

The Future Housing Market: POPGROUP Forecasting - 2011 Refresh – South Lakeland

Introduction

Aim: This report estimates the future number of dwellings (including the number of new dwellings) that may be associated with a series of differing population, housing and economic scenarios. These scenarios are defined in subsequent sections of this report. All scenarios have been generated using the POPGROUP demographic forecasting software.

About POPGROUP: POPGROUP is a family of software products designed to project the population, households and labour force that may be associated with specified future scenarios. The software is provided by the Centre for Census & Survey Research at the University of Manchester. It uses a standard cohort component methodology, allowing users to generate scenarios based on the entry of past information and assumptions about the future in relation to births and fertility, deaths and mortality, migration, housing and the labour market. POPGROUP analysis is only available down to a district level.

The need for local information: The Office for National Statistics (ONS) makes national and sub-national population projections every two years using the same standard cohort component methodology applied by POPGROUP. ONS projections are simply intended to represent what the population may look like in the future based on one fixed set of assumptions. The assumptions made by the ONS are that past trends relating to births, deaths and migration (based on data observed over the five years immediately prior to the projections being made) will continue into the future. This set of assumptions can be said to present one potential future 'scenario'.

While the ONS projections provide a useful baseline scenario, they do not offer users the flexibility to adjust or add any further assumptions, for example: the implications of local planning restrictions/developments; decline/growth of the local economy; or, longer / shorter term trends in birth, death and migration rates. However, we know that these local factors can make a real difference to the way populations might look in twenty years time. To address this issue, POPGROUP was purchased as a means of providing us with the facility to create our own scenarios, incorporating our own localised assumptions into projections.

POPGROUP and Strategic Housing Market Assessments (SHMAs): In early 2009 Cumbria Intelligence Observatory (CIO) used the POPGROUP software to produce a series of district level population and housing projections to inform the county's 2009 Strategic Housing Market Assessments (SHMAs). These projections were based on a number of scenarios which utilised a wide range of local information.

When running a POPGROUP scenario, only one factor (either population, dwellings or the labour force) may be selected to drive the model. Associated projections for the remaining two factors are then produced to fit around the driving factor. Therefore, the POPGROUP projections within the 2009 SHMAs were split into three distinct types of scenario:

1. Population Led Scenarios
2. Dwelling Led Scenarios
3. Labour Force Led Scenarios

Population Led Scenarios: With population as a driving factor, these scenarios looked at what had happened to population in the past in terms of district level trends in fertility, mortality and migration, and projected what would happen to the population in the future should these trends continue. Age and gender specific projections were produced for each district by the software, along with projections for the associated numbers of dwellings and households that would be needed to support the projected population.

Dwelling Led Scenarios: With dwellings as a driving factor, these scenarios looked at what had happened to the number of dwellings in each district in the past and made assumptions about what was expected to happen to these numbers of dwellings in the future. The population projections produced by the software reflected the associated population that would be required to live in the dwellings that the model predicted for each district.

Labour Force Led Scenarios: With the labour force as a driving factor, these scenarios looked at what had happened to the number of Full Time Equivalent (FTE) jobs in each district in the past, and applied what was expected to happen in the future in terms of numbers of FTE jobs. The population, household and dwelling projections produced by the model reflected the associated number of people and houses that would be needed to support these changes in the number of jobs for each district.

2010 Refresh: Since the 2009 POPGROUP forecasts were produced by the CIO, a number of the data sets that were incorporated into the scenarios have been superseded as new and more up to date information has become available. More specifically, new data has become available in relation to:

- National fertility, mortality and migration rates for 2008;
- District level counts for births and deaths in 2007 and 2008;
- District level fertility and mortality rates for 2007 and 2008;
- District level internal migration estimates for 2007, 2008 and 2009;
- District level international migration estimates for 2007, 2008 and 2009; and
- District level population estimates for 2007, 2008 and 2009.

Furthermore, as part of the 'Improving Migration and Population Statistics programme', the ONS have also revised their local population estimates from 2002 through to 2008 having gained access to new administrative sources that provide more accurate indications of migration patterns for people moving between local authorities in the UK.

