

South Hampshire Strategic Housing Market Assessment

Partnership for Urban South Hampshire

Final Report: Appendices

Version 1: January 2014

Prepared by

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APPENDIX A: WARDS IN SELECTED AUTHORITIES FALLING WITHIN THE PUSH SUB-REGION

Local Authority	Wards
East Hampshire	<ul style="list-style-type: none"> • Horndean Downs • Horndean Catherington and Lovedean • Horndean Hazleton and Blendworth • Horndean Murray • Horndean Kings • Rowlands Castle • Clanfield and Finchdean Ward
New Forest	<ul style="list-style-type: none"> • Totton North • Totton East • Totton South • Totton West • Totton Central • Marchwood • Dibden and Hythe East • Hythe West and Langdown • Butts Ash and Dibden Purlieu • Furzedown and Hardley • Holbury and North Blackfield • Fawley, Blackfield and Langley Ward
Test Valley	<ul style="list-style-type: none"> • Romsey Extra • Cupernham • Abbey • Tadburn • North Baddesley • Valley Park • Chilworth, Nursling and Rownhams • Ampfield and Braishfield
Winchester	<ul style="list-style-type: none"> • Colden Common and Twyford • Owslebury and Curdrige • Bishops Waltham • Shedfield • Whiteley • Denmead • Boarhunt and Southwick • Swanmore and Newtown • Wickham

APPENDIX B: DEFINITION OF THE PORTSMOUTH HMA (PUSH EAST)

Local Authority	Wards
Gosport	All
Havant	All
Portsmouth	All
Fareham (East Wards)	<ul style="list-style-type: none"> • Porchester East • Porchester West • Fareham East • Fareham North • Fareham North West • Fareham West • Fareham South • Stubbington • Hill Head • Tichfield*
East Hampshire (Part)	<ul style="list-style-type: none"> • Horndean Downs • Horndean Catherington and Lovedean • Horndean Hazleton and Blendworth • Horndean Murray • Horndean Kings • Rowlands Castle • Clanfield and Finchdean Ward
Winchester (East Wards)	<ul style="list-style-type: none"> • Denmead • Boarhunt and Southwick • Swanmore and Newtown* • Wickham

APPENDIX C: DEFINITION OF THE SOUTHAMPTON HMA (PUSH WEST)

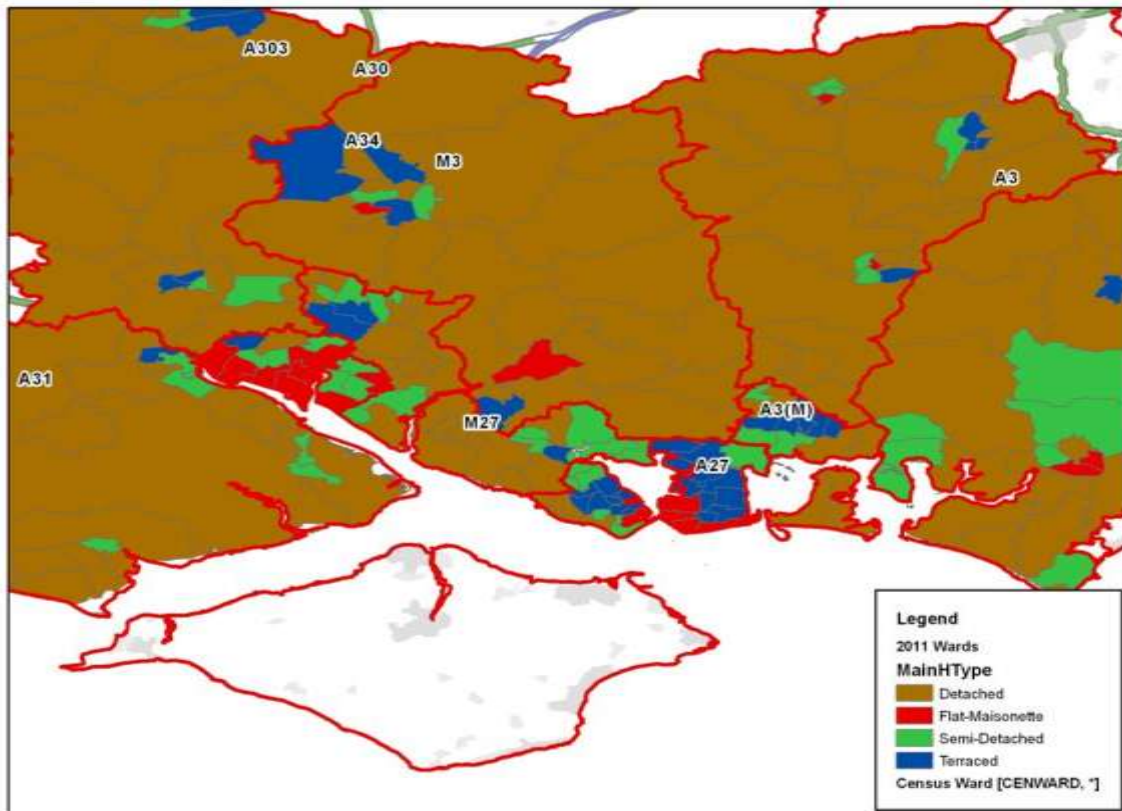
Local Authority	Wards
Eastleigh	All
Southampton	All
Fareham (West Wards)	<ul style="list-style-type: none"> • Warsash • Titchfield Common • Locks Heath • Park Gate • Sarisbury
New Forest (Part)	<ul style="list-style-type: none"> • Totton North • Totton East • Totton South • Totton West • Totton Central • Marchwood • Dibden and Hythe East • Hythe West and Langdown • Butts Ash and Dibden Purlieu • Furzedown and Hardley • Holbury and North Blackfield • Fawley, Blackfield and Langley Ward
Test Valley	<ul style="list-style-type: none"> • Romsey Extra • Cupernham • Abbey • Tadburn • North Baddesley • Valley Park • Chilworth, Nursling and Rownhams • Ampfield and Braishfield
Winchester (West Wards)	<ul style="list-style-type: none"> • Colden Common and Twyford • Owslebury and Curdrige • Bishops Waltham • Shedfield • Whiteley

APPENDIX D: PRICES FOR A STANDARD PROPERTY, SUMMER 2013

Zoopla Z Index House Prices			
Gosport	£160,453	Hythe	£242,928
		Eastleigh	£246,725
Portsmouth	£172,078	Bursledon	£248,295
Cosham	£180,356	Hayling Island	£249,457
Southsea	£180,846		
Havant	£190,760	Hilsea	£251,193
Cowplain	£199,556	Horndean	£256,449
		Stubbington	£257,869
Totton	£205,270	Wickham	£267,539
Portchester	£207,158	Titchfield	£271,516
Park Gate	£212,594	Botley	£273,105
Southampton	£216,815	Bishops Waltham	£286,338
Southwick	£222,354	Chandlers Ford	£290,066
Hedge End	£227,471	Waltham Chase	£300,047
Fawley	£228,522	Emsworth	£301,190
Fareham	£230,928	Romsey	£330,233
Waterlooville	£230,928	BurrIDGE	£497,866
		Curdrige	£568,324

APPENDIX E: PREDOMINANT HOUSE TYPE (WARD LEVEL)

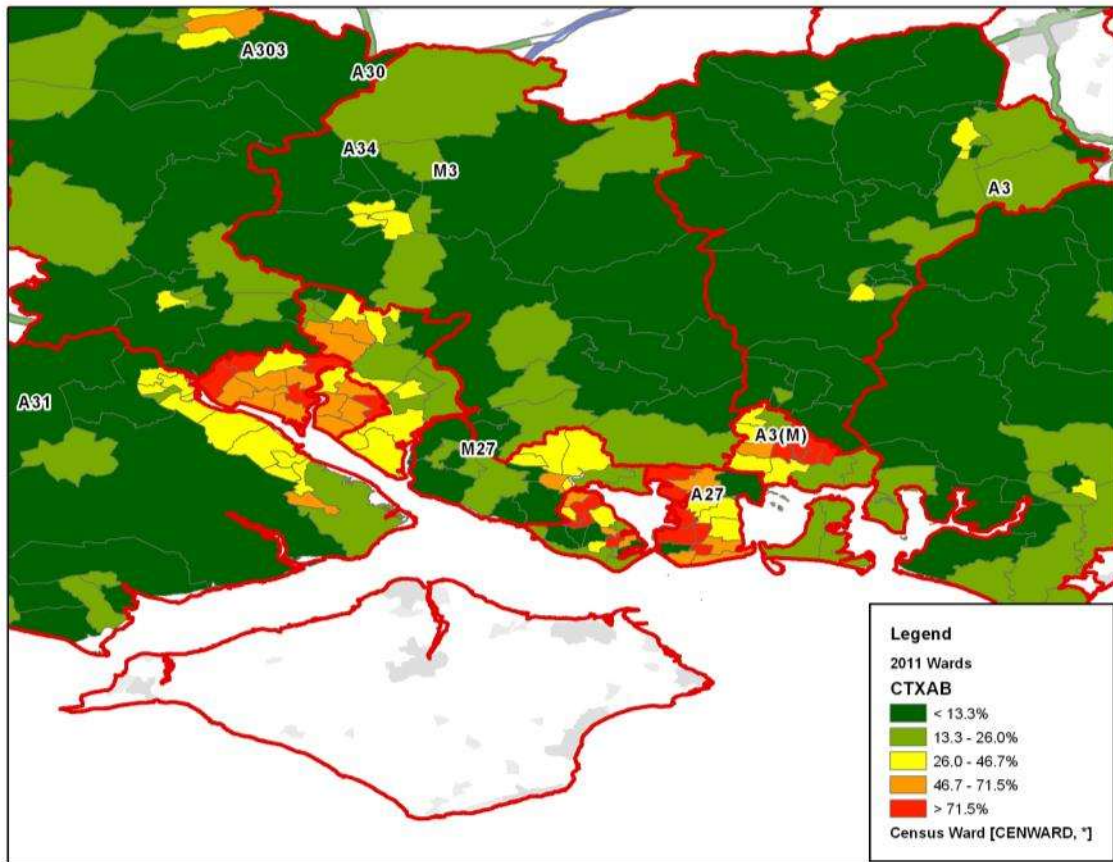
PUSH Strategic Housing Market Assessment Predominant House Type: Ward-Level, 2011



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APPENDIX F: PROPERTIES IN COUNCIL TAX BANDS A & B (WARD LEVELS)

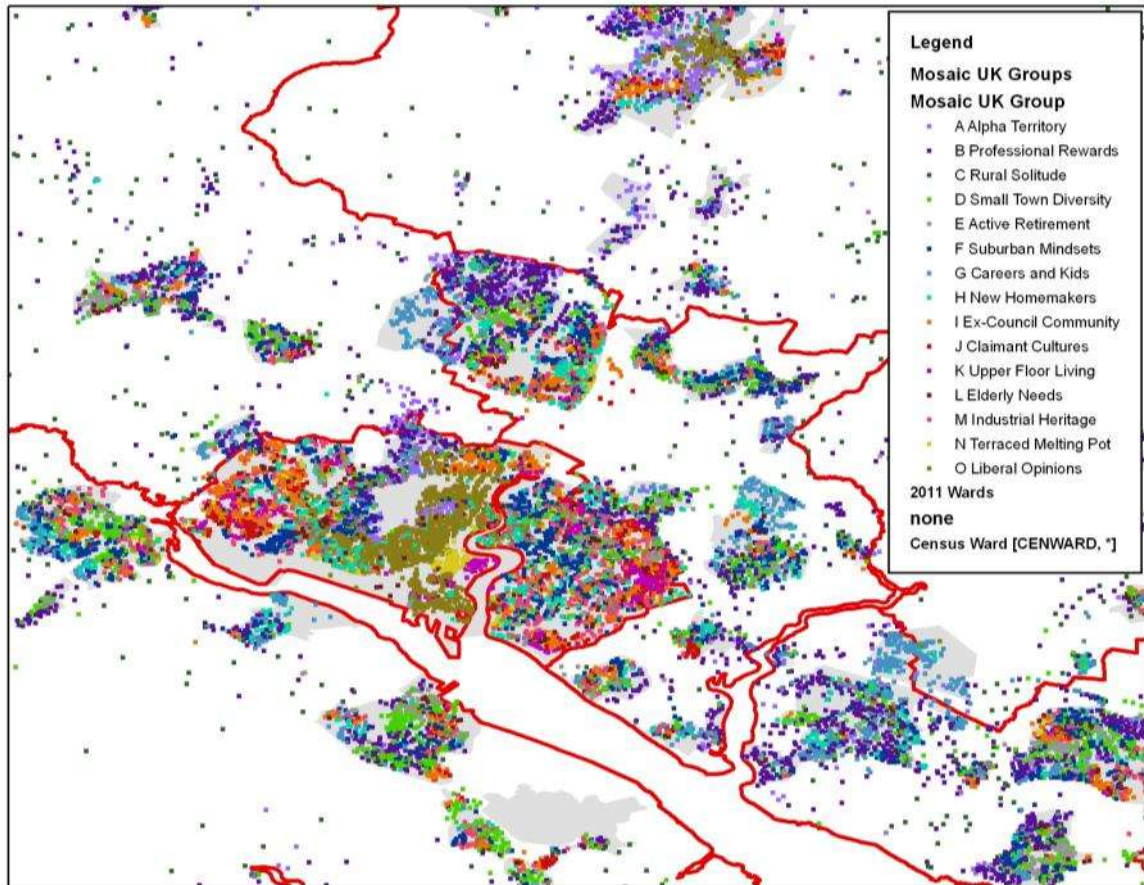
PUSH Strategic Housing Market Assessment
% Properties in Council Tax Bands A & B, 2011



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APPENDIX G: ACORN MOSAIC GROUPS, WEST OF PUSH AREA

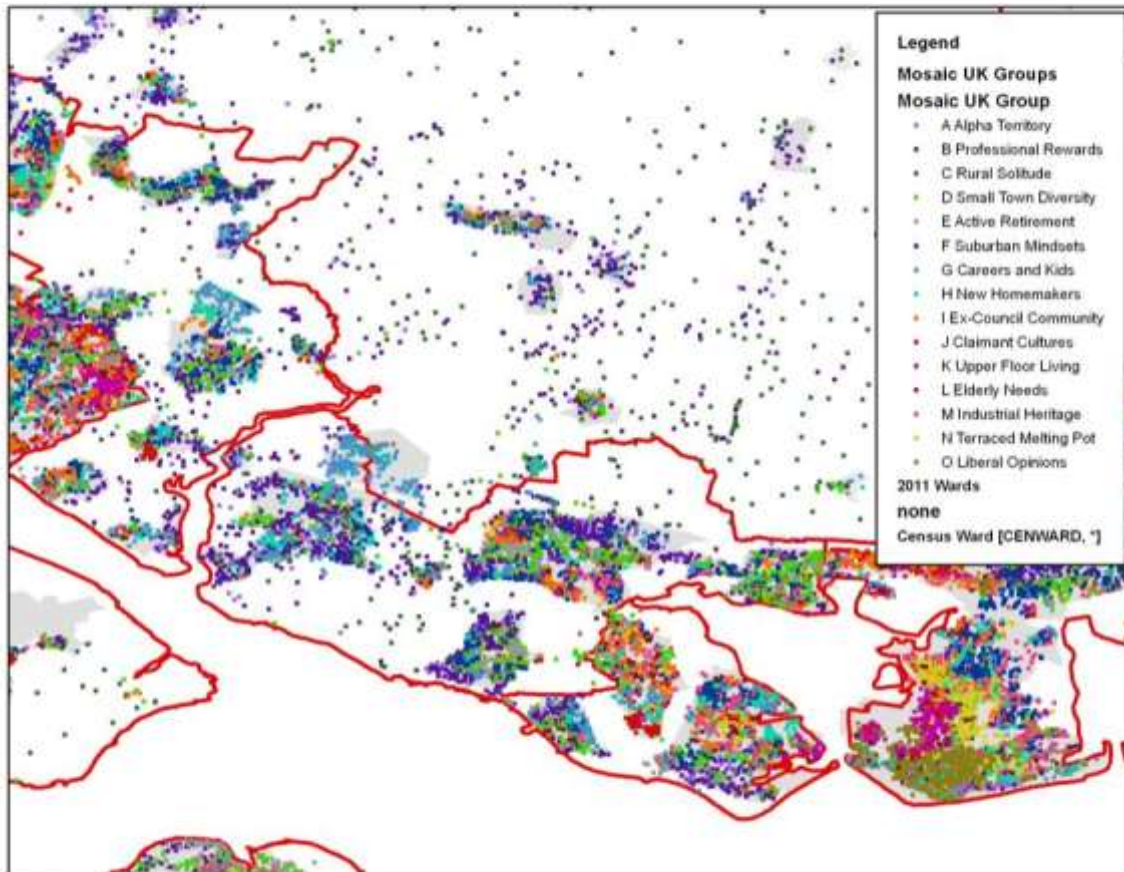
PUSH Strategic Housing Market Assessment Experian Mosaic Classification (Groups): West



