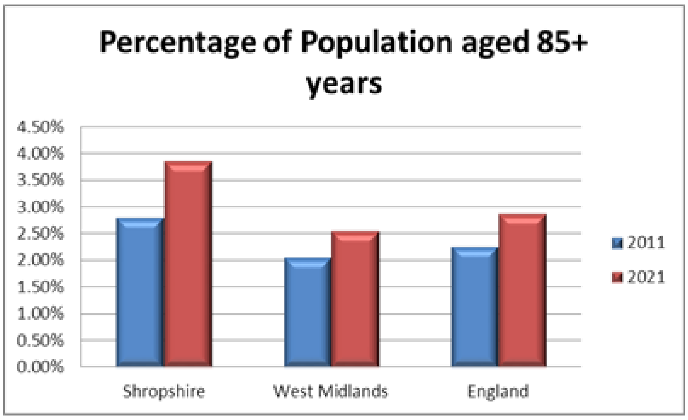


5.39 The 0-4 year population group in Shropshire is projected to experience 5% population growth in the next ten years. In terms of the proportion of the total population this is an increase of 0.21% since 2011. In comparison the West Midlands is projected to experience more significant growth in the 0-4 year population group.









5.38 In terms of the proportion of the total population, Shropshire is strikingly below levels in the West Midlands region in the 5 to 17 year age group. Shropshire has the lowest percentage of people aged between 18 to 64 years.

International Migration in Shropshire

5.39 This section looks at the following range of data sources to build a picture of international migration;

- The 2011 Census, Office of National Statistics (ONS) long-term migration estimates,
- ONS short-term International Migration Estimates,
- Shropshire Council, School Census,
- Flag 4 GP registrations,
- ONS Births to Mothers Born Outside the UK,
- Department of Work and Pensions (DWP) National Insurance Number Data (Nino).

5.40 Net international migration levels are lower in Shropshire compared to the national and regional averages. Despite low levels, the following evidence shows that international migration levels are rising in Shropshire and predominantly follow national trends. Evidence suggests that a large number of international migrants are from the European Union, and the EU Accession States. As the global recession begins to improve and the European Union expands, this rise is likely to continue or increase in future years.

5.41 The presence of greater numbers of overseas migrant workers can have an impact on housing needs in Shropshire as people often have different housing needs in terms of size, type of house required, housing for families and housing affordability. There can also be an impact on local schools and other services.

5.42 It is not always clear how long migrants are staying for, or if they are staying on a permanent basis. Evidence suggests that migrants are staying longer and bringing their families over.

The 2011 Census and the Non-UK Population

5.43 The 2011 Census shows that 4.7% of the population, or 14,387 people, were born outside of Shropshire. Of the residents who had arrived in the UK, 47.7% or 6,862 people arrived from 2001 onwards. This represents 2.2% of the total population, lower than the West Midlands Region 5.3% and England and Wales 6.7%. Although 2.2% is comparably low, to put into context, the increase in non-UK born population since 2001 is almost equal to the number of non-UK born residents who arrived before 2001. The number of non-UK born residents arriving prior to 2001 was 7,525 or 2.5%.

Estimates of Non-UK Born Residents per 1000 population

5.44 Latest estimates shown in (table 5.8), show the non-UK born population per 1,000 resident population. The non-UK population has fallen in Shropshire since 2008 from 52.6 per 1,000 residents (approx. 15,800 people) to 45.0 or (13,500 people). In the West Midlands and England the non-UK population has increased.

Table 5.8: Estimates of Non-UK Born Residents per 1,000 Residents

Geography	Indicator	2008	2009	2010	2011	2012
Shropshire UA		52.6	55.7	42.0	45.3	45.0
West Midlands		101.3	105.4	101.5	110.0	112.4
England		121.3	124.1	127.5	133.3	134.5

Source: Migration Indicators Tool Mid 2012, Office of National Statistics, August 2013, estimates derived from the Annual Population Survey (APS) January-December 2012

Country of Birth

5.45 The large majority of Shropshire residents (95.3%) were born in the United Kingdom. In total 6,007 people or (2.0%) of Shropshire residents were born in countries that are part of the European Union (EU) as of March 2011. Of those born in the European Union, 53.1% or (3,189) people were born in countries that joined the European Union between April 2001- March 2011 (Lithuania, Poland, Romania, Czech Republic, Cyprus, Estonia, Latvia, Hungary, Malta, Slovenia, Slovakia and Bulgaria).

Long Term International Migration

5.46 In 2012, 2.6 people per 1,000 resident population (approx. 800) residents left (Table 5.10) the County, whilst 2.9 people (approx. 900) per 1000 population arrived in the Shropshire (Table 5.9). This is much lower than national and regional averages.

Table 5.9: Long Term Migration Inflows per 1,000 Residents Estimates

Geography	Indicator	2008	2009	2010	2011	2012
Shropshire		3.3	3.6	3.0	3.3	2.9
West Midlands		7.7	7.1	7.0	8.1	6.4
England		10.7	10.1	9.8	10.1	8.5

Source: Migration Indicators Tool Mid 2012, Office of National Statistics, August 2013, estimates derived from the Components of Population Change data

Table 5.10: Long Term Migration Outflows Estimates per 1,000 Residents

Geography	Indicator	2008	2009	2010	2011	2012
Shropshire		2.0	3.0	2.6	2.6	2.6
West Midlands		3.0	4.6	3.8	4.4	3.6
England		6.1	6.7	5.6	5.7	5.6

Source: Migration Indicators Tool Mid 2012, Office of National Statistics, August 2013, estimates derived from the Components of Population Change data

Table 5.11: Long Term Migration Turnover Estimates per 1,000 Residents

Geography	Indicator	2008	2009	2010	2011	2012
Shropshire		..	65.9	69.0	67.7	71.7
West Midlands		38.7	38.2	37.9	37.7	38.3
England		4.2	3.9	3.8	3.8	3.9

Source: Migration Indicators Tool Mid 2012, Office of National Statistics, August 2013, estimates derived from the Components of Population Change data

5.47 The number of people arriving in Shropshire (Table 5.9) since 2008 has remained at a similar level. However there has been a fall between 2011 and 2012 to 2.9 per 1000 residents, a five year low. There is a striking difference in the level of international migration turnover when comparing Shropshire to England (Table 5.11).

Short Term Migration

5.48 Short-term migration estimates show the estimate of short term international migrants who stayed in England and Wales (in the year to June) per 1,000 population. Shropshire has a low level of short term migration. In 2011 it is estimated that 0.5 per 1,000 resident population (approx. 150 people) were short term migrants.

Table 5.12: Short Term Migration Inflows Estimates per 1,000 Residents

Geography	Indicator	2008	2009	2010	2011	2012
Shropshire		0.9	0.9	0.7	0.5	..
West Midlands		1.6	1.1	1.3	1.1	..
England		2.5	2.0	2.1	1.8	..

Source: Migration Indicators Tool Mid-2012, Office of National Statistics, August 2013

Migrant GP Registrations

5.49 Migrant patients who are registering with an NHS GP practice for the first time are given a marker called flag 4. Table 5.13 shows in 2012 Shropshire had 3.9 per 1,000 population (approx. 1,190) migrant GP registrations, much lower than the West Midlands and England.

Table 5.13: Migrant GP Registrations per 1,000 Population 2008 – 2012

Geography	Indicator	2008	2009	2010	2011	2012
Shropshire		4.2	4.0	3.8	3.9	3.9
West Midlands		8.8	8.1	8.2	8.8	8.3
England		11.3	11.1	11.5	11.5	10.8

Source: Migration Indicators Tool Mid-2012, Office of National Statistics, August 2013
New migrant GP registrations are used to calculate the rates for the Migrant GP Registrations

Children and Young People

5.50 In 2011, there were 16,940 pupils in Shropshire of compulsory school age and above. In primary schools (6.8%) of pupils were classed as non-white British, (6.9%) for secondary schools. This is compared to the West Midlands where at primary schools (30.6%) of pupils were classed as non-white British and (25.9%) at secondary school. Nationally these figures were (27.1%) and (23.4%) respectively

5.51 In 2011 (2.3%) of primary school pupils in Shropshire and (1.7%) of secondary pupils spoke with a first language other than English. This is low compared to the West Midlands (18.9%) of pupils at primary school and (13.8%) at secondary school. Nationally these figures were (16.8%) and (12.3%) respectively.

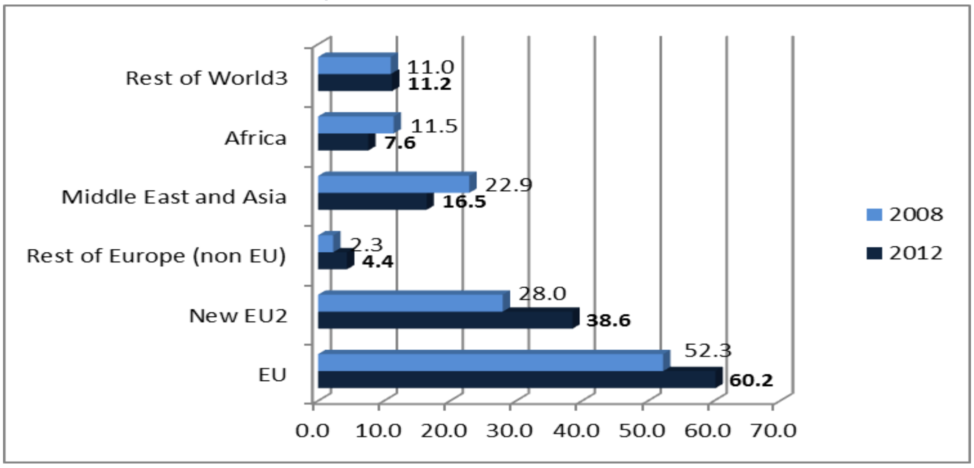
Source: The School Census, Shropshire Council and 2011 Pupil Data, Department for Education

Births to Non-UK Born Mothers

5.52 As is the case nationally, the number of births has increased in Shropshire from 2,628 in 2001 to 2,912 in 2012. The proportion of births to non-UK mothers is considerably lower in Shropshire than England and Wales and the West Midlands. In 2012 there were 249 (8.6%) of births to non-UK mothers. The regional average was (22.7%) and (25.9%) nationally.

5.53 There has been an upward trend in the number of births to non-UK mothers in Shropshire from 4.5% in 2001 to 8.6% in 2012 (chart 5.15). The majority of these births are by mothers from the EU or the new EU. These two groups have been increasing since 2008 (chart 5.15) (New EU refers to: Estonia, Latvia, Lithuania, Czech Republic, Hungary, Poland, Romania, Slovakia, Malta, Bulgaria, Cyprus (EU), Slovenia, Czechoslovakia).

Chart 5.15 Births to Non UK Mothers by Nationality as a percentage of all births to Non-UK Mothers in Shropshire

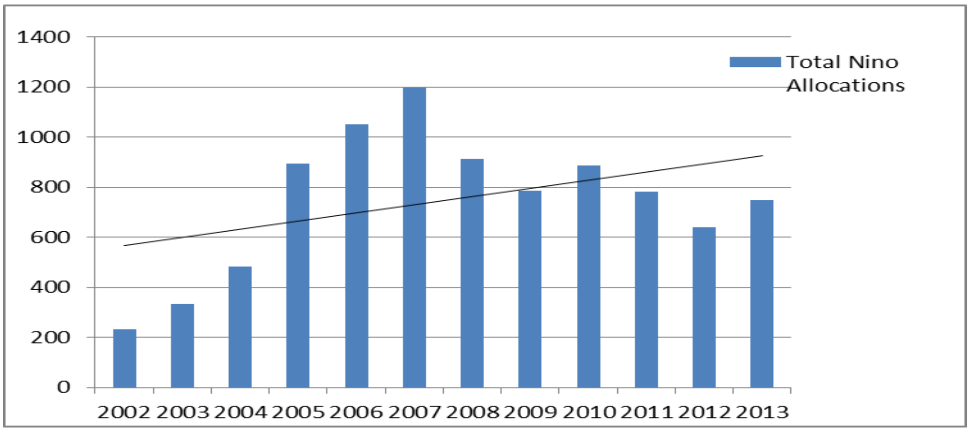


Source: Parents' Country of Birth, Office of National Statistics, 2012

National Insurance Allocations Data

5.54 The data covers adult overseas nationals entering the UK and allocated a National Insurance Number (NINo). In 2013 there were 747 NINo's issued in Shropshire, a rise from 234 in 2002. In 2007 Bulgaria and Romania joined the EU.

Chart 5.16 Total NINo Allocations in Shropshire



Source: DWP Nino's to Overseas Nationals Stat-Xplore

5.55 In 2012 NINo allocations in Shropshire represented (3.4) per 1000 resident population, significantly less than in the West Midlands and in England. NINo allocations are mainly from EU accession states 435 or (58.2%) in 2013.

Table 5.14: NI No Registrations per 1000 Population 2008 – 2012

Geography	Indicator	2008	2009	2010	2011	2012
Shropshire		4.9	4.2	4.7	4.1	3.4
West Midlands		12.3	10.6	12.8	12.7	9.7
England		17.5	16.2	17.6	17.7	13.5

Source: Migration Indicators Tool Mid-Year 2012, Office of National Statistics, August 2013.
Migrant NINo registrations used to calculate rates for the NINo indicator.

Household Change

Introduction

5.56 The following section focusses on changes in the number and types of households in Shropshire between 1991 and 2011. The information and analysis is based on statistics from three Censuses; where possible comparisons between the censuses have been provided, however each Census has provided slightly different information regarding households and household reference persons.

5.57 It should be noted that for consistency, the figures for Shropshire use the current Unitary Authority / pre-2009 County boundaries. This is important because at the time of the 1991 Census, Shropshire included what is now Telford and Wrekin Unitary Authority. In 2001, Shropshire operated as a County Council with five District and Borough Councils; however the boundaries of the former County Council are the same as the present Unitary Authority boundaries.

Change in Number of Households and Rooms

Table 5.15: Household Change in Shropshire and England

	1991 Census		2001 Census		2011 Census	
	Shropshire	**England**	**Shropshire**	**England**	**Shropshire**	**England**
Total Population	266,871	47,055,204	283,174	49,138,831	306,129	53,012,456
Total Households	104,468	18,765,583	117,301	20,451,427	129,674	22,063,368
Average Household Size	2.51	2.47	2.34	2.36	2.3	2.4
Average Number of Rooms per Household	5.54	5.09	5.87	5.33	6.0	5.4

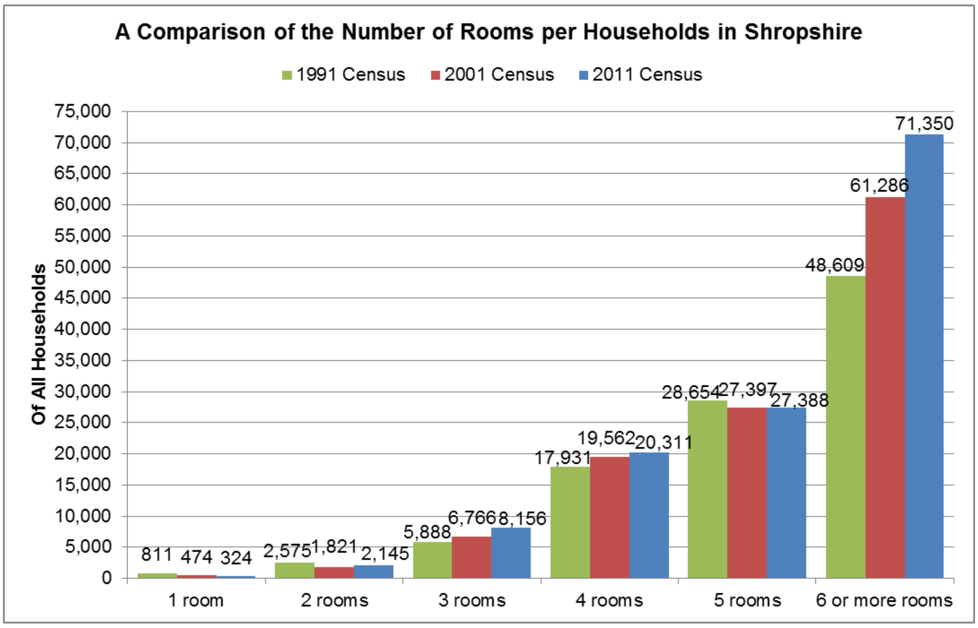
Source: 1991/2001/2011 Census, Office for National Statistics, © Crown Copyright 2014.

5.58 Since the 1991 Census, in Shropshire there has been an overall decrease in average household size. However, since 1991 there has also been a slight increase in the average number of rooms per household. As the following Chart 5.17 shows, there has been a significant increase in households with six or more rooms in Shropshire.

5.59 What is perhaps surprising is that according to the 2011 Census, the majority of one person households (34.1%) lived in households with six or more rooms.

- In 2001, a smaller majority of one person households lived in households with six or more rooms (29.8%).
- In 1991, the majority of one person households lived in households with four rooms (27.0%).
- The number of one person households living in houses with six or more rooms has more than doubled between 1991 and 2011.

Chart 5.17: A Comparison of the Number of Rooms per Household in Shropshire



Source: 1991/2001/2011 Census, Office for National Statistics, © Crown Copyright 2014.

Aged 65 Years and Over

5.60 In 2011, almost half of all one person households in Shropshire had a Household Reference Person aged 65 years and over (48.2%). This was significantly higher than the national average (40.9%).

5.61 In 2011, over a quarter of households in Shropshire were composed entirely of residents aged 65 years and over (32,854 households, or 25.3%).

- 55% of these households were one person households.

5.62 In 2011 there were 7,946 Shropshire residents living in communal establishments (2.6% of all usual residents).

- 32.9% of communal establishment residents were aged 65 years and over.
- 19.4% of communal establishment residents were aged 85 years and over.

What is significant is that whilst 8,407 residents aged 85 years and over made up 2.7% of all usual residents in Shropshire, within that age group 18.3% lived in communal establishments, compared to 4.1% of residents aged 65 years and over and 2.6% of all usual residents.

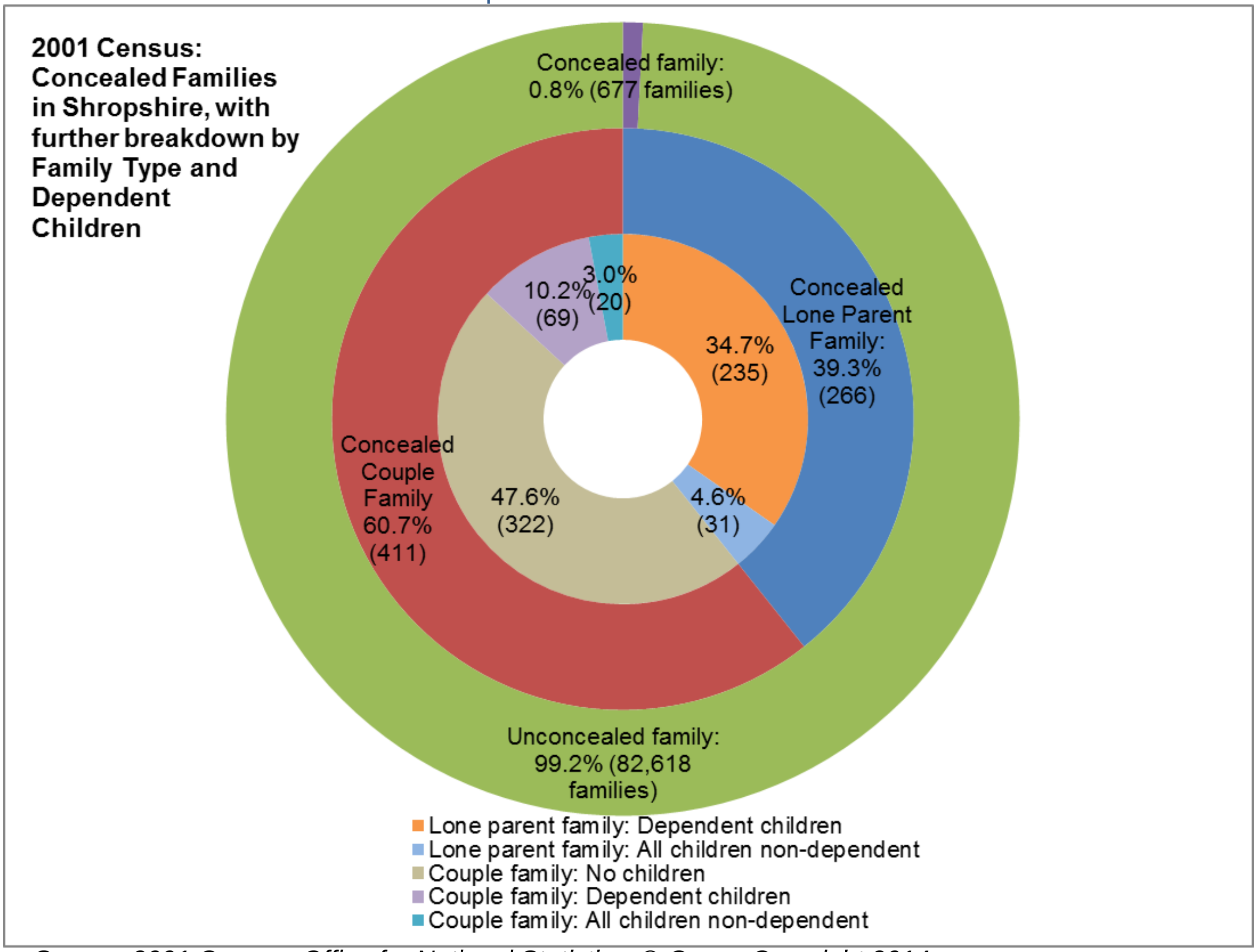
5.63 In 2011, the majority of Household Reference Persons aged 65+ were married (19,948 Household Reference Persons, or 48.7%).

5.64 In 2011, a significant majority of Household Reference Persons aged 85+ were either widowed or a surviving partner from a same-sex civil partnership (3,937 Household Reference Persons, or 66.9%). This compares to 12.7% of all Household Reference Persons.

Concealed Families

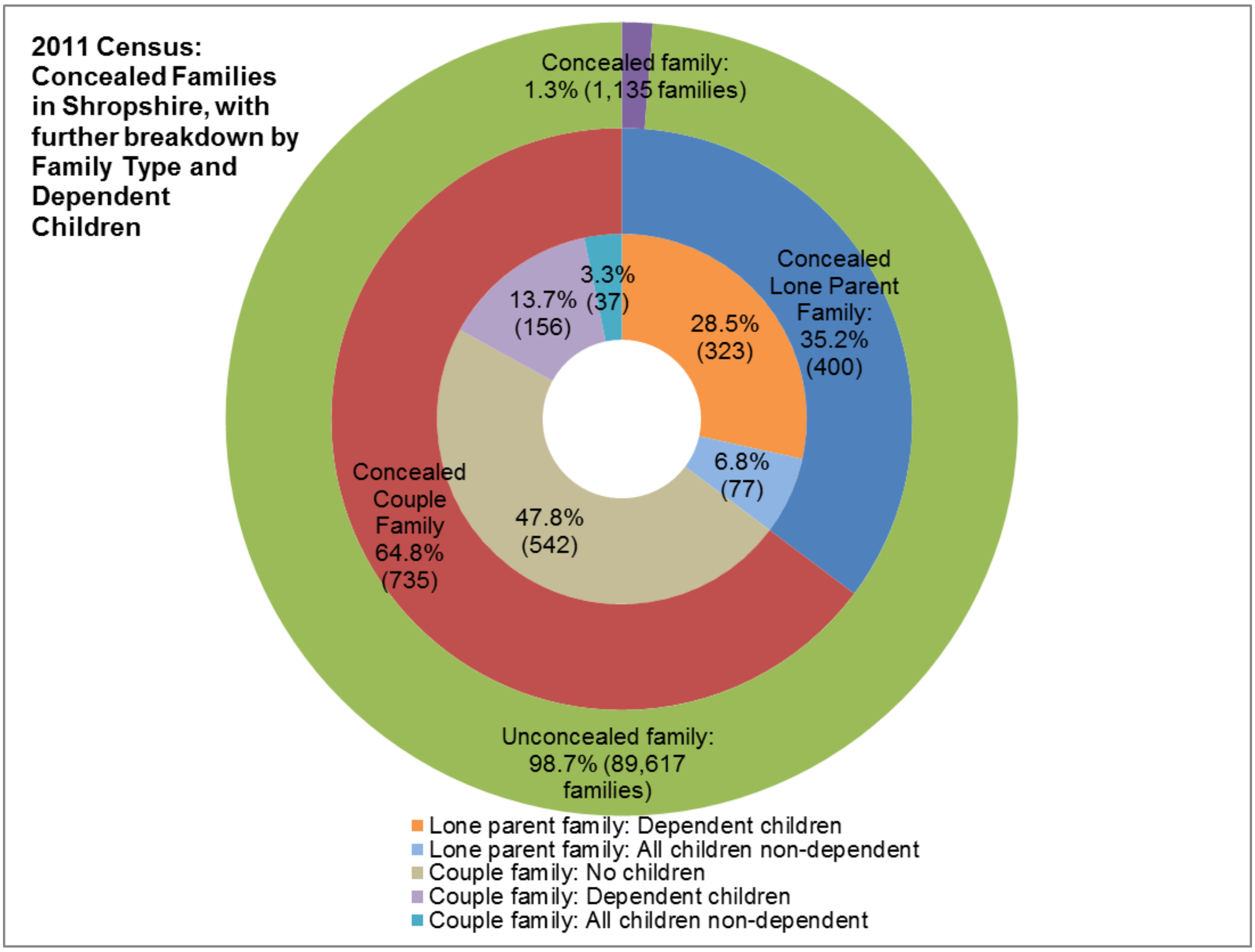
5.65 Whilst Shropshire continues to have a small proportion of concealed families, the number of families that do not include a Household Reference Person has increased between the 2001 Census and the 2011 Census. The following charts 5.18 and 5.19 show the proportion of families in the 2001 and 2011 Censuses that were classified as concealed, with a further breakdown of concealed families by type of family.