Following the release of the above data sets, the CIO has re-run the two 'Population-Led' POPGROUP scenarios (the Zero Net Migration and the 5 Year Migration scenarios) which were included in the 2009 SHMAs. The CIO also produced one additional 'Dwelling-Led' scenario (the 10-Year Dwelling Led scenario) and one additional Population-Led scenario (the 10 Year Migration Scenario).

In **February 2011**, the CIO also updated the 2009 Labour-Force Led POPGROUP Scenario to incorporate the latest district level job forecasts; produced by Experian and provided by Cumbria County Council's Economic Development Department in February 2011.

The above forecasts were produced in order to offer some further insight for county and district planning teams as to potential future housing demand; based on the most recently available local information. It is the aim of this document to present the results of these refreshed / additional POPGROUP forecasts. The figures contained in this document should be seen as an additional piece of work that follows on from Section Four of the 2009 SHMA.

Limitations and Caveats

Like all population forecasting outputs, POPGROUP outputs are simply a representation of what might happen in the future if various trends are played out as we expect. It is especially important to note that POPGROUP Scenarios can only be driven by one factor at a time (population, dwellings or the labour force). However, in reality, we know that these factors are inter-linked and dependent upon one and other, so it is very unlikely that one factor will exclusively drive change in an area.

As a result, these projections cannot be relied upon as fact, and actual results may end up being significantly different to what the scenarios suggest will happen. This should be kept in mind at all times when using the outputs, and caution should be used when incorporating the outputs into any decision making processes. Instead figures should be viewed as a guide to indicate the potential parameters for housing demand, should various scenarios arise.

Results: POPGROUP Forecasting –2010 Refresh

Population Led Forecast: Zero Net Migration Scenario

This scenario shows what might happen to the population if natural change (births and deaths) were the only contributing factor to future population trends. This scenario assumes that there will be no migration – either in or out both internally and internationally – for the period of the forecast. This is, of course, an unlikely scenario. However, it is useful in the broader context because it allows us to take migration out of the equation and examine how natural changes are likely to affect the future population.

South Lakeland	2009	2014	2019	2024	2029
Population	103,766	101,722	99,842	98,286	96,679
Households	46,401	46,315	46,671	47,000	46,722
Dwellings	52,136	52,039	52,439	52,809	52,496
5 Year Migration		0	0	0	0
5 Year Net Change		-2044	-1880	-1555	-1607
Annualised Migration		0	0	0	0
Annualised Change		-409	-376	-311	-321
Annualised Dwelling Requirement		-19	80	74	-62
Average Annualised Dwelling Requirement	18				

Source: Zero Net Migration Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010

Population Forecast by Age:

South Lakeland	2009	2014	2019	2024	2029
0-14	15,318	13,076	12,131	11,931	12,597
15-29	14,189	16,468	17,459	15,279	13,047
30-44	18,197	14,207	11,805	14,087	16,359
45-59	22,926	22,747	21,392	17,730	13,863
60-74	21,299	22,070	22,036	21,055	21,009
75-84	8,392	8,989	10,082	12,207	12,439
85+	3,445	4,165	4,936	5,996	7,366
Total	103,766	101,722	99,842	98,286	96,679

Source: Zero Net Migration Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010

Household Forecast by Household Type:

South Lakeland					
Household Types	2009	2014	2019	2024	2029
Married couple	22,689	21,362	20,256	19,259	18,198
Cohabiting couple	4,185	4,487	4,989	5,407	5,587
Lone parent	1,890	1,723	1,551	1,468	1,468
Other multi-person	2,401	2,551	2,700	2,715	2,692
One person	15,236	16,192	17,175	18,150	18,778
All Households	46,401	46,315	46,671	47,000	46,722
Private household population	100,300	98,164	96,145	94,335	92,426
Average household size	2.16	2.12	2.06	2.01	1.98
Source: Zero Net Migration Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010					

Household Forecast by Tenure:

Using Annex Table 1.7 (Household Type by Tenure) derived from the 2008-09 English Housing Survey, which was produced by the Department for Communities and Local Government (CLG), it is possible to apportion tenure to the above household types in order to produce additional household projections by tenure.