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APPENDIX H: ACORN MOSAIC GROUPS, CENTRAL PART OF PUSH AREA

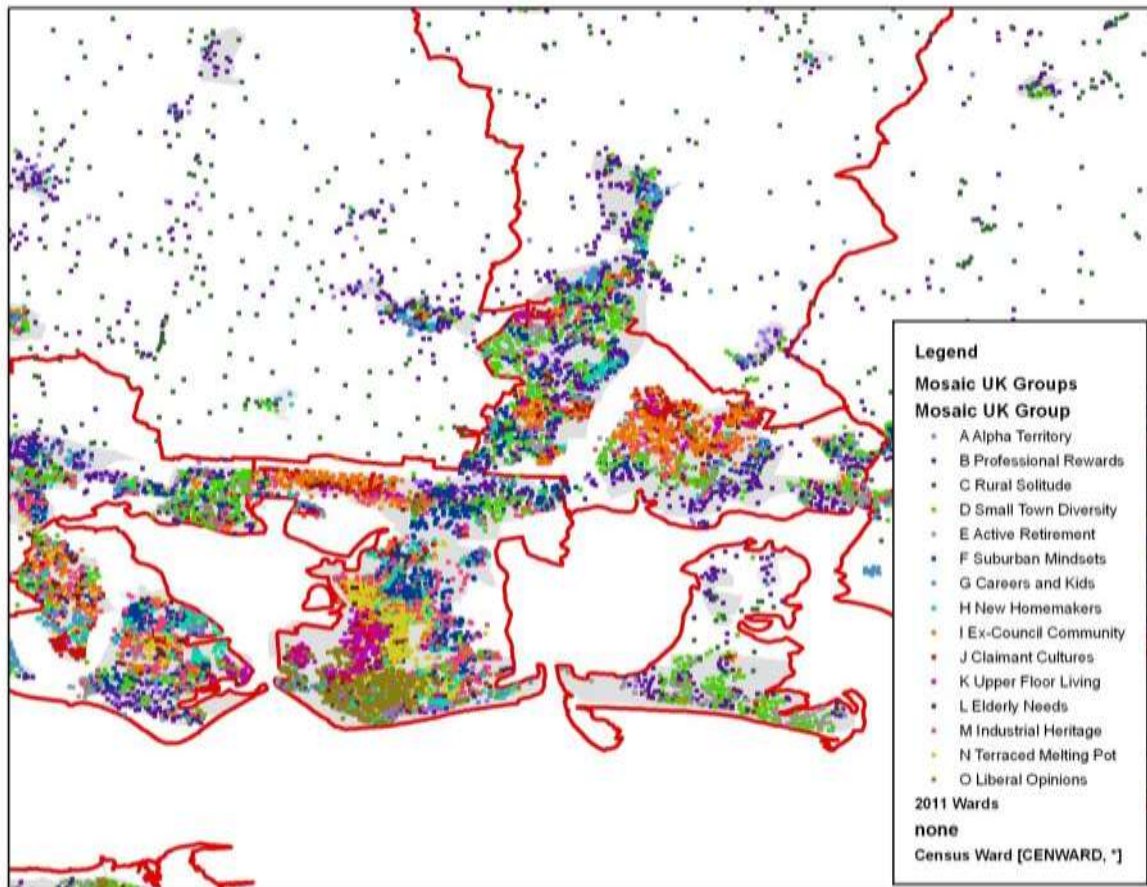
PUSH Strategic Housing Market Assessment Experian Mosaic Classification (Groups): Central



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APPENDIX I: ACORN MOSAIC GROUPS, EAST OF PUSH AREA

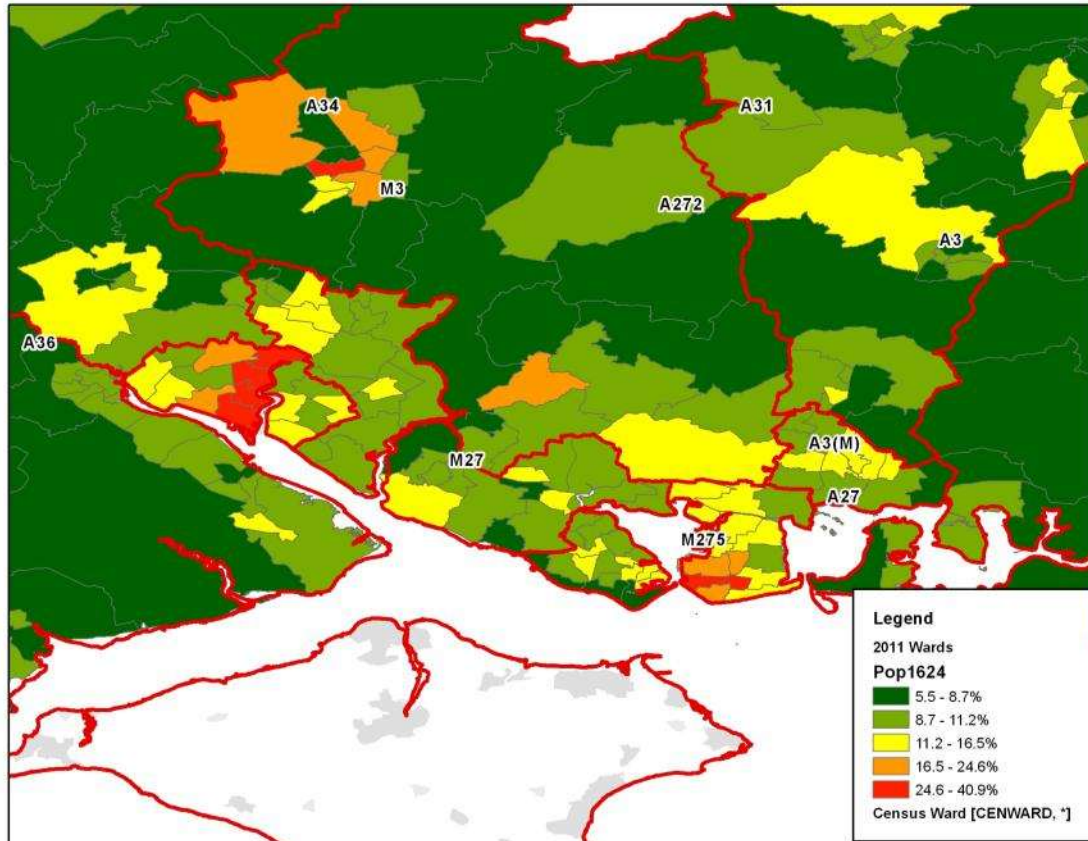
PUSH Strategic Housing Market Assessment Experian Mosaic Classification (Groups): East



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APPENDIX J: POPULATION AGED 16-24 IN 2011 (WARD LEVEL)

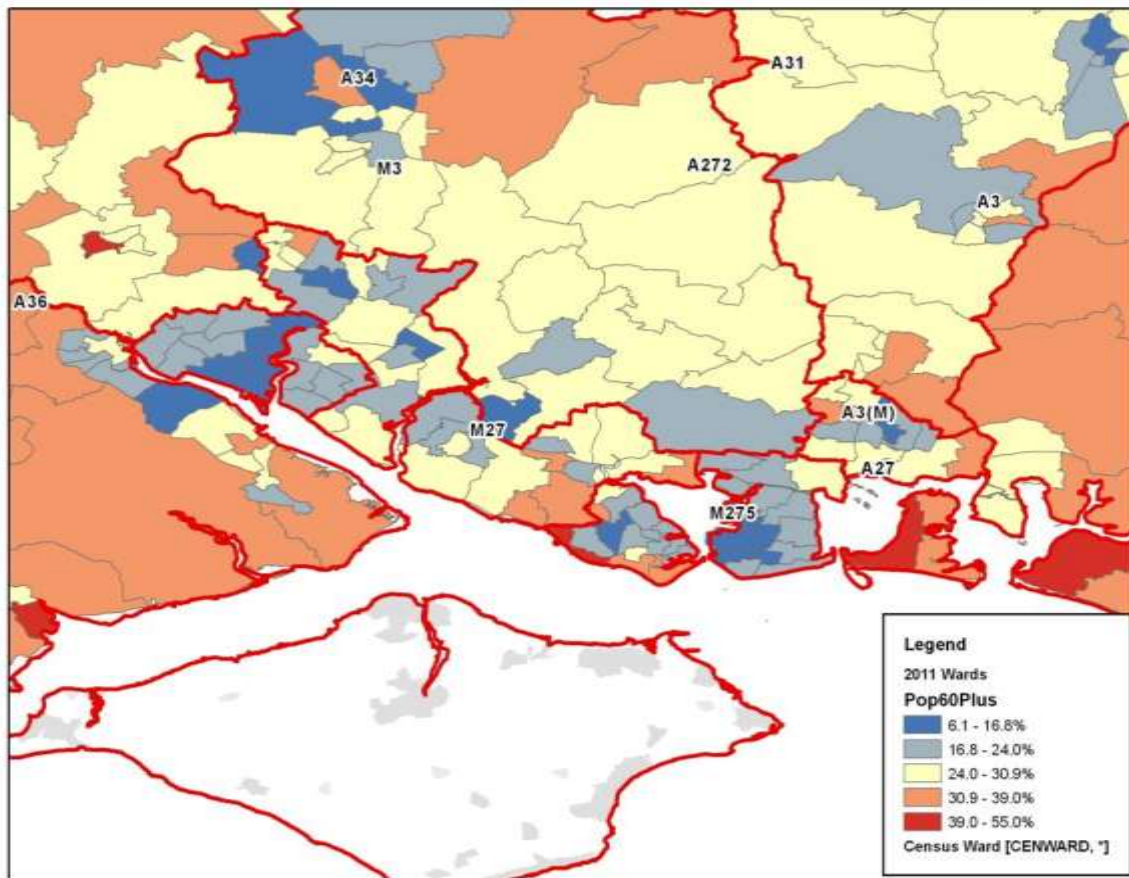
PUSH Strategic Housing Market Assessment
% Population Aged 16-24, 2011



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APPENDIX K: POPULATION AGED OVER 60, 2011 (WARD LEVEL)

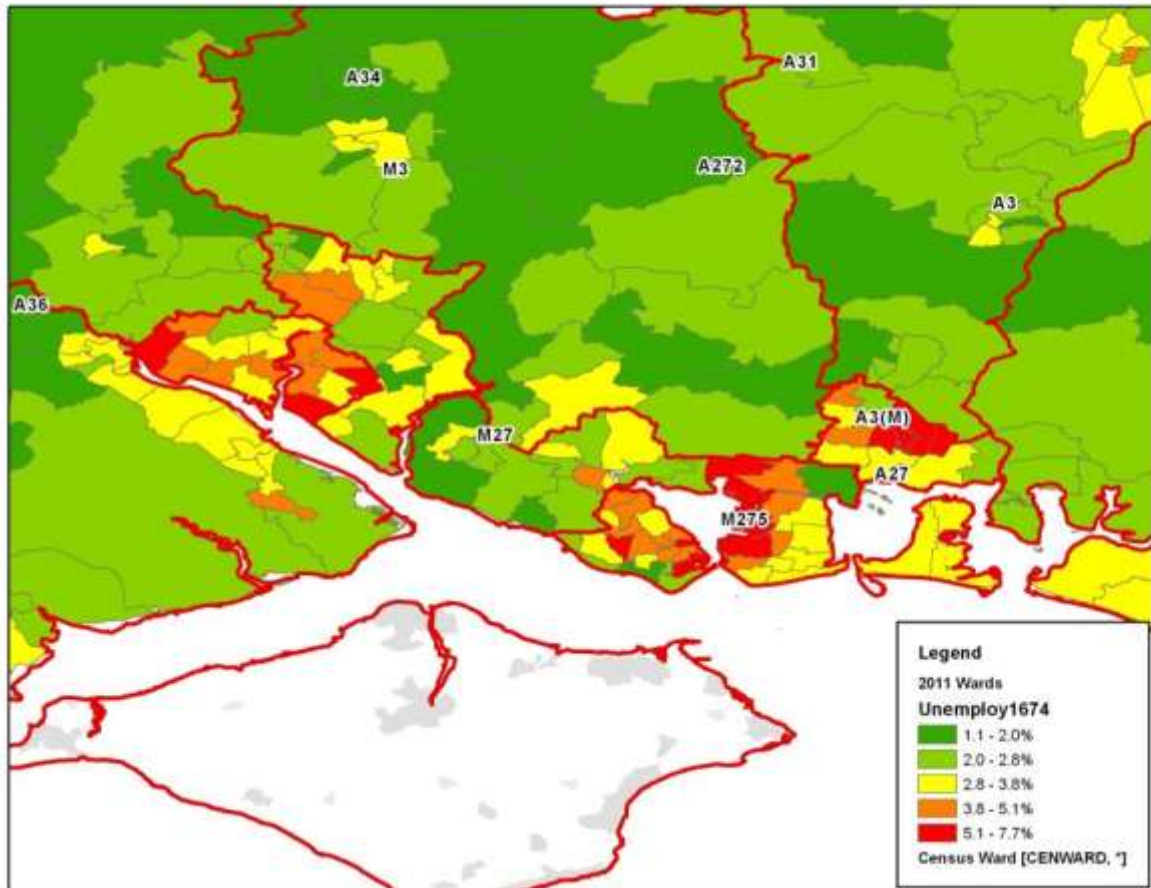
PUSH Strategic Housing Market Assessment % Population Aged 60 and Over, 2011



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APPENDIX L: UNEMPLOYMENT, 2011