Chart 5.18: Concealed Families Reported in 2001 Census



Source: 2001 Census, Office for National Statistics, © Crown Copyright 2014.

Chart 5.19: Concealed Families Reported in 2011 Census



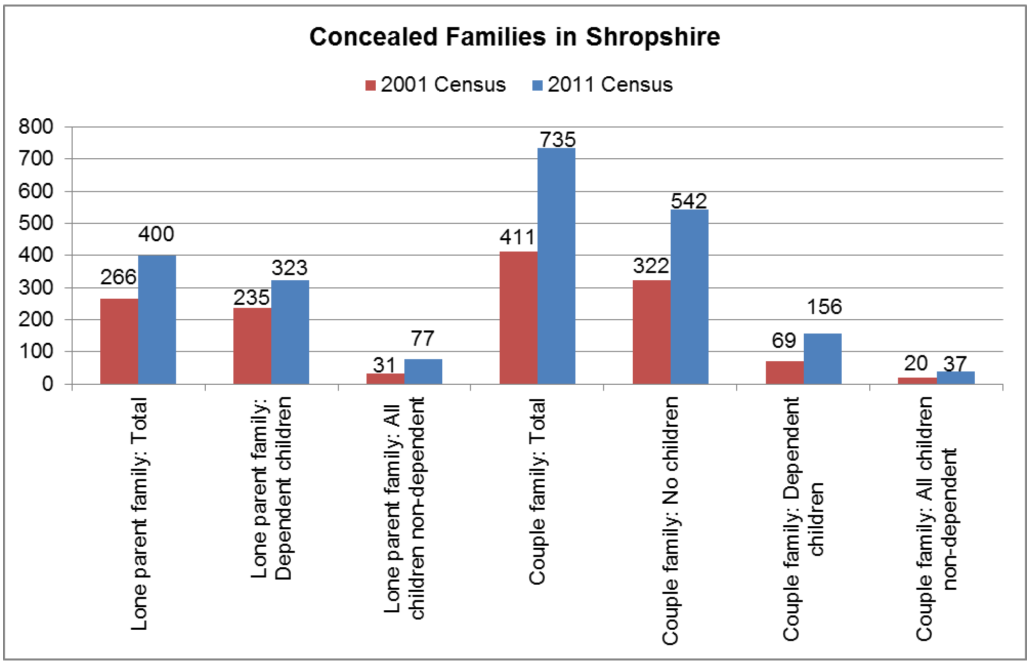
Source: 2011 Census, Office for National Statistics, © Crown Copyright 2014.

5.66 According to the 2011 Census, in Shropshire there were 1,135 concealed families, representing 1.3% of all families. This was a smaller proportion than the England average (1.9%). There has been a 67.7% increase in the number of concealed families in Shropshire between the 2001 Census and the 2011 Census.

5.67 Although the concealed families may be related to their Household Reference Person (HRP), they are not dependent children and are either in a couple, have children of their own, or both. It is important to note that concealed families have their own Family Reference Person (FRP); in households with two or more FRP, the HRP is chosen by following a number of criteria.

5.68 In 2011, over three-fifths (64.8%) of concealed families in Shropshire were couple families and over two-fifths (47.8%) of concealed families were couples with no children. As the following Chart 5.20 shows, the 2011 Census showed that there had been particular increases in couple families with no children and families with dependent children.

Chart 5.20: Concealed Families in Shropshire



Source: 2001/2011 Census, Office for National Statistics, © Crown Copyright 2014.

5.69 Further analysis of concealed families by the age of their FRP indicates that there were a similar amount of younger and older concealed families in Shropshire:

- FRP aged 24 and under: 24.0% of all concealed families (compared to 21.0% in England)
- FRP aged 25 to 34: 27.8% (compared to 32.5% in England)
- FRP aged 65 and over: 23.2% (compared to 19.1% in England)

5.70 However, the distribution of FRPs differed between concealed lone parent families and concealed couple families:

- The majority of concealed lone parent families in Shropshire had a FRP aged 24 and under (35.3% compared to 31.2% in England)
- The majority of concealed couple families had a FRP aged 65 and over (30.6% compared to 24.0% in England).

5.71 There are a number of factors that could explain the increase in concealed families in Shropshire including rising house prices, changes to the welfare system and possible student debt.

5.72 It should be noted that a family can be defined as a couple; the proportion of older concealed families could in part be a result of older couples living in homes with younger relatives, either to provide care or to be cared for.

Lone Parents

5.73 According to the 2011 Census, there were 11,971 lone parent households in Shropshire. Since 2001 the number of lone parent households has increased by 2,353 households or 24.5%. In 2011, 39.0% of lone parent households in Shropshire had no dependent children, a higher percentage than the England average (32.6%).

5.74 Looking at the concealed families in Shropshire, 19.3% of families had no dependent children, a lower percentage than the England average (21.7%).

- Whilst the number of concealed lone parent families with no dependent children was small (77 families), the number of families in this category had more than doubled from the 2001 Census (when there were 31 families).

- In 2011, the majority of concealed lone parent families with dependent children had a FRP aged 24 and under (43.7%), whilst the majority of concealed lone parent families with non-dependent children had a FRP aged 65 and over (49.4%).

Overcrowding and Under-occupancy

5.75 In Shropshire, there has been a large increase in both the number of households that are overcrowded and the number that are under-occupied.

Table 5.16: Occupancy Rating (Rooms) in Shropshire

	2001 Census		2011 Census		Change from 2001 Census to 2011 Census	
	Number	%	Number	%	Number	%
All households	117,301		129,674		12,373	10.5
Potential under-occupancy of households						
Occupancy rating (rooms) of +2 or more	71,892	61.3	82,123	63.3	10,231	14.2
Occupancy rating (rooms) of +1	26,724	22.8	26,320	20.3	-404	-1.5
Occupancy rating (rooms) of 0	14,618	12.5	16,009	12.3	1,391	9.5
Potential overcrowding in households						
Occupancy rating (rooms) of -1 or less	3,191	2.7	5,222	4.0	2,031	63.6

Source: 2001/2011 Census, Office for National Statistics, © Crown Copyright 2014.

5.76 In 2011, Shropshire had a larger proportion of households that were more significantly under-occupied (rating of 2+ or more) compared to the England average (63.3% compared to 49.7%). Although the number of households that were potentially overcrowded had increased to 4.0% of all households in Shropshire, this proportion was smaller than the England average (8.7%).

5.77 In Shropshire in 2011, the rate of under-occupancy and overcrowding varied significantly by household composition. Households that had more significant under-occupancy (with a rating of 2+ or more) than the county average in 2011 (63.3%) included:

- One family only: households where all residents were aged 65 and over (84.1%)
- One family only: married or same-sex civil partnership couples with no children (86.3%)

Households that had more overcrowding (with a rating of -1 or less) than the County average in 2011 (4.0%) included:

- One person households below the age of 65 (7.0%)
- One family only: cohabiting couples with dependent children (7.0%)
- One family only: lone parents with dependent children (10.2%)
- Other household types: with dependent children (16.1%)
- Other household types: other (including households with residents that were all full-time students or all aged 65 and over) (10.7%)

No usual residents

5.78 In addition to the 129,674 households that were recorded in Shropshire in 2011, there were a further 5,971 household spaces with no usual residents. Over three-quarters of all dwellings with no usual residents were unshared whole houses or bungalows (75.7%). This is a larger proportion than the England average (62.1%).

Household Projections

Introduction

5.79 The Department for Communities and Local Government (CLG) have published 2008 and 2011 household projections. The following report looks at the projected household numbers and changes in household types up to the year 2021 as this is the last year shown in the 2011 projections. This section focusses on the projections supplied by CLG, rather than any alternative forecasts generated by Shropshire Council.

Total Households

5.80 In both the 2008 and 2011 household projections, the household population of Shropshire is expected to increase to just over 139,000 households. Although there are projected to be more households in the 2011 projections, the percentage change from 2011 is smaller.

Table 5.17: A Comparison of 2008 and 2011 Based Household Projections

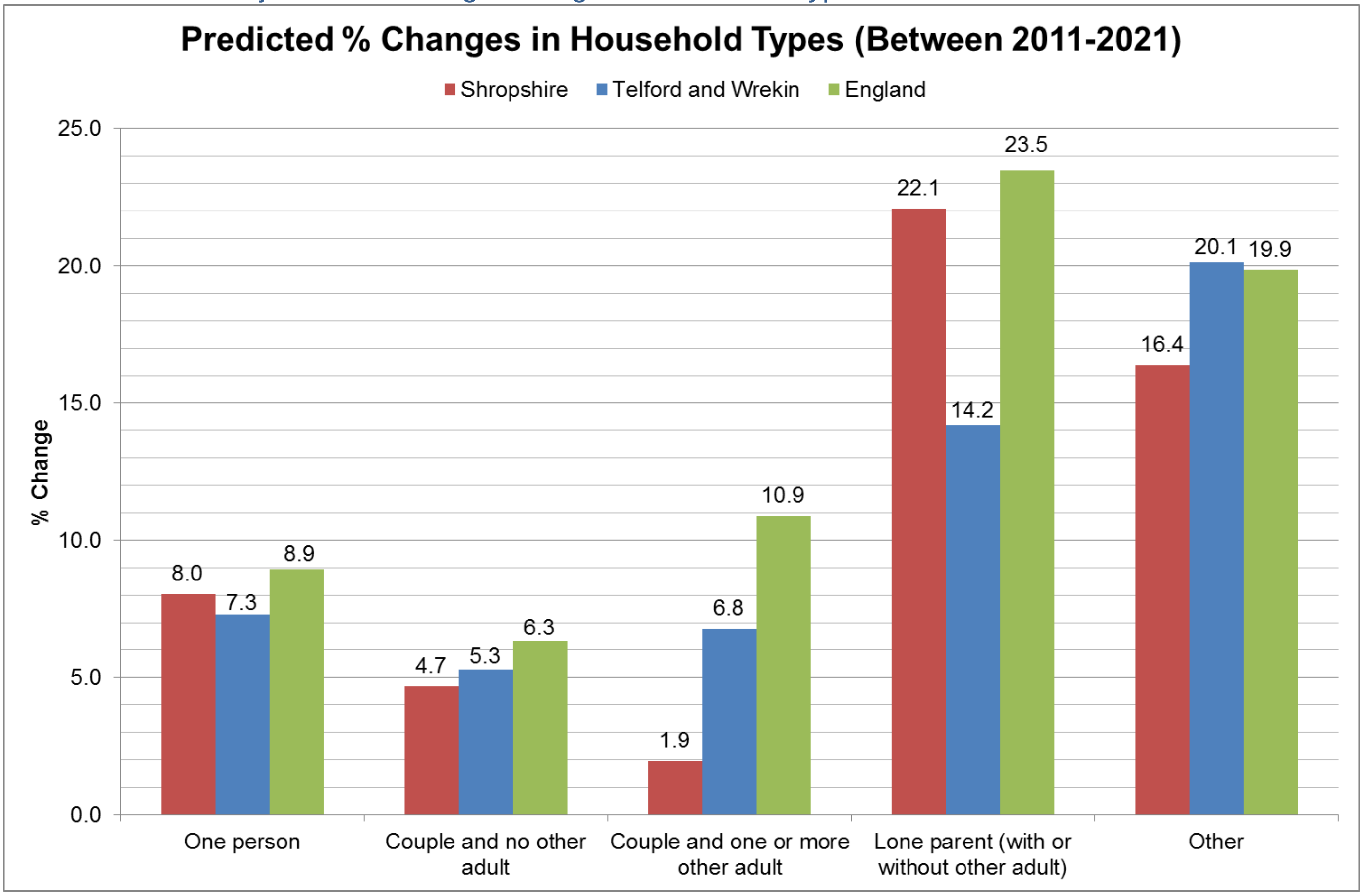
	2008 Projections		2011 Projections	
	Total Households		Total Households	
	No.	% change from 2011	No.	% change from 2011
2011	126,700		130,100	
2016	132,900	4.9	134,800	3.6
2021	139,000	9.7	139,100	7.0

Source: 2008 and 2011 Household Projections, Department for Communities and Local Government, © Crown Copyright 2014.

5.81 According to the mid-2011 housing projections, Shropshire's projected housing growth between 2011 and 2021 is similar to that of the neighbouring Local Authority of Telford and Wrekin (7.8%) but a lot smaller than the England average (10.0%).

5.82 The largest percentage change by household type in Shropshire is predicted to be in Lone Parent Households (with or without other adults); the percentage change is greater than in Telford and Wrekin but less than the England average.

Chart 5.21: Projected Percentage Change in Household Types



Source: 2011 Household Projections, Department for Communities and Local Government, © Crown Copyright 2014.

5.83 Looking more closely at the projections for different types of households, it becomes apparent that there have been significant revisions to the predictions of household types between the 2008 and 2011 projections.

5.84 In the 2011 projections, the largest number of households in 2021 is predicted to be one family household, formed of couples with no children. The next largest household category is predicted to be one person households.

5.85 The predicted increase of one person households is lower in the 2011 projections than in the 2008 projections.

5.86 Meanwhile, the 2011 projections show an expected increase in the number of couple households with at least one other adult and no dependent children and the number of households classified as ‘Other’ households. What this could indicate is a change in expectations, due in part to the recent recession, of people who would have occupied one person households instead forming households with other people.

Table 5.18: A Comparison of 2008 and 2011 Projections by Household Type

Shropshire	2008 Projections			2011 Projections		
	No. in 2011	No. in 2021	% change from 2011 to 2021	No. in 2011	No. in 2021	% change from 2011 to 2021
One Person Households	39,400	46,700	18.6	38,500	41,600	8.0
One Family: Couples with No Dependent Children	43,400	49,800	14.9	41,200	42,800	3.7
One Family: Couples with Dependent Children	21,900	21,400	-2.4	22,400	23,900	6.4
One Family: Lone Parent	6,300	7,800	22.8	6,200	7,700	25.2
Couples with Other Adults: No Dependent Children	7,100	5,700	-19.4	10,800	11,600	7.5
Couples with Other Adults: Dependent Children	2,700	2,100	-23.1	2,800	2,300	-18.9
Lone Parent with Other Adults	800	800	-1.7	800	800	-2.4
Other Households	5,000	4,700	-6.2	7,400	8,600	16.4
Total	126,700	139,000	9.7	130,100	139,100	7.0

Source: 2008 and 2011 Household Projections, Department for Communities and Local Government, © Crown Copyright 2014.

One Person Households

5.87 According to the 2011 household projections, the number of one person households is projected to increase by 8.0% in Shropshire. However, further analysis of the projections by age groups suggests that there will be a significant increase in older one person households.

Table 5.19: One Person Household by Age Group of Household Reference Person

	All Persons		24 and Under		65+		85+	
	No.	% change from 2011	No.	% change from 2011	No.	% change from 2011	No.	% change from 2011
2011	38,500		1,000		19,600		3,900	
2016	40,000	4.0	800	-21.8	21,200	8.2	4,400	14.9
2021	41,600	8.0	600	-34.3	22,800	16.2	5,100	31.7

Source: 2011 Population Projections, Department for Communities and Local Government, © Crown Copyright 2014.

Lone Parent Households

5.88 The following Table 5.20 shows the predicted increase in one family: lone parent households. Three age groups have been selected for further analysis. Whilst the 24 and under category has more households, a greater percentage change is seen in the older person households. Whilst the projections focus on lone parents with dependent children, it would be interesting to analyse the numbers of lone parent households with non-dependent children.

Table 5.20: Lone Parent Households by Age Group of Household Reference Person

	All Persons		24 and Under		65+		85+	
	No.	% change from 2011	No.	% change from 2011	No.	% change from 2011	No.	% change from 2011
2011	6,200		600		100		0	
2016	6,800	11.3	600	-0.6	200	47.9	100	57.6
2021	7,700	25.2	700	6.9	300	111.6	100	142.4

Source: 2011 Population Projections, Department for Communities and Local Government, © Crown Copyright 2014.

5.89 According to the overall household projections, there is predicted to be a slight decrease in the number of households where a lone parent is living with one or more other adults. Looking specifically at the younger and older households in Shropshire, the 24 and under households show a 2.0% increase between 2011 and 2021.

Young People

5.90 According to the 2011 projections, the number of 24 and under households is projected to decrease by -21.6% between 2011 and 2021.

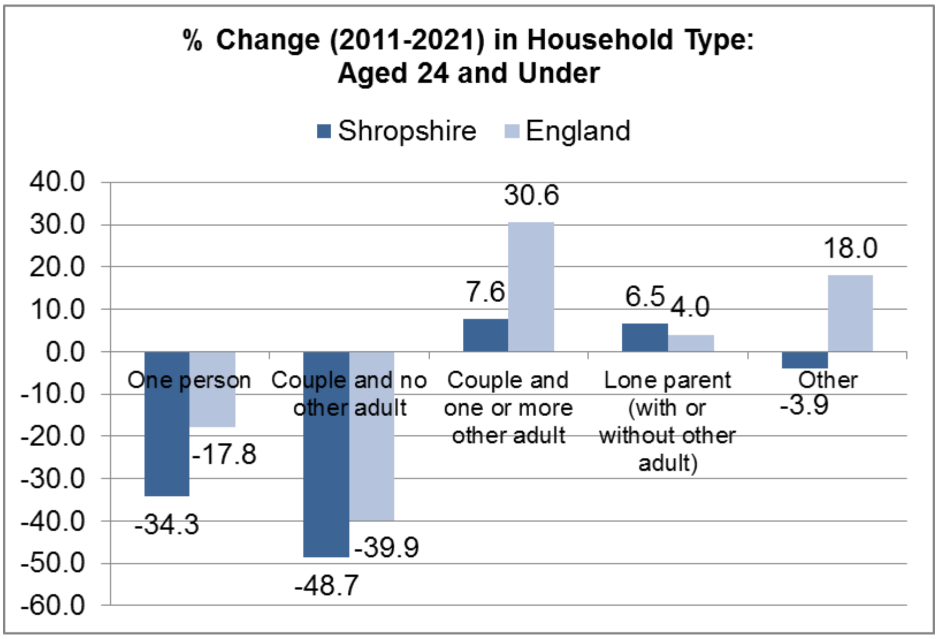
5.91 The largest percentage decrease between 2011 and 2021 is predicted to be for one family households comprised of couples with no dependent children (-56.9%).

5.92 Not all of the household categories for this age group are predicted to decrease in numbers:

- One Family: Lone Parent (6.9%)
- Couples with Other Adults: No Dependent Children (3.6%)
- Couples with Other Adults: Dependent Children (15.0%)
- Lone Parent with Other Adults (2.0%)

5.93 In England, the numbers of households classified as ‘Other’ are predicted to increase by 18.0%; this is compared to a -3.9% decrease in Shropshire.

Chart 5.22: Percentage Change (2011 to 2021) by Age of HRP and by Household Type



Source: 2011 Population Projections, Department for Communities and Local Government, © Crown Copyright 2014.

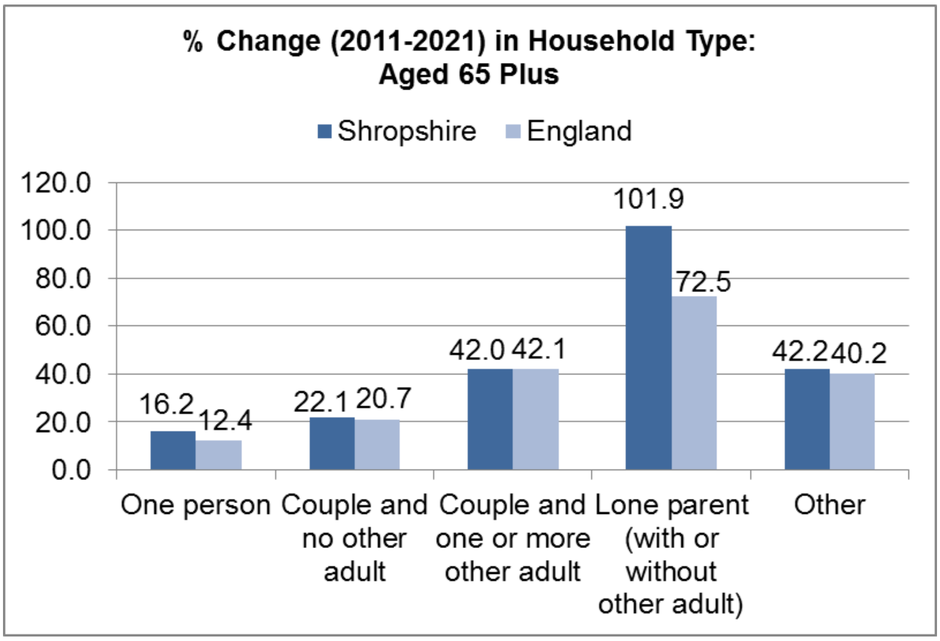
Retirement Age (65 Years and Over)

5.94 According to the 2011 projections, the number of households aged 65 and above is projected to increase between 2011 and 2021 by 22.6%.

5.95 The only category with a predicted decrease in households during this period is Lone Parent with Other Adults (-27.3%).

- As the chart 5.23 below shows, the overall number of lone parent households is predicted to increase and by a larger percentage than the England average (101.9% compared to 72.5%).

Chart 5.23: Percentage Change (2011 to 2021) by Age of HRP and by Household Type



Source: 2011 Population Projections, Department for Communities and Local Government, © Crown Copyright 2014.

Older People (85 Years and Over)

5.96 According to the 2011 projections, the number of households aged 85 years and above is projected to increase between the years 2011-2021 by 41.7%.