South Lakeland					
Tenure	2009	2014	2019	2024	2029
Owner Occupiers	32,120	31,900	32,027	32,134	31,802
Social Renters	7,983	8,074	8,213	8,365	8,428
Private Renters	6,298	6,341	6,431	6,500	6,492
All Tenures	46,401	46,315	46,671	47,000	46,722
Source: Zero Net Migration Scenario, POPGROUP Forecasting Software, with Tenure Rates by Household Type applied based on English Housing Survey 2008-09 (CLG), Cumbria Intelligence Observatory, August 2010					

South Lakeland - Annualised Household Change					
Tenure	2009	2014	2019	2024	2029
Owner Occupiers		-44	25	21	-66
Social Renters		18	28	30	12
Private Renters		9	18	14	-2
All Tenures		-17	71	66	-56
Source: Zero Net Migration Scenario, POPGROUP Forecasting Software, with Tenure Rates by Household Type applied based on English Housing Survey 2008-09 (CLG), Cumbria Intelligence Observatory, August 2010					

Population Led Forecast: 5 Year Migration Scenario

This scenario uses all the information provided in the zero net migration scenario about births and deaths, but also takes account of migration. The model uses estimates of migration over the past five years to formulate **what might happen to the population if the rates of migration that we have experienced in the last 5 years continue into the future.** The migration data is weighted giving the greatest weight to migration estimates for the two most recent years.

South Lakeland	2009	2014	2019	2024	2029
Population	103,766	103,385	102,380	101,126	99,500
Households	46,401	47,245	48,332	49,397	50,042
Dwellings	52,136	53,085	54,305	55,503	56,227
5 Year Migration		1809.75	1505.72	1447.84	1436.46
5 Year Net Change		-381	-1004	-1254	-1626
Annualised Migration		362	301	290	287
Annualised Change		-76	-201	-251	-325
Annualised Dwelling Requirement		190	244	239	145
Average Annualised Dwelling Requirement	205				

Source: 5 Year Migration (Weighted) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010

Population Forecast by Age:

South Lakeland	2009	2014	2019	2024	2029
0-14	15,318	13,702	12,561	11,434	10,980
15-29	14,189	15,577	16,243	14,993	13,384
30-44	18,197	14,657	12,000	12,979	14,390
45-59	22,926	23,532	22,968	19,830	15,984
60-74	21,299	22,688	23,408	23,170	23,928
75-84	8,392	9,031	10,185	12,601	13,267
85+	3,445	4,198	5,017	6,120	7,567
Total	103,766	103,385	102,380	101,126	99,500

Source: 5 Year Migration (Weighted) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010

Household Forecast by Household Type:

South Lakeland					
Household Types	2009	2014	2019	2024	2029
Married couple	22,689	21,907	21,241	20,608	19,897
Cohabiting couple	4,185	4,545	5,080	5,606	5,980
Lone parent	1,890	1,723	1,495	1,327	1,249
Other multi-person	2,401	2,585	2,785	2,880	2,941
One person	15,236	16,486	17,730	18,976	19,976
All Households	46,401	47,245	48,332	49,397	50,042
Private household population	100,300	99,827	98,683	97,175	95,247
Average household size	2.16	2.11	2.04	1.97	1.90
Source: 5 Year Migration (Weighted) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010					

Household Forecast by Tenure:

South Lakeland					
Tenure	2009	2014	2019	2024	2029
Owner Occupiers	32,120	32,568	33,231	33,882	34,217
Social Renters	7,983	8,218	8,458	8,707	8,902
Private Renters	6,298	6,459	6,643	6,809	6,923
All Tenures	46,401	47,245	48,332	49,397	50,042
Source: 5 Year Migration (Weighted) Scenario, POPGROUP Forecasting Software, with Tenure Rates by Household Type applied based on English Housing Survey 2008-09 (CLG), Cumbria Intelligence Observatory, August 2010					

South Lakeland - Annualised Household Change					
Tenure	2009	2014	2019	2024	2029
Owner Occupiers		90	133	130	67
Social Renters		47	48	50	39
Private Renters		32	37	33	23
All Tenures		169	217	213	129
Source: 5 Year Migration (Weighted) Scenario, POPGROUP Forecasting Software, with Tenure Rates by Household Type applied based on English Housing Survey 2008-09 (CLG), Cumbria Intelligence Observatory, August 2010					

Dwelling Led Forecast: 10 Year Dwelling Led Scenario

This scenario takes the data used in the 5 year migration scenario, but this time looks at **what might happen to the forecast population if house building (net dwelling change) were to continue as it has over the last 10 years** (based on the average figure for housing completions between 1999-01 and 2008-09).