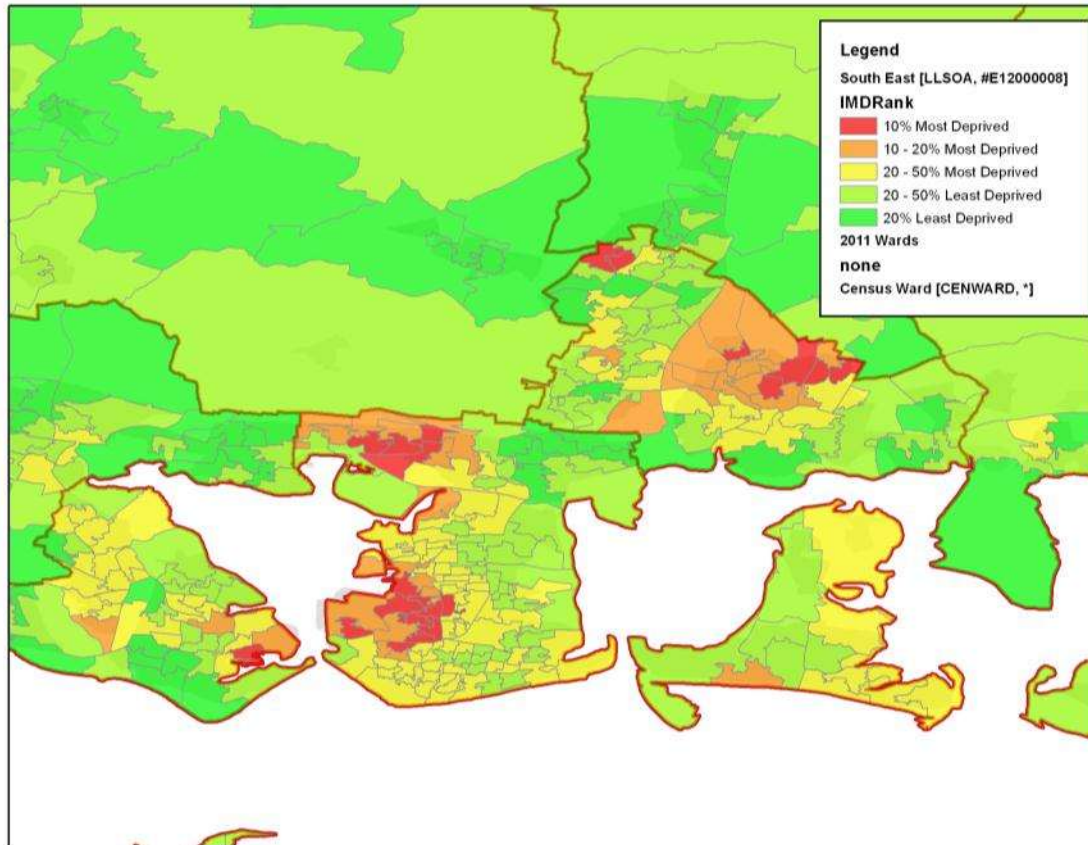
PUSH Strategic Housing Market Assessment Unemployment (% Population 16-74), 2011



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APPENDIX M: DEPRIVATION IN THE PORTSMOUTH HMA, 2010

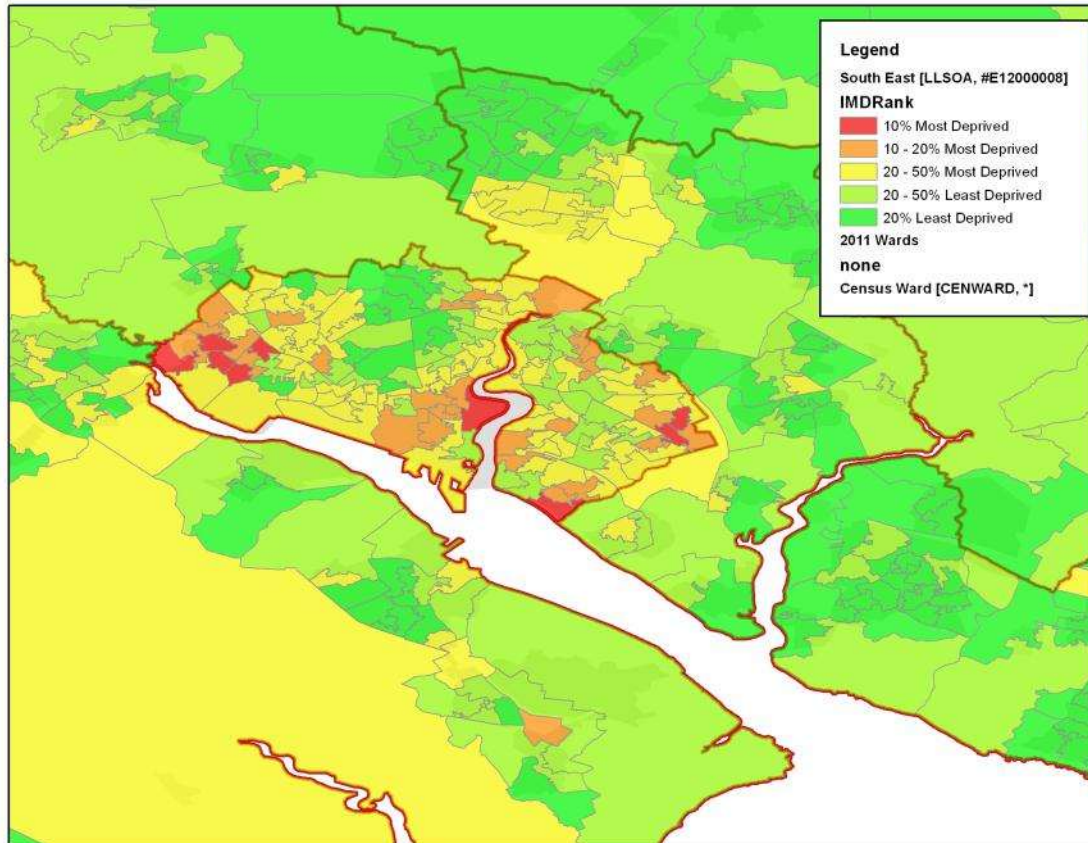
PUSH Strategic Housing Market Assessment
Index of Deprivation: 2010



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APPENDIX N: DEPRIVATION IN THE SOUTHAMPTON HMA, 2010

PUSH Strategic Housing Market Assessment Index of Deprivation: 2010



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APPENDIX O: DETAILED TENURE PROFILE (DISTRICTS, 2011)

	Owned	Shared Ownership	Social Rented	Private Rented	Living Rent Free
East Hampshire (Part)	83.5%	0.4%	7.3%	7.8%	1.0%
New Forest (Part)	74.1%	0.7%	13.1%	11.2%	0.9%
Test Valley (Part)	78.7%	0.4%	9.4%	10.3%	1.1%
Winchester (Part)	75.2%	0.8%	10.2%	12.0%	1.7%
Eastleigh	73.5%	1.1%	12.3%	12.3%	0.8%
Fareham	80.4%	0.6%	8.1%	10.0%	0.9%
Gosport	65.2%	1.1%	16.4%	16.3%	1.0%
Havant	69.0%	0.5%	19.6%	9.9%	1.0%
Portsmouth	54.9%	1.0%	18.3%	24.7%	1.2%
Southampton	49.7%	1.0%	23.3%	24.9%	1.1%
PUSH area	64.6%	0.9%	16.4%	17.1%	1.0%
PUSH East HMA	65.1%	0.8%	16.3%	16.7%	1.1%
PUSH West HMA	64.1%	0.9%	16.5%	17.5%	1.0%
Hampshire	71.5%	0.9%	13.8%	12.5%	1.2%
South East	67.6%	1.1%	13.7%	16.3%	1.3%
England	63.3%	0.8%	17.7%	16.8%	1.3%

Source: 2011 Census

APPENDIX P: HOUSE TYPES (DISTRICTS, 2011)

	Detached	Semi -Detached	Terraced	Flats
East Hampshire (Part)	55.9%	24.0%	11.6%	8.1%
New Forest (Part)	37.1%	28.4%	21.9%	11.4%
Test Valley (Part)	43.0%	23.1%	21.9%	11.1%
Winchester (Part)	44.3%	25.1%	18.2%	10.3%
Eastleigh	33.7%	27.8%	22.0%	15.7%
Fareham	36.4%	32.1%	18.8%	12.3%
Gosport	13.4%	26.7%	36.6%	23.0%
Havant	28.3%	28.7%	24.1%	18.6%
Portsmouth	4.2%	15.8%	45.2%	33.9%
Southampton	13.2%	26.0%	21.2%	38.7%
PUSH Area	22.8%	25.2%	27.1%	24.1%
PUSH East HMA	18.2%	24.3%	33.1%	23.9%
Push West HMA	27.4%	26.2%	21.1%	24.3%
Hampshire	34.5%	26.8%	22.5%	15.4%
South East	28.2%	28.1%	22.5%	20.3%
England	22.4%	31.2%	24.5%	21.2%

Source: 2011 Census

APPENDIX Q: NUMBER OF BEDROOMS (DISTRICT)

	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5 or more bedrooms
East Hampshire (Part)	5.8%	19.4%	38.8%	29.2%	6.6%
New Forest (Part)	8.4%	25.2%	47.4%	16.0%	2.9%
Test Valley (Part)	7.8%	19.7%	41.0%	24.9%	6.4%
Winchester (Part)	7.8%	21.5%	36.1%	25.5%	9.0%
Eastleigh	9.0%	25.6%	42.2%	18.6%	4.3%
Fareham	7.6%	22.6%	43.3%	21.7%	4.7%
Gosport	12.2%	29.2%	45.0%	10.8%	2.6%
Havant	10.6%	26.2%	44.5%	15.1%	3.2%
Portsmouth	15.3%	29.2%	41.8%	9.8%	3.6%
Southampton	12.9%	26.6%	41.6%	14.6%	4.1%
PUSH area	12.9%	26.6%	41.6%	14.6%	4.1%
PUSH East HMA	12.1%	27.1%	43.3%	13.7%	3.6%
PUSH West HMA	13.7%	26.1%	40.0%	15.4%	4.5%
Hampshire	9.3%	24.1%	41.3%	19.6%	5.6%
South East	11.6%	26.2%	38.9%	17.0%	6.0%
England	11.8%	27.9%	41.2%	14.4%	4.6%

Source: 2011 Census¹

¹ 'No bedrooms' has not been included in the table.

APPENDIX R: HOUSE PRICES BY TYPE (DISTRICTS, Apr 2012 – Mar 2013)

	Detached	Semi - Detached	Terraced	Flat
East Hampshire (Part)	£290,000	£215,750	£170,000	£123,000
New Forest (Part)	£249,999	£191,000	£165,000	£139,000
Test Valley (Part)	£346,250	£227,475	£206,667	£210,000
Winchester	£387,167	£231,000	£210,750	£140,167
Eastleigh	£300,000	£205,875	£177,000	£138,000
Fareham	£293,125	£208,744	£168,248	£126,100
Gosport	£277,000	£165,500	£130,500	£106,687
Havant	£295,500	£195,667	£150,050	£110,500
Portsmouth	£318,750	£182,250	£149,467	£120,800
Southampton	£219,583	£177,125	£147,667	£125,600

Source: GLH Analysis of HMLR Data

APPENDIX S: HOUSING SALES (DISTRICTS, Apr 2012 – Mar 2013)

	Detached	Semi - Detached	Terraced	Flat
East Hampshire	69	35	22	11
New Forest (Part)	166	99	136	79
Test Valley (Part)	136	52	82	26
Winchester	87	52	83	29
Eastleigh	259	191	221	113
Fareham	315	255	192	94
Gosport	78	136	220	152
Havant	192	164	172	107
Portsmouth	30	122	515	237
Southampton	175	286	279	427

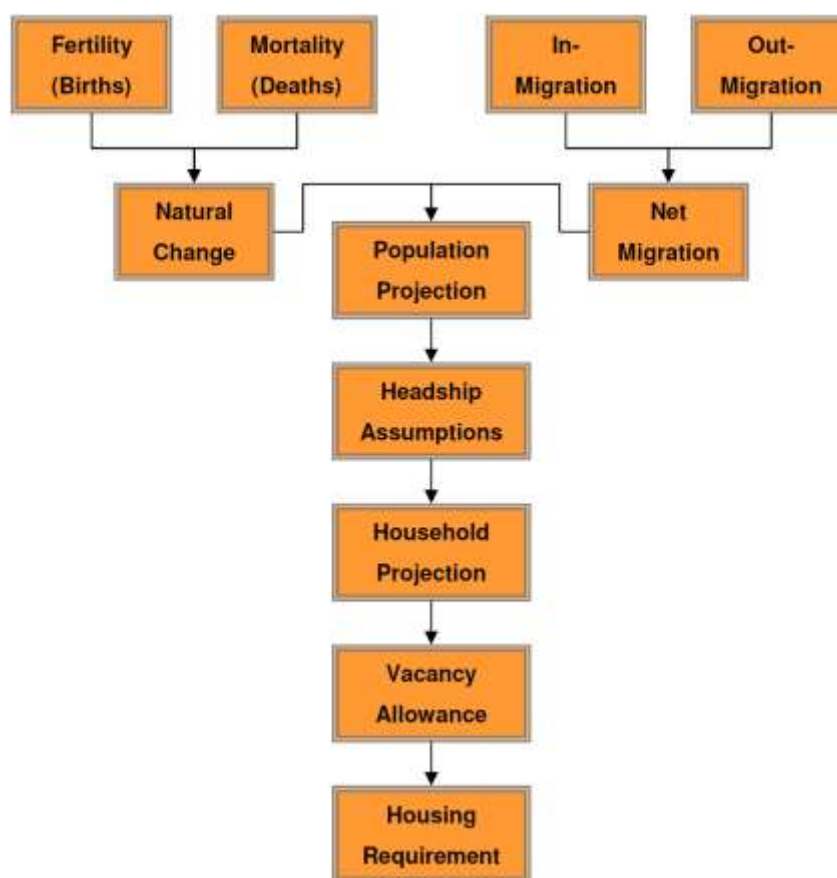
Source: GLH Analysis of HMLR Data

APPENDIX T: PROJECTION METHODOLOGY, INPUTS AND ASSUMPTIONS

Overview of Methodology

- 1.1 Our methodology used to determine population and household growth and housing needs is based on fairly standard population projection methodology consistent with the methodology used by ONS and CLG in their population and household projections. Essentially the method establishes the current population and how will this change in the period from 2011 to 2036. This requires us to work out how likely it is that women will give birth (the fertility rate); how likely it is that people will die (the death rate) and how likely it is that people will move into or out of each District. These are the principal components of population change and are used to construct our principal trend-based population projections.
- 1.2 Figure 1 below shows the key stages of the projection analysis through to the assessment of overall housing needs.