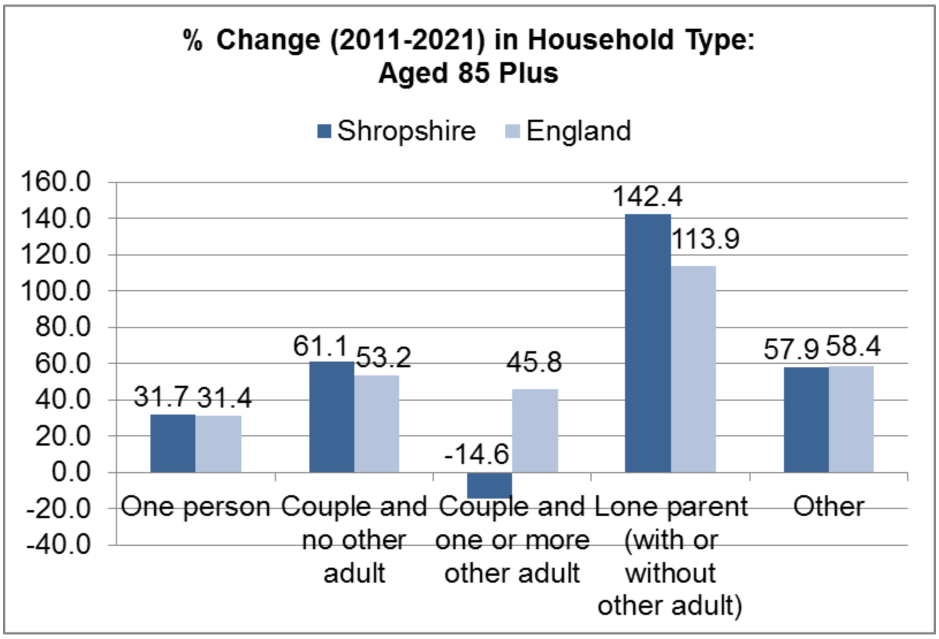
5.97 There are two categories where the numbers of older person households are predicted to decrease:

- Couples with Other Adults: No Dependent Children (-13.3%)
- Couples with Other Adults: Dependent Children (-33.3%)
- By contrast, according to the projections for England the number of couple and other adult households is predicted to increase by 45.8%.

5.98 There are two categories where the numbers of households are projected to more than double between 2011 and 2021:

- One Family: Couples with Dependent Children (147.4%)
- One Family: Lone Parent (142.4%)

Chart 5.24: Percentage Change (2011 to 2021) by Household Type and Age of HRP



Source: 2011 Population Projections, Department for Communities and Local Government, © Crown Copyright 2014.

Population, Household and Labour Force Projections

Introduction

6.1 The purpose of this element of the Shropshire Housing Market Assessment is to begin to understand future demand for housing in Shropshire over the next twenty five years. As change in population, households and labour force are major drivers of housing demand a selection of projections based on historic trends have been produced. These projections do not attempt to take account of possible future changes in house building or economic growth. These projections lay the foundations for future scenario forecasting work during 2014.

6.2 Popgroup V4 modelling software has been used to prepare five sets of population and household projections and four sets of labour force projections for Shropshire. The benefit of using Popgroup V4 is that it now better reflects the methodology adopted nationally by the Office for National Statistics.

- A natural change projection
- A nil migration projection
- The ONS 2010 Sub-national Population Projections (SNPP) with an up-to-date population base
- Projection A: utilising long-term linear trends for internal migration
- Projection B: utilising migration trends adopted in the ONS 2010 bases SNPPs

Popgroup Model

6.3 POPGROUP is a family of demographic models developed to generate population, household, labour force, and other derived projections for specified geographical areas and/or population groups. Shropshire Council was an initial investor in the development of the Popgroup suite of software, recognising the need to understand future demand for housing.

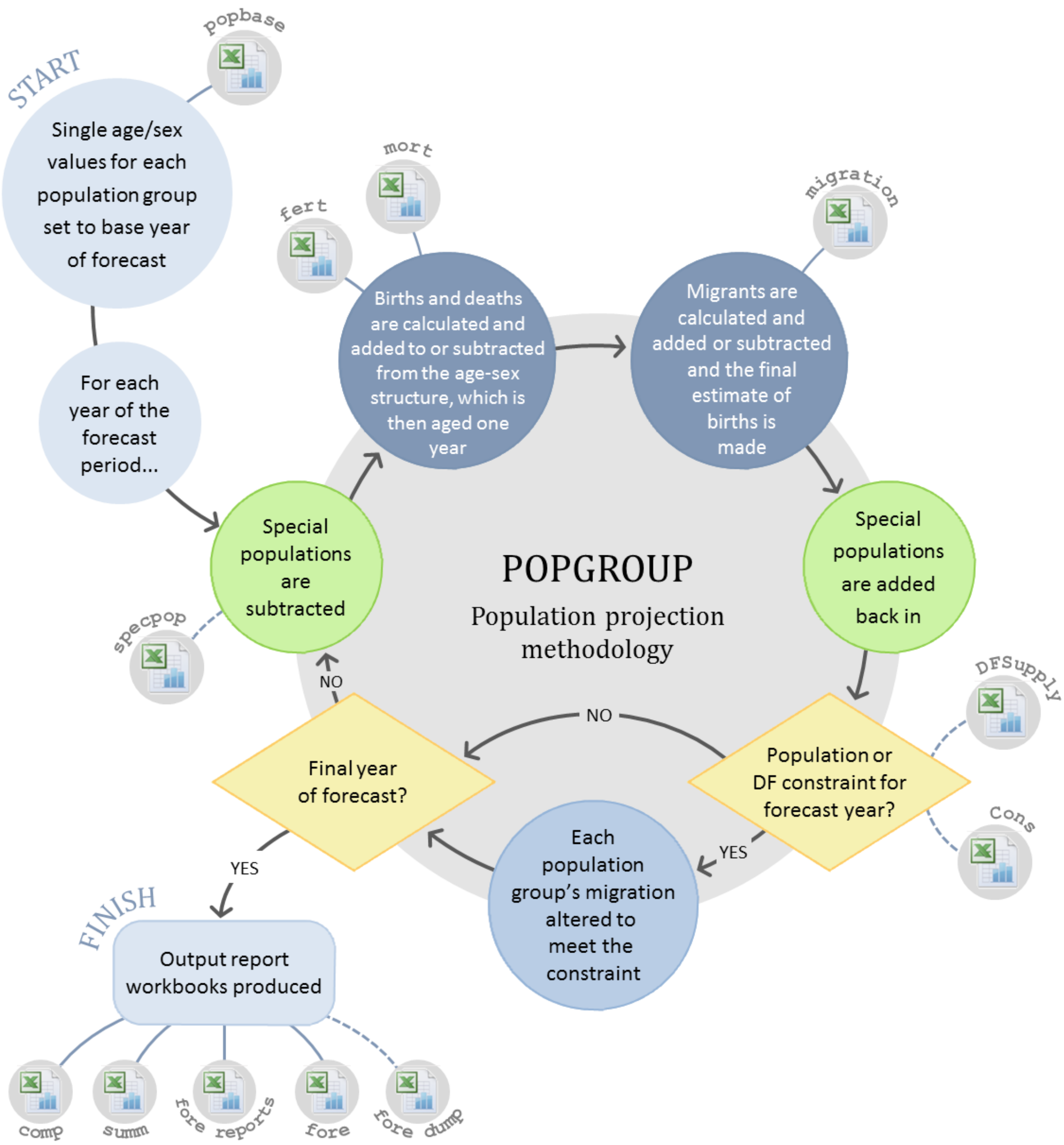
6.4 Popgroup was developed by John Andelin and Professor Ludi Simpson and is now developed by Edge Analytics. It has now become the lead forecasting model adopted by local authorities as it can produce high-quality, defensible population statistics for use in strategic planning, service planning and policy development.

6.5 Popgroup uses a cohort component methodology (used by the UK national statistical agencies) that enables the development of population forecasts based on births, deaths and migration inputs and assumptions. Current populations can be estimated and future populations forecast, with detailed age and sex composition. The following diagram prepared by Edge Analytics for the Popgroup manual best illustrates the methodology.

6.6 For the purpose of preparing household and labour force projections Shropshire Council has used the Popgroup Derived Forecast model. This has required the input of assumptions on household formation and economic activity.

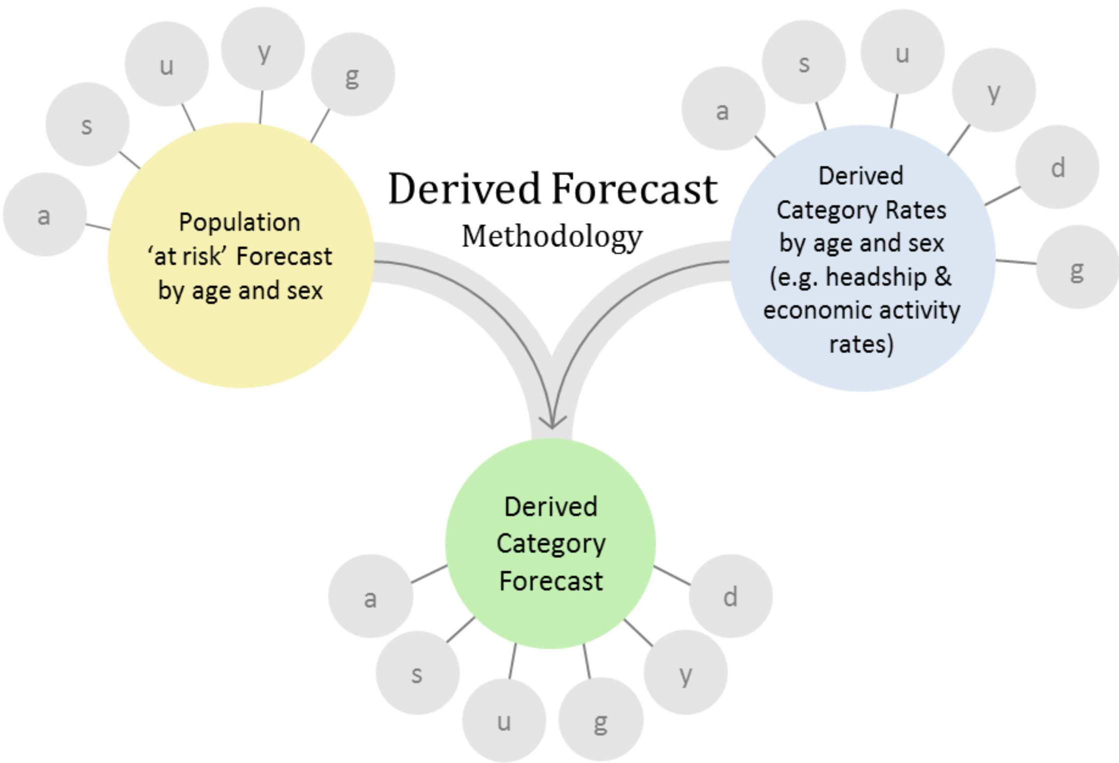
6.7 A major driver for this work has been the large margin (over 10,000 people) identified between the 2011 Census resident population count and the pre-census 2010 based mid-year population estimate. This made pre-Census sub-national population projections (2008 and 2010) out of date.

Figure 6.1: The POPGROUP Module



Source: Edge Analytics, POPGROUP Reference Manual, 2014

Figure 6.2: Derived Forecast (DF) methodology



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

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

Source: Edge Analytics, Popgroup Reference Manual, 2014

Assumptions Used

6.8 The following section outlines the assumptions and data sources that have been used in preparing the five projections. More information about how inputs work within the model is available at http://www.ccsr.ac.uk/popgroup/

Population Base

6.9 The 2011 mid-year population estimates by single year of age and sex have been used as the population base for the model. This is to reflect the year of the 2011 Census when the most up-to-date population count for Shropshire was identified.

Fertility Rates and Long-term Birth Trends

6.10 The fertility assumptions were developed using the following data sources:

- Vital Statistics Table 2: Births by Age of Mother – Office for National Statistics, Vital Statistics Unit.

- Population and Components of Change Estimates produced for the preparation of the 2002-2012 Mid-Year Population Estimates (revised following 2011 Census) – Office for National Statistics, Population Estimates Unit.

6.11 The model requires the inclusion of age specific fertility rates (ASFR). These are defined as the number of births in a year to women in a 5-year age group, divided by the number of all women in that age group, multiplied by a thousand. Two options were considered for preparing local age specific fertility rates for Shropshire:

- Using national standard ASFRs in combination with calculated local age specific differentials.

- Calculating rates based on the sum of five years of births by age of mother divided by the sum of five years of female population of child bearing age and multiplied by one thousand.

6.12 After testing both options in the model the second option was adopted as it was judged to provide the most realistic projections of births based on historic trends. For 2011 actual total births figures by gender were added.

Mortality Rates (Deaths)

6.13 The mortality assumptions were developed using the following data sources:

- Vital Statistics Table 3: Deaths by Age – Office for National Statistics, Vital Statistics Unit.

- Mid-Year Population Estimates 2006 to 2011 (revised following the 2011 Census) – Office for National Statistics, Population Estimates Unit.

6.14 The model requires age specific mortality rates. These are defined as the total number of deaths per year per thousand people of a given age. They are calculated by dividing the total number of deaths by the total population in the same specified age group and multiplied by one thousand. Two options were considered for preparing local age specific fertility rates for Shropshire:

- Using national standard ASMRs in combination with calculated local age specific differentials.
- Calculating rates based on the sum of five years of deaths by age of mother divided by the sum of five years of female population of child bearing age and multiplied by one thousand.

6.15 After testing both options in the model the second option was adopted as it was judged to provide the most realistic projections of deaths based on historic trends. For 2011 actual total birth figures by gender were added.

Migration

6.16 Within Popgroup different variables on in and out migration can be added i.e. inter-regional etc. For the purpose of preparing the following projections assumptions about internal migration within the UK and international (overseas) migration have been included in the model.

Internal Migration

6.17 The internal migration assumptions were developed using the following data sources:

- UK Population Projections for reference purposes – ONS National Population Projections 2012 based
- Population and Components of Change Estimates of internal migration by single age and gender produced for the preparation of the 2002-2012 Mid-Year Population Estimates (revised following 2011 Census) – Office for National Statistics, Population Estimates Unit.
- ONS 2010 based sub-national population projection components of change estimates on internal migration to 2035.

Please note: ONS use the GP Patient Register and the NHSCR (two National Health Service administrative data sets) together with HESA data on student moves to estimate internal migration.

6.18. For the purpose of preparing nil migration forecasts the difference was calculated between in migration and out migration identified in the 2010 based population projections to 2035. The difference was divided in half and then added to the lowest number of migrants. These totals were then applied as both the in and out migration inputs into the Popgroup model.

6.19 Age specific migration rates are required for in and out migrants to inform the model. These are defined as the number of migrants into or out of Shropshire in a given year by age and gender expressed per thousand population. These have been calculated using the sum of five years of migrants by age and gender divided by the total population in the same specified age group and multiplied by one thousand.

6.20 Two methods of defining the long-term trends of in and out migration were tested as follows:

(a) Calculating total internal migration figures for Shropshire for the whole of the forecast period using a linear trend based on 10 years data from the Mid-Year Estimates Components of Change (2002-2012).

(b) Adopting the migration estimates by age and gender from the ONS 2010 based Sub National Population Projections to 2035 prepared by Office for National Statistics. These were entered in the form of counts of migrants.

Both methods when tested produced significantly different levels of internal migration so the decision has been taken to publish two sets of projections based on method A and method B. Looking at the historic trend method B has probably overestimated the level of migration in the long-term, leading to larger population growth.

International Migration

6.21 The international migration assumptions were developed using the following data sources:

- Population and Components of Change Estimates of international migration by single age and gender produced for the preparation of the 2002-2012 Mid-Year Population Estimates (revised following 2011 Census) – Office for National Statistics, Population Estimates Unit.

- ONS 2010 based sub-national population projection components of change estimates on international migration to 2035.

6.22 Two options were considered for inputting assumptions for international migration. The first involved calculating the age specific distribution of migrants for in migration from overseas and age specific migration rates for out migration to overseas. This used the ONS components of change data to calculate the age breakdown and long-term linear trend. Tests showed this gave unlikely levels of international migration which suggested the assumptions were not robust enough.

6.23 In the end after having looked closely at the historic trend it was decided to adopt the international migration estimates by age and gender from the ONS 2010 based Sub National Population Projections to 2035 prepared by the Office for National Statistics. These were entered in the form of counts of migrants and applied to projections A and B.

Special Population Groups

6.24 A 'special population' is a group for whom it is not appropriate to apply the standard fertility, mortality and migration rates and/or age on. For the purpose of this modelling exercise the total armed forces population resident at RAF Shawbury, RAF Cosford and Copthorne Barracks and Tern Hill in Shropshire has been identified as a special population group. Data has been sourced from the 2011 Census on defence establishment residents.

6.25 The model operates by extracting the special population group from the 2011 population base at the beginning of the forecast, and then applies the fertility, mortality and migration rates, adding the special population back in at the end of the process to obtain the total resident population. Students have not been identified as a 'special population group' due to the absence of a large student population in Shropshire.

6.26 Please note as the projections are based on historic trends they do not take account of the closure of Copthorne Barracks in 2015 or the proposals to develop a further education establishment in Shropshire.

Household Formation

6.27 To produce household projections a robust set of assumptions is required around household formation by type of household. In most cases the household formation rates prepared by ONS for producing the latest sub-national household projections are used to inform the model. New sub-national household projections that reflect the results of the 2011 Census will not be available until later in 2014.

6.28 The household formation rates are calculated by ONS using information gathered on household composition from the most recent Census. There has been much discussion amongst demographers about the impact of the global recession on recent household formation and whether this will be reflected in lower household formation rates later in 2014.

6.29 A decision was made to use ONS formation rates taken from:

- The latest 2011 based interim household projections for the years 2011 to 2021.
- The previous 2008 based household projections for the remainder of the projection period, keeping the rates unchanged for the last three years to 2036.

This is not ideal and further work could be undertaken to explore alternative ways of extending the rates beyond 2021.

Projections

Natural Change Projection

6.30 Natural change projections assume that only new births and deaths will influence population change in the County and that there is no migration into or out of Shropshire.

6.31 This Natural Change Projection represents a standard baseline position and is provided for comparison purposes only, as it is unrealistic to expect there to be zero migration. Table 6.1 shows that using this projection the population of Shropshire would decrease by 4% over the period 2011 to 2036. This represents 12,700 fewer persons.

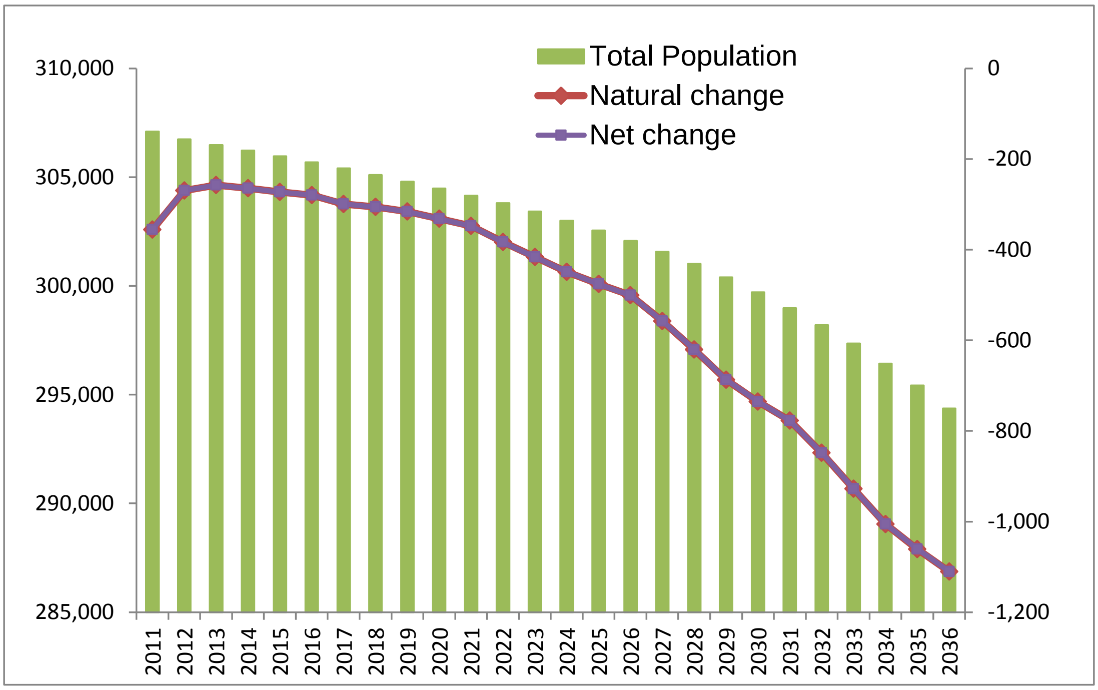
6.32 Although this projection shows a reduction in population numbers there is an increase in household numbers. There are a number of reasons for this including the fact that people are living longer due to improved social conditions and better health, as well as the fact that household size is reducing with more people living on their own.

Table 6.1: Population by Age Group and the Percentage Change between Years

Natural Change Projection								
Age Group	**2011**	**2026**	***% Change 2011-2026***	**2031**	***% Change 2026-2031***	**2036**	***% Change 2031-2036***	***% Change 2011-2036***
0-4	15,700	14,200	-9.6%	14,000	-1.4%	13,400	*-4.3%*	*-14.6%*
5-9	15,600	14,200	-9.0%	14,100	-0.7%	14,000	*-0.7%*	*-10.3%*
10-14	17,800	14,500	-18.5%	14,200	-2.1%	14,100	*-0.7%*	*-20.8%*
15-19	19,200	16,100	-16.1%	14,900	-7.5%	14,600	*-2.0%*	*-24.0%*
20-24	16,800	16,000	-4.8%	16,100	0.6%	14,900	*-7.5%*	*-11.3%*
25-29	15,700	17,900	14.0%	15,700	-12.3%	15,800	*0.6%*	*0.6%*
30-34	15,500	18,800	21.3%	17,800	-5.3%	15,600	*-12.4%*	*0.6%*
35-39	17,500	16,200	-7.4%	18,600	14.8%	17,600	*-5.4%*	*0.6%*
40-44	22,100	15,400	-30.3%	16,200	5.2%	18,500	*14.2%*	*-16.3%*
45-49	23,600	15,100	-36.0%	15,300	1.3%	16,100	*5.2%*	*-31.8%*
50-54	21,200	17,100	-19.3%	15,000	-12.3%	15,100	*0.7%*	*-28.8%*
55-59	20,100	21,400	6.5%	16,900	-21.0%	14,800	*-12.4%*	*-26.4%*
60-64	22,300	22,400	0.4%	20,900	-6.7%	16,500	*-21.1%*	*-26.0%*
65-69	19,400	19,600	1.0%	21,700	10.7%	20,300	*-6.5%*	*4.6%*
70-74	15,200	17,700	16.4%	18,600	5.1%	20,600	*10.8%*	*35.5%*
75-79	11,800	18,100	53.4%	16,200	-10.5%	17,100	*5.6%*	*44.9%*
80-84	9,000	13,700	52.2%	15,400	12.4%	13,900	*-9.7%*	*54.4%*
85-89	5,600	8,200	46.4%	10,300	25.6%	11,800	*14.6%*	*110.7%*
90+	3,000	5,400	80.0%	7,000	29.6%	9,500	*35.7%*	*216.7%*
Total	307,100	302,100	-1.6%	299,000	-1.0%	294,400	*-1.5%*	*-4.1%*

Source Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*
This report was produced with POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

Chart 6.1: Natural Change Projection with Components of Change



Source: Research & Intelligence Team, Shropshire Council

Table 6.2: Number of Households in Shropshire and Percentage Change between 2011 and 2036

Number of Households in Shropshire based on Natural Change Projection	Households				Change	
Category of Households	**2011**	**2026**	**2031**	**2036**	**Number**	**%**
One Person Households Male	15,700	20,500	20,900	20,800	5,100	32%
One Person Households Female	22,900	30,200	30,600	30,900	8,000	35%
One family & no others: Couple: No dependent children	41,200	49,300	50,500	50,300	9,100	22%
One family and no others: Couple: 1 dependent child	8,600	8,000	7,700	7,600	-1,000	-12%
One family and no others: Couple: 2 dependent children	10,000	8,400	8,400	8,500	-1,500	-15%
One family and no others: Couple: 3+ dependent children	3,700	3,400	3,400	3,500	-200	-5%
One family and no others: Lone parent: 1 dependent child	3,300	4,500	4,700	4,700	1,400	42%
One family and no others: Lone parent: 2 dependent children	2,100	2,900	3,100	3,100	1,000	48%
One family and no others: Lone parent: 3+ dependent children	800	1,000	1,000	1,000	200	25%
A couple and one or more other adults: No dependent children	10,800	3,900	3,200	2,900	-7,900	-73%
A couple and one or more other adults: 1 dependent child	1,700	1,200	1,000	900	-800	-47%
A couple and one or more other adults: 2 dependent children	800	500	500	400	-400	-50%
A couple and one or more other adults: 3+ dependent children	300	300	300	300	0	0%
A lone parent and one or more other adults: 1 dependent child	500	300	300	300	-200	-40%
A lone parent and one or more other adults: 2 dependent children	200	300	300	300	100	50%
A lone parent and one or more other adults: 3+ dependent children	100	100	100	100	0	0%
Other Households	7,400	6,500	6,600	6,600	-800	-11%
Total	**130,000**	**141,500**	**142,600**	**142,400**	**12,400**	**10%**

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

6.33 Table 6.2 shows that the number of households would increase by 12,400 (10%) over the 25 year period.

2010 Sub-National Projections (Revised)

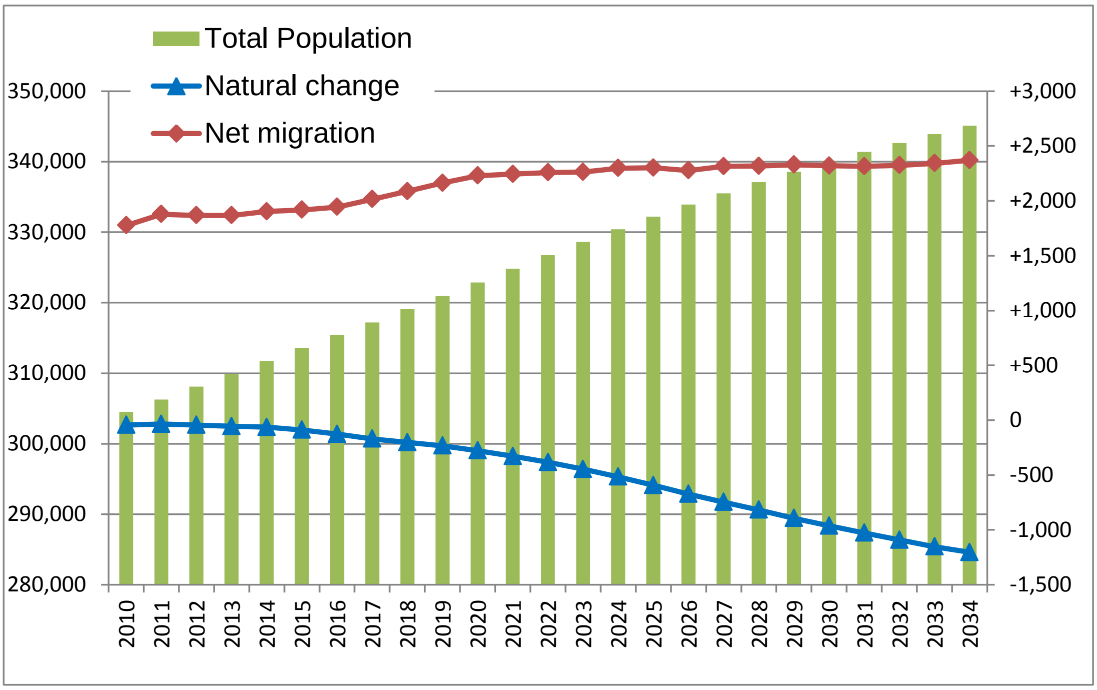
6.34 The Revised 2010 Sub-National Projections assume that recent trends in fertility, mortality and migration will continue into the future. They do not always include local information on births and deaths.

