

Inspector Query Summary: *The letter notes that new 2022-based population and household projections were published by StatsWales on 20 November 2025, replacing the older 2018-based projections currently used in Pembrokeshire’s Local Development Plan (LDP) 2. Although projections for national parks (including Pembrokeshire Coast National Park) have not yet been released, the updated figures for local authorities may have significant implications for the plan’s housing strategy.*

To support the ongoing examination of LDP 2, you are requested to review the new 2022-based household projections for Pembrokeshire and provide a short paper outlining any potential impacts on the plan, based on the information currently available.

Council Response: The Council has engaged Edge Analytics to assist in answering the above query. The Council also provided a copy of the Inspectors’ letter to the Consultants.

Chapter 3 of the Edge Analytics Report ED06b* provides a summary of the LDP 2 and WG Scenarios Compared.

A further table has been provided by Edge Analytics below so the reader has a rough guide as to the differences between the two scenarios (WG & LDP 2) in terms of dwelling numbers per annum anticipated using an averaging approach. Please note that WG has not at this stage published an evaluation of associated dwelling growth. These data releases are awaited (paragraph 3.7 of Edge Analytics Report 2026).

Scenario or	Change 2017–2033			Average per year		
	Population Change %	Household Change	Household Change %	Net Migration	Natural Change	Dwellings
WG Projection						
2022-Based Principal*	11.10%	7,017	15.80%	1,089	-382	561
2022-Based 15yr Migration*	6.40%	4,741	10.70%	801	-382	395
WG Average	8.75%	5,879	13.25%	945	-382	478
LDP 2						
Dwelling-led (10yr Average)	9.80%	5,577	12.40%	955	-331	379
Dwelling-led (5yr Average)	10.90%	6,058	13.50%	1,023	-323	412
PG Long Term	6.50%	4,342	9.70%	771	-353	295

PCC Average	9.07%	5,326	11.87%	916	-336	362
WG Average vs LDP 2 Average	-0.32%	553	1.38%	46	46	116

The main findings of the report are (chapter 3 and 4) that:

- the population growth average of the WG Principal and WG 15-year scenarios is lower than that of the LDP2 scenarios.
- Conversely, household growth averages are higher, confirming the combined effect of altered population inputs and revised household membership rates.
- Awaiting further key assumptions on the WG's household model, a dwelling-growth impact assessment is not included in the main report, but anticipated household growth under the WG scenarios is noticeably higher due to the important revisions to population and household inputs and assumptions.
- Household growth differences are noticeably higher in the WG variants, where post-Census population inputs and revised membership rates have lifted the estimated rate of household growth over the 2017-33 projection period.
- More specifically in the WG projections migration is projected to be the key driver of future population change across much of Wales. For Pembrokeshire, higher net-migration inflows have been a feature of its demographic profile post-2015, peaking in 2019/20 and 2020/21, reducing thereafter. Much of the net inflow has been 'cross-border' from English local authorities, with high net gains of 45–64-year-olds, countered by net losses of 16– 24-year-olds (see graphs between paragraphs 2.5 and 2.6 of the Edge report). A continuation of these recent trends is not a certainty but is the key driver of the high growth outcome of the latest WG Principal scenario.

Conclusion: The Council has taken a long-term view in determining its housing requirement (365 per annum) taking account of the likelihood of there being a higher rate of development influencing the Housing Requirement (dwelling led 5 year average 413 per annum) in part. The Housing Requirement Paper 2023 (SD45) sets out in detail various drivers for change in the County area. As the Edge Analytics 2026 Paper advises: *Balancing the short-term and long-term historical perspective in judging the material impact of the new WG output upon LDP2 evidence would seem to be an imperative given the continuing uncertainty associated with the longer-term impact of social, economic and political events upon the UK landscape. (paragraph 4.3)* The WG 15-year Migration figure (rough rule of thumb estimate of 395 dwellings per annum) is closest to the Housing Requirement figure (365 per annum) but it would be unwise to seek to re-visit the housing requirement based primarily on the increase in in-migration focused around the Covid period which has driven the changes in household growth in Pembrokeshire more recently.

It should also be noted that the Plan's Housing Requirement (Policy SP 2) includes a 10% flexibility allowance, which would provide for the equivalent of 401 dwellings per annum if needed. Paragraph 5.9 LDP Manual 3(SD66) advises '*The plan will need to evidence there is sufficient flexibility above the requirement to account for non-delivery and unforeseen issues.*'

No change is proposed.