Please note that the 2009 SHMA also included a dwelling led forecast. However, the 2009 dwelling led forecast considered what might happen if house building followed the average figure for housing completions in the five years prior to the forecast; rather than the 10 year average figure used in the above forecast. For the 2010 refreshed POPGROUP forecasts, a 10 year average was used to drive the dwelling led forecast at the request of colleagues from Strategic Planning. This change in methodology was adopted as it was agreed that a 10 year average would better reflect future housing completion levels as the average figure for the last 5 years was heavily skewed by the recent instability in housing completions following the global recession.

South Lakeland	2009	2014	2019	2024	2029
Population	103,766	105,366	105,573	105,515	106,003
Households	46,401	48,034	49,667	51,299	52,932
Dwellings	52,136	53,971	55,805	57,640	59,474
5 Year Migration		3736.99	2561.93	2453.48	3354.2
5 Year Net Change		1600	206	-58	489
Annualised Migration		747	512	491	671
Annualised Change		320	41	-12	98
Annualised Dwelling Requirement		367	367	367	367
Average Annualised Dwelling Requirement	367				
Source: 10 Year Dwelling Led Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010					

Population Forecast by Age:

South Lakeland	2009	2014	2019	2024	2029
0-14	15,318	13,996	13,120	12,274	12,164
15-29	14,189	16,207	17,042	15,785	14,576
30-44	18,197	15,068	12,756	14,226	16,223
45-59	22,926	23,847	23,481	20,499	16,924
60-74	21,299	22,917	23,800	23,710	24,762
75-84	8,392	9,095	10,290	12,803	13,612
85+	3,445	4,237	5,084	6,217	7,743
Total	103,766	105,366	105,573	105,515	106,003
Source: 10 Year Dwelling Led Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010					

Household Forecast by Household Type:

South Lakeland					
Household Types	2009	2014	2019	2024	2029
Married couple	22,689	22,215	21,737	21,298	20,917
Cohabiting couple	4,185	4,679	5,322	5,953	6,512
Lone parent	1,890	1,773	1,575	1,432	1,397
Other multi-person	2,401	2,630	2,860	2,981	3,094
One person	15,236	16,737	18,173	19,635	21,012
All Households	46,401	48,034	49,667	51,299	52,932
Private household population	100,300	101,808	101,876	101,564	101,750
Average household size	2.16	2.12	2.05	1.98	1.92
Source: 10 Year Dwelling Led Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010					

Household Forecast by Tenure:

South Lakeland					
Tenure	2009	2014	2019	2024	2029
Owner Occupiers	32,120	33,106	34,141	35,178	36,186
Social Renters	7,983	8,359	8,698	9,049	9,423
Private Renters	6,298	6,569	6,828	7,072	7,323
All Tenures	46,401	48,034	49,667	51,299	52,932
Source: 10 Year Dwelling Led Scenario, POPGROUP Forecasting Software, with Tenure Rates by Household Type applied based on English Housing Survey 2008-09 (CLG), Cumbria Intelligence Observatory, August 2010					

South Lakeland - Annualised Household Change					
Tenure	2009	2014	2019	2024	2029
Owner Occupiers		197	207	208	201
Social Renters		75	68	70	75
Private Renters		54	52	49	50
All Tenures		327	327	327	327
Source: 10 Year Dwelling Led Scenario, POPGROUP Forecasting Software, with Tenure Rates by Household Type applied based on English Housing Survey 2008-09 (CLG), Cumbria Intelligence Observatory, August 2010					

Population Led Forecast: 10 Year Migration Scenario

Like the 10 year dwelling led scenario, this 10 year migration scenario was also produced by the CIO in response to instability experienced in recent years.