Table 6.3: Population by Age Group and Percentage Change between Years

ONS 2010 Sub National Population Projection (Revised)								
Age Band	**2011**	**2026**	*% change 2011 to 2026*	**2031**	*% change 2026 to 2031*	**2035**	*% change 2031 to 2035*	*% Change 2011 to 2035*
0-4	15,600	15,600	0.0%	15,100	-3%	15,100	0.0%	-3%
5-9	15,600	17,100	9.6%	16,800	-2%	16,400	-2.4%	5%
10-14	17,700	18,600	5.1%	18,400	-1%	18,100	-1.7%	2%
15-19	18,800	17,900	-4.8%	18,400	3%	18,300	-0.5%	-3%
20-24	16,800	12,100	-28.0%	13,200	9%	13,500	2.2%	-20%
25-29	15,700	14,500	-7.6%	14,200	-2%	15,300	7.2%	-3%
30-34	15,300	16,300	6.5%	15,500	-5%	15,100	-2.6%	-1%
35-39	17,500	21,500	22.9%	17,900	-17%	17,300	-3.5%	-1%
40-44	22,200	19,700	-11.3%	22,900	16%	20,100	-13.9%	-9%
45-49	23,500	18,700	-20.4%	20,600	10%	23,400	12.0%	0%
50-54	21,200	19,900	-6.1%	19,400	-3%	21,000	7.6%	-1%
55-59	20,100	24,400	21.4%	20,600	-16%	19,700	-4.6%	-2%
60-64	22,300	25,700	15.2%	25,200	-2%	22,500	-12.0%	1%
65-69	19,300	22,400	16.1%	25,800	15%	25,500	-1.2%	32%
70-74	15,200	19,800	30.3%	21,700	10%	24,700	12.1%	63%
75-79	11,900	19,600	64.7%	18,400	-6%	19,600	6.1%	65%
80-84	9,100	14,700	61.5%	17,200	17%	16,200	-6.2%	78%
85-89	5,600	9,000	60.7%	11,400	27%	13,500	15.6%	141%
90+	3,000	6,400	113.3%	8,500	33%	10,800	21.3%	260%
Total	**306,300**	**333,900**	**9.0%**	**341,400**	**2%**	**346,300**	**1.4%**	**13%**

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

Chart 6.2: ONS 2010 Sub National Population Projections with Components of Change



Source: Research & Intelligence Team, Shropshire Council

Table 6.4: Number of Households in Shropshire and Percentage Change

Number of Households in Shropshire based on ONS SNPP 2010 Revised Projection	**Households**				**Change**	
Category of Households	**2011**	**2026**	**2031**	**2036**	**Number**	**%**
One Person Households Male	15,700	22,200	23,500	24,200	8,500	54%
One Person Households Female	22,900	33,600	35,400	36,900	14,000	61%
One family & no others: Couple: No dependent children	41,200	55,500	59,200	61,400	20,200	49%
One family and no others: Couple: 1 dependent child	8,600	8,800	8,700	8,800	200	2%
One family and no others: Couple: 2 dependent children	10,000	10,300	10,100	9,900	-100	-1%
One family and no others: Couple: 3+ dependent children	3,700	4,300	4,200	4,100	400	11%
One family and no others: Lone parent: 1 dependent child	3,300	5,000	5,300	5,400	2,100	64%
One family and no others: Lone parent: 2 dependent children	2,000	3,300	3,400	3,400	1,400	70%
One family and no others: Lone parent: 3+ dependent children	800	1,100	1,100	1,100	300	38%
A couple and one or more other adults: No dependent children	10,800	4,400	3,800	3,700	-7,100	-66%
A couple and one or more other adults: 1 dependent child	1,700	1,400	1,200	1,100	-600	-35%
A couple and one or more other adults: 2 dependent children	800	600	500	500	-300	-38%
A couple and one or more other adults: 3+ dependent children	300	300	300	300	0	0%
A lone parent and one or more other adults: 1 dependent child	500	300	300	300	-200	-40%
A lone parent and one or more other adults: 2 dependent children	200	400	400	400	200	100%
A lone parent and one or more other adults: 3+ dependent children	100	100	100	100	0	0%
Other Households	7,400	6,900	7,300	7,600	200	3%
Total	**129,900**	**158,400**	**164,900**	**169,200**	**39,300**	**30%**

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

Nil Migration

6.35 Nil Migration Projection assume that there will be zero net migration during the forecast period. This means that the number of in and out migrants is assumed to be the same.

6.36 Nil Migration Projection provide context by showing the effect of the age specific migration rates on the resident population. Whilst there is no population gain, there is an effect on the shape of the age structure.

6.37 Using this methodology the forecast again shows a decline in the population of the County of 5,800 people (2%).

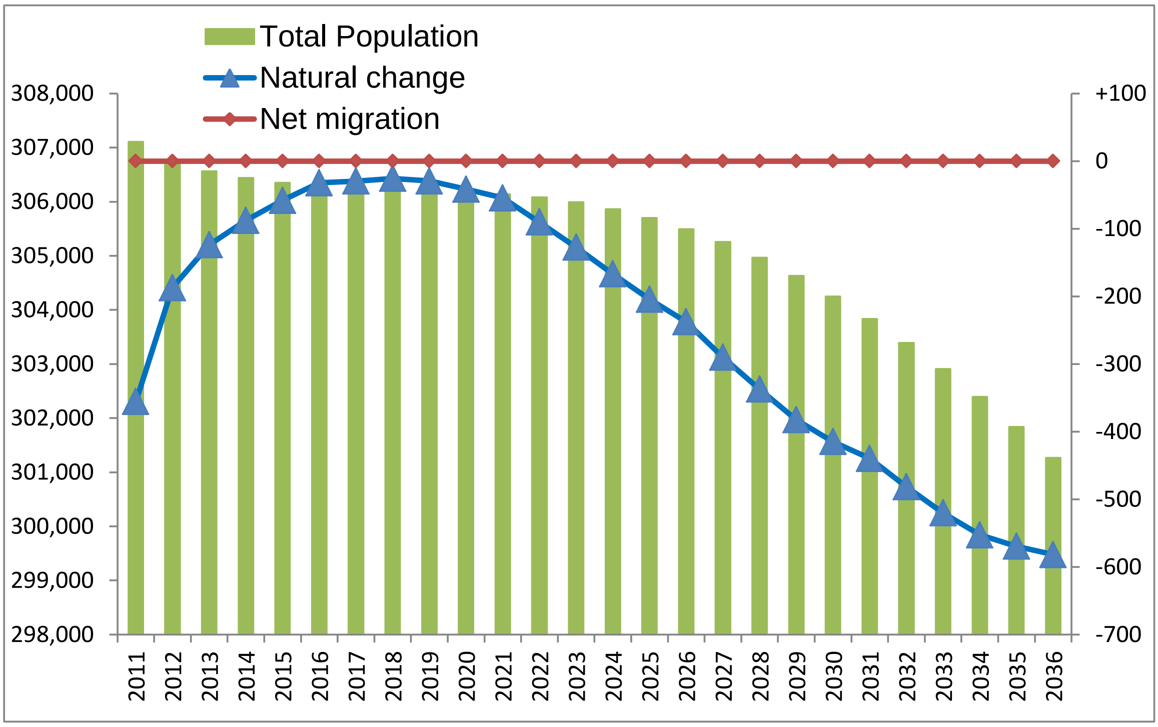
6.38 Despite the decline in population the projected number of households is set to increase from 130,000 in 2011 to 141,800 an increase of 9%.

Table 6.5: Population by Age Group and the Percentage Change between Years

Nil Migration Projection								
Age Groups	**2011**	**2026**	***% Change 2011 to 2026***	**2031**	***% Change 2026 to 2031***	**2036**	***% Change 2031 to 2036***	***% Change 2011 to 2036***
0-4	15,700	15,100	-4%	14,500	-4%	14,200	-2%	-10%
5-9	15,600	15,700	1%	15,300	-3%	14,700	-4%	-6%
10-14	17,800	15,800	-11%	15,800	0%	15,300	-3%	-14%
15-19	19,200	16,500	-14%	16,400	-1%	16,300	-1%	-15%
20-24	16,800	16,400	-2%	17,300	5%	17,300	0%	3%
25-29	15,700	17,700	13%	16,600	-6%	17,500	5%	11%
30-34	15,500	19,000	23%	17,700	-7%	16,700	-6%	8%
35-39	17,500	18,500	6%	18,700	1%	17,400	-7%	-1%
40-44	22,100	17,200	-22%	18,400	7%	18,500	1%	-16%
45-49	23,600	16,200	-31%	17,100	6%	18,200	6%	-23%
50-54	21,200	17,200	-19%	16,100	-6%	16,900	5%	-20%
55-59	20,100	20,600	2%	16,900	-18%	15,800	-7%	-21%
60-64	22,300	21,400	-4%	19,900	-7%	16,400	-18%	-26%
65-69	19,400	18,800	-3%	20,500	9%	19,100	-7%	-2%
70-74	15,200	16,900	11%	17,600	4%	19,200	9%	26%
75-79	11,800	17,200	46%	15,200	-12%	15,900	5%	35%
80-84	9,000	12,900	43%	14,400	12%	12,800	-11%	42%
85-89	5,600	7,600	36%	9,400	24%	10,600	13%	89%
90+	3,000	4,900	63%	6,300	29%	8,200	30%	173%
Total	**307,100**	**305,500**	**-1%**	**303,800**	**-1%**	**301,300**	**-1%**	**-2%**

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*
This report was produced using POPGROUP software developed by Bradford Council, the University of Manchester & Andelin Associates

Chart 6.3: Nil Migration with Components of Change



Source: Research & Intelligence Team, Shropshire Council

6.39 Chart 6.3 shows the total population declining during the life of the projection due to negative natural change.

Table 6.6: Number of Households in Shropshire and Percentage Change between 2011 and 2036

Number of Households in Shropshire based on Nil Migration Projection	Households				Change	
Category of Households	2011	2026	2031	2036	Number	%
One Person Households Male	15,700	20,400	20,900	21,000	5,300	34%
One Person Households Female	22,900	29,200	29,500	29,700	6,800	30%
One family & no others: Couple: No dependent children	41,200	48,200	49,200	49,200	8,000	19%
One family and no others: Couple: 1 dependent child	8,600	8,300	8,100	8,100	-500	-6%
One family and no others: Couple: 2 dependent children	10,000	9,100	9,000	8,900	-1,100	-11%
One family and no others: Couple: 3+ dependent children	3,700	3,700	3,700	3,600	-100	-3%
One family and no others: Lone parent: 1 dependent child	3,300	4,700	4,900	4,900	1,600	48%
One family and no others: Lone parent: 2 dependent children	2,100	3,100	3,300	3,300	1,200	57%
One family and no others: Lone parent: 3+ dependent children	800	1,100	1,000	1,000	200	25%
A couple and one or more other adults: No dependent children	10,800	3,800	3,200	3,000	-7,800	-72%
A couple and one or more other adults: 1 dependent child	1,700	1,200	1,000	1,000	-700	-41%
A couple and one or more other adults: 2 dependent children	800	600	500	500	-300	-38%
A couple and one or more other adults: 3+ dependent children	300	300	300	300	0	0%
A lone parent and one or more other adults: 1 dependent child	500	300	300	300	-200	-40%
A lone parent and one or more other adults: 2 dependent children	200	400	400	400	200	100%
A lone parent and one or more other adults: 3+ dependent children	100	100	100	100	0	0%
Other Households	7,400	6,300	6,300	6,500	-900	-12%
Total	**130,000**	**140,800**	**141,700**	**141,800**	**11,800**	**9%**

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

Projection A

6.40 Projection A includes internal migration numbers based on a UK linear trend (calculated over a 10 year period) and international migration numbers from the ONS 2010 Sub-National Population Projections. The migration data is based on past recent trends and assumes that these will be carried into the future.

6.41 The forecast shows that, with the inclusion of migration movements in and out of Shropshire the population will increase by 4%, a total of 13,200 people. The largest increase occurs in the 65 and over age band.

Table 6.7: Projection A: Population Change by Age Group and Percentage Change between Years

Projection A								
Age Band	**2011**	**2026**	***% Change 2011 to 2026***	**2031**	***% Change 2026 to 2031***	**2036**	***% Change 2031 to 2036***	***% Change 2011 to 2036***
0-4	15,700	14,100	-10.2%	13,300	-5.7%	12,800	-3.8%	-18%
5-9	15,600	15,600	0.0%	14,700	-5.8%	13,800	-6.1%	-12%
10-14	17,800	17,200	-3.4%	16,400	-4.7%	15,500	-5.5%	-13%
15-19	19,200	18,800	-2.1%	18,700	-0.5%	17,900	-4.3%	-7%
20-24	16,800	13,800	-17.9%	14,700	6.5%	14,700	0.0%	-13%
25-29	15,700	15,300	-2.5%	14,300	-6.5%	15,200	6.3%	-3%
30-34	15,500	16,700	7.7%	15,700	-6.0%	14,700	-6.4%	-5%
35-39	17,500	19,000	8.6%	17,800	-6.3%	16,600	-6.7%	-5%
40-44	22,100	19,300	-12.7%	20,200	4.7%	18,900	-6.4%	-14%
45-49	23,600	19,200	-18.6%	20,000	4.2%	20,800	4.0%	-12%
50-54	21,200	20,400	-3.8%	19,700	-3.4%	20,400	3.6%	-4%
55-59	20,100	24,000	19.4%	20,700	-13.8%	19,900	-3.9%	-1%
60-64	22,300	24,800	11.2%	24,100	-2.8%	20,800	-13.7%	-7%
65-69	19,400	21,400	10.3%	24,200	13.1%	23,500	-2.9%	21%
70-74	15,200	18,500	21.7%	20,200	9.2%	22,800	12.9%	50%
75-79	11,800	18,000	52.5%	16,600	-7.8%	18,200	9.6%	54%
80-84	9,000	13,200	46.7%	15,100	14.4%	14,100	-6.6%	57%
85-89	5,600	7,700	37.5%	9,600	24.7%	11,200	16.7%	100%
90+	3,000	5,100	70.0%	6,500	27.5%	8,600	32.3%	187%
Total	**307,100**	**322,100**	**4.9%**	**322,400**	**0.1%**	**320,300**	**-0.7%**	**4%**

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*
This report was produced with POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

6.42 Table 6.7 shows an increase of 4.9% during the Core Strategy Plan period to 2026. Of particular interest is the large increase in the 85 and over population. This reflects Shropshire’s top heavy age structure.

Table 6.8: Population by Broad Age Group

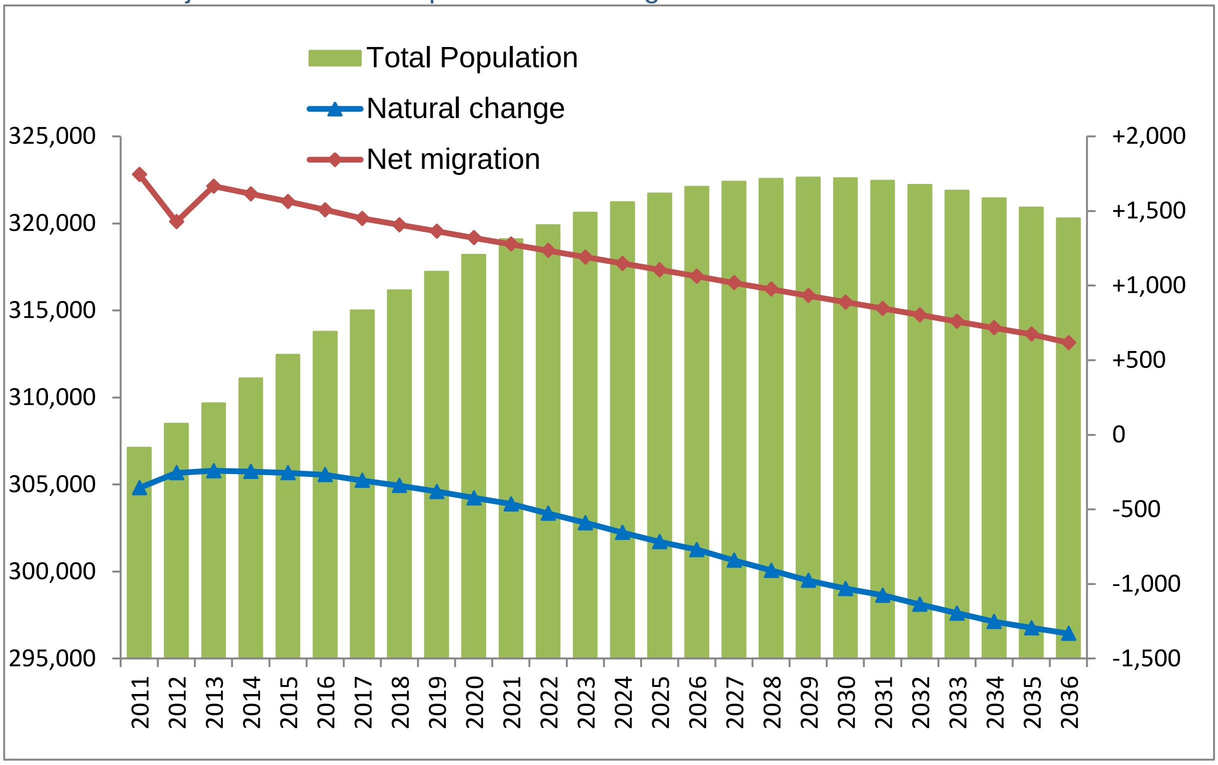
Broad Age Group	Total Population Projection A				% Change		
	2011	2026	2031	2036	2011 to 2026	2026 to 2031	2031 to 2036
0-17	61,100	58,000	55,400	52,600	-5%	-4%	-5%
18-64	182,100	180,200	174,800	169,300	-1%	-3%	-3%
65-84	55,300	71,100	76,100	78,600	29%	7%	3%
85+	8,600	12,800	16,200	19,800	49%	27%	22%
Total	307100	322,100	322,400	320,300	5%	0.1%	-1%

Source: Research & Intelligence Team, Shropshire Council
Numbers rounded to the nearest 100

6.43 Table 6.8 above shows that the largest increase in population based on Projection A occurs in the 85 and over age group between the years 2011 and 2026 (22%, 11,200 persons). This would suggest that there will be an increasing demand for adaptations to existing homes and new housing suitable for people who are often less mobile.

6.44 The younger age groups 0-17 and 18-64 show a decline in population with a small increase of 3% in the 65-84 age group over the life of the forecast.

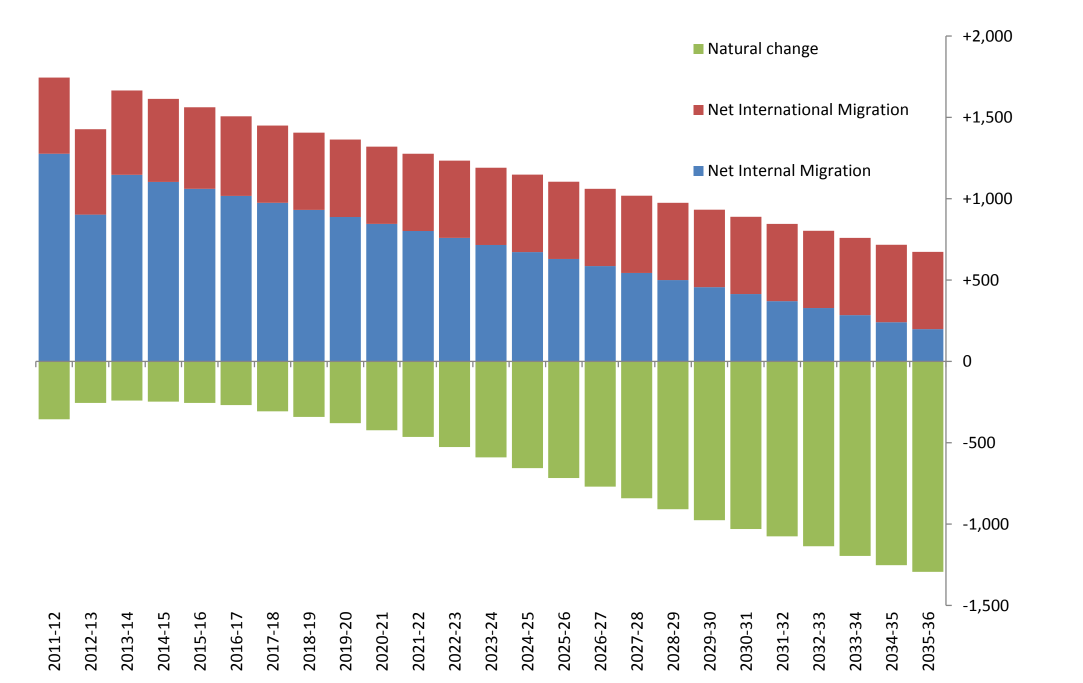
Chart 6.4: Projection A with Components of Change



Source: Research & Intelligence Team, Shropshire Council

6.45 Chart 6.4 shows the trend in population change alongside the components of change. The population is projected to rise until 2029 and then begin to decline to the end of projection in 2036.