Figure 1: Overview of Methodology

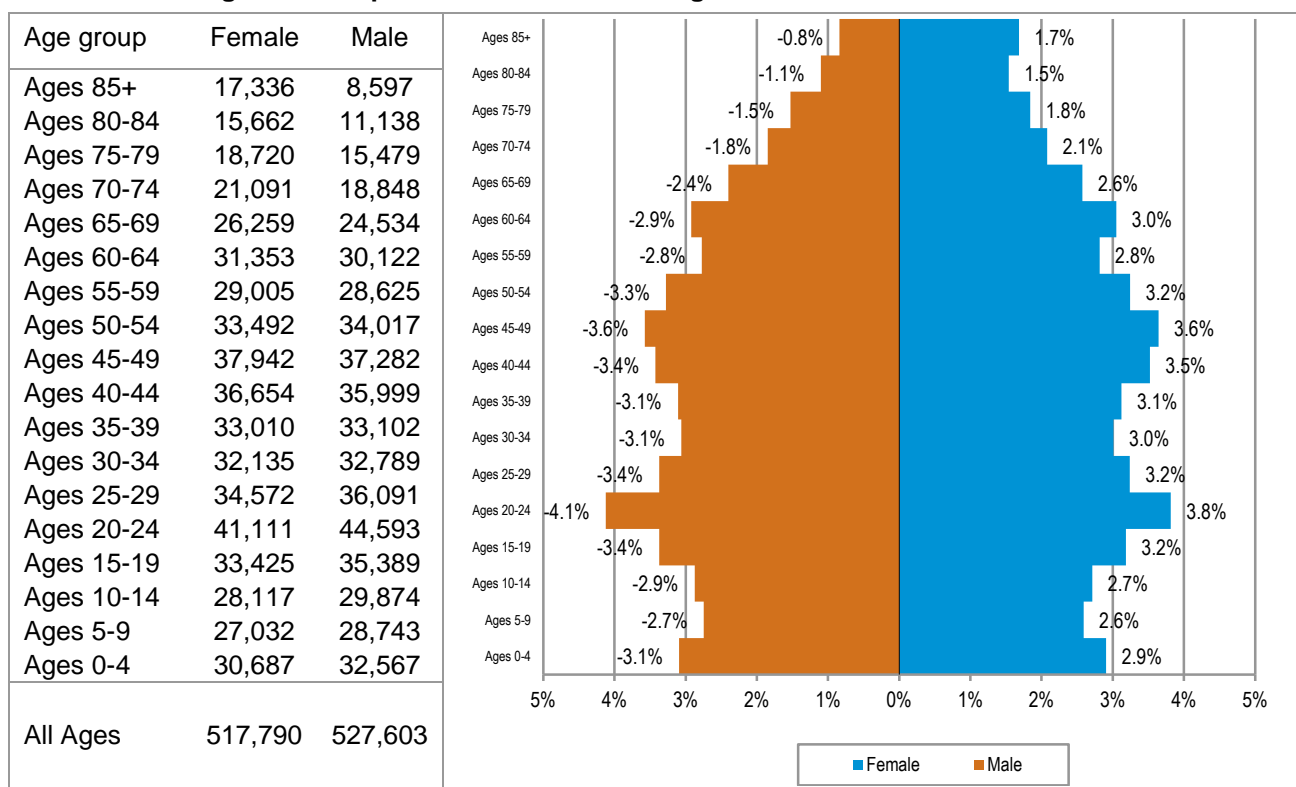


- 1.3 Much of the data for the projections draws on ONS information contained within the 2010- and 2011-based Sub-National Population Projections (SNPP) and the 2011-based CLG Household Projections. In particular we have used the SNPP to look at fertility rates, mortality rates and the profile of in- and out-migrants (by age and sex).
- 1.4 There are a total of ten local authorities covered by the PUSH area. In addition to the six whole Council areas (Eastleigh, Fareham, Gosport, Havant, Portsmouth and Southampton) there are parts of four other areas. Projections for partial authorities are based on District-wide projections with a proportion of the growth being taken forward in to the total PUSH figures based on existing population (as follows):
- East Hampshire – 17%
 - New Forest – 40%
 - Test Valley – 35%
 - Winchester – 31%
- 1.5 The sections below discuss in detail the assumptions and inputs underpinning the demographic modelling. These should be read in conjunction with the Assessing Future Housing Needs section (Section 7) in the main report.

Baseline Population

1.6 The baseline for our projections is taken to be 2011 with the projection run for each year over the period up to 2036. The estimated population profile as of 2011 has been taken from the 2011-based SNPP. The overall population in 2011 was estimated to be 1,045,393 with slightly more females than males.

Figure 2: Population of PUSH Sub-Region – 2011



Source: 2011-Mid-Year Population Estimates

1.7 Table 1 and Figure 3 below show the population distribution in each local authority area in broad 15-year age categories. The data shows the highest population (of around 236,000) to be in Southampton with the smallest population (of about 15,000) being in the East Hampshire part of PUSH.

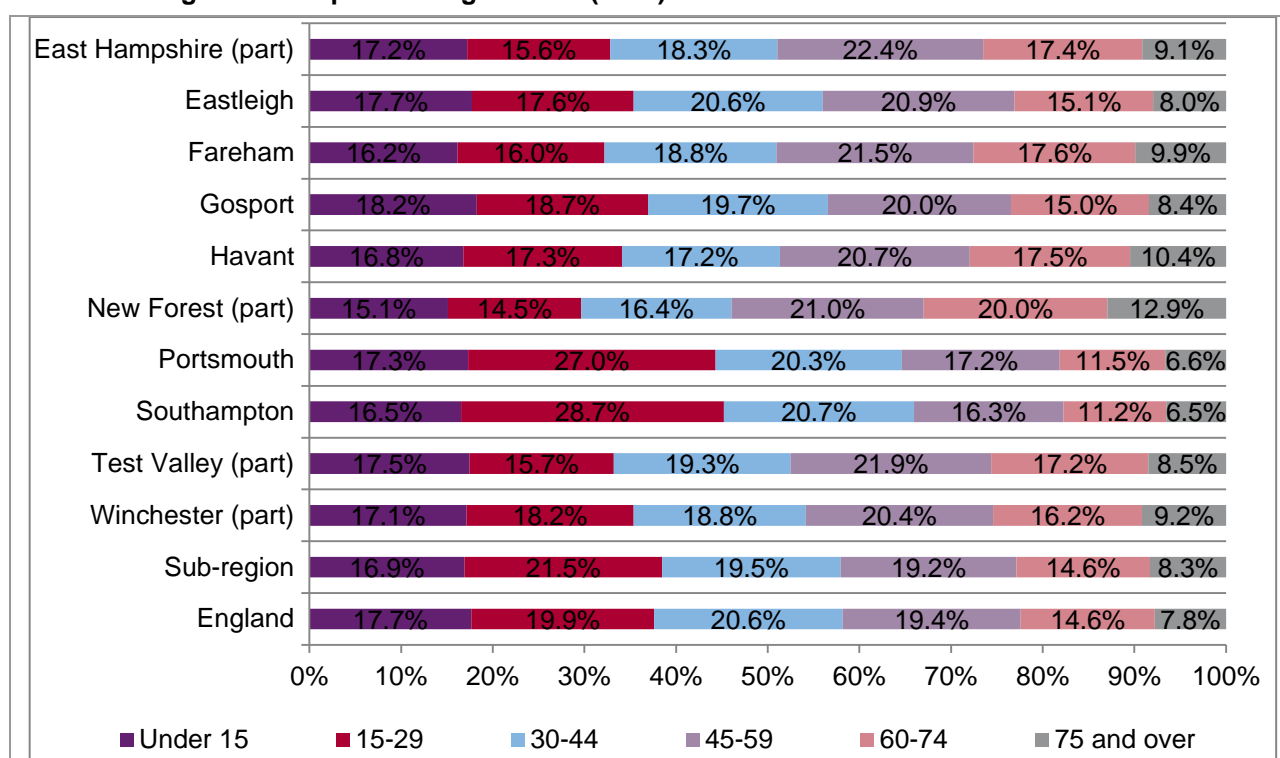
1.8 When looking at the population age structure the data shows a very similar profile overall to the national average. There are however some notable differences within different local authorities. Portsmouth and Southampton in particular have a young population with around 45% of the population aged under 30 (compared with a sub-regional average of 38%). In contrast New Forest and to a lesser extent Fareham and Havant have much older populations.

Table 1: Comparison of Population Profile in different Local Authorities (2011)

	Under 15	15-29	30-44	45-59	60-74	75+	Total
East Hampshire (part)	2,596	2,351	2,754	3,382	2,620	1,378	15,081
Eastleigh	22,338	22,175	25,956	26,347	19,030	10,006	125,852
Fareham	18,088	17,940	21,002	24,092	19,735	11,074	111,931
Gosport	15,087	15,441	16,250	16,508	12,441	6,942	82,669
Havant	20,290	20,899	20,797	25,011	21,166	12,620	120,783
New Forest (part)	10,695	10,261	11,605	14,833	14,173	9,148	70,716
Portsmouth	35,576	55,460	41,723	35,385	23,700	13,589	205,433
Southampton	39,012	67,629	48,909	38,469	26,454	15,397	235,870
Test Valley (part)	7,131	6,425	7,887	8,939	7,005	3,458	40,844
Winchester (part)	6,208	6,600	6,806	7,396	5,883	3,320	36,214
PUSH total	177,021	225,181	203,689	200,362	152,208	86,931	1,045,393

Source: 2011-Mid-Year population estimates

Figure 3: Population Age Profile (2011)



Source: 2011-Mid-Year Population Estimates

1.9 Understanding the age structure and how this will change over time is important in developing the demographic projections as this will influence trends in migration in and out of an area, as well as household structures. In particular older persons are more likely to live within smaller households and less likely to move relative to younger households.

Fertility and Mortality Rate Assumptions

- 1.10 For modelling of fertility we have used the rates contained within the ONS 2010-based Sub-National Population Projections (SNPP). In all areas fertility rates are expected to increase very slightly in the short-term before dropping quite notably moving towards the end of the projection period. ONS expects birth rates to fall in the medium-term. We also interrogated the ONS 2010-based SNPP with regard to death rates which suggested that life expectancy is expected to increase over time for both males and females.
- 1.11 The expected figures changes in fertility and mortality (birth and death rates) in the sub-region in the ONS projections are consistent with past trend data and future expected patterns as published by ONS on a national basis.
- 1.12 The 2011-based SNPP is known at the national level to slightly over-estimate numbers of births. However in regard to projections of housing need, birth rates have a limited impact on housing numbers as there are few people who will be borne in the projection period who might become a head of a household over the period to 2036². The projections of housing need are more sensitive to improvements in life expectancy as this can mean people living in their homes for longer into their old age, and often in smaller households. However trends in life expectancy are much less variable than for other indicators (e.g. migration).

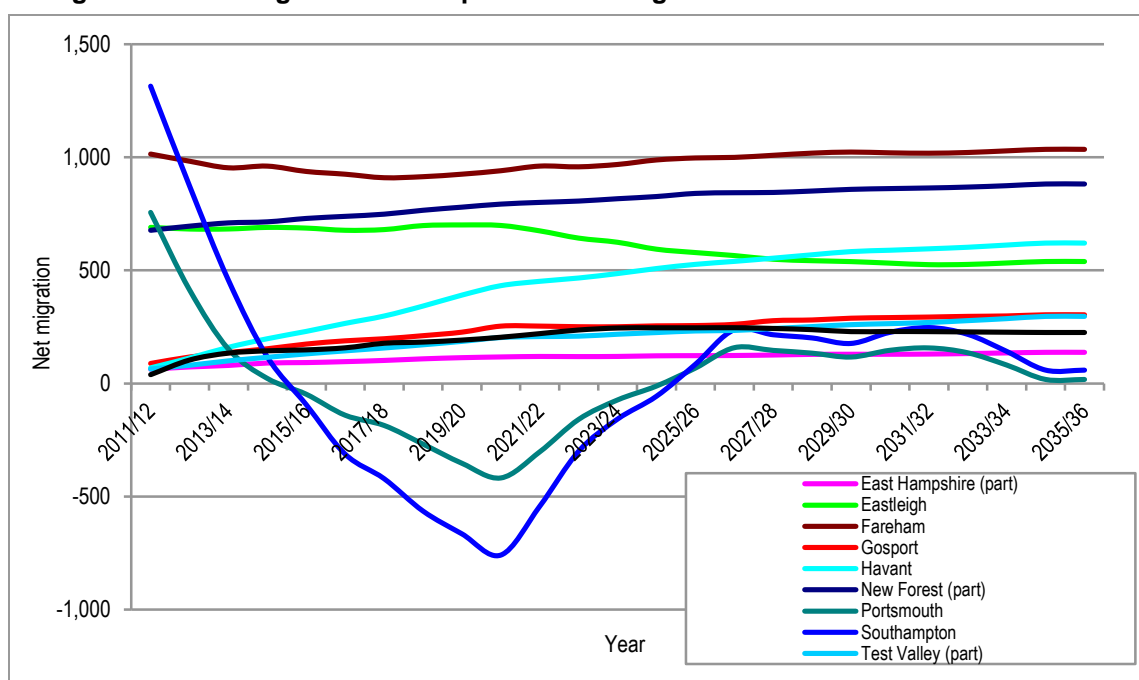
Levels of Migration

Initial Demographic Projections (PROJ 1)

- 1.13 Figure 4 shows the levels of net migration assumed in the ONS Projections (2010- and 2011-based) from 2011/12 to 2030/31 in each of the ten areas. For the PUSH area as a whole the projections start in 2011/12 with a net in-migration figure of around 4,800 per annum. This is expected to decrease over time to reach a net in-migration of around 2,500 people per annum in 2020/21 before rising again to reach about 4,100 per annum at the end of the projection period. For the projection period studied as a whole, the average level of net migration is an in-migration of 3,600 people per annum.
- 1.14 For individual areas however the figures are quite different. Portsmouth and Southampton are expected to start with significant levels of net in-migration with these falling rapidly to 2020/21 before increasing to 2026/27 and levelling off thereafter. In most other areas levels of net in-migration are expected to increase slightly over time although year-on-year changes are not as stark as is projected for Portsmouth and Southampton. Eastleigh is however expected to a general decline in net migration over the period studied.

² A sensitivity analysis indicates that the impact of this is most prevalent in Southampton, Eastleigh and Fareham where a reduction in fertility by 10% would reduce housing need by 0.2% over the 2011-31 period and by 1.8% over the period to 2036. Whilst there is a downside risk on this basis, ONS project that birth rates will fall over the projection period and there is an upside risk that this will not occur as projected.

Figure 4: ONS Migration Assumptions – Net Migration 2011/12 to 2035/36



Source: ONS 2010- and 2011-based Sub-National Population Projections

- 1.15 It should be noted that the net migration data shown is made up of gross in-migration minus gross out-migration. Both of the gross figures are significantly larger than the net migration data and hence small changes in either in- or out-migration can have a significant impact on net migration figures. This can be seen most clearly in the case of Portsmouth and Southampton where gross migration is particularly significant (in excess of 15,000 people each year for both in- and out-migration in Portsmouth and over 20,000 in the case of Southampton).
- 1.16 The year-on-year changes are also strongly linked to the population age structure in an area and in areas which typically generate in-migrants to specific locations. Again focussing on Portsmouth and Southampton the data shows reducing levels of net in-migration followed by some 'recovery'. Such a pattern can be linked (at least in part) to national population projections which show a projected decline in younger adults who are typically student in-migrants in the period to 2021 (hence there is a smaller potential pool of in-migrants and so net migration declines), with recovery and growth within these age groups thereafter.
- 1.17 In Havant ONS is projecting that levels of net migration will increase. This is a function of both an increase in gross in-migration and a reduction in gross out-migration (which together serve to increase the level of net migration). The changing levels of gross migration (both in- and out-) are to a large degree reflective of a changing age structure in Havant and also in areas which see migration to the Borough.

1.18 For other areas, wider population profile changes are also having an impact on levels of in-migration whilst a changing population structure within each area will also influence patterns of out-migration (e.g. an ageing population may see reductions in out-migration as older age groups tend to be less migratory).

Adjusted SNPP (PROJ 2)

1.19 Table 2 below shows the levels of migration estimated by ONS at the time of its work on the 2011 SNPP and the revised estimated produced following the Census rebasing. Data for the five years to 2011 has been used.

1.20 Across the PUSH Area the most recent data suggested that migration was under-recorded by around 434 people per annum with over recording in Fareham, New Forest and Southampton and an under-recording in all other areas (figures for the partial authorities have been scaled down in line with proportions presented above).

1.21 Compared to many areas across the Country (and indeed the in- and out-flows) the levels of over- and under-estimation are pretty moderate. Whilst the reasons for problems with population estimates are unknown, it is the case that migration is notoriously difficult to accurately measure given that there is no formal method of registration of moves from one area to another. The issues with migration data are most likely to result from inaccuracies in the modelling of interational migration and poor data regarding movement of younger persons, particularly students.