Like the 5 Year Migration scenario, this scenario is uses all the information provided in the zero net migration scenario and takes account of migration. However, this scenario uses estimates of migration over the past ten years to formulate **what might happen to the population if the rates of migration that we have experienced in the last 10 years continue into the future.**

The migration data used in this scenario is not weighted; the model gives equal weight to each of the last ten years worth of migration data. This method offers some helpful insight in to **what would happen to the population should migration follow more longitudinal trends rather than recent short-term trends; which we know have been particularly erratic over the last five years.**

South Lakeland	2009	2014	2019	2024	2029
Population	103,766	104,381	104,490	104,395	103,870
Households	46,401	48,044	49,712	51,205	52,222
Dwellings	52,136	53,982	55,856	57,533	58,677
5 Year Migration		2815.44	2679.01	2733.92	2729.2
5 Year Net Change		615	109	-95	-525
Annualised Migration		563	536	547	546
Annualised Change		123	22	-19	-105
Annualised Dwelling Requirement		369	375	335	229
Average Annualised Dwelling Requirement	327				

Source: 10 Year Migration (Equal Weights) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010

Population Forecast by Age:

South Lakeland	2009	2014	2019	2024	2029
0-14	15,318	13,924	12,946	11,928	11,603
15-29	14,189	14,843	15,026	13,892	12,587
30-44	18,197	15,018	12,495	13,077	13,878
45-59	22,926	24,114	24,074	21,248	17,559
60-74	21,299	23,054	24,315	24,748	26,182
75-84	8,392	9,157	10,454	13,094	14,038
85+	3,445	4,270	5,180	6,408	8,024
Total	103,766	104,381	104,490	104,395	103,870

Source: 10 Year Migration (Equal Weights) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010

Household Forecast by Household Type:

South Lakeland					
Household Types	2009	2014	2019	2024	2029
Married couple	22,689	22,343	22,023	21,620	21,025
Cohabiting couple	4,185	4,564	5,004	5,395	5,689
Lone parent	1,890	1,757	1,551	1,399	1,329
Other multi-person	2,401	2,601	2,809	2,932	3,050
One person	15,236	16,779	18,325	19,859	21,129
All Households	46,401	48,044	49,712	51,205	52,222
Private household population	100,300	100,823	100,793	100,444	99,617
Average household size	2.16	2.10	2.03	1.96	1.91
Source: 10 Year Migration (Equal Weights) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, August 2010					

Household Forecast by Tenure:

South Lakeland					
Tenure	2009	2014	2019	2024	2029
Owner Occupiers	32,120	33,122	34,174	35,091	35,648
Social Renters	7,983	8,358	8,712	9,056	9,339
Private Renters	6,298	6,564	6,826	7,057	7,236
All Tenures	46,401	48,044	49,712	51,205	52,222
Source: 10 Year Migration (Equal Weights) Scenario, POPGROUP Forecasting Software, with Tenure Rates by Household Type applied based on English Housing Survey 2008-09 (CLG), Cumbria Intelligence Observatory, August 2010					

South Lakeland - Annualised Household Change					
Tenure	2009	2014	2019	2024	2029
Owner Occupiers		200	210	183	111
Social Renters		75	71	69	56
Private Renters		53	52	46	36
All Tenures		329	334	298	204
Source: 10 Year Migration (Equal Weights) Scenario, POPGROUP Forecasting Software, with Tenure Rates by Household Type applied based on English Housing Survey 2008-09 (CLG), Cumbria Intelligence Observatory, August 2010					

Labour Force Led Forecast: Experian Jobs Forecast February 2011

In December 2010 Cumbria Intelligence Observatory began working with Experian to produce a modified baseline employment forecast for Cumbria, using Experian's standard forecasts as a start point. The purpose of this work was to ensure that local factors were fully captured rather than relying on national and regional assumptions about impacts. A workshop was held with project partners and findings from the 2010 Cumbria Business Survey were also used to take account of particular factors which may influence Experian's standard forecasts. Factors taken into account were:

- Likely pace and scale of public sector restructuring in Cumbria;
- Potential for employment in the renewables sector;
- Impact of decommissioning;
- Potential for nuclear new build;
- Positive industry sentiment in the hotel & catering sector;
- Carlisle's growth point aspirations;
- Retail developments such as Penrith New Squares and other supermarket developments;
- Expectations about the BAe Systems workforce in Barrow;
- Optimism around the ports in Barrow and Workington;
- Negative trends in the construction sector.