Chart 6.5 Summary - Components of Population Change – Projection A



Source: Research & Intelligence Team, Shropshire Council

6.46 Chart 6.5 above demonstrates how by 2036 both the net international and internal migration no longer offset the natural change within the population resulting in a decline in the total population.

Table 6.9: Number of Households in Shropshire based on Projection A

Number of Households in Shropshire based on Projection A	**Households**				**% Change 2011-2036**	
Category of Households	**2011**	**2026**	**2031**	**2036**	**Number**	**%**
One Person Households Male	15,700	21,400	22,200	22,500	6,800	43%
One Person Households Female	22,900	31,300	32,300	33,300	10,400	45%
One family & no others: Couple: No dependent children	41,200	52,800	55,400	56,400	15,200	37%
One family and no others: Couple: 1 dependent child	8,600	8,700	8,400	8,300	-300	-3%
One family and no others: Couple: 2 dependent children	10,000	10,000	9,700	9,400	-600	-6%
One family and no others: Couple: 3+ dependent children	3,700	4,100	4,000	3,800	100	3%
One family and no others: Lone parent: 1 dependent child	3,300	4,900	5,100	5,100	1,800	55%
One family and no others: Lone parent: 2 dependent children	2,100	3,200	3,300	3,200	1,100	52%
One family and no others: Lone parent: 3+ dependent children	800	1,100	1,100	1,000	200	25%
A couple and one or more other adults: No dependent children	10,800	4,300	3,700	3,500	-7,300	-68%
A couple and one or more other adults: 1 dependent child	1,700	1,300	1,200	1,100	-600	-35%
A couple and one or more other adults: 2 dependent children	800	600	500	500	-300	-38%
A couple and one or more other adults: 3+ dependent children	300	300	300	300	0	0%
A lone parent and one or more other adults: 1 dependent child	500	300	300	300	-200	-40%
A lone parent and one or more other adults: 2 dependent children	200	400	400	400	200	100%
A lone parent and one or more other adults: 3+ dependent children	100	100	100	100	0	0%
Other Households	7,400	6,500	6,600	6,900	-500	-7%
Total	**130,000**	**151,400**	**154,600**	**156,100**	**26,100**	**20%**

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

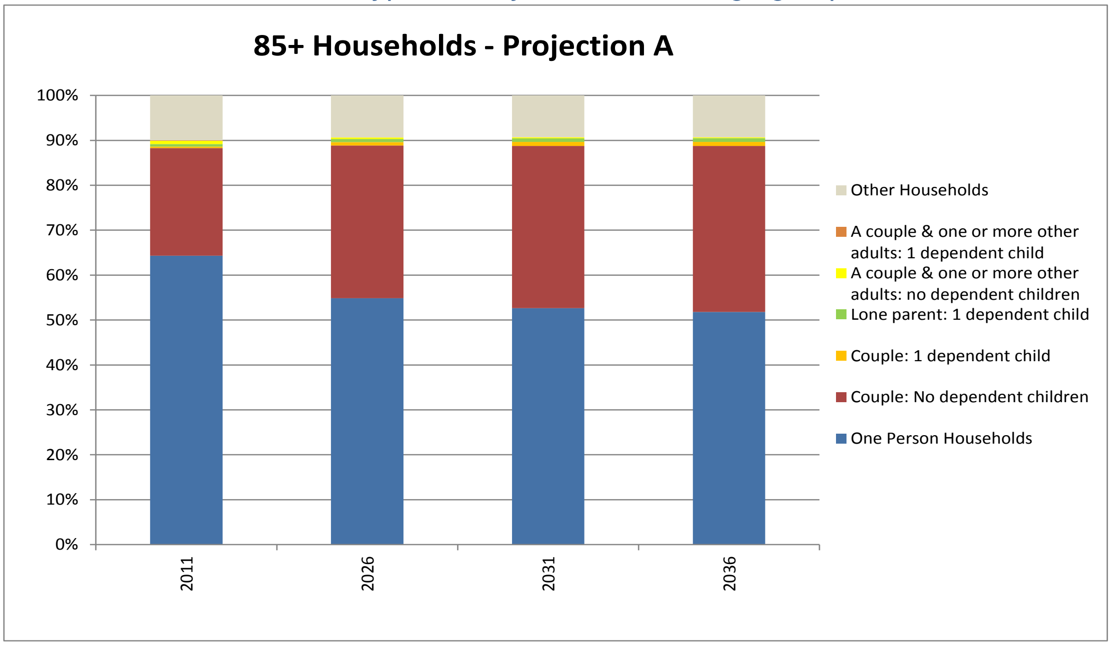
6.47 Using the population figures from Projection A, Table 6.9 shows an increase in the total number of households between 2011 and 2036 of 26,100 (20%).

6.48 Shropshire has an increasing older population and further analysis of household numbers shows that in 2036 based on these population projections 19% of all households would be one person households where the occupant is aged 65 and over and a further 20% would be households (aged 65 and over) comprising couples with no dependent children.

6.49 Chart 6.6 shows the 85 and over households by household type and indicates that by 2036 over 50% of 85 and over households will be one person households. However, it also shows a slight increase in the number of 85 and over households categorised as “Couple: No Dependent Children”. An increase in life expectancy for men means that couples can continue to care for each other for longer.

6.50 This may have implications for the type of housing provision that is required in Shropshire over future years.

Chart 6.6: Household type for 85 years and over age group.



Source: Research & Intelligence Team, Shropshire Council

Table 6.10 Household type based on Projection A – Grouped

Household Type	Households based on Projection A				Change 2011-2036	
	2011	2026	2031	2036	Number	% Change
One Person Households	38,600	52,700	54,500	55,700	17,100	44%
One family & no others: couple: no dependent children	41,200	52,800	55,400	56,400	15,200	37%
One family & no others: couple: with dependent children	22,400	22,800	22,100	21,500	-900	-4%
One family and no others: lone parent	6,100	9,200	9,500	9,400	3,300	54%
A couple and one or more other adults: no dependent children	10,800	4,300	3,700	3,500	-7,300	-68%
A couple and one or more other adults: with dependent children	4,400	3,900	3,600	3,500	-900	-20%
A lone parent & one or more other adults: with dependent children	800	800	800	800	0	0%
Other Households	7,400	6,500	6,600	6,900	-500	-7%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

6.51 Table 6.10 on the previous page shows that the greatest changes in household type between 2011 and 2036 are within One Person Households (44%), One Family & No Others; Couple; No Dependent Children (37%) and One Family and No Others; Lone Parent (53%).

Projection B

6.52 Alongside, Age Specific Fertility Rates and Age Specific Mortality Rates, Projection B factors in Internal and International Migration numbers into the life of the projection. In this instance the migration numbers entered into the projection have been taken from the 2010 ONS Sub-National Population Projections (Revised). This is for both Internal and International migration. The data is based on past recent trends in migration and assumes that these will be carried into the future.

Table 6.11 Projection B: Population Change by Age Group and Percentage Change between Years

Projection B								
Age Band	**2011**	**2026**	***% Change 2011 to 2026***	**2031**	***% Change 2026 to 2031***	**2036**	***% Change 2026 to 2031***	***% Change 2011 to 2036***
0-4	15,700	15,700	0.0%	14,800	-5.7%	14,200	-4%	-10%
5-9	15,600	17,300	10.9%	16,600	-4.0%	15,700	-5%	1%
10-14	17,800	18,500	3.9%	18,400	-0.5%	17,700	-4%	-1%
15-19	19,200	15,500	-19.3%	16,100	3.9%	15,900	-1%	-17%
20-24	16,800	11,700	-30.4%	12,900	10.3%	13,300	3%	-21%
25-29	15,700	14,800	-5.7%	14,200	-4.1%	15,700	11%	0%
30-34	15,500	18,900	21.9%	16,000	-15.3%	15,300	-4%	-1%
35-39	17,500	21,800	24.6%	20,400	-6.4%	17,400	-15%	-1%
40-44	22,100	19,600	-11.3%	23,000	17.3%	21,600	-6%	-2%
45-49	23,600	18,500	-21.6%	20,400	10.3%	23,800	17%	1%
50-54	21,200	19,900	-6.1%	19,300	-3.0%	21,300	10%	0%
55-59	20,100	24,300	20.9%	20,700	-14.8%	20,100	-3%	0%
60-64	22,300	25,500	14.3%	25,000	-2.0%	21,500	-14%	-4%
65-69	19,400	22,200	14.4%	25,500	14.9%	25,100	-2%	29%
70-74	15,200	19,500	28.3%	21,400	9.7%	24,600	15%	62%
75-79	11,800	19,400	64.4%	18,100	-6.7%	20,000	10%	69%
80-84	9,000	14,300	58.9%	16,800	17.5%	15,900	-5%	77%
85-89	5,600	8,400	50.0%	10,800	28.6%	12,800	19%	129%
90+	3,000	5,900	96.7%	7,800	32.2%	10,500	35%	250%
Total	307,100	331,800	8.0%	338,100	1.9%	342,300	1%	11%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*
This report was produced with POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

6.53 The inclusion of this migration data results in a greater increase in the total population during the life of the forecast. The number of persons increases from 307,100 in 2011 to 342,300 in 2036, an increase of 11%.

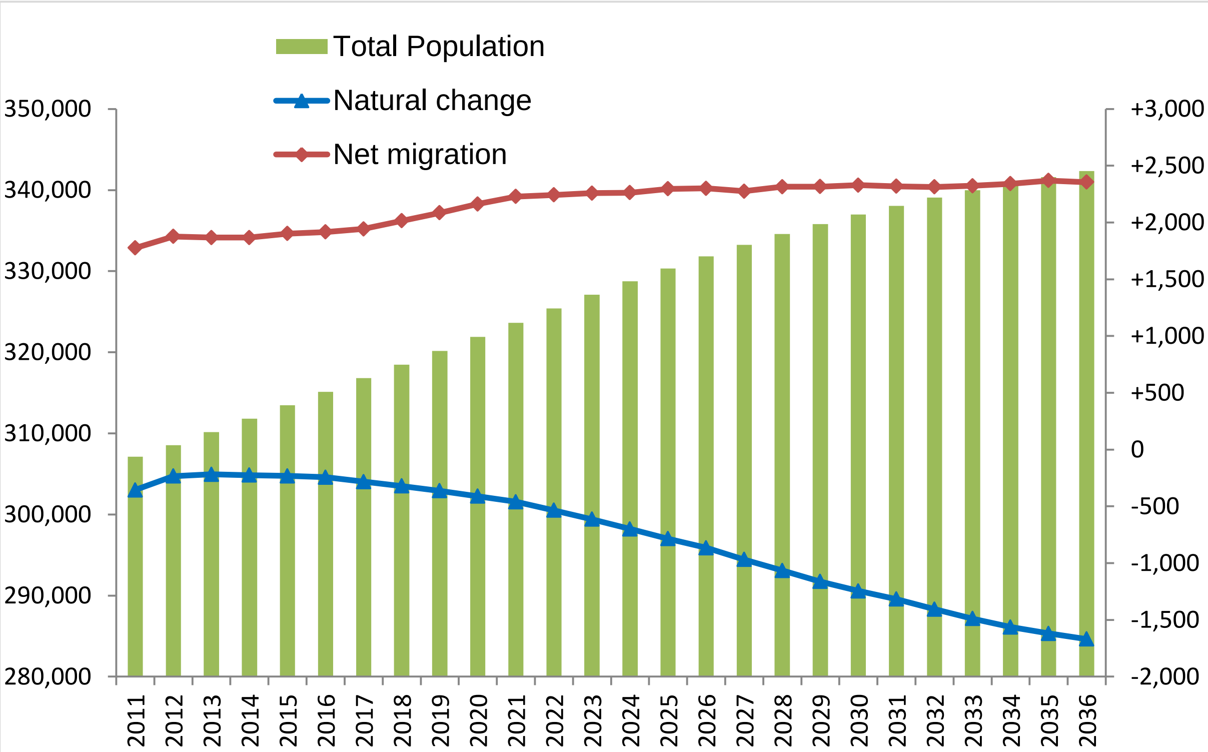
Table 6.12: Population by Broad Age Group – Projection B

Broad Age Group	Total Population Projection B				% Change		
	2011	2026	2031	2036	2011 to 2026	2026 to 2031	2031 to 2036
0-17	61,100	61,500	60,300	58,000	1%	-2%	-4%
18-64	182,100	180,500	177,400	175,500	-1%	-2%	-1%
65-84	55,300	75,500	81,800	85,600	37%	8%	5%
85+	8,600	14,400	18,600	23,300	67%	29%	25%
Total	307,100	331,800	338,100	342,300	8%	2%	1%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

6.54 In line with other projections for Shropshire Table 6.12 shows that the largest increase occurs in the 85 and over age group with the numbers rising from 8,600 in 2011 to 23,300 in 2036.

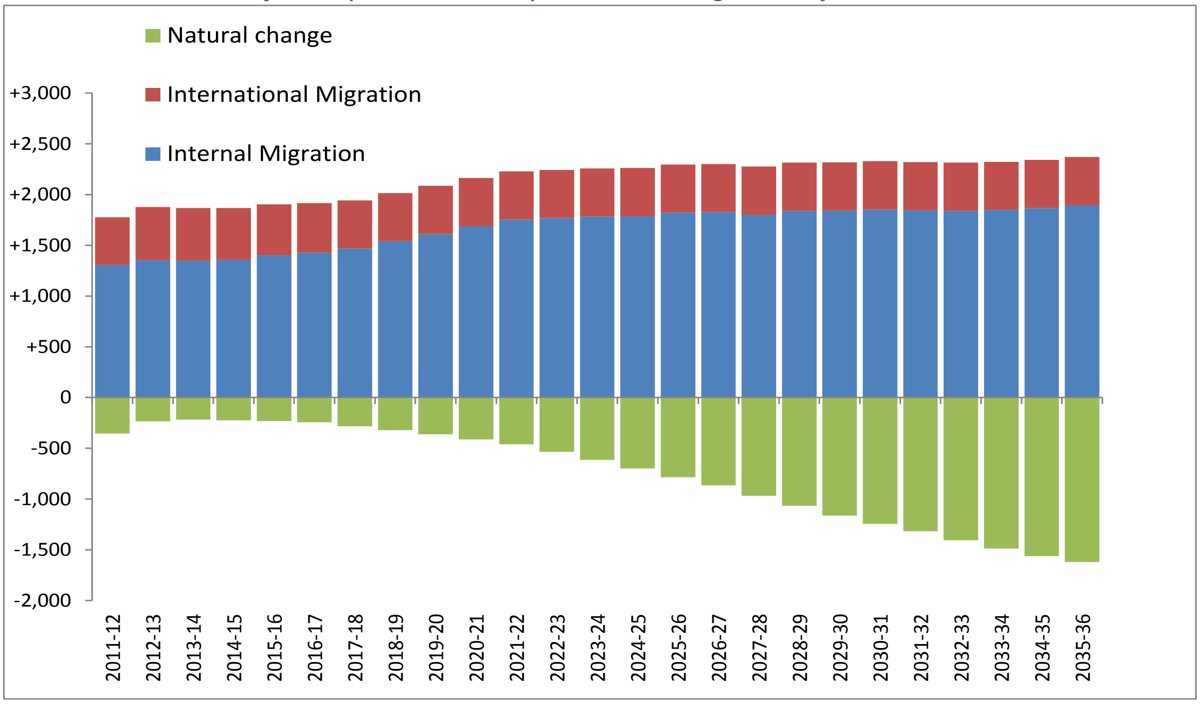
Chart 6.7: Projection B with Components of Change



Source: Research & Intelligence Team, Shropshire Council

6.55 Chart 6.7 shows the continued rise in the population of Shropshire throughout the life of the projection. This can be attributed to the net migration which increases slightly and then keeps reasonably constant.

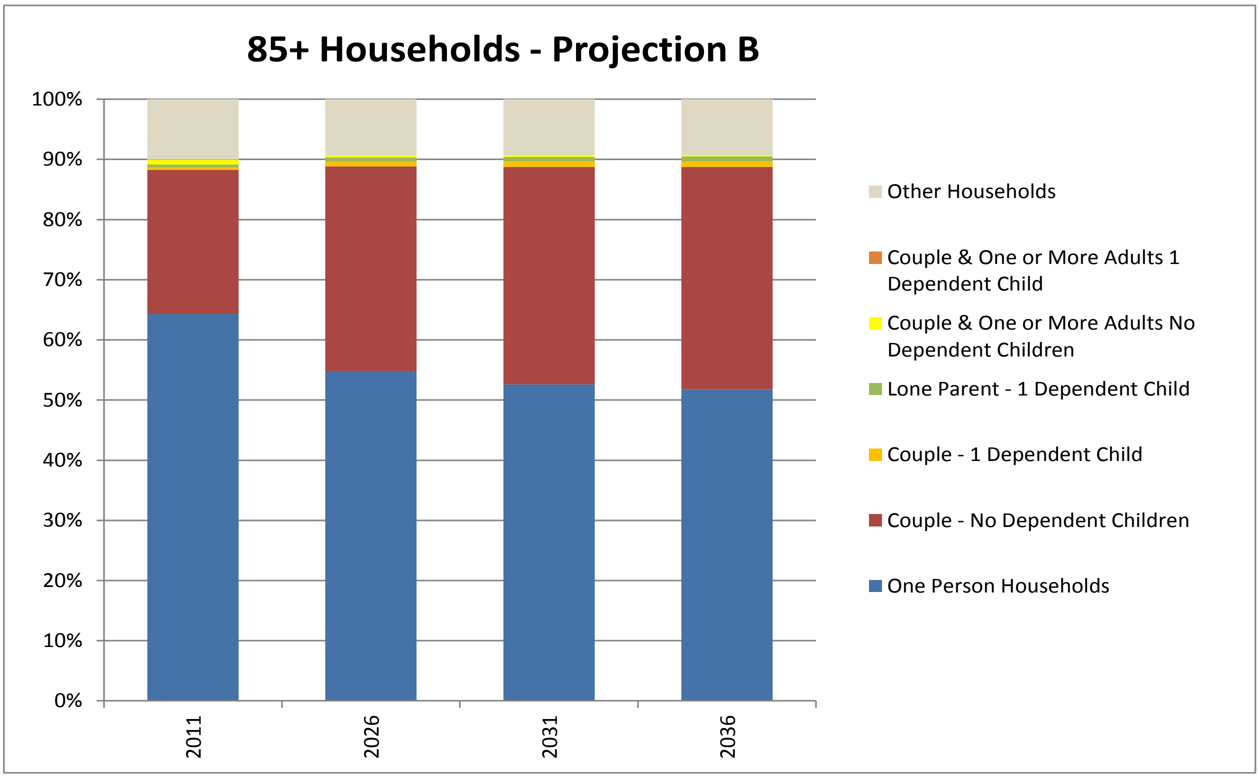
Chart 6.8: Summary Components of Population Change – Projection B



Source: Research & Intelligence Team, Shropshire Council

6.56 Chart 6.8 shows that within Projection B internal and international migration combined will exceed the reduction in population by natural change.

Chart 6.9: Household Type for the 85 Years and Over Age Group



Source: Research & Intelligence Team, Shropshire Council

6.57 Chart 6.9 shows a slight decrease in “One Person Households” for the 85 and over age group and a slight increase in “Couple – No Dependent Children” households; as with Projection A this is to be expected given the increase in male life expectancy.

Table 6.13: Grouped Household Type Numbers and Change

Household Type	Households based on Projection B				Change 2011-2036	
	2011	**2026**	**2031**	**2036**	Number	% Change
One Person Households	38,600	55,500	58,300	60,800	22,200	58%
One family & no others: Couple: No dependent children	41,200	55,100	58,600	61,000	19,800	48%
One family & no others: Couple: With dependent children	22,300	23,700	23,600	23,400	1,100	5%
One family and no others: Lone parent	6,200	9,400	9,900	9,900	3,700	60%
A couple and one or more other adults: No dependent children	10,800	4,400	3,800	3,700	-7,100	-66%
A couple and one or more other adults: With dependent children	2,800	2,300	2,000	2,000	-800	-29%
A lone parent & one or more other adults: With dependent children	800	800	800	800	0	0%
Other Households	7,400	6,800	7,100	7,500	100	1%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

6.58 Table 6.13 above shows that in line with Projection A for Shropshire the greatest increase in household type would be in “One Person Households” where numbers increase from 38,600 to 60,800 (58%).

6.59 The second highest increase is in “One Family & No Others: Lone Parent” with a growth of 3,700 households. However in terms of % increase this is the biggest change with an increase of 60% in the number of households of this type.

Table 6.14: Number of Households in Shropshire – Projection B

Number of Households in Shropshire based on Projection B	**Households**				**Change**	
Category of Households	**2011**	**2026**	**2031**	**2036**	**Number**	**%**
One Person Households Male	15,700	22,400	23,500	24,200	8,500	54%
One Person Households Female	22,900	33,100	34,800	36,600	13,700	60%
One family & no others: Couple: No dependent children	41,200	55,100	58,600	61,000	19,800	48%
One family and no others: Couple: 1 dependent child	8,600	9,000	8,800	9,000	400	5%
One family and no others: Couple: 2 dependent children	10,000	10,400	10,500	10,200	200	2%
One family and no others: Couple: 3+ dependent children	3,700	4,300	4,300	4,200	500	14%
One family and no others: Lone parent: 1 dependent child	3,300	5,000	5,300	5,400	2,100	64%
One family and no others: Lone parent: 2 dependent children	2,100	3,300	3,500	3,400	1,300	62%
One family and no others: Lone parent: 3+ dependent children	800	1,100	1,100	1,100	300	38%
A couple and one or more other adults: No dependent children	10,800	4,400	3,800	3,700	-7,100	-66%
A couple and one or more other adults: 1 dependent child	1,700	1,400	1,200	1,200	-500	-29%
A couple and one or more other adults: 2 dependent children	800	600	500	500	-300	-38%
A couple and one or more other adults: 3+ dependent children	300	300	300	300	0	0%
A lone parent and one or more other adults: 1 dependent child	500	300	300	300	-200	-40%
A lone parent and one or more other adults: 2 dependent children	200	400	400	400	200	100%
A lone parent and one or more other adults: 3+ dependent children	100	100	100	100	0	0%
Other Households	7,400	6,800	7,100	7,500	100	1%
Total	**130,000**	**157,900**	**164,200**	**169,100**	**39,100**	**30%**

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

Projections Summary

6.60 The number of people living in Shropshire has grown by 14.7% between 1991 and 2011. To help us understand how this may change in future years a number of projections were prepared. Table 6.15 shows the results of these.

Table 6.15: Results of the five projections run for Shropshire

Projection:	Year				Change 2011-2036	
	2011	2026	2031	2036	Number	% Change
Natural Change	307,100	302,100	299,000	294,400	-12,700	-4%
Nil Migration	307,100	305,500	303,900	301,300	-5,800	-2%
ONS2010 SNPP	306,300	333,900	341,400	346,300	40,000	13%
Projection A	307,100	322,100	322,500	320,300	13,200	4%
Projection B	307,100	331,900	338,100	342,400	35,300	11%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

6.61 Table 6.12 above shows that three out of the five population projection models result in an increase in total population over the life of the projection. The increase ranges from 4% to 13%.

6.62 Two of the projections show a declining population - Natural Change (where no migration data is incorporated) and Nil Migration (which assumes that in/out migration is balanced). Both of these projections are provided for context purposes and are hypothetical.

Table 6.16: Number of Households based on the Five Population Projections

Projection	Number of Households				Change 2011-2036	
	2011	2026	2031	2036	Number	% Change
Natural Change	130,000	141,500	142,600	142,400	12,400	10%
Nil Migration	130,000	140,800	141,700	141,800	11,800	9%
2010 ONS SNPP (Revised)	129,900	158,400	164,900	169,200	39,300	30%
Projection A	130,000	151,400	154,600	156,100	26,100	20%
Projection B	130,000	157,900	164,200	169,100	39,100	30%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

6.63 Table 6.16 above indicates that despite a declining population in two of the projections the number of households rises in all five of the projections.