Table 2: Pre- and Post-Census Migration Estimates (2006-2011)

	Estimated Migration (Pre-Census Estimates)	Actual Migration (Revised Post- Census Figures)	Difference	Difference Per annum
East Hampshire	486	560	74	15
Eastleigh	3,216	4,122	906	181
Fareham	4,325	3,304	-1,021	-204
Gosport	328	1,540	1,212	242
Havant	840	2,547	1,707	341
New Forest	2,689	2,208	-481	-96
Portsmouth	3,913	4,546	633	127
Southampton	2,967	1,732	-1,235	-247
Test Valley	381	637	256	51
Winchester	1,521	1,642	122	24
TOTAL	20,666	22,838	2,172	434

Source: ONS Mid-Year Population Estimates

1.22 In line with the guidance, we have therefore prepared an adjusted projection which adjusts the level of net migration in the SNPP projection on a year-by-year basis using the annual difference shown in Table 2. We anticipate that this adjusted SNPP projection will be broadly

reflective of an ONS projection would show, if one were carried out on the basis of the new data published since April 2013.

5 and 10 Year Migration Trends

- 1.23 Figure 3 below shows estimated net migration into the sub-region (and each local authority area) from 2001/2 to 2010/11. The figures have been taken from the revised ONS Mid-Year Population Estimates.

Table 3: Past Trends in Net In-Migration

Year	EH (part)	East-leigh	Fare-ham	Gos-port	Havant	NF (part)	Ports-mouth	South-ampton	TV (part)	Winc'r (part)	Sub-region
2001/2	28	35	298	111	417	631	241	497	117	194	2,569
2002/3	-7	128	133	677	262	493	1,625	1,028	258	214	4,811
2003/4	47	141	-105	385	46	400	2,850	997	211	216	5,188
2004/5	57	861	-472	435	201	516	2,316	2,417	183	184	6,697
2005/6	67	888	371	761	243	511	-1,006	-859	161	145	1,282
2006/7	137	854	955	763	387	460	-1,835	-617	251	335	1,690
2007/8	102	400	697	689	684	391	170	-153	125	399	3,505
2008/9	126	559	605	-1	306	531	1,911	156	-30	338	4,500
2009/10	122	1,307	552	-23	597	494	2,622	1,502	93	320	7,585
2010/11	73	1,002	495	112	573	333	1,678	844	197	250	5,558
Average (last ten years)	75	618	353	391	372	476	1,057	581	157	259	4,339
Average (last five years)	112	824	661	308	509	442	909	346	127	328	4,568

Source: ONS Mid-Year Population Estimates

- 1.24 The data shows that the figures can be somewhat variable over time – particularly for individual districts. Variation could be linked to a number of factors such as completions levels (which could inhibit or provide greater opportunities for migration) or year-on-year changes to specific parts of the population such as students. Additionally, given the difficulty of measuring migration accurately, it is possible that year-on-year changes are influenced by recording issues. Overall, for the full decade studied it is however considered that the figures in the table above are of the right order of magnitude as these have been calibrated to take account of Census data (in both 2001 and 2011).
- 1.25 Generally the highest estimated levels of migration have been over the past five years, including a net in-migration of 7,600 people in 2009/10. This contrasts with some much lower levels of net in-migration in 2005/6 and 2006/7 (1,300 and 1,700 people respectively).

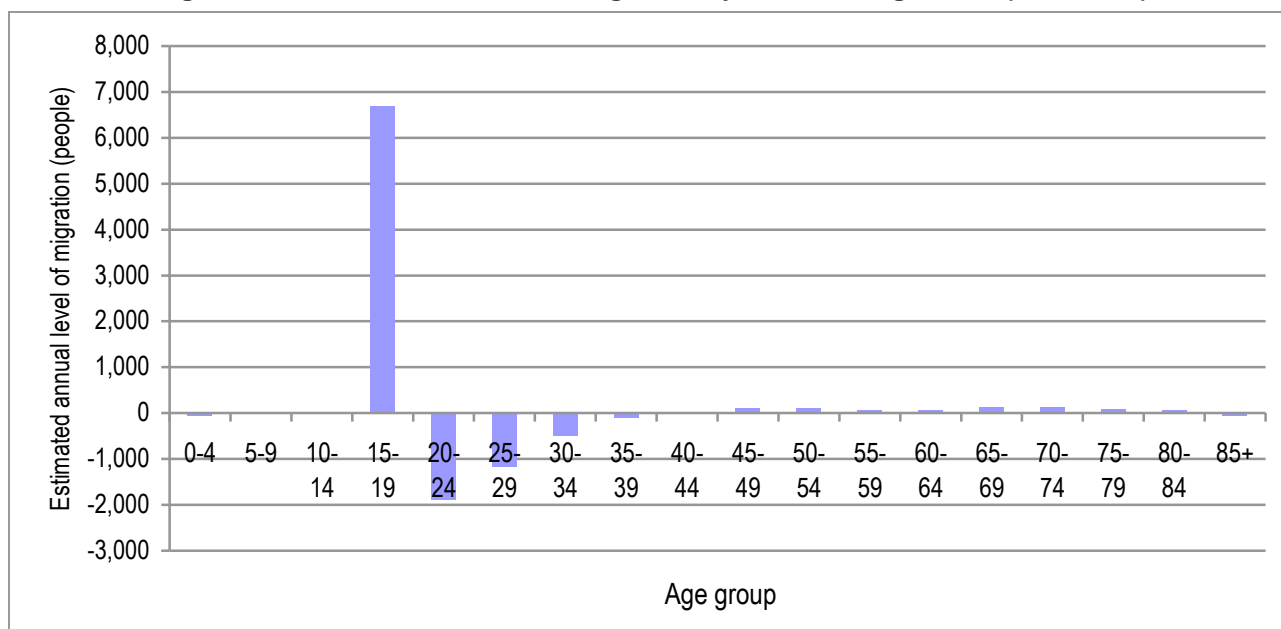
Age Profile of Migrants

- 1.26 For the purposes of understanding the profile of migrants we have again drawn on the ONS 2010-and 2011-based Sub-National Population Projections. Over the period from 2011 to 2036 the ONS figures show an average annual level of net in-migration of 3,642 people to

the PUSH Area. The data (shown below) clearly shows that the most important age groups are from 15 to 24. The high level of net in-migration of those aged 15-19 is driven by in-migration to Portsmouth and Southampton – driven by the student population. All other areas actually show a net out-migration of the population aged 15 to 19. Data in **Appendix X** shows figures for in- and out-migration by age group for each of the full local authority areas.

1.27 When projecting migration for the various projection scenarios we have used the migration data from the SNPP (PROJ 1 or PROJ 2) and adjusted levels of in-migration to match the requirements of our scenario (e.g. when testing what level of migration is required to support a workforce of a particular size). Out-migration is not adjusted. This approach has consistently been adopted across all analysis.

Figure 5: Estimated Annual Net Migration by Five-Year Age Band (2011-2036)



Source: Derived from ONS 2010-based Population Projections

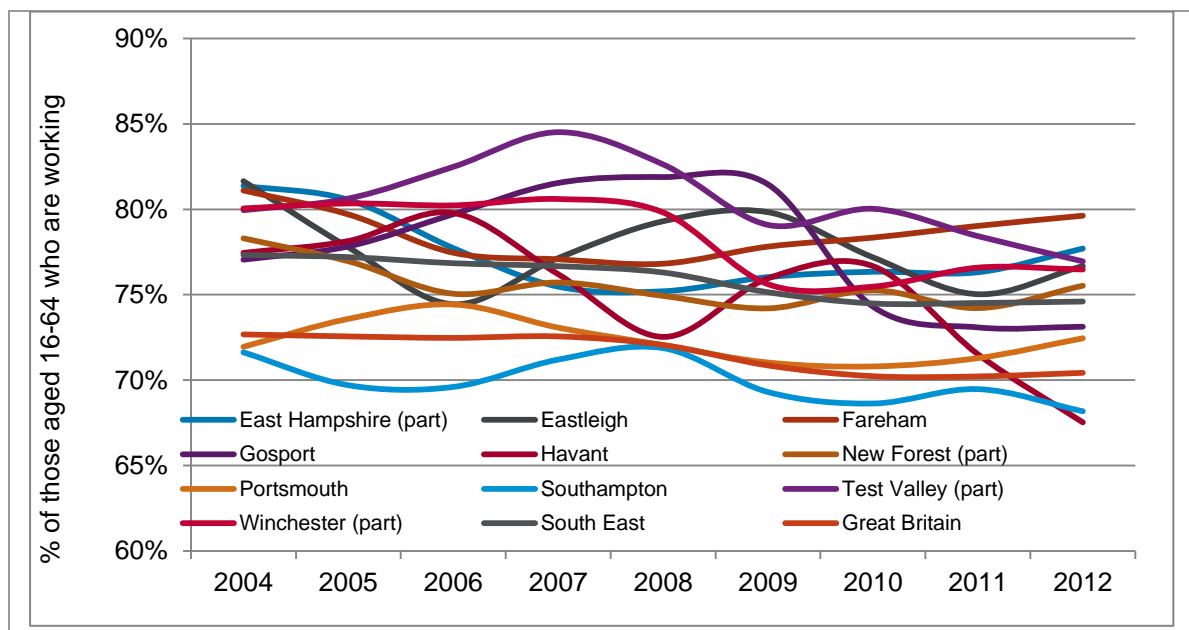
Employment Rate Assumptions

1.28 With the change in demographic structure will come changes in the number of people who are working (as the population of people of working age changes). The next stage of the projection process was therefore to make estimates about how numbers of people in work (labour supply) would change in each projection.

1.29 The first stage of the process was to establish employment rates in each local authority. The figure below, Figure 6, shows data on the proportion of people living in each area who were in employment (based on the proportion of the population aged 16-64 who are working). This latter data has also been provided for the South East and Great Britain.

1.30 The data shows that overall the proportion of people working has been quite variable over time but generally the trend has been downward (linked to the impact of the recent recession). Overall, it is quite difficult to pick out a real trend from the district-level data. In both the South East and Great Britain employment rates can more clearly be seen to have dropped along with a very slight improvement through 2012.

Figure 6: Proportion of Population Working

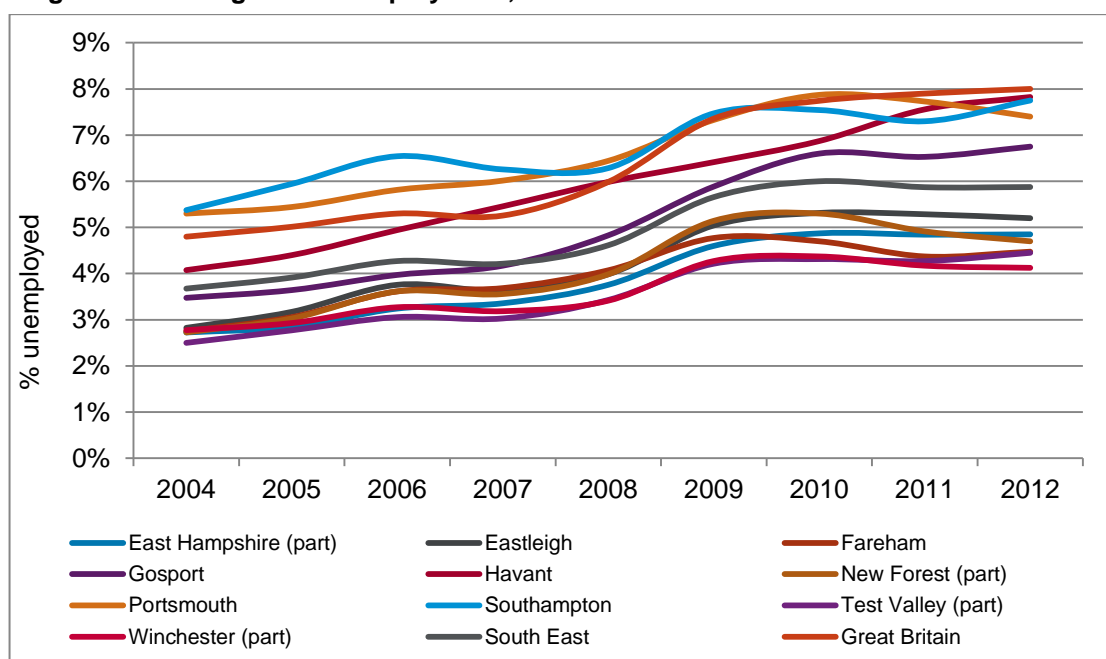


Source: Annual Population Survey

1.31 Part of the problem with the Annual Population Survey source used above is that data is based on only a sample of the population and therefore figures can be quite variable at a local authority level.

1.32 We have therefore also drawn on data about unemployment to give an indication of how employment rates may have changed over the past few years. In all areas this analysis shows a clearer trend towards increased unemployment with figures going up in all areas (increases in unemployment typically in the range of 2%-3.5% depending on area). The unemployment rate describes the proportion of people 16-64 who are unemployed.

Figure 7: Changes in Unemployment, 2004-12



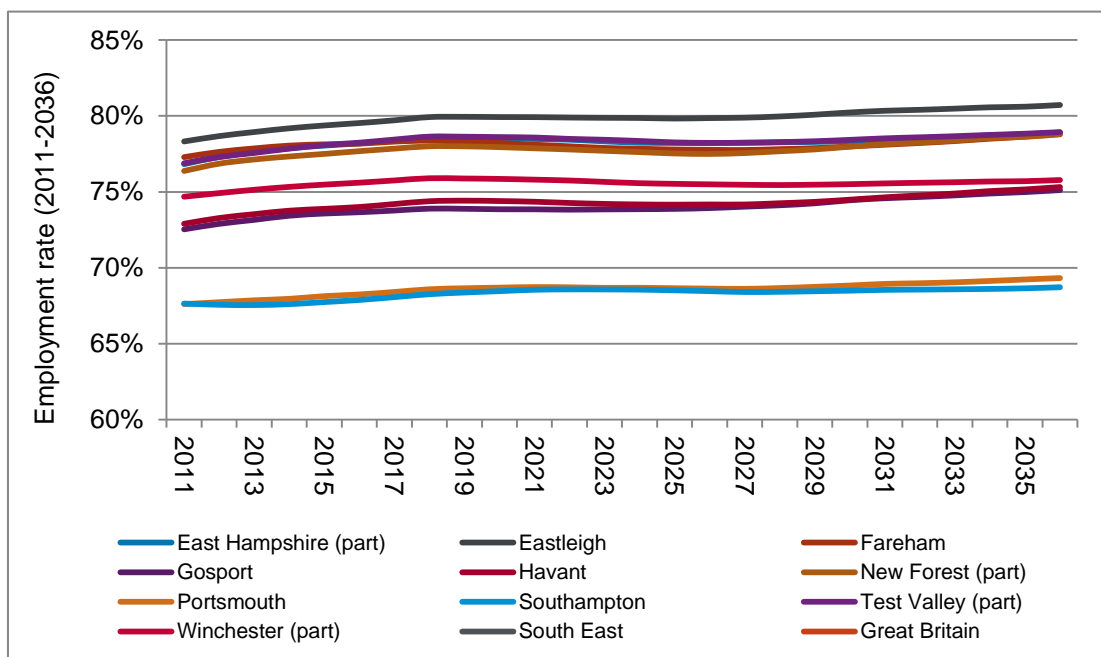
Source: Annual Population Survey (modelled data)

- 1.33 Using the above data to provide us with an overall picture of working patterns, we also drew on 2001 and 2011 Census data and information from the Annual Population Survey to model the distribution of residents in employment by age and sex.
- 1.34 In projecting forward we have assumed that there is a latent labour force that could be brought back into work as a result of reducing unemployment. This improvement is assumed to occur fairly consistently through the projection period to 2036.
- 1.35 The modelling also includes provision for potential increases in employment rates due to changes in pensionable age. These additional changes have been based on studying the age-specific 'drop-off' in employment as people get older.
- 1.36 The modelled improvement to employment rates will have the effect of reducing unemployment over time, and increasing employment rates amongst older age groups over the projection period.
- 1.37 Figure 8 below shows how employment rates are projected to change over the period studied. This is the percentage of people 16-64 in employment. In all of the authorities the data shows a short-term improvement to about 2019 – this is mainly due to changes in pensionable age. Following this the rate levels off or drops down slightly – this is due to age structure changes with a greater number of people expected to be in some of the older 'working' age groups which typically have lower employment rates. Beyond this, about 2027, there is expected to be some increase in employment rates – this is again linked to

demographic change with all areas expected to see population increases in some of the key working age groups.