The result of the above work was that employment in the public administration, education, construction and fuel refining sectors was revised downwards from the original Experian baseline whilst employment in the transport, transport equipment and hotels and catering sectors was revised upwards. The overall effect of these revisions was that under the modified baseline for Cumbria, finalised in February 2011, employment was forecast to decline by around 4,500 in 2011 and a little further in 2012, before returning to modest growth thereafter. By 2016, employment was expected to have recovered to 2010 levels and by 2020 to have grown by 1.2% compared to 2010.

The table below shows how the numbers of Full Time Equivalent (FTE) jobs are predicted to change within the district from an initial position in 2009 through to 2024; based on the modified Experian baseline forecast outlined above.

Experian Jobs Forecast - February 2011							
	2009	2014	2019	2024	2009-2024		
	FTEs	FTEs	FTEs	FTEs	No. Change	% Change	Annual % Change
South Lakeland	46,855	46,740	48,088	49,301	2,447	5.2	0.35

Source: Experian (2011) - Provided by Cumbria County Council, Economic Development

The following scenario takes the data used in the 5 year migration scenario, but this time looks at **what might happen to the forecast population, and the associated housing requirement, if the annual net change in jobs was to follow the latest FTE job forecasts** (produced by Experian and provided by Cumbria County Council's Economic Development Department - February 2011).

It is important to note that the employment led scenario assumes that economic activity levels will remain stable into the future. Therefore, the additional labour needed to support any employment growth must be derived from population growth rather than increased

economic activity among the existing population. However, there are a number of factors which may influence economic activity in the next decade, for example: changes to the benefit system; increased retirement age; and new employment opportunities. Should economic activity levels increase as a result of these factors, the dwelling requirement associated with employment growth would reduce.

Furthermore, it is vital to understand that the employment led scenario assumes that the additional workforce will become available to fill new jobs following employment growth. However, in reality, it is possible that the additional workforce may not become available to fill new jobs and so the availability of labour may act as a constraint on employment growth and therefore the number of dwellings that may be required.

South Lakeland	2009	2014	2019	2024
Population	103,766	105,145	110,073	115,619
Households	46,401	47,915	51,469	55,663
Dwellings	52,136	53,837	57,830	62,542
5 Year Migration		3574.02	7177.19	7534.51
5 Year Net Change		1379	4928	5546
Annualised Migration		715	1435	1507
Annualised Change		276	986	1109
Annualised Dwelling Requirement		340	799	942
Average Annualised Dwelling Requirement	694			
Source: Labour Force Led - Experian Jobs Forecast (February 2011) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, February 2011				

Population Forecast by Age:

South Lakeland	2009	2014	2019	2024
0-14	15,318	13,921	13,644	13,851
15-29	14,189	16,258	19,044	18,581
30-44	18,197	14,957	13,382	17,008
45-59	22,926	23,806	24,108	21,716
60-74	21,299	22,872	24,266	24,827
75-84	8,392	9,096	10,447	13,171
85+	3,445	4,234	5,183	6,465
Total	103,766	105,145	110,073	115,619
Source: Labour Force Led - Experian Jobs Forecast (February 2011) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, February 2011				

Household Forecast by Household Type:

South Lakeland				
Household Types	2009	2014	2019	2024
Married couple	22,689	22,162	22,345	22,741
Cohabiting couple	4,185	4,659	5,697	6,882
Lone parent	1,890	1,765	1,680	1,679
Other multi-person	2,401	2,627	2,982	3,239
One person	15,236	16,701	18,765	21,122
All Households	46,401	47,915	51,469	55,663
Private household population	100,300	101,587	106,376	111,668
Average household size	2.16	2.12	2.07	2.01