6.64 Each of the population projection have indicated an increase in the elderly population of Shropshire (which is to be expected based on past data). The following table details household numbers for the 85 and over age group. There is a significant increase in numbers in each of the projections.

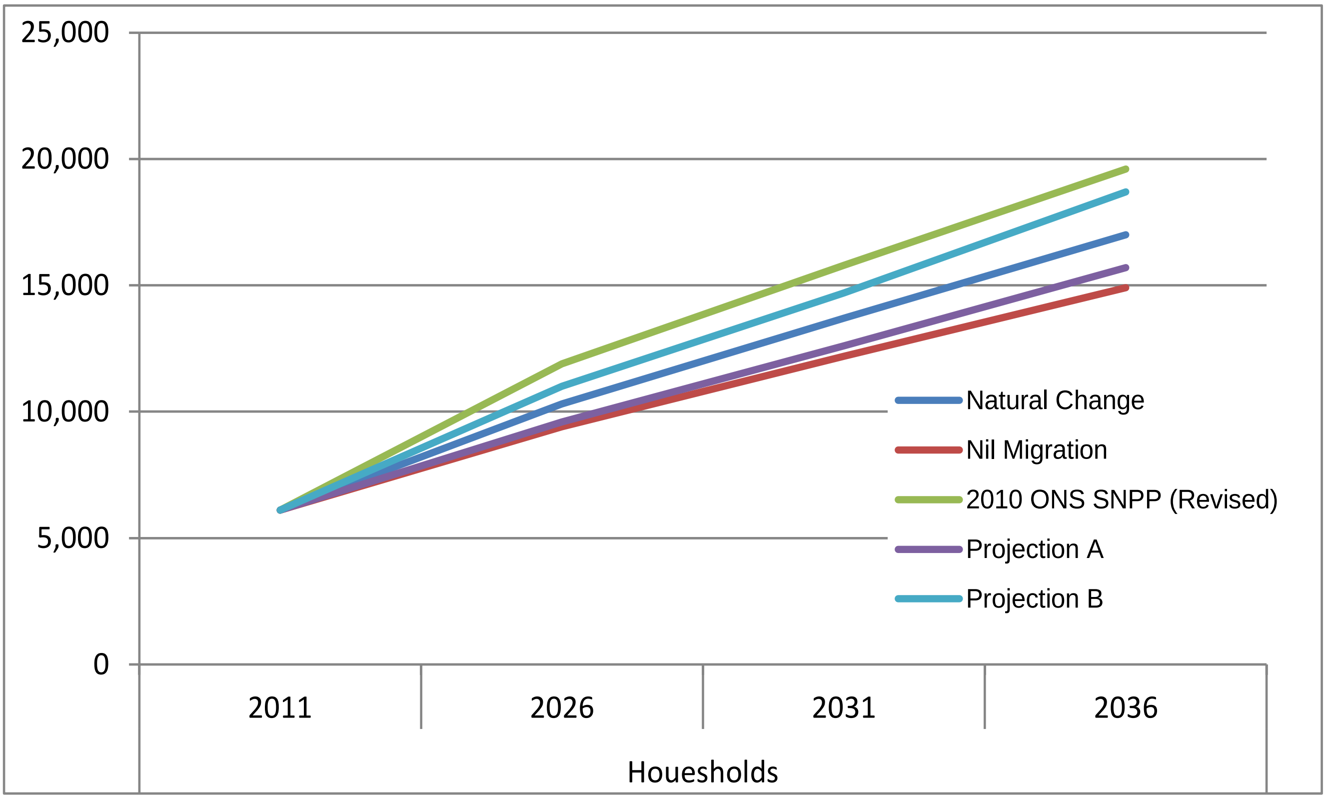
Table 6.17: Number of Households in the 85 and Over Age Group based on the Five Population Projections

Projection	Households				Change 2011-2036	
	2011	2026	2031	2036	Number	% Change
Natural Change	6,100	10,300	13,700	17,000	10,900	179%
Nil Migration	6,100	9,400	12,200	14,900	8,800	144%
2010 ONS SNPP (Revised)	6,100	11,900	15,800	19,600	13,500	221%
Projection A	6,100	9,600	12,600	15,700	9,600	157%
Projection B	6,100	11,000	14,700	18,700	12,600	207%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to the nearest 100*

6.65 The number of 85 and over age group households is set to increase in all of the five projections (Table 6.17). The greatest increase is seen in the 2010 ONS SNPP (Revised) Projection. Chart 6.10 below shows the rising number of 85 and over households in each of the five projections over the life of the projection.

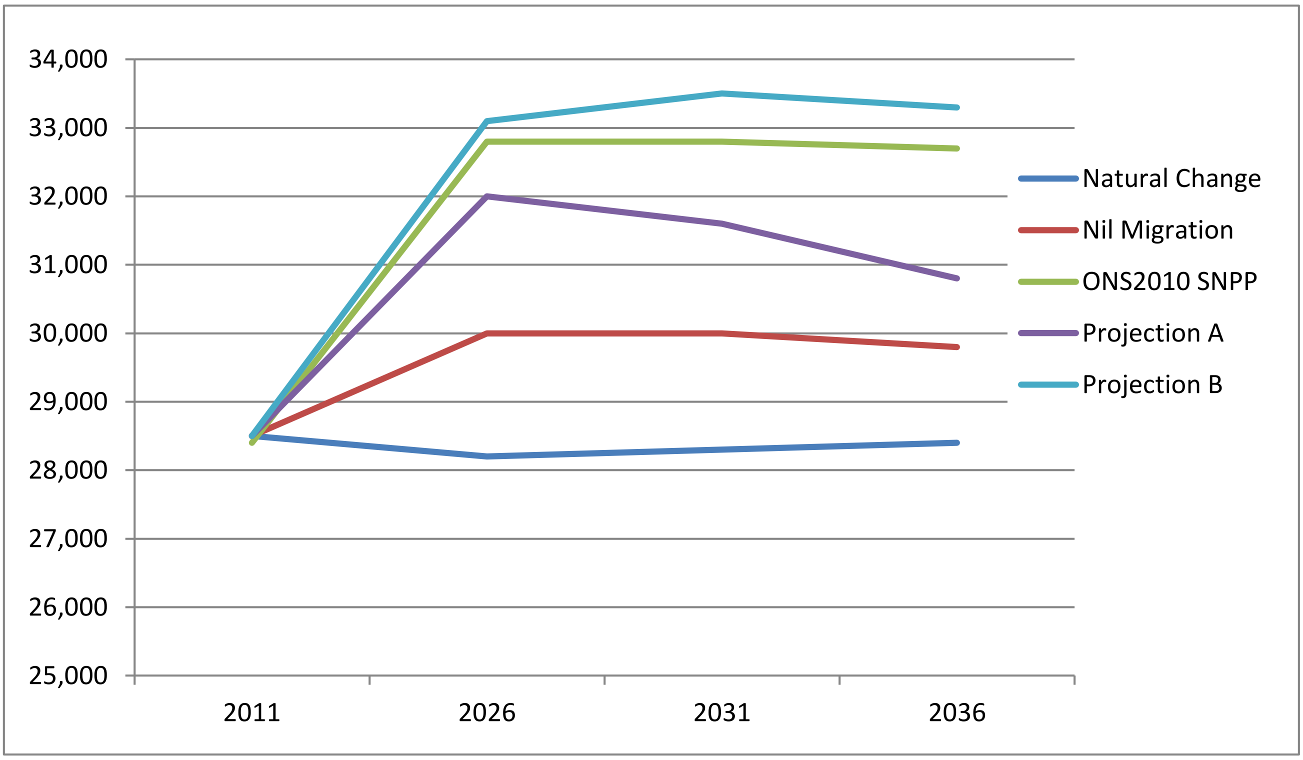
Chart 6.10: 85 and Over Households



Source: Research & Intelligence Team, Shropshire Council

6.66 Over the 2011-2036 projection period the number of "Family Households with Dependent Children" rises significantly and then stabilises for four of the projections and shows a slight decline in Projection A. This is shown in Chart 6.11 over the page.

Chart 6.11: Family Households with Dependent Children



Source: Research & Intelligence Team, Shropshire Council

Labour Force Projections

Introduction

6.67 Changes in the shape and size of the Shropshire labour force are a product of demographic change combined with change in the level of economic activity. Over the past generation, the greater economic activity of women has swelled the workforce. At the same time, the greater intake into further and higher education amongst young adults has acted in the opposite direction by delaying entry into the labour market. Typically, economic activity is highest amongst the “prime age” population (those aged 25 to 49), but over recent years there has been increased participation in the labour market amongst older age groups. This has been brought about by a number of factors including changes in the State Pension Age for women; inadequate private pension provision and the accompanying need to work for longer; and an increase in life expectancy and healthy life expectancy.

6.68 There are strong linkages between the labour force and housing supply. The Shropshire economy depends on an appropriately skilled workforce and a sufficient supply of appropriately sized and priced housing is a critical factor in attracting and retaining suitable workers.

Background

Definition of the Labour Force/Economic Activity

6.69 The labour force includes those people who are aged 16 and over and are economically active. A person is economically active if they are either employed or unemployed using the International Labour Organization (ILO) definition. Under the ILO definition, a person is unemployed if they are without a job, are available to start work and are actively seeking a job, or are waiting to start a job already obtained. The other side of economic activity is economic inactivity. Economic inactivity refers to those people who are not in employment and are either not looking for work or are not available to start. The sum of the active and the inactive makes up the entire population.

State Pension Age

6.70 The State Pension Age (SPA) is the earliest age an individual can draw their State Pension. The SPA is specific to an individual’s date of birth. Changes in the SPA are being made to accelerate the standardisation of the SPA for both men and women to 65 and ultimately to take the retirement age for both men and women to 68.

- Between April 2010 and November 2018, the retirement age for women is being increased to 65. There will be an accelerated increase between April 2016 and November 2018.

- Between December 2018 and October 2020, the SPA for both men and women is increasing to 66.
- Between April 2034 and April 2036, retirement ages for men and women are increasing to 67. The Government is proposing bringing forward the increase in SPA to 67 to between 2026 and 2028.
- Between April 2044 and April 2046, retirement ages for men and women are increasing to 68.

Retirement Age

6.71 Retirement age is different to pension age. The default retirement age is being phased out, which means that employers will no longer be able to dismiss staff just because they have reached the age of 65. The purpose of the change is to tackle issues around the ageing population and the shortfall in pension savings. It can also have a positive economic impact and can benefit the individual by providing the freedom to work for longer. However, individuals can still retire at the age of 65 if they choose to do so.

Working Age

6.72 The definition of “working age” has been standardised in published ONS statistics to 16-64 for both men and women to reflect the phased increase in SPA for women. However, the actual size of the available for work population is artificially reduced if only those of working age are included. Consequently, the forecasts included within this report reflect the total labour force aged 16 and above.

Past Trends

6. 73 At the time of the 2011 Census, there were 160,564 economically active people in Shropshire, which is the equivalent of 63.5% of the total population aged 16 and over. In the two decades to 2011, the Shropshire labour force has increased by more than 29,000 people. While this growth has been largely fuelled by population growth, the level of economic activity has also risen. This means that a greater proportion of the population is now economically active than it was 20 years ago.

6.74 The main impetus for growth in the labour market has been a notable rise in economic activity amongst women, with participation in the labour market rising from less than half of all women aged 16 and over in 1991 to 57.4% 20 years later. In contrast, the economic activity rate amongst men has dropped back from 73.6% to 69.7% over the same 20 year period. Population growth has still resulted in an increase in the male labour force (+12.9% between 1991 and 2011), but growth in the female labour force has been far superior (+34.9% between 1991 and 2011).

Table 6.18: Size of the Shropshire Labour Force and Economic Activity Rates by Sex, 1991 & 2011

Persons aged 16+	1991		2011	
	Number	Economic Activity Rate	Number	Economic Activity Rate
Total labour force	131,518	60.9%	160,564	63.5%
Male labour force	76,866	73.6%	86,814	69.7%
Female labour force	54,650	48.9%	73,750	57.4%

Source: Office for National Statistics, 1991 and 2011 Census, © Crown Copyright 2014

6.75 Table 6.19 shows that more than three-quarters (77.6%) of labour force change between 1991 and 2011 was as a direct result of demographic shift within Shropshire. The remaining change – a net gain of 6,500 people – has been brought about by changes in participation rates. Given that male economic activity rates have fallen over the last 20 years, this additional labour force supply is entirely attributable to female labour force capacity.

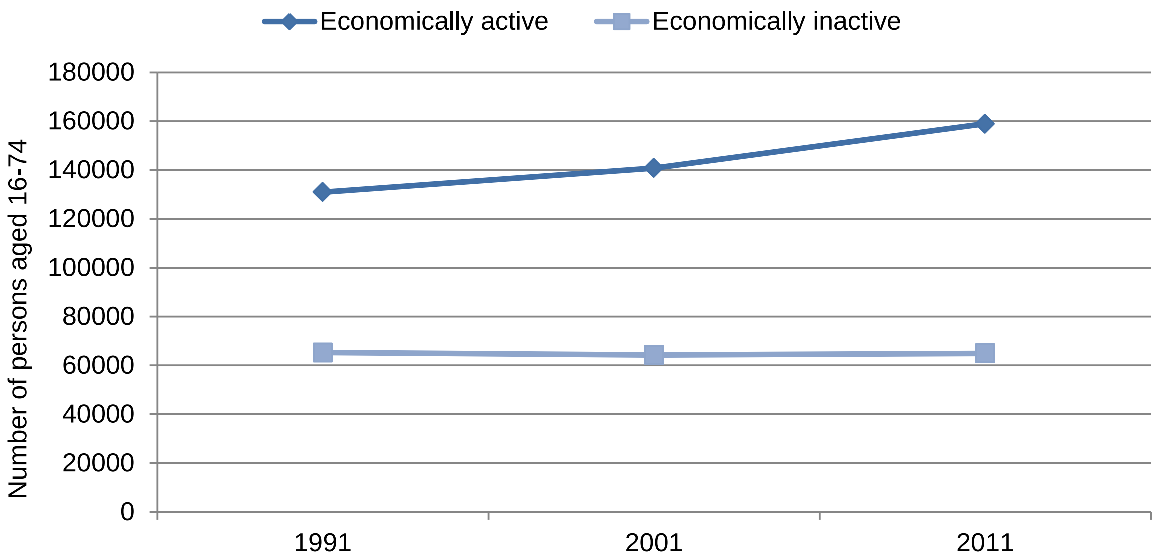
Table 6.19: Analysis of Labour Force Change, 1991-2011

Persons aged 16+	Population effect	Activity effect	Total change	% change 1991-2011
Total labour force	22,546	6,500	29,046	+22.1%
Male labour force	14,840	-4,892	9,948	+12.9%
Female labour force	8,127	10,973	19,100	+34.9%

Source: Office for National Statistics, 1991 and 2011 Census, © Crown Copyright 2014

6.76 The following chart shows that growth in the Shropshire labour market was more heavily concentrated in the decade leading up to the 2011 Census than in the preceding decade. It should be noted though that economic activity rates for those aged 75 and over are not available from the 2001 Census. Hence, the data illustrated on Chart 6.12 refers to the 16-74 year old labour force rather than the 16 and over labour force to which the figures in the Table 6.18 and Table 6.19 above relate.

Chart 6.12: Trends in Economic Activity and Inactivity, 1991-2011



Source: Office for National Statistics, 1991, 2001 and 2011 Census, © Crown Copyright 2014

6.77 Economic activity rates have also changed according to age over the last two decades. Higher participation in further and higher education and the ensuing delayed entry to the labour market means that the economic activity rate for the 16-19 age band has declined over the last 20 years – from 55.5% of the cohort to 52.7%. While participation in the labour force has increased amongst the 20-25, 25-29 and 30-34 age bands, population change means that the actual number of economically active people in each of these age bands has fallen. In 2011, there were almost 3,000 fewer economically active people aged below 35 than there were in 1991.

6.78 In contrast, both activity rates and the number of economically active people have risen in every older age band. In the case of the over 60s, this has been acute, with the number of economically active 60-64 year olds almost doubling over the last two decades. Over the same period, the participation rate amongst those aged 65 and above has more than doubled to 13.8%, leading to close to a threefold increase in the size of the labour force.

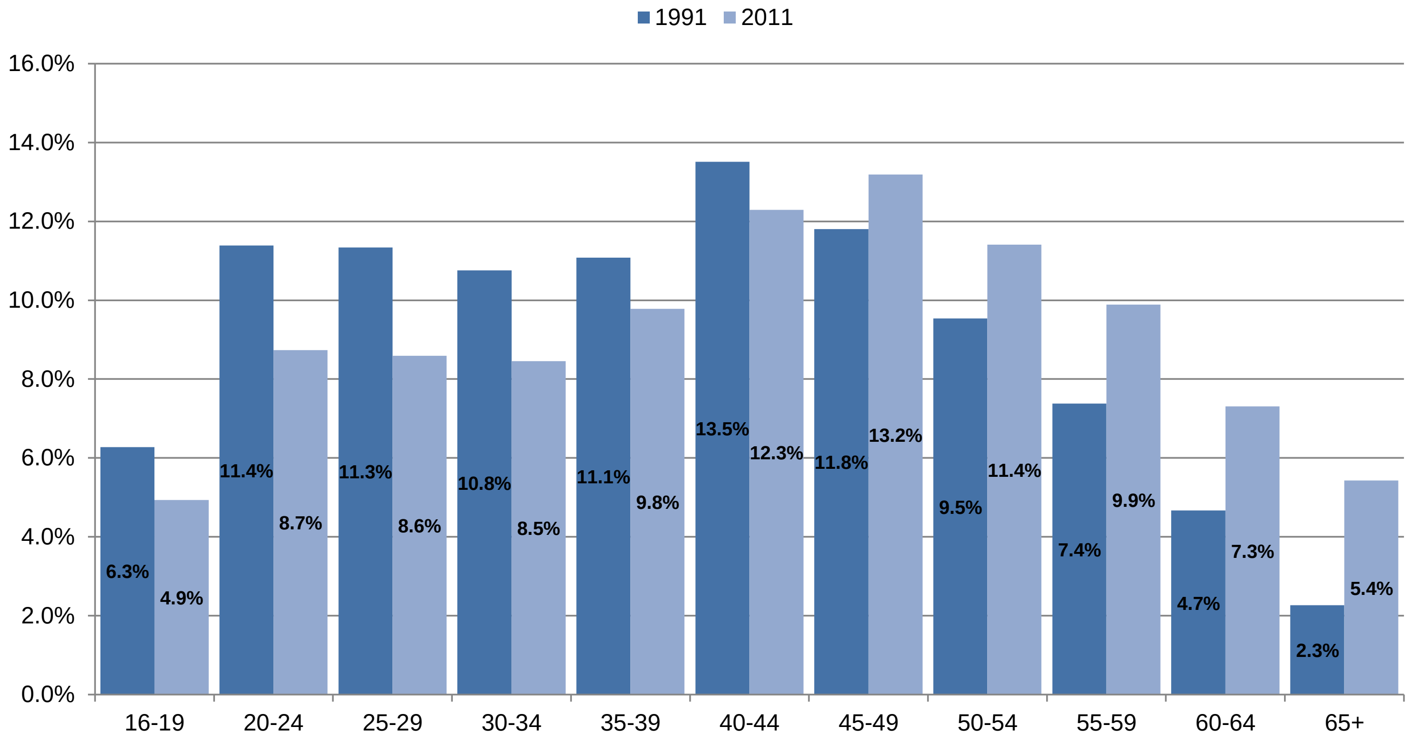
Table 6.20: Size of Shropshire Labour Force and Economic Activity Rates by Age, 1991 & 2011

Persons aged 16+	1991	2011	Change 1991-2011	
			Number	%
Total labour force	131,516	160,564	29048	22.1%
16-19	8,253	7,923	-330	-4.0%
20-24	14,979	14,025	-954	-6.4%
25-29	14,911	13,788	-1,123	-7.5%
30-34	14,142	13,571	-571	-4.0%
35-39	14,575	15,702	1,127	7.7%
40-44	17,773	19,736	1,963	11.0%
45-49	15,525	21,177	5,652	36.4%
50-54	12,544	18,320	5,776	46.0%
55-59	9,701	15,874	6,173	63.6%
60-64	6,135	11,736	5,601	91.3%
65+	2,978	8,712	5,734	192.5%
% of all persons aged 16+				
Total labour force	60.9%	71.0%		
16-19	55.5%	52.7%		
20-24	81.9%	84.4%		
25-29	83.2%	88.3%		
30-34	81.3%	88.1%		
35-39	83.5%	88.3%		
40-44	86.1%	89.0%		
45-49	84.5%	89.8%		
50-54	79.1%	87.2%		
55-59	67.2%	78.7%		
60-64	41.2%	52.6%		
65+	6.5%	13.8%		

Source: Office for National Statistics, 1991 and 2011 Census, © Crown Copyright 2014

6.79 Chart 6.13 illustrates the extent to which the composition of the Shropshire labour market has changed over the last two decades. It is evident that the work force has aged discernibly, with all age bands at 45 and above accounting for a higher share of the labour force than they did 20 years ago. The reverse is true for all age bands below 45. More than half of all economically active people in Shropshire are now aged 45 and above and more than one in ten are aged 60 and above.

Chart 6.13: Percentage Breakdown of the Shropshire Labour Force by Age Band, 1991 & 2011

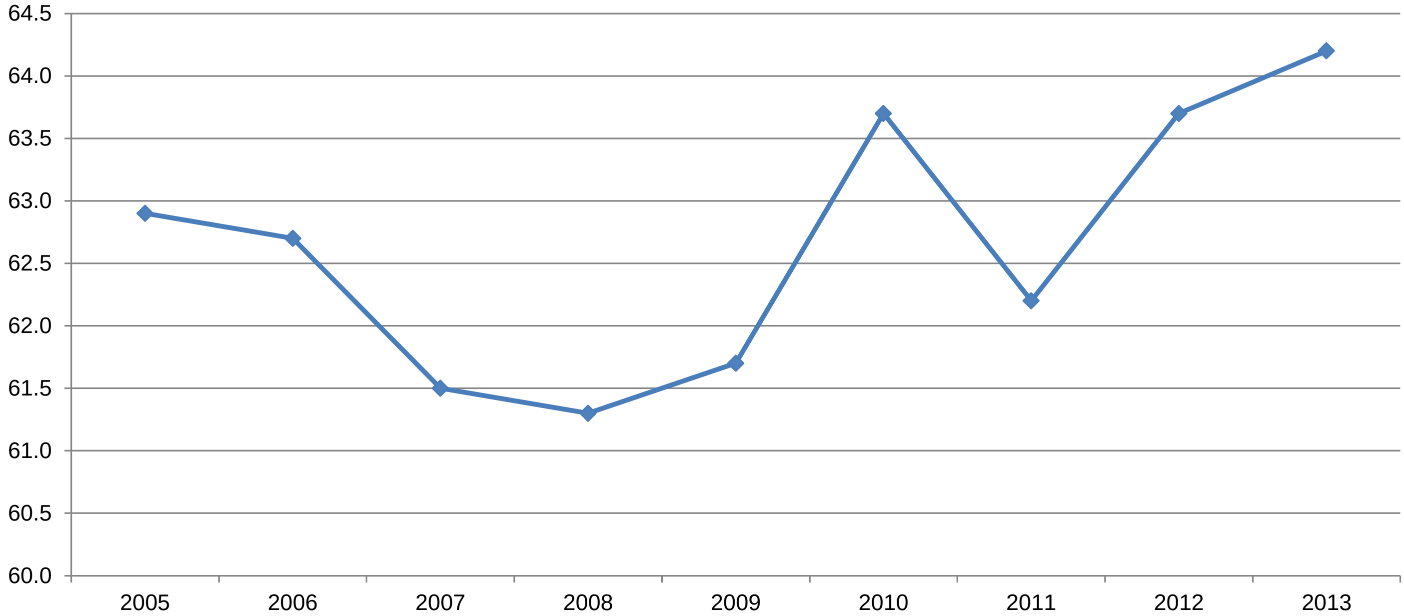


Source: Office for National Statistics, 1991 and 2011 Census, © Crown Copyright 2014

Inter-Census Economic Activity Rates

6.80 Economic activity rates are also measured on a quarterly basis via the ONS Annual Population Survey (APS). Unlike the Census, which provides a snapshot of the population on Census day, the data is based on interviews conducted over a year. Looking at the APS data in the two years closest to Census day (year ending March 2011 and year ending March 2012), economic activity amongst the 16 and over Shropshire population is measured at 62.2% (2011) and 63.7% (2012). Over the eight years between 2005 and 2013, the economic activity rate has fluctuated between 61.3% (2008) and 64.2% (2013).