- 1.38 Overall employment rates are highest in Eastleigh and lowest in Portsmouth and Southampton. Relative differences in employment rates between the local authorities are largely expected to remain throughout the projection period.

Figure 8: Projected changes in Employment Rates



Source: JGC

- 1.39 By applying these employment rates to our population figures it is estimated that in mid-2011 there were 506,500 people in employment across the sub-region. This figure has been derived by analysis of 2011 Census data and is consistent with recent figures provided in the Annual Population Survey.

Assumptions in Economic-Driven Projections

- 1.40 Two economic-driven projections are developed, PROJ A and PROJ B. The assumptions on employment growth levels (workplace jobs) in these are derived from Experian econometric forecasts from Summer 2013. The table below shows the estimated increase in the number of residents in employment in each area.
- 1.41 The Solent LEP has commissioned the preparation of detailed economic scenarios to consider future economic performance. The analysis herein should be regarded as indicative as it is not based on a detailed assessment of drivers, opportunities and risks associated with future economic performance across the sub-region.

1.42 It should also be borne in mind that economic forecasting is not an exact science and is more difficult to undertake accurately than projections for future population growth. How the economy might perform over the next 20+ years is somewhat uncertain.

1.43 Table 4 below summarises the forecasts for employment growth derived from the Experian Model (May 2013). It also shows what this represents in terms of growth in economic output (GVA) per annum. The forecasts indicate employment growth of between 0.7-0.9% per annum on average over the 2011-31 period.

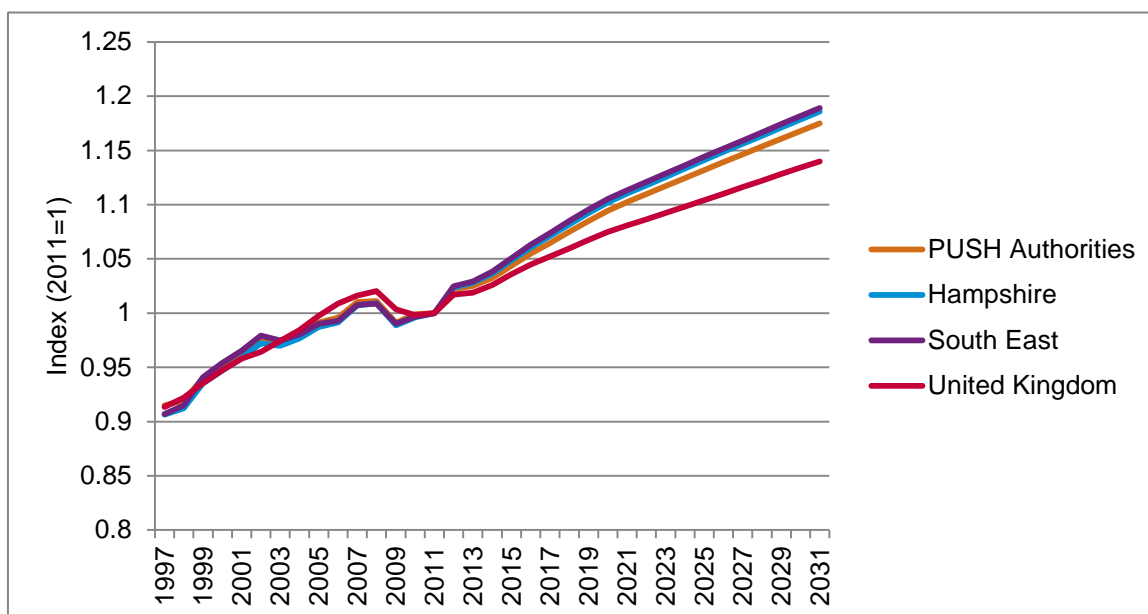
Table 4: Experian Forecasts for Economic Growth, 2011-31

	Growth in Employment, 2011-31	% Growth, 2011-31	% Employment Growth Per Annum	% per Annum GVA Growth
East Hampshire	9500	17%	0.9	2.1
Eastleigh	12900	18%	0.8	2.3
Fareham	10500	18%	0.8	2.4
Gosport	3800	18%	0.7	2.3
Havant	6900	15%	0.7	2.5
New Forest	14000	18%	0.8	2.1
Portsmouth	19500	17%	0.8	2.0
Southampton	23800	19%	0.8	2.0
Test Valley	8800	15%	0.7	2.2
Winchester	15400	19%	0.9	2.4
Hampshire	168480	19%	0.8	2.3
South East	831537	19%	0.9	2.3
United Kingdom	4389790	14%	0.6	2.0

Source: Experian

1.44 Overall the level of employment growth forecast across the PUSH authorities falls moderately below that forecast across Hampshire and the South East, but is notably above that forecast nationally as Figure 9 indicates.

Figure 9: Forecast Employment Growth across PUSH Authorities, 2011-31



Source: Experian

- 1.45 The Experian forecasts run only to 2031. To provide an indication of employment growth over the 2031-36 period we have assumed that the rate of growth in total employment over the 2026-31 period continues thereafter.
- 1.46 Relating economic performance to housing need is also not straightforward, and will be influenced by a range of factors including:
- Future economic and employment growth;
 - Potential changes to commuting patterns;
 - The relationship between growth in employment and the workforce; and
 - The proportion of people (in different age groups) who are in work.
- 1.47 The projections in the SHMA are based on a single set of econometric projections for Experian; pending detailed economic scenario development work which is being undertaken by the Solent LEP.
- 1.48 The assumptions on changes to employment rates are described above. The projections assume a 1:1 relationship between growth in jobs (in net terms) and in people in work. No assumptions are made for 'double-jobbing' which could have a modest impact on reducing the level of population growth and housing need derived from the projections.
- 1.49 In relating jobs and population/ housing need the projections are however particularly sensitive to assumptions on commuting which describe the relationship between where

people live and work. Two projections have therefore been developed to provide some quantification of the impact which commuting has.

- 1.50 PROJ A assumes that there is a 1:1 relationship between growth in residents in employment and forecast growth in jobs in each authority. PROJ 2 assumes that historical commuting patterns occur (and hold true) based on 2001 Census data.
- 1.51 The difference between PROJ A and PROJ B relates wholly to the assumptions made on commuting. In PROJ A it is assumed that there is a commuting ratio of 1 (i.e. we see a consistent growth in workforce to jobs moving forwards). In PROJ B we have applied the following commuting ratios. A commuting ratio of over 1.0 assumes net out-commuting from the area; whilst a ratio of under 1.0 assumes that some employment growth will be supported by in-commuting. The ratios are based on 2001 Census data.

Table 5: Commuting Ratios used in PROJ B

	Live in area (and are working)	Work in the Area	Commuting ratio
East Hampshire	54,814	43,146	1.27
Eastleigh	60,362	57,043	1.06
Fareham	53,797	46,363	1.16
Gosport	36,681	26,805	1.37
Havant	52,805	41,651	1.27
New Forest	76,786	64,124	1.20
Portsmouth	86,163	105,075	0.82
Southampton	97,962	111,076	0.88
Test Valley	56,995	52,920	1.08
Winchester	52,974	64,002	0.83

Source: 2001 Census

- 1.52 Table 6 below indicates the resultant assumptions on growth in residents in employment made in each of the economic-driven scenarios.

Table 6: Employment Growth Assumptions used in Modelling

Period	PROJ A – Jobs Baseline Net Jobs Growth, 2011-36	PROJ B – Residents in Employment Net Growth, 2011-36
Total 2011-36	112,035	112,268
EH (part)	1,849	2,349
Eastleigh	15,149	16,031
Fareham	12,590	14,609
Gosport	4,816	6,591
Havant	8,385	10,631
NF (part)	6,588	7,889
Portsmouth	23,968	19,654
Southampton	29,337	25,873
TV (part)	3,616	3,894
Winc'r (part)	5,735	4,747

Source: Experian 2013, GL Hearn

- 1.53 Looking at the individual local authorities, Experian expects stronger growth in Portsmouth and Southampton than any other area although this will to a large part be influenced by a larger population in the Cities than in any of the districts. Differences between PROJ A and PROJ B are most marked in Gosport due to a higher proportion of residents who currently commute out of the Borough to work relative to the numbers who commute into Gosport. The opposite is the case for Portsmouth, Southampton and Winchester.

Completions Trend Projection (PROJ Z)

- 1.54 PROJ Z is based on projecting forward past completions. This projection is not a projection of 'housing need' but seeks to demonstrate the population, employment growth and household growth which would arise if past trends in housing delivery (based on average completions over the past 10-years) were to continue into the future.
- 1.55 It is important to note that this projection is indicative – it does not take account of future arising needs and thus is not an approach upon which future planning should be based. It does not represent an assessment of "housing need."
- 1.56 Based on the completions data provided by Hampshire County Council, we have used the delivery figures set out in Table 7 below in developing PROJ Z.

Table 7: Past Completion Figures used for Projection

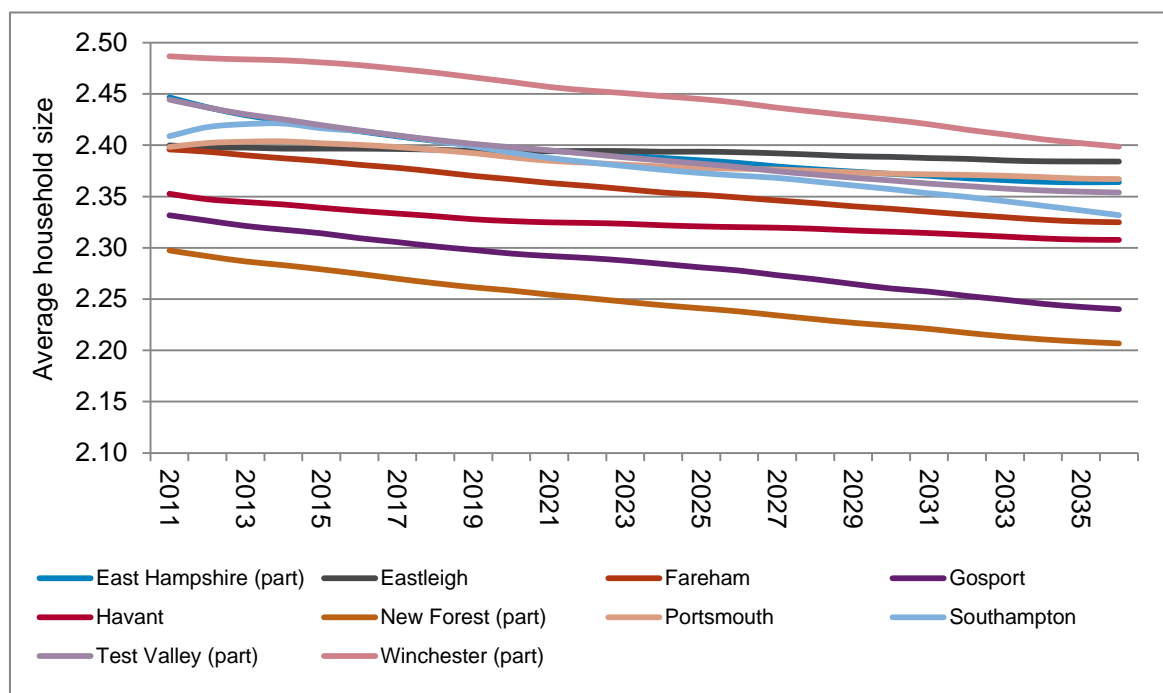
	Per annum	2011-2036
East Hampshire (part)	40.3	1,008
Eastleigh	514.5	12,863
Fareham	338.1	8,453
Gosport	297.8	7,445
Havant	241	6,025
New Forest (part)	138.5	3,463
Portsmouth	616.5	15,413
Southampton	866.8	21,670
Test Valley (part)	113.6	2,840
Winchester (part)	181.7	4,543
TOTAL	3,348.8	83,720

Source: Hampshire County Council

Headship Rate Assumptions

- 1.57 Headship rates are used in the projections to relate changes in the population size and structure to growth in households. Headship rates can be described in their most simple terms as the number of people who are counted as heads of households (or in this case the more widely used Household Reference Person (HRP)).
- 1.58 For the purposes of this analysis we have used information contained in the 2011-based CLG Household Projections about the relationship between the total population in an age group and the number of household reference persons (HRPs) in that age group.
- 1.59 By applying headship rates to the population projections we project growth in households. The effect of changes in the age structure of the population, and of expected household structures, is to result in a reduction in average household sizes within the population over the period to 2036. This is a way of summarising the impact of headship rate assumptions.
- 1.60 Figure 10 below shows the estimated average household size from 2011 to 2036 derived from CLG projections when applied to PROJ 1. The data shows in all areas that household sizes are expected to decline moving forward. For the purposes of the projection across the whole sub-region it is assumed that average household sizes start at about 2.39 in 2011 and reduce down to 2.33 in 2036 (although exact figures do vary depending on the projection being run).
- 1.61 Average household sizes are particularly expected to fall as the population of older persons is expected to grow, and older households are typically smaller. This is an important influence on the need for additional housing.

Figure 10: Projected trends in Average Household Size



Source: Derived from 2011-based CLG Household Projections

- 1.62 When applying headship rates to the population data we derive an estimated number of households in mid-2011 of 437,700. This figure is consistent with the number of households shown in the 2011 Census and the 2011-based CLG Household Projections.
- 1.63 The main projections in the SHMA are based on the headship rate assumptions in the 2011-based Household Projections from Government. A sensitivity analysis is however run to PROJ 2 based on applying the headship rates in the CLG 2008-based Household Projections. The results of this are presented in the main report.

Relating Growth in Households to Dwellings

- 1.64 In converting an estimated number of households into requirements for additional dwellings we have also factored in a small vacancy/second home allowance which is normal to allow for movement of households between properties. For the analysis we have assumed that around 3% of additional stock will comprise vacant and second homes. This is reflective of what should be achievable within new stock (where there is not a requirement for extensive repair/ upgrading).
- 1.65 Table 8 summarises the key assumptions within the demographic projections.