Source: Labour Force Led - Experian Jobs Forecast (February 2011) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, February 2011

Household Forecast by Tenure:

South Lakeland				
Tenure	2009	2014	2019	2024
Owner Occupiers	32,120	33,023	35,365	38,148
Social Renters	7,983	8,338	9,022	9,834
Private Renters	6,298	6,553	7,082	7,681
All Tenures	46,401	47,915	51,469	55,663

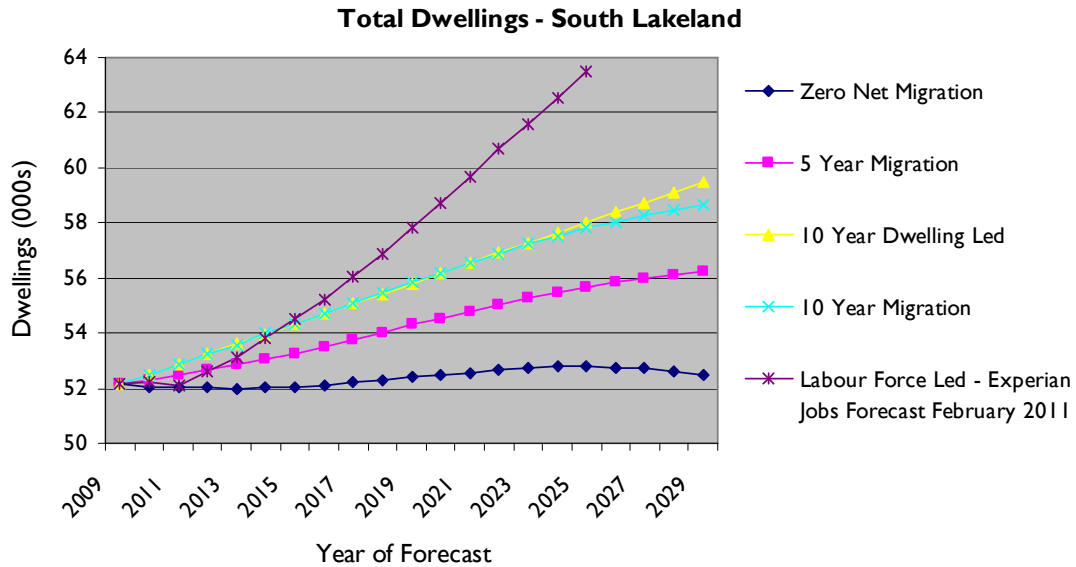
Source: Labour Force Led - Experian Jobs Forecast (February 2011) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, February 2011

South Lakeland - Annualised Household Change				
	2009	2014	2019	2024
Owner Occupiers		181	468	557
Social Renters		71	137	163
Private Renters		51	106	120
All Tenures		303	711	839

Source: Labour Force Led - Experian Jobs Forecast (February 2011) Scenario, POPGROUP Forecasting Software, Cumbria Intelligence Observatory, February 2011

Comparing 2010 POPGROUP Scenarios: Dwelling Requirements

As we have seen in the previous sections, the forecast population and associated dwelling requirements vary significantly depending upon the assumptions we make about the future. The graph below compares the number of dwellings required to support the populations forecast by each of the five scenarios discussed above.



As stated earlier, like all population forecasting outputs, POPGROUP outputs are simply a representation of what might happen in the future if various trends are played out as we expect. It is especially important to note that POPGROUP Scenarios can only be driven by one factor at a time (population, dwellings or the labour force). However, in reality, we know that these factors are inter-linked and dependent upon one and other, so it is very unlikely that one factor will exclusively drive change in an area.

As a result, these projections cannot be relied upon as fact, and actual results may end up being significantly different to what the scenarios suggest will happen. This should be kept in mind at all times when using the outputs, and caution should be used when incorporating the outputs into any decision making processes. Instead figures should be viewed as a guide to indicate the potential parameters for housing demand, should various scenarios arise.

For more information about POPGROUP Forecasting please contact Cumbria Intelligence Observatory: info@cumbriaobservatory.org.uk