Chart 6.14: Economic Activity Rates Measured by the APS, 2005-2013



Source: Office for National Statistics, Annual Population Survey (APS), © Crown Copyright 2014
Note: Year ending March

Labour Force Projections

6.81 The labour force projections show the size of the labour force that would result from four of the alternative population projections that are presented in this report:

- Natural Change – for definition please see paragraph 6.30
- Nil Migration – for definition please see paragraph 6.35
- Projection A – for definition please see paragraph 6.40
- Projection B – for definition please see paragraph 6.52

6.82 In the absence of any post-2011 Census national labour force projections[5], economic activity rates have been kept constant throughout the forecast period. Although the Annual Population Survey (APS) does have more up-to-date age-specific economic activity rates than the latest Census, as it is survey-based rather than count-based, the Census is widely regarded as the more robust dataset. Hence this is the source data that has been used for the following labour force projections.

6.83 These forecasts do not take into account social and lifestyle changes or other structural and cyclical factors that will drive changes in levels of economic activity. Structural factors include changes in family composition, shifts in government policy and changes to pension schemes. Cyclical factors tend to be associated with the

[5] The Office for National Statistics (ONS) has announced that it will no longer be publishing projections of the national labour force, which includes estimates of future age and gender-specific activity rates. The last set of projections was published in 2006.

economic climate, although labour market participation is less affected by the economic cycle than employment.

6.84 The increased tendency towards economic activity amongst older age groups – and especially those aged 60 and above – that has been in evidence over the last two decades is expected to continue. Because of this, the projected size of the labour force against all of the following population projections is likely to be conservative.

6.85 It is common to prepare labour force forecasts based on the number of jobs that are required to grow the economy. Sophisticated economic modelling is required to scenario forecast the labour market in this way. This has not been undertaken for this report.

Natural Change

6.86 Natural change labour force projections provide useful context showing how the labour market would change if there was no migration into or out of Shropshire. These projections show that there will be a significant reduction in the available for work population by 2036 and that the rate of economic activity will reduce to 55.2% by the end of the forecast period. The overall size of the labour force will reduce by 21,400 people (-13.3%) to 139,700.

6.87 The composition of the labour market will also change, with a significant reduction in economically active 16-19 year olds as well as a reduction in the labour force aged 40-64. Partially compensating for lower numbers of economically active people in these age bands will be a large increase in the number of 65 and over economically active people (+46.9%). By 2036, around a tenth of the labour force (9.3%) will be older than the current retirement age.

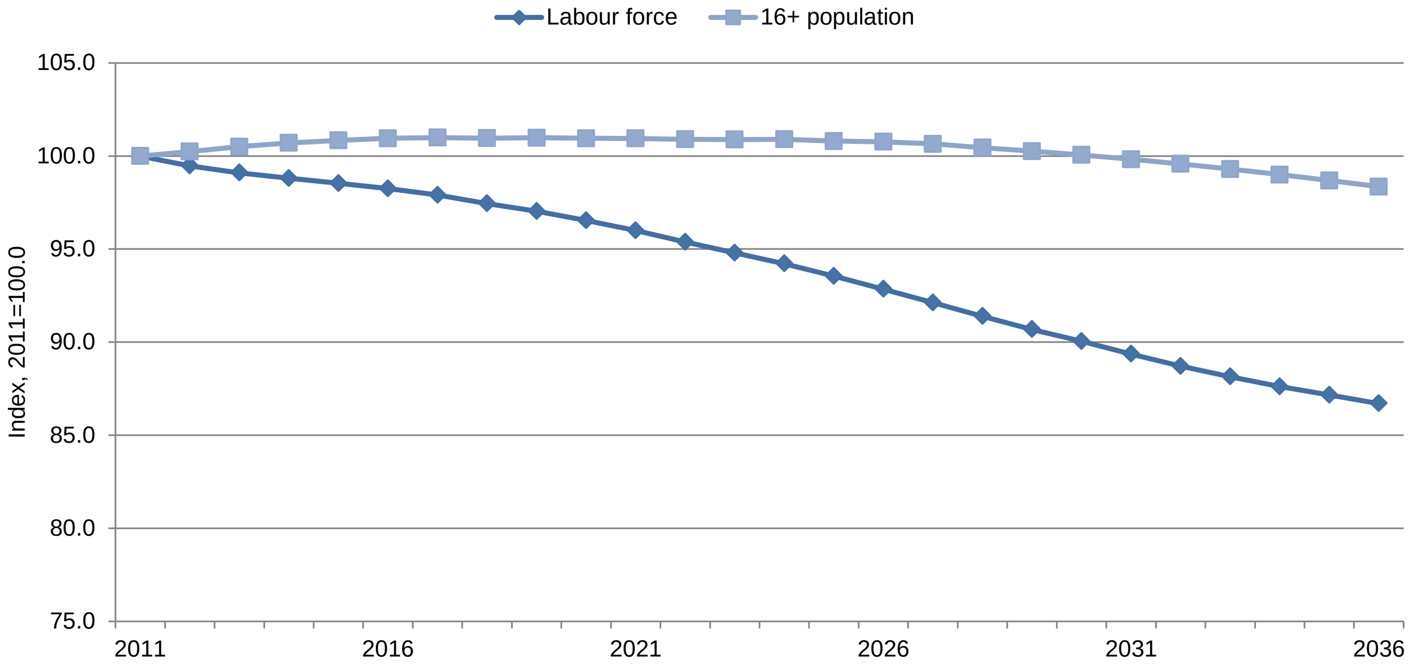
Table 6.21: Natural Change Labour Force Projections, 2011-2036

					Change, 2011-2036	
	2011	2026	2031	2036	Number	%
Total	161,100	149,600	143,900	139,700	-21,400	-13.3%
16-19	8,100	6,900	6,300	6,200	-1,900	-23.3%
20-24	14,200	13,500	13,600	12,600	-1,600	-11.4%
25-29	13,900	15,700	13,800	14,000	100	0.5%
30-34	13,700	16,600	15,700	13,800	100	0.7%
35-39	15,400	14,400	16,500	15,600	200	0.8%
40-44	19,700	13,700	14,400	16,500	-3,200	-16.1%
45-49	21,200	13,600	13,800	14,500	-6,700	-31.7%
50-54	18,500	14,900	13,100	13,200	-5,300	-28.6%
55-59	15,800	16,900	13,300	11,700	-4,100	-26.2%
60-64	11,700	11,900	11,100	8,700	- 3,000	-25.6%
65+	8,800	11,500	12,400	12,900	4,100	46.9%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to nearest 100*

6.88 Over the 2011-2036 forecast period, the size of the 16+ Shropshire population will fall by 4,200 people (-1.6%) according to the natural change projections.

Chart 6.15: Natural Change Labour Force and 16+ Population Indexed Growth, 2011-2036



Source: Research & Intelligence Team, Shropshire Council

Nil Migration

6.89 Nil migration projections are also provided as context to give a better understanding of how in and out migration can impact on the size and composition of the labour force. Shropshire labour force projections based on nil migration population projections show that there will be a significant reduction in the available for work population by 2036 and that the rate of economic activity will reduce to 58.2% by the end of the forecast period. The overall size of the labour force will reduce by 13,200 people (-8.2%) to 147,900.

6.90 According to nil migration projections, there will be a marginal increase in the labour force aged 20-34 and a significant increase in those aged 65 and over. The economically active population in all other age bands is projected to decline. In the case of those aged 40-64 this reduction will be significant.

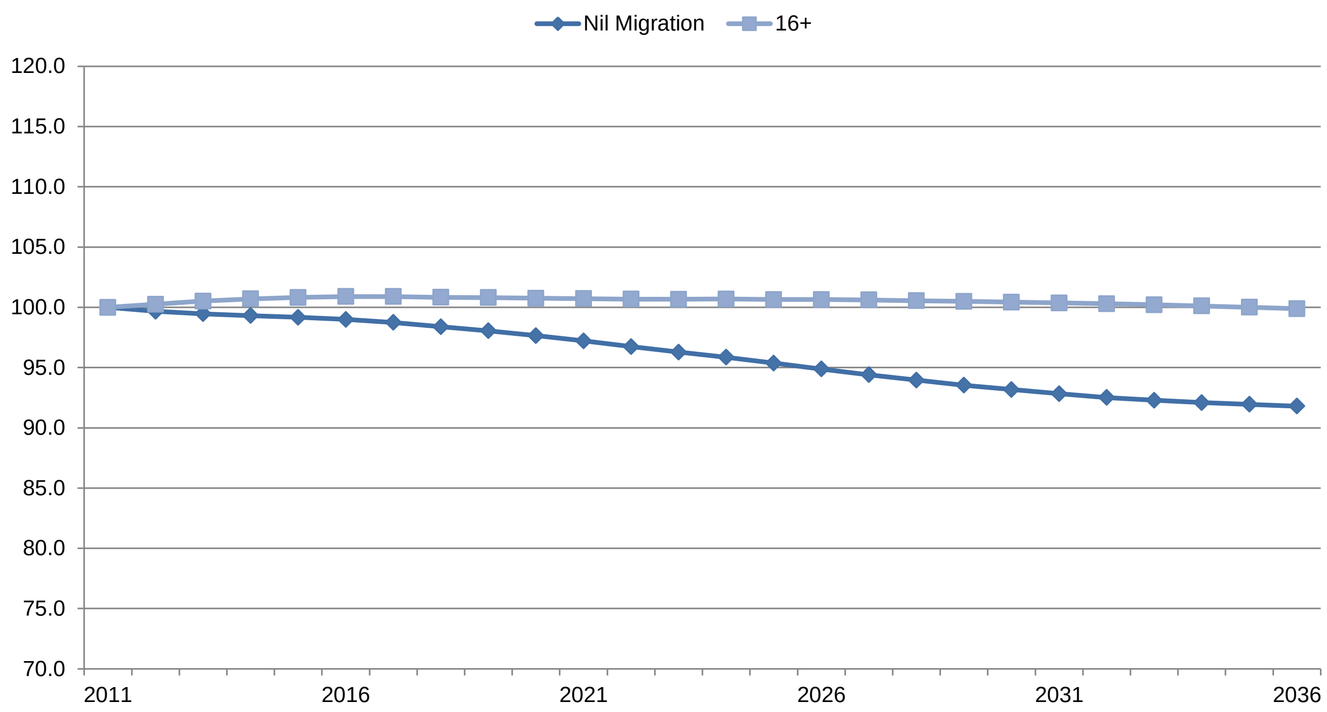
Table 6.22: Nil Migration Labour Force Projections, 2011-2036

					Change, 2011-2036	
	2011	2026	2031	2036	Number	%
Total	161,100	152,800	149,500	147,900	-13,200	-8.2%
16-19	8,100	7,000	7,000	6,900	-1,200	-14.2%
20-24	14,200	13,800	14,600	14,500	300	2.4%
25-29	13,900	15,600	14,600	15,500	1,600	11.6%
30-34	13,700	16,700	15,600	14,700	1,000	7.6%
35-39	15,400	16,300	16,600	15,400	-	-0.1%
40-44	19,700	15,300	16,400	16,500	-3,200	-16.3%
45-49	21,200	14,500	15,400	16,400	-4,800	-22.8%
50-54	18,500	15,000	14,000	14,800	-3,700	-20.2%
55-59	15,800	16,300	13,300	12,500	-3,300	-21.1%
60-64	11,700	11,300	10,500	8,700	-3,000	-26.1%
65+	8,800	10,900	11,600	11,900	3,100	35.6%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to nearest 100*

6.91 Over the 2011-2036 forecast period, the size of the 16 and over Shropshire population will contract very slightly – by around 300 people according to projections based on nil migration.

Chart 6.16: Nil Migration Labour Force and 16+ Population Indexed Growth, 2011-2036



Source: Research & Intelligence Team, Shropshire Council

Projection A

6.92 Shropshire labour force projections (projections A) show that there will be a moderate decrease in the available for work population by 2036 of 6,100 people (-3.8%). At the same time, the overall population aged 16 and above is projected to grow. Hence, the rate of economic activity will reduce to 56.4% by the end of the forecast period. The overall size of the labour force is projected to stand at 154,900 in 2036.

6.93 The most notable change in the age composition of the labour force will be a sharp rise in the number of economically active people who are aged 65 and over (+54.7%). The size of the labour force in all other age bands will decline according to these projections.

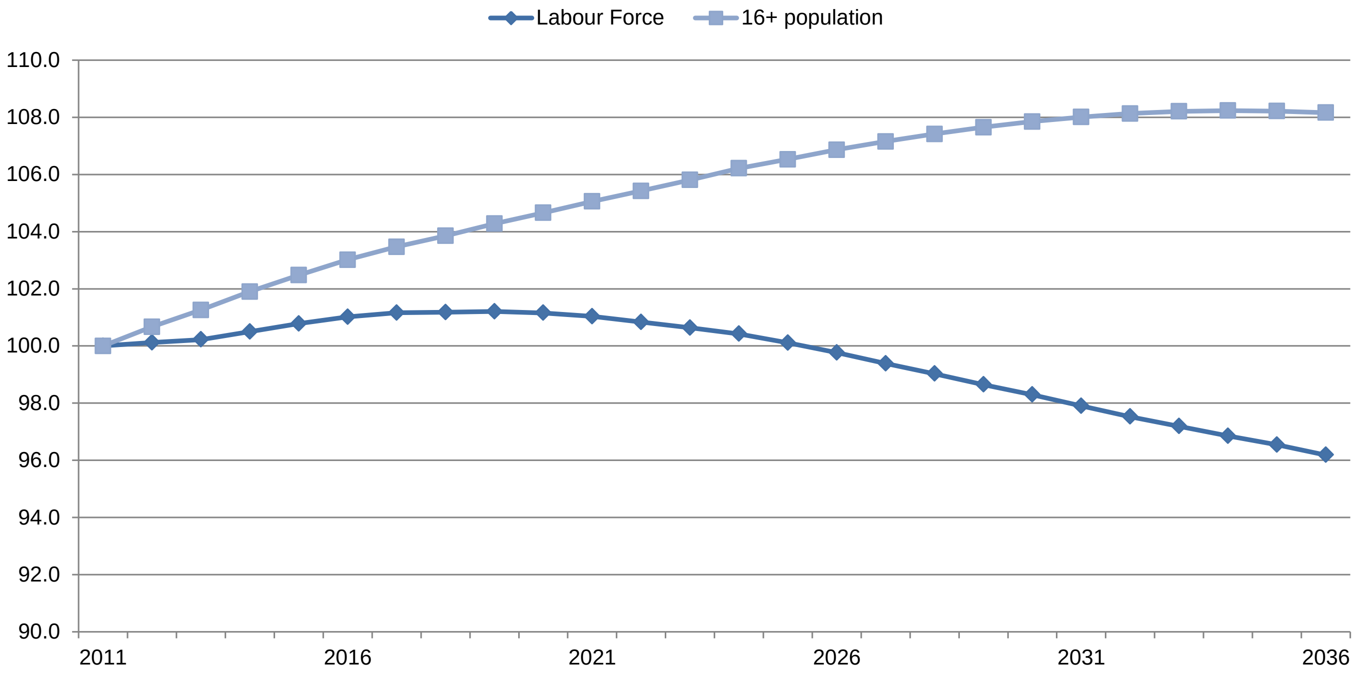
Table 6.23: Projection A: Labour Force Projections: 2011-2036

					Change, 2011-2036	
	2011	2026	2031	2036	Number	%
Total	161,100	160,700	157,700	154,900	- 6,200	-3.8%
16-19	8,100	8,000	8,000	7,700	- 400	-5.4%
20-24	14,200	11,700	12,400	12,400	-1,800	-12.6%
25-29	13,900	13,500	12,700	13,400	-500	-3.1%
30-34	13,700	14,800	13,900	13,000	-700	-4.6%
35-39	15,400	16,900	15,800	14,700	-700	-4.6%
40-44	19,700	17,200	18,000	16,900	-2,800	-14.1%
45-49	21,200	17,300	18,000	18,700	-2,500	-11.7%
50-54	18,500	17,800	17,100	17,800	-700	-4.1%
55-59	15,800	18,900	16,300	15,700	-100	-0.9%
60-64	11,700	13,100	12,700	10,900	-800	-6.8%
65+	8,800	11,600	12,800	13,600	4,800	54.7%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to nearest 100*

6.94 Over the 2011-2036 forecast period, the size of the 16 and over Shropshire population will increase by 20,700 people (+8.2%) according to population projections A.

Chart 6.17: Projections A Labour Force and 16+ Population Indexed Growth, 2011-2036



Source: Research & Intelligence Team, Shropshire Council

Projection B

6.95 Shropshire labour force projection (projections B) show that there will be a modest increase in the available for work population by 2036 of 800 people (+0.5%). Growth within the overall population aged 16 and above will be far superior to this, however. Hence, the rate of economic activity will reduce to 55.6% by the end of the forecast period. The overall size of the labour force in 2036 will stand at 161,900.

6.96 The most notable change in the age composition of the labour force will be a sharp rise in the number of economically active people who are aged 65 and over (+71.7%). There will also be a very slight increase in the number of economically active 45-54 year olds according to these projections.

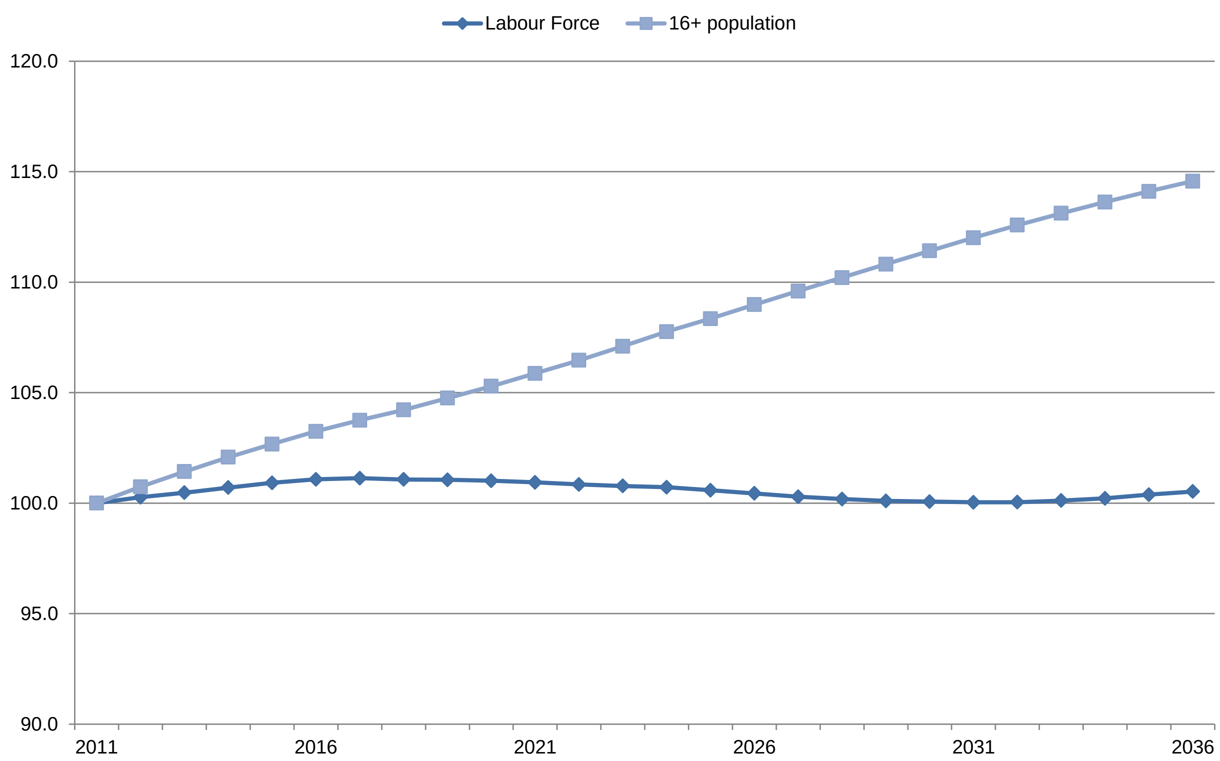
Table 6.24 Projection B Labour Force Projections: 2011-2036

					Change, 2011-2036	
	2011	2026	2031	2036	Number	%
Total	161,100	161,800	161,100	161,900	800	0.5%
16-19	8,100	6,400	6,600	6,600	-1,500	-18.9%
20-24	14,200	9,900	10,900	11,300	-2,900	-20.7%
25-29	13,900	13,000	12,500	13,800	-100	-0.4%
30-34	13,700	16,700	14,000	13,500	-200	-1.3%
35-39	15,400	19,300	18,000	15,400	-	-0.6%
40-44	19,700	17,500	20,500	19,200	-500	-2.3%
45-49	21,200	16,600	18,300	21,400	200	0.8%
50-54	18,500	17,400	16,800	18,600	100	0.1%
55-59	15,800	19,100	16,300	15,800	-	-0.1%
60-64	11,700	13,500	13,200	11,300	-400	-3.5%
65+	8,800	12,500	14,000	15,100	6,300	71.7%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to nearest 100*

6.97 Over the 2011-2036 forecast period, the size of the 16+ Shropshire population will increase by 37,000 people (+14.6%) according to population projections B.

Chart 6.18: Projections B Labour Force and 16+ Population Indexed Growth, 2011-2036



Source: Research & Intelligence Team, Shropshire Council

Labour Force Projections Summary

6.98 The size of the labour force is projected to decline according to three of the four presented projections. This is particularly acute against the natural change projections, which do not take migration into account at all. In contrast, a very modest increase in the labour force can be expected according to Projection B.

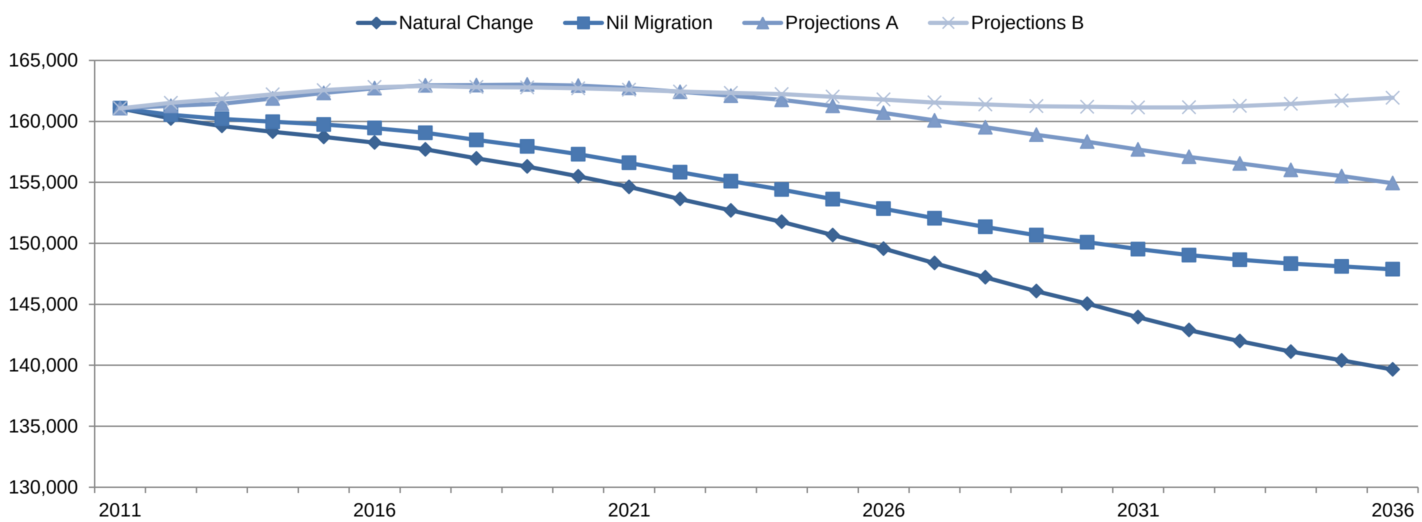
6.99 Against all of the four projections there is a widening gap between the size of the 16 and over population and the forecast size of the labour force, which is resulting from the ageing population and the lower rates of economic activity that are associated with older age bands.