Table 8: TABLE OF KEY INPUTS AND ASSUMPTIONS FOR DEMOGRAPHIC PROJECTIONS

Projection	SNPP	SNPP (updated)	10-year migration trends	5-year migration trends	Jobs	Residents in employment	Zero net migration	Zero employment growth	Past completions	SNPP (updated) (08-based rates)
Baseline population	A 2011-baseline population is taken from the Census 2011-based mid-year Population estimates produced by ONS. This population is split by single year of age and gender.									
Fertility and mortality rates	Fertility and mortality rates are applied to the projections based on the using projected fertility/mortality rates and differentials for the individual authorities within the PUSH area, taken from ONS 2010-based SNPP									
Migration profile	Profile of migration taken from 2010-based SNPP updated to take account of differences shown in the 2011-based SNPP. Figures are consolidated to ensure population exactly matches those shown in the 2011-based SNPP with consolidation factors taken forward into other projections. Migration is assessed by sex and single year of age as well as separately for in- and out-migration for each of internal, cross-border and international migration. Where adjustments are made to migration it is assumed (for modelling purposes) that this will be an increase or decrease in in-migration with out-migration held constant for all projections.									
Headship rates	2011-based CLG household projections headship rates have been used to 2021. Beyond 2021 a linear trend has been used drawing on figures for 2011 and 2021.									2008-based CLG headship rates – rebased to 2011 household estimate
Employment rates	Data is based on proportion of residents in employment by age and sex in 5-year age bands from 16 to 74 (the 16-19 age band is only four years). Figures moving forward take account of potential reductions in unemployment (based on specific local data from NOMIS) and increases in older people working due to changes in pensionable age.									
Vacancy rate	Assumed to be 3% - i.e. dwelling requirement to be 3% higher than projected growth in households									
Main scenario specific assumptions	All assumptions as per 2011-based SNPP.	As per previous projection but with some	Projection based on average level of migration	Projection based on average level of migration	Projection takes an Experian forecast and projects	Links to previous projection but also takes into	Projects the population growth, housing requirement	Projects the population growth and housing requirement	Projects population and employment growth of	As per the second projection but with headship rates taken from

	Beyond 2021 the figures use data from the 2010-based SNPP rebased to 2021 figures shown in the 2011-based data	adjustment to take account of over- or under-recording of migration in the past (as evidenced through 2011 mid-year population estimates).	over the past 10-years (to mid-2011).	over the past 5-years (to mid-2011).	required population change for the number of residents in employment to increase by the forecast amount.	account commuting patterns (as evidenced in the 2001 Census). A commuting ratio is calculated and assumed to be constant throughout the projection.	s and employment growth of there being no net migration over the projection period	s of there being no change in the number of residents in employment over the projection period	housing provision in line with past completions (2003-13).	the 2008-based CLG household projections.
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APPENDIX U: DETAILED PROJECTION OUTPUTS (PUSH WIDE)

Introduction

- 1.1 This section provides detailed outputs of the modelling under each of the nine scenarios run to look at population growth, employment change and housing needs. All the projections look at the period from 2011 to 2036 with outputs available for each year of the projection (although these have generally been summarised for five year periods). The projections run are summarised in table 9 below.

Table 9: Description of Projections used for Demographic Modelling

Projection	Description
PROJ 1	Linked to 2010- and 2011-based SNPP
PROJ 2	Linked to SNPP with adjusted migration
PROJ 3	10-year migration trends
PROJ 4	5-year migration trends
PROJ A	Jobs baseline
PROJ B	Residents in employment
PROJ X	Zero net migration
PROJ Y	Zero employment Growth
PROJ Z	Past Completions

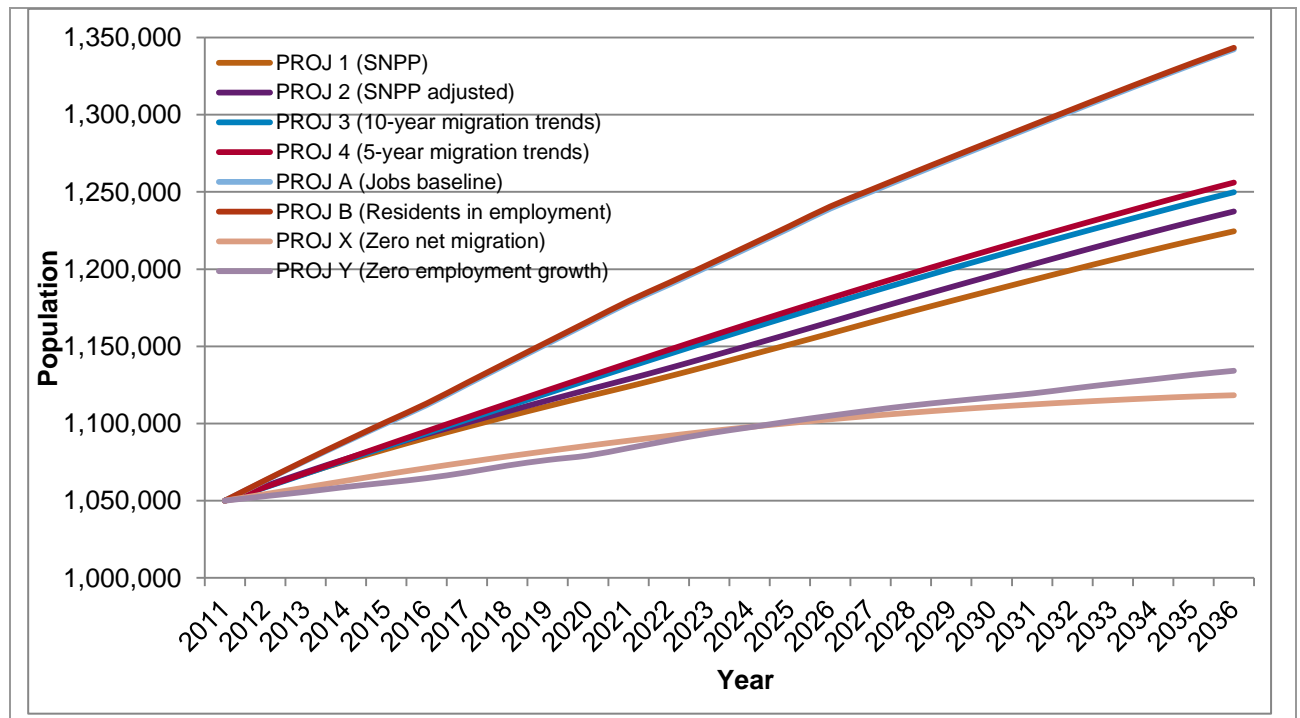
Population Projections

- 1.2 Table 10 and Figure 11 below show the expected growth in population under each of the nine projection runs. The projections are for the PUSH area as a whole.

Table 10: Population Estimates 2011 to 2036

	2011	2016	2021	2026	2031	2036
PROJ 1 (SNPP)	1,050,034 0.0%	1,090,762 3.9%	1,123,952 7.0%	1,158,311 10.3%	1,192,885 13.6%	1,224,502 16.6%
PROJ 2 (SNPP adjusted)	1,050,034 0.0%	1,093,052 4.1%	1,128,733 7.5%	1,165,712 11.0%	1,202,971 14.6%	1,237,340 17.8%
PROJ 3 (10-year migration trends)	1,050,034 0.0%	1,093,823 4.2%	1,136,568 8.2%	1,177,376 12.1%	1,215,084 15.7%	1,249,807 19.0%
PROJ 4 (5-year migration trends)	1,050,034 0.0%	1,095,054 4.3%	1,139,074 8.5%	1,181,150 12.5%	1,220,089 16.2%	1,256,038 19.6%
PROJ A (Jobs baseline)	1,050,034 0.0%	1,111,891 5.9%	1,178,075 12.2%	1,239,159 18.0%	1,291,968 23.0%	1,342,323 27.8%
PROJ B (Residents in employment)	1,050,034 0.0%	1,113,003 6.0%	1,179,299 12.3%	1,240,540 18.1%	1,293,172 23.2%	1,343,324 27.9%
PROJ X (Zero net migration)	1,050,034 0.0%	1,071,121 2.0%	1,088,868 3.7%	1,102,727 5.0%	1,112,327 5.9%	1,118,306 6.5%
PROJ Y (Zero employment growth)	1,050,034 0.0%	1,064,644 1.4%	1,084,084 3.2%	1,105,056 5.2%	1,119,450 6.6%	1,134,163 8.0%

Figure 11: Population Change, 2011 – 2036

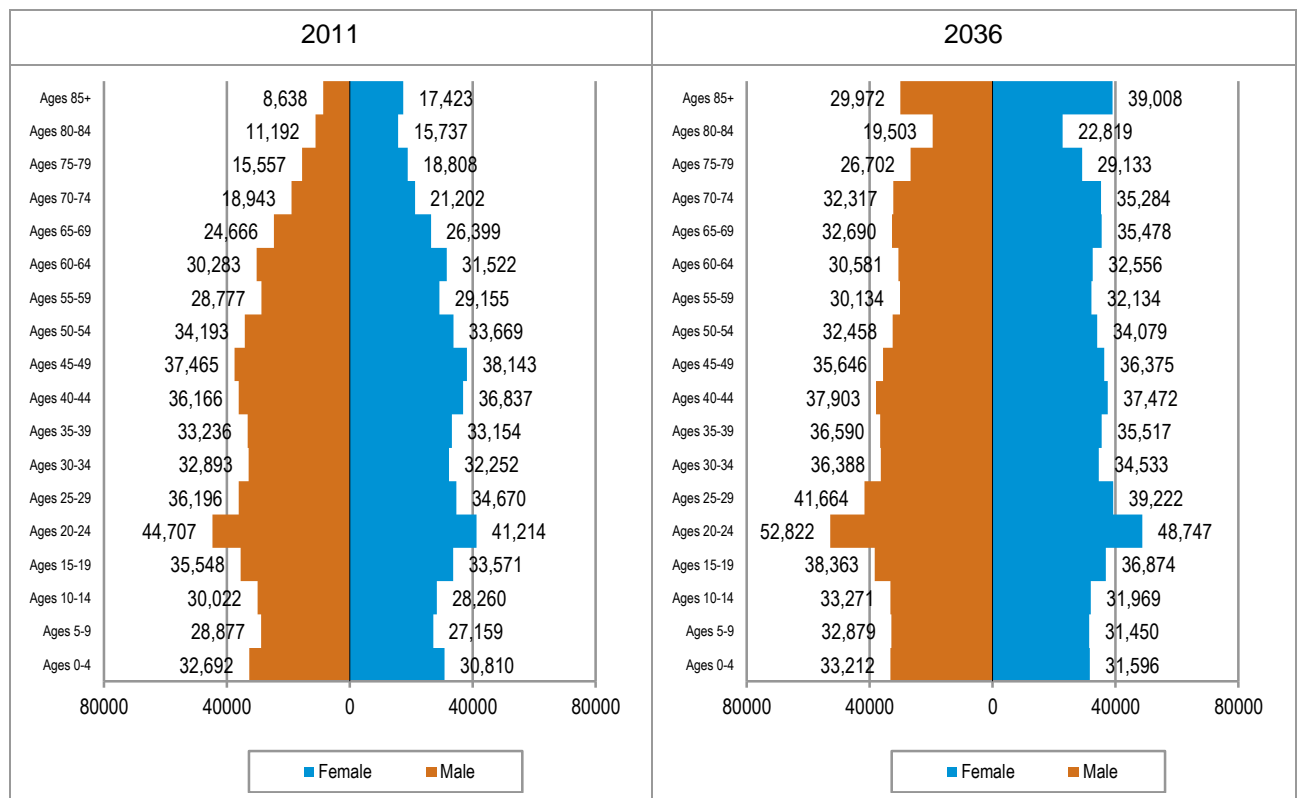


Impact on Population Age Structure

1.3 With the changes shown above there will also be a change in the age/sex profile of the population. We have therefore looked in a bit more detail at population change under PROJ 2 (linked to the adjusted SNPP). The figure below shows population pyramids for 2011 and 2036.

1.4 The 'pyramids' show the growth in population overall and highlight the ageing of the population with a greater proportion of the population expected to be in age groups aged 60 and over (and even more so for older age groups) - in particular the oldest age group (85+) shows an increase from 26,061 people to 68,980.

Figure 12: Distribution of Population 2011 and 2036 (PROJ 2)



1.5 Table 11 below summarises the findings for key (15 year) age groups. The largest growth will be in people aged over 60. In 2036 it is estimated that there will be 366,000 people aged 60 and over. This is an increase of 125,700 from 2011, representing growth of 52%. The population aged 75 and over is projected to increase by an even greater proportion, 91%.

1.6 The growth in the older population is an important driver of housing needs, in particular as older households typically are smaller than those in younger age groups.

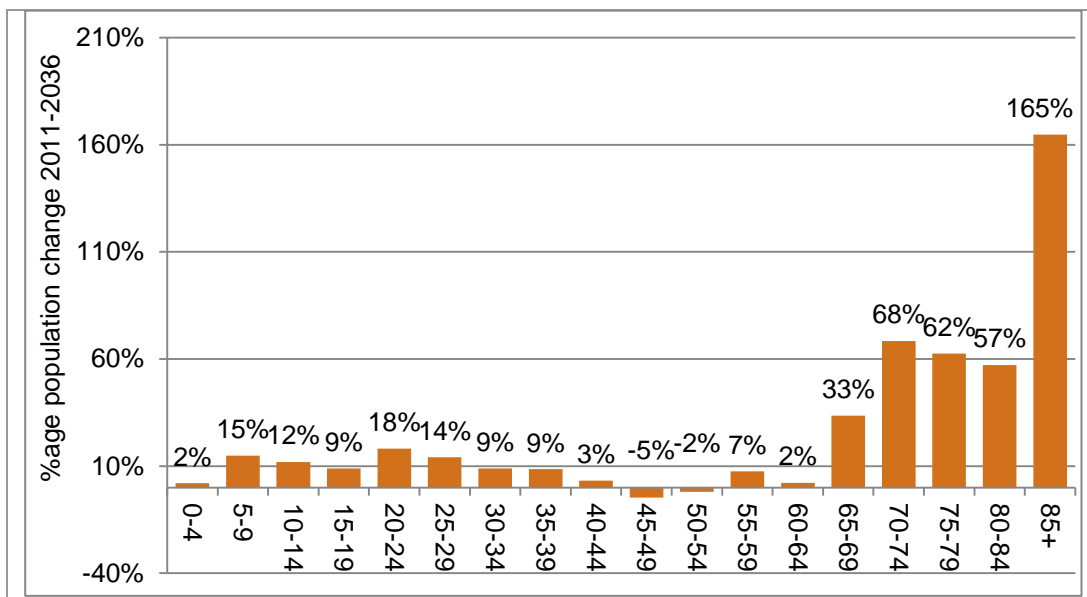
1.7 Looking at the other end of the age spectrum we can see that there are projected to be around 9% more people aged under 15 with increases seen for the 15-29 and 30-44 age groups. The 45-59 age group is expected to see a small decline in population.

Table 11: Population Change 2011 to 2036 by Fifteen Year Age Bands (PROJ 2)

Age group	Population 2011	Population 2036	Change in population	% change from 2011
Under 15	177,820	194,377	16,558	9.3%
15-29	225,905	257,690	31,785	14.1%
30-44	204,537	218,405	13,868	6.8%
45-59	201,403	200,827	-576	-0.3%
60-74	153,014	198,906	45,892	30.0%
75+	87,355	167,135	79,780	91.3%
Total	1,050,034	1,237,340	187,306	17.8%

1.8 Figure 13 below shows the percentage changes for each five year age group. The most stark trend is the increase in the population aged 85 and over (up 165%) which may have implications for future housing delivery as many of this group may require some form of specialist housing. In contrast we see only moderate increases (and some decreases) in most age groups up to age 65. The large projected growth in population in the oldest age groups is linked to projected improvements in life expectancy.