Table 6.25: Projected Size of the Labour Force and Overall Economic Activity Rates, 2036

			Change 2011-2036	
	Projected labour force	Projected economic activity rate, 2036	Number	%
Natural Change	139,700	55.2%	-21,400	-13.3%
Nil Migration	147,900	58.2%	-13,200	-8.2%
Projection A	154,900	56.4%	-6,200	-3.8%
Projection B	161,900	55.6%	800	0.5%

Source: Research & Intelligence Team, Shropshire Council *Numbers rounded to nearest 100*

Chart 6.19: Comparison of Changes to the Labour Market according to the Four Projections, 2011-2036

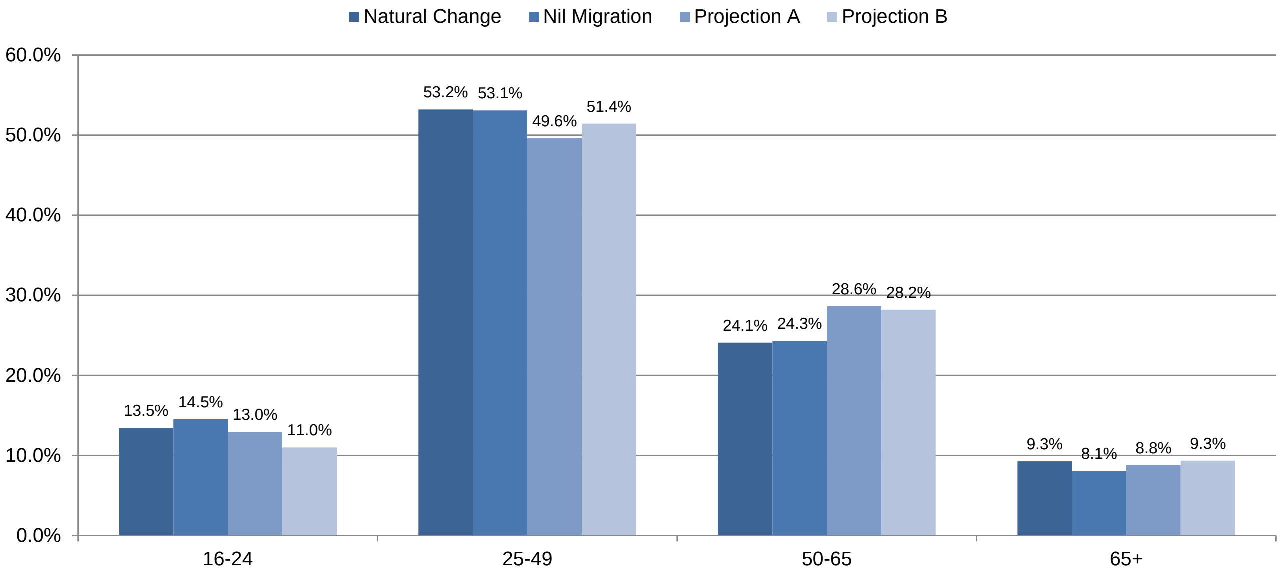


Source: Research & Intelligence Team, Shropshire Council

Projected Labour Force Age Breakdown

6.100 Chart 6.20 shows the projected split of the 2036 labour force according to broad age group against each of the four population projections. The projections which have been prepared using migration trends (Projections A and B) both show a greater dependency on “post prime” age bands compared with the alternative projections (natural change and nil migration).

Chart 6.20: Projected Age Breakdown according to the Four Projections, 2036



Source: Shropshire Council, Research & Intelligence Team

7. Conclusions

Matching housing to households

7.1 Shropshire's population is ageing, with large increases forecast in the proportion of older age groups. Deaths continue to significantly outnumber births. Population growth in Shropshire is driven by net in migration. However, even with no in migration, the number of households would increase due to the increasing proportion of one person households in the county.

7.2 A number of projections were run for Shropshire, resulting in the interim household projections summarised in table 7.1 below. These will need to be updated when the ONS 25-year projections are released later in 2014.

Table 7.1: Number of Households based on the Five Population Projections

Projection	Number of Households				Change 2011-2036	
	2011	2026	2031	2036	Number	% Change
Natural Change	130,000	141,500	142,600	142,400	12,400	10%
Nil Migration	130,000	140,800	141,700	141,800	11,800	9%
2010 ONS SNPP (Revised)	129,900	158,400	164,900	169,200	39,300	30%
Projection A	130,000	151,400	154,600	156,100	26,100	20%
Projection B	130,000	157,900	164,200	169,100	39,100	30%

Source: Table 6.16 Research & Intelligence Team, Shropshire Council
Numbers rounded to the nearest 100

7.3 The Shropshire labour force is ageing rapidly. Unless economic activity rates amongst the 65 and overs rise significantly, the ratio between those who are participating in the labour market and those who are not will fall. Only according to Projection B will population growth be sufficient to sustain the current size of the labour force.

Dwellings required

7.4 The Core Strategy requirement of 27,500 households over 2006-2026 remains the best assessment of Shropshire's housing requirements until the ONS projections are published later in 2014. At that point this SHMA will be updated to reflect the ONS 25-year projections.

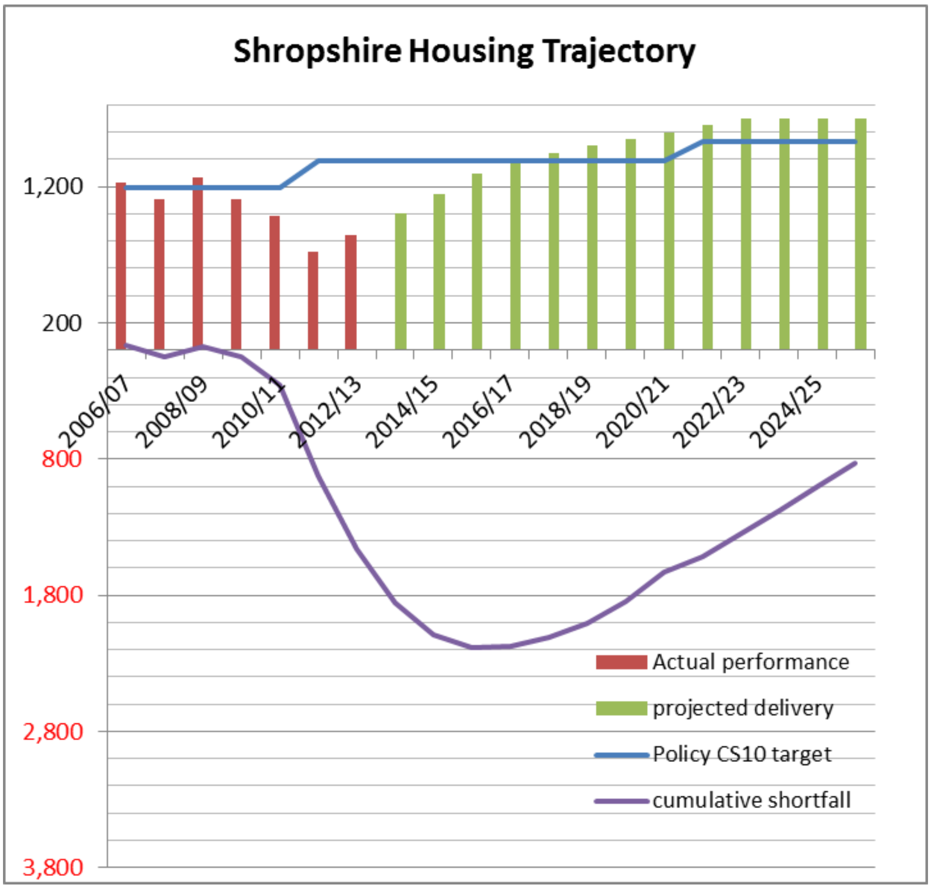
7.5 The need for affordable homes is assessed at between 469 and 997 dwellings per annum, equivalent to 34% - 72% of Shropshire's annualised requirement in the Core Strategy.

7.6 There is a growing need for supported housing for persons with health and mobility requirements, often but not always older people, linked to Shropshire's rapidly ageing demographic. A total of 672 additional units of extra care accommodation is forecast to be needed by 2020, rising to 956 units by 2030.

Meeting Shropshire's housing requirements

Meeting Shropshire's objectively assessed housing requirements will take a step change in housing delivery, and this is recognised by Core Strategy policy CS10 which anticipates an increase in the annual delivery of homes to 1,390 a year 2011-2021 and 1,530 dwellings a year beyond 2021. However the weak national housing market 2008-2011 has resulted in low delivery in the early years of the plan, as shown in chart 7.1 below.

Chart 7.1 Housing Delivery Trajectory at Dec 2013



Source: Shropshire Annual Monitoring Report 2014

The cumulative shortfall (purple line) is forecast to continue to grow until housing delivery exceeds 1,390 dwellings per annum. If the number of homes built in Shropshire matches the projected figures in chart 7.1 (shown in green) then the shortfall is likely to increase until around 2017, before reducing slowly over the latter half of the plan period. A substantial and sustained increase in housing delivery is required to meet Shropshire's housing requirements.

The challenges of delivering sufficient quantity and mix housing require careful attention to be paid to deliverability. This is discussed in more detail in the Market Assessment chapter of the Strategic Housing Land Availability (SHLAA) Study 2014.

A considerable step-change in delivery is only likely to be achieved by working with rather than against the market. For instance, increased delivery is more likely where the market is strong in East Shropshire and in Shrewsbury, and least likely in areas with low viability such as North West Shropshire and the North East towns.

The market is also strongest for certain types of housing, particularly 3, 4 and 5 bedroomed homes. Demand has yet to catch up with the evident need for affordable homes, smaller units and retirement housing. In brief, flexibility is required in the geographical location, mix and type of housing to ensure that Shropshire meets its housing requirements.

Appendix 1 Shropshire Developer Panel

The Shropshire Developer Panel is comprised of representatives from large and small housebuilders land agents and registered providers (RPs) active in Shropshire. It's current composition is:

Anwyl Construction
Barratt Homes
Bromford Housing Association (RP)
Galliers Homes
J Ross Developments
Persimmon Homes
Peter Richards Ltd (land agent)
Severnside Housing (RP)
Shropshire Homes
Shropshire Housing Group (RP)
Taylor Wimpey

Appendix 2: Housing Register by parish January 2014

Current parish	Place Plan Area	Affordable housing stock	Housing Applications from households in Parish (Shropshire only) - update	Number of lettings June 2009 - January 2014	Average number bids per property let June 2009 - January 2014	No. households s living in parish AND stating it as their first choice	No. preferring this parish as their first choice
Albrighton CP	Albrighton	312	33	58	44.5	21	41
Bedstone CP (linked to hopton castle)	**Bishops Castle**	**0**					
Bettws-y-Crwyn CP	Bishops Castle	4					
Bishop's Castle CP	Bishops Castle	157	16	63	26.62	9	19
Bucknell CP	Bishops Castle	55	10	16	14	6	10
Chirbury with Brompton CP	Bishops Castle	28	1	8	14.63		1
Clun CP	Bishops Castle	48	10	19	16.42	5	13
Clunbury CP	Bishops Castle	7	3	3	15.33		
Clungunford CP	Bishops Castle	14	2	4	21		
Colebatch CP	Bishops Castle	0					
Edgton CP (linked Lydbury north)	**Bishops Castle**	**0**					2
Hopton Castle CP (linked bedstone)	**Bishops Castle**	**4**	**1**				
Llanfair Waterdine CP	Bishops Castle	0					
Lydbury North CP (inc Edgton)	**Bishops Castle**	**22**	**7**	6	17.67		2
Lydham CP	Bishops Castle	16	1	6	35.5		
Mainstone CP	Bishops Castle	0	1				
More CP	Bishops Castle	4	1				
Myndtown CP (linked Wentnor)	**Bishops Castle**	**0**					1
Newcastle on Clun CP	Bishops Castle	1	1				
Norbury CP	Bishops Castle	0					
Ratlinghope CP	Bishops Castle	0					
Stowe CP	Bishops Castle	0					
Wentnor CP (linked Myndtown)	**Bishops Castle**	**15**	**2**	4	17.25		1

Worthen with Shelve CP	Bishops Castle	56	11	19	14.32	3	3
Acton Round CP (linked aston eyre/ upton cressett)	**Bridgnorth**	**0**					
Alveley CP	Bridgnorth	83	5	28	33.46	2	9
Astley Abbotts CP	Bridgnorth	0	2	1	13		3
Aston Botterell CP (linked neenton)	**Bridgnorth**	**0**					
Aston Eyre CP (linked acton round)	**Bridgnorth**	**0**					
Billingsley CP	Bridgnorth	0					
Bridgnorth CP	Bridgnorth	598	75	195	37.8	58	159
Burwarton CP (linked Cleobury North)	**Bridgnorth**	**0**	**1**	5	6.8		
Chetton CP	Bridgnorth	4	1	1	58		
Claverley CP	Bridgnorth	43	5	17	32.29	2	4
Cleobury North CP (linked Burwarton)	**Bridgnorth**	**6**	**1**	**1**	**21**		**2**
Deuxhill CP	Bridgnorth	0					
Ditton Priors CP	Bridgnorth	28	2	15	14.07	2	6
Eardington CP	Bridgnorth	31	5	7	39.86		1
Glazeley CP	Bridgnorth	0					
Middleton Scriven CP	Bridgnorth	0					
Monkhopton CP	Bridgnorth	5	3				
Morville CP	Bridgnorth	9	1	2	21		
Neenton CP (inc Aston Botterell)	**Bridgnorth**	**7**	**1**	2	38.5		
Quatt Malvern CP	Bridgnorth	0	4				
Romsley CP	Bridgnorth	0					
Ruckley and Langley CP	Bridgnorth	0					
Rudge CP (linked Worfield)	**Bridgnorth**	**0**					3
Stockton CP	Bridgnorth	2	3				
Sutton Maddock CP	Bridgnorth	11	1	1	71		2
Tasley CP	Bridgnorth	98	7	33	33.64		
Upton Cressett CP	Bridgnorth	0					
Worfield CP (linked Rudge)	**Bridgnorth**	**93**	**7**	17	75.41	1	3
Barrow CP	Broseley	4	5				1
Broseley CP	Broseley	393	39	108	34.63	32	45
Acton Burnell CP	Church Stretton	0					
Acton Scott CP	Church Stretton	2	1				1
All Stretton CP	Church Stretton	0	1				

Cardington CP	Church Stretton	1					
Church Stretton CP	Church Stretton	233	41	109	27.55	22	38
Eaton-under-Heywood CP	Church Stretton	2					
Frodesley CP	Church Stretton	0					
Hope Bowdler CP	Church Stretton	17	1	3	37.33		
Leebotwood CP	Church Stretton	10	1	3	57		
Longnor CP	Church Stretton	9		1	25		
Pitchford CP	Church Stretton	4	1				
Rushbury CP	Church Stretton	24	2	9	19.44	1	1
Smethcott CP	Church Stretton	0					
Woolstaston CP	Church Stretton	0	1				
Boraston CP	Cleobury Mortimer	0					2
Cleobury Mortimer CP	Cleobury Mortimer	191	21	96	22.11	11	19
Coreley CP	Cleobury Mortimer	20	2	2	10		
Farlow CP	Cleobury Mortimer	0	1				
Hopton Wafers CP	Cleobury Mortimer	0	1				
Kinlet CP	Cleobury Mortimer	13	5	3	32.33	3	7
Milson CP	Cleobury Mortimer	0	1				
Nash CP	Cleobury Mortimer	0					
Neen Savage CP	Cleobury Mortimer	5	2				
Neen Sollars CP	Cleobury Mortimer	0					
Sidbury CP (linked to Stottesden)	**Cleobury Mortimer**	**0**					
Stottesdon CP (linked Sidbury)	**Cleobury Mortimer**	**25**	**1**	5	14.8		
Wheathill CP	Cleobury Mortimer	0	4				
Abdon CP	Craven Arms	0					
Clee St. Margaret CP	Craven Arms	4	1				1
Craven Arms CP	Craven Arms	286	48	110	20.22	22	41
Culmington CP	Craven Arms	7	2	2	50.5	1	1
Diddlebury CP	Craven Arms	15	3	3	45		1
Heath CP	Craven Arms	0					
Hopesay CP	Craven Arms	1	3	1	69		
Munslow CP	Craven Arms	3	2				
Sibdon Carwood CP	Craven Arms	0					
Wistanstow CP	Craven Arms	11	1	2	12		1
Cockshutt CP (linked Petton)	**Ellesmere**	**55**	**6**	**7**	**74.57**	**1**	**3**
Ellesmere Rural CP	Ellesmere	72	3	22	47.05	1	20
Ellesmere Urban CP	Ellesmere	222	40	50	45.9	19	33
Hordley CP	Ellesmere	8	1	3	9.67		
Petton CP (linked Cockshutt)	**Ellesmere**	**1**					3
Welshampton and Lyneal CP	Ellesmere	15	2	2	38.5		1

Chelmarsh CP	Highley	15	5	2	66.5	2	3
Highley CP	Highley	39	28	92	30.17	16	23
Ashford Bowdler CP (linked Richards Castle)	**Ludlow**	**0**					2
Ashford Carbonel CP	Ludlow	0					
Bitterley CP	Ludlow	15	5	2	46		2
Bromfield CP	Ludlow	1	1				
Burford CP	Ludlow	68	4	12	19.67	3	10
Caynham CP	Ludlow	79	11	27	18.7	1	3
Greete CP	Ludlow	0					
Hope Bagot CP	Ludlow	0					
Hopton Cangeford CP	Ludlow	0					
Ludford CP	Ludlow	93	4	23	36.7		2
Ludlow CP	Ludlow	907	114	306	33.02	61	123
Onibury CP	Ludlow	11	3	5	26.2	1	2
Richard's Castle (Shropshire) CP (linked ashford Bowdler)	**Ludlow**	**2**	**4**				2
Stanton Lacy CP	Ludlow	1	1				
Stoke St. Milborough CP (linked Hopton Cangeford)	**Ludlow**	**3**	**1**	1	47		
Whitton CP	Ludlow	0					
Adderley CP	Market Drayton	7		7	31.57		1
Cheswardine CP	Market Drayton	45	7	12	36.75	4	8
Child's Ercall CP	Market Drayton	40	5	11	40.18	2	7
Hinstock CP	Market Drayton	35	7	8	36.63		4
Hodnet CP	Market Drayton	92	9	18	38.67	5	10
Market Drayton CP	Market Drayton	786	111	317	25.66	84	123
Moreton Say CP	Market Drayton	8	1	1	56		1
Norton in Hales CP	Market Drayton	23	1	9	42.89		1
Stoke upon Tern CP	Market Drayton	22	9	10	45.1	1	2
Sutton upon Tern CP	Market Drayton	8	4	4	36.25		
Woore CP	Market Drayton	37	3	5	22.4		2
Buildwas CP	Much Wenlock	20	3	4	29	1	4
Church Preen CP	Much Wenlock	1					
Cressage CP (linked Sheinton)	**Much Wenlock**	**43**	**7**	**12**	**41.5**	**1**	**3**
Easthope CP - linked stanton long	**Much Wenlock**	**0**					**1**
Harley CP	Much Wenlock	3		2	15		2
Hughley CP	Much Wenlock	0					

Kenley CP	Much Wenlock	0					
Much Wenlock CP	Much Wenlock	188	32	39	43.41	22	33
Sheinton CP (linked Cressage)	**Much Wenlock**	**0**					3
Shipton CP	Much Wenlock	3	1				
Stanton Long CP - linked easthope	Much Wenlock	0					1
Gobowen, Selattyn and Weston Rhyn CP (splits) - poss double count	**Oswestry**	**253**	**35**	159	31.52		16
Kinnerley CP	Oswestry	29	2	7	39.29	2	4
Knockin CP	Oswestry	12	2				1
Llanyblodwel CP	Oswestry	53	3	12	33.83		1
Llanymynech and Pant CP	Oswestry	40	6	8	25	2	6
Oswestry CP	Oswestry	1340	164	392	37.69	117	184
Oswestry Rural CP	Oswestry	211	22	61	33.97	1	16
Ruyton-XI-Towns CP	Oswestry	38	7	16	28.31	1	1
St. Martin's CP	Oswestry	210	22	48	32.69	13	19
West Felton CP	Oswestry	53	3	6	33.5	1	7
Weston Rhyn CP (SEE Gobowen, Selattyn and West Rhyn) ++USE DATA WITH CAUTION++	**Oswestry**	**161**	**35**	64	20.06	11	16
Whittington CP	Oswestry	151	10	45	48.27	5	10
Minsterley CP	Pontesbury and Minsterley	128	22	67	26.22	4	11
Pontesbury CP	Pontesbury and Minsterley	127	13	29	25.79	7	12
Kemberton CP	Shifnal	4	1				
Sheriffhales CP	Shifnal	36	4	7	45		3
Shifnal CP	Shifnal	533	87	158	45.82	60	93
Alberbury with Cardeston CP	Shrewsbury	18	4	2	31.5		2
Astley CP	Shrewsbury	9		1	26		
Atcham CP	Shrewsbury	12	5	3	68.67		2
Baschurch CP	Shrewsbury	65	5	19	32.16	2	11
Bayston Hill CP	Shrewsbury	78	14	30	67.93	11	31
Berrington CP	Shrewsbury	122	10	16	27		1
Bicton CP	Shrewsbury	27	4	13	41.77	1	12
Church Pulverbatch CP	Shrewsbury	6	1	1	25		
Condover CP	Shrewsbury	78	9	11	68.55	4	6
Cound CP	Shrewsbury	7	2				
Ford CP	Shrewsbury	61	9	14	28		10
Great Hanwood CP	Shrewsbury	135	10	51	37.76	3	13

Great Ness CP	Shrewsbury	38	3	7	54.86		1
Leighton and Eaton Constantine CP	Shrewsbury	13	2	1	89		1
Little Ness CP	Shrewsbury	3	1				
Longden CP	Shrewsbury	27	4	3	37.33	1	5
Melverley CP	Shrewsbury	0					
Montford CP	Shrewsbury	6	2				4
Pimhill CP	Shrewsbury	101	22	20	32.95	3	3
Shrewsbury CP	Shrewsbury	4597	578	945	71.81	437	657
Uffington CP	Shrewsbury	0	1				7
Upton Magna CP	Shrewsbury	6	1	2	38.5		
Westbury CP	Shrewsbury	34	12	41	44.34	2	5
Withington CP	Shrewsbury	0	1				
Wroxeter and Uppington CP	Shrewsbury	13	2	3	35.67	1	
Clive CP	Wem	24	1	5	19.6		2
Grinshill CP	Wem	0					2
Hadnall CP	Wem	23	9	3	50.33	5	11
Loppington CP	Wem	10	3	3	74		2
Moreton Corbet and Lee Brockhurst CP	Wem	6	2	2	54		
Myddle and Broughton CP	Wem	39	6	10	66.2		
Shawbury CP	Wem	145	14	42	55.55	6	19
Stanton upon Hine Heath CP	Wem	11	1	1	38		1
Wem Rural CP	Wem	28	6	5	46.2	1	27
Wem Urban CP	Wem	321	60	114	36.13	21	38
Weston-under-Redcastle CP	Wem	4					2
Whixall CP	Wem	12	3				4
Ightfield CP	Whitchurch	14	3			1	2
Prees CP	Whitchurch	88	15	56	32.5	3	12
Whitchurch Rural CP	Whitchurch	43	11	10	46.8	2	40
Whitchurch Urban CP	Whitchurch	646	101	181	34.77	39	60
TOTAL Shropshire		16258	2223	4695	36.61287	1193	2275

Source: Shropshire Homepoint Jan 2014