Figure 13: Forecast Population Change by Age Group 2011 – 2036



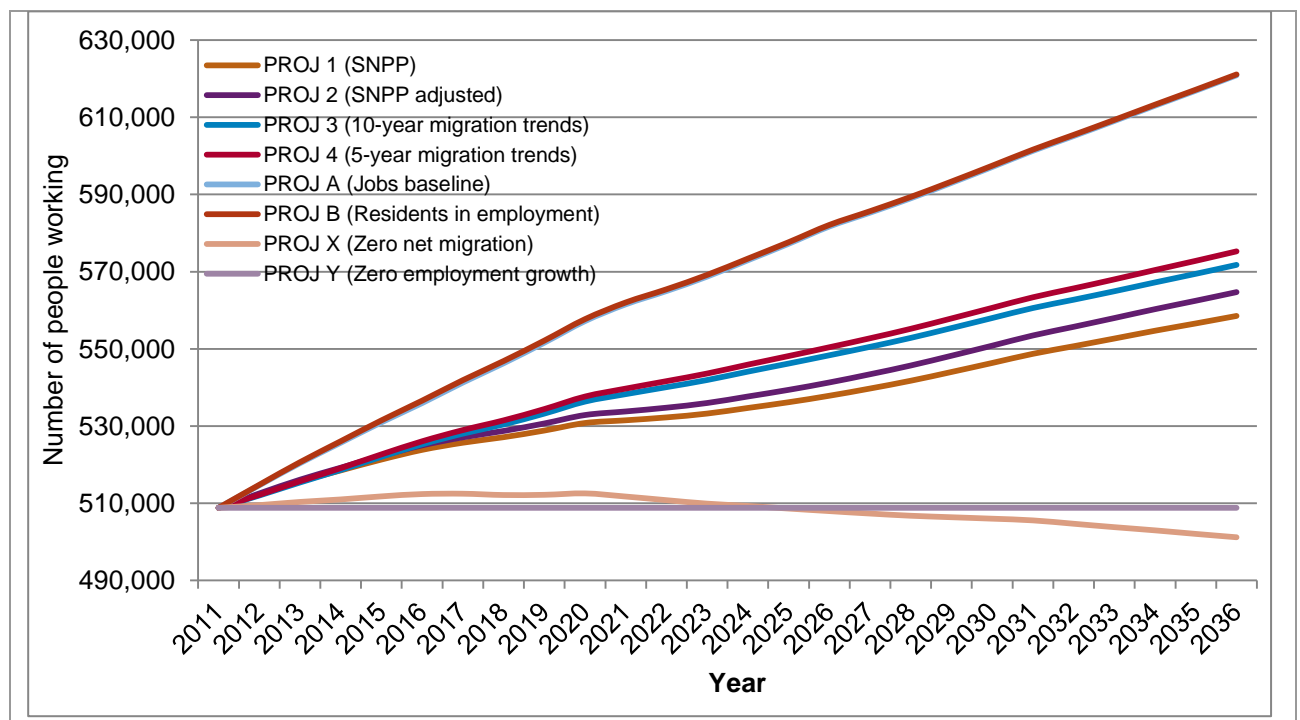
Employment Changes

1.9 The table and figure below show the estimated number of people living in the PUSH Area who are working under each of our eight projections. The figures are thus for ‘residents in employment.’

Table 12: Employment Estimates 2011 to 2036

	2011	2016	2021	2026	2031	2036
PROJ 1 (SNPP)	508,825 0.0%	523,835 2.9%	531,498 4.5%	537,856 5.7%	548,717 7.8%	558,533 9.8%
PROJ 2 (SNPP adjusted)	508,825 0.0%	525,001 3.2%	533,786 4.9%	541,300 6.4%	553,473 8.8%	564,701 11.0%
PROJ 3 (10-year migration trends)	508,825 0.0%	525,277 3.2%	538,274 5.8%	548,340 7.8%	560,581 10.2%	571,753 12.4%
PROJ 4 (5-year migration trends)	508,825 0.0%	526,057 3.4%	539,709 6.1%	550,419 8.2%	563,362 10.7%	575,260 13.1%
PROJ A (Jobs baseline)	508,825 0.0%	535,957 5.3%	561,540 10.4%	581,700 14.3%	601,296 18.2%	620,859 22.0%
PROJ B (Residents in employment)	508,825 0.0%	536,584 5.5%	562,018 10.5%	582,104 14.4%	601,615 18.2%	621,093 22.1%
PROJ X (Zero net migration)	508,825 0.0%	512,391 0.7%	511,748 0.6%	507,971 -0.2%	505,571 -0.6%	501,193 -1.5%
PROJ Y (Zero employment growth)	508,825 0.0%	508,825 0.0%	508,825 0.0%	508,825 0.0%	508,825 0.0%	508,825 0.0%

Figure 14: Employment Change, 2011 – 2036



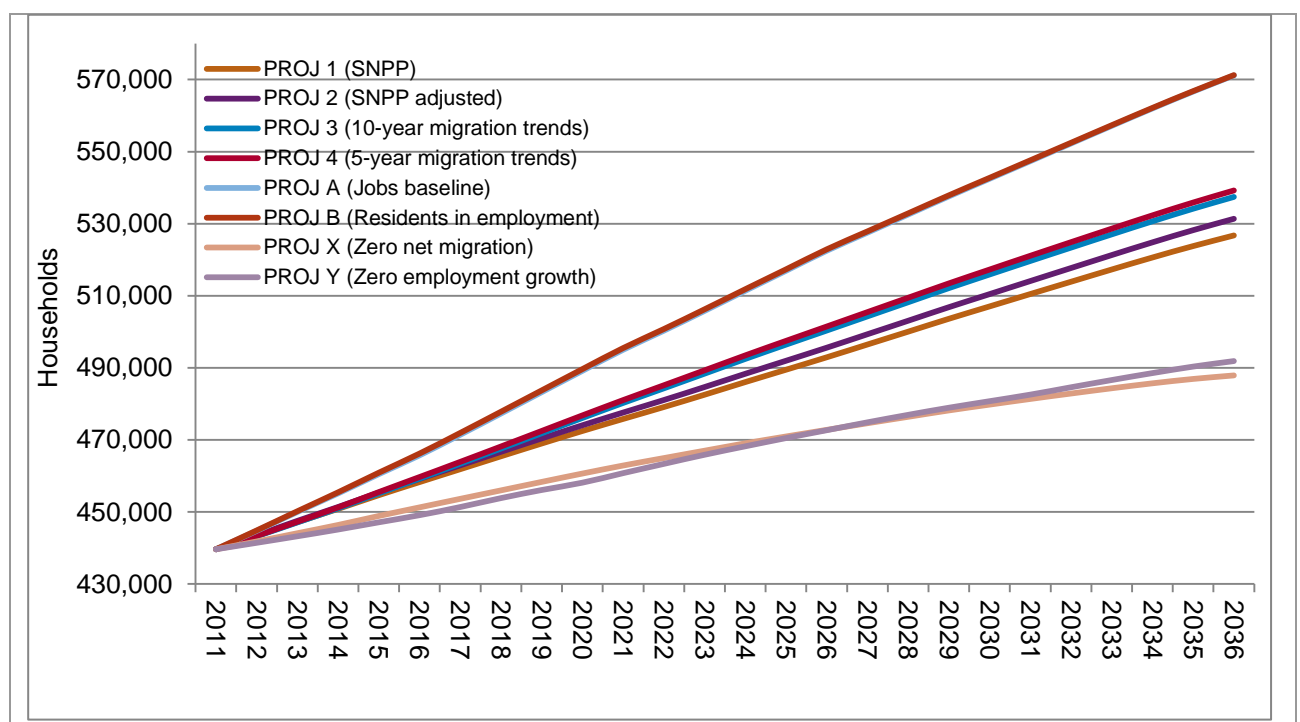
Household Growth

1.10 The table and figure below show the projected growth in the number of households under each of the main eight scenarios.

Table 13: Household Estimates 2011 to 2036

	2011	2016	2021	2026	2031	2036
PROJ 1 (SNPP)	439,639	458,286	475,815	492,922	510,479	526,744
	0.0%	4.2%	8.2%	12.1%	16.1%	19.8%
PROJ 2 (SNPP adjusted)	439,639	459,173	477,588	495,590	514,086	531,369
	0.0%	4.4%	8.6%	12.7%	16.9%	20.9%
PROJ 3 (10-year migration trends)	439,639	459,253	480,257	500,350	519,656	537,437
	0.0%	4.5%	9.2%	13.8%	18.2%	22.2%
PROJ 4 (5-year migration trends)	439,639	459,685	481,043	501,465	521,099	539,228
	0.0%	4.6%	9.4%	14.1%	18.5%	22.7%
PROJ A (Jobs baseline)	439,639	465,711	495,009	522,490	547,359	571,147
	0.0%	5.9%	12.6%	18.8%	24.5%	29.9%
PROJ B (Residents in employment)	439,639	466,202	495,480	522,879	547,592	571,250
	0.0%	6.0%	12.7%	18.9%	24.6%	29.9%
PROJ X (Zero net migration)	439,639	451,269	462,887	472,785	481,360	487,897
	0.0%	2.6%	5.3%	7.5%	9.5%	11.0%
PROJ Y (Zero employment growth)	439,639	449,102	460,768	472,683	482,565	491,880
	0.0%	2.2%	4.8%	7.5%	9.8%	11.9%

Figure 15: Household Change, 2011 – 2036



Dwelling Growth

1.11 The analysis above concentrated on the number of additional households. In reality there are always likely to be some vacant homes in the area and so the number of properties required to house all of these households will be slightly greater than the projected household numbers. We have therefore added a vacancy allowance of 3% to all of the above figures to make estimated housing requirements with figures shown in the table below.

Table 14: Estimated Housing Numbers with 3% Vacant & Second Home Allowance (to 2036)

Projection variant	Annual household growth	Annual requirement with vacancy allowance	Requirement over 25-years
PROJ 1 (SNPP)	3,484	3,589	89,719
PROJ 2 (SNPP adjusted)	3,669	3,779	94,482
PROJ 3 (10-year migration trends)	3,912	4,029	100,732
PROJ 4 (5-year migration trends)	3,984	4,103	102,576
PROJ A (Jobs baseline)	5,260	5,418	135,453
PROJ B (Residents in employment)	5,264	5,422	135,559
PROJ X (Zero net migration)	1,930	1,988	49,706
PROJ Y (Zero employment growth)	2,090	2,152	53,809

Demographic Projections at the Local Authority Level

1.12 The discussion and analysis above has concentrated upon the housing need generated across the PUSH area as a whole from the various projections. We now turn to consider the outcomes of the various projections for housing requirements at the individual district (or part district) level, focussing particularly on the following projections:

- PROJ 2 – Adjusted SNPP
- PROJ 2A – Adjusted SNPP with 2008 headship rate assumptions
- PROJ A – Jobs Baseline
- PROJ B – Residents in employment

1.13 Detailed outputs for population, employment and household growth for all of the projection scenarios are set out in **Appendix T**.

1.14 We have described the outputs for key projections below; before moving onto provide tables summarising key outputs for each local authority.

PROJ 2 – Adjusted SNPP

- 1.15 Table 15 below sets out the housing needs and annual growth rate for each local authority area (and part area) within the PUSH Area arising from the adjusted SNPP PROJ 2 projection.

Table 15: District Housing Needs – PROJ 2

Area	Housing Need (2011-2036)	Housing Need per Annum	Implied Annual Growth Rate in Housing (% per Annum)
East Hampshire (part)	2,025	81	1.0%
Eastleigh	13,898	556	1.0%
Fareham	9,108	364	0.8%
Gosport	10,364	415	1.1%
Havant	10,367	415	0.8%
New Forest (part)	6,880	275	0.9%
Portsmouth	17,411	696	0.8%
Southampton	17,689	708	0.7%
Test Valley (part)	3,550	142	0.8%
Winchester (part)	3,180	127	0.8%

PROJ 2A – Adjusted SNPP with 2008 Headship Rates

- 1.16 Table 16 below sets out the housing need and annual growth rate for each authority (and part authority) within the PUSH area arising from the adjusted SNPP PROJ 2A projection if 2008-based headship rates are used. These are based on longer-term trends in household formation dating back to 1971 and take less account of trends over the 2001-11 decade.
- 1.17 The impact of using the 2008 headship rates is to increase the projected household growth relative to those based on the 2011-based headship rates.

Table 16: District Housing Needs – PROJ 2A

Area	Housing Need (2011-2036)	Housing Need per Annum	Implied Annual Growth Rate in Housing (% per Annum)
East Hampshire (part)	2,325	93	1.1%
Eastleigh	16,937	677	1.3%
Fareham	10,653	426	0.9%
Gosport	11,918	477	1.3%
Havant	12,519	501	0.9%
New Forest (part)	8,185	327	1.0%
Portsmouth	21,479	859	1.0%
Southampton	22,029	881	0.9%
Test Valley (part)	4,209	168	1.0%
Winchester (part)	3,763	151	1.0%

PROJ A – Jobs Baseline

- 1.18 Table 17 below sets out the housing requirement and annual growth rate for each authority (and part authority) within the PUSH area arising from the adjusted SNPP PROJ A – Jobs Baseline projection. Across all areas we can see that meeting economic and employment trends could generate upward pressure on housing needs when compared to the PROJ 2 projection (although the same caveats apply as set out above regarding economic-driven projections as set out in the main report).
- 1.19 In particular, the PROJ A outputs show a particularly strong upward pressure on Winchester, Fareham, Southampton and New Forest. With the exception of Southampton this reflects the older population structure in these areas. In Southampton it would however be reasonable to assume that employment growth is partly supported by net inward commuting (consistent with past trends) as modelled in PROJ B.

Table 17: District Housing Needs – PROJ A

Area	Housing Need (2011-2036)	Housing Need per Annum	Implied Annual Growth Rate in Housing (% per Annum)
East Hampshire (part)	2,725	109	1.3%
Eastleigh	16,159	646	1.2%
Fareham	16,246	650	1.4%
Gosport	9,460	378	1.0%
Havant	14,164	567	1.1%
New Forest (part)	10,570	423	1.3%
Portsmouth	24,578	983	1.1%
Southampton	29,968	1,199	1.2%
Test Valley (part)	5,326	213	1.2%
Winchester (part)	6,270	251	1.7%

PROJ B – Residents in Employment

- 1.20 The table below sets out the housing requirement and annual growth rate for each authority (and part authority) within the PUSH area arising from the PROJ B projection. Again, we can see that economic and employment trends could create pressure on housing need when compared to PROJ 2.
- 1.21 It is particularly interesting to note the differences between PROJ B and PROJ A, which are driven by the commuting patterns and dynamics of each authority. In Southampton, Portsmouth and Winchester, taking account of commuting serves to reduce the housing need identified compared to

PROJ A. In all other authorities, commuting patterns serve to increase the housing requirement compared to PROJ A.

Table 18: District Housing Needs – PROJ B

Area	Housing Need (2011-2036)	Housing Need per Annum	Implied Annual Growth Rate in Housing (% per Annum)
East Hampshire (part)	3,050	122	1.5%
Eastleigh	16,756	670	1.2%
Fareham	17,608	704	1.5%
Gosport	10,834	433	1.2%
Havant	15,926	637	1.2%
New Forest (part)	11,565	463	1.5%
Portsmouth	21,320	853	1.0%
Southampton	27,358	1,094	1.1%
Test Valley (part)	5,514	221	1.3%
Winchester (part)	5,633	225	1.5%

PROJ 2 – Midpoint Headship

- 1.22 As described in the main report, the 2011-based Headship Rates project forward a degree of suppressed household formation. However not all of the difference between the results in Tables 15 and 16 above can be attributed to suppressed household formation; some is more likely to relate to international migration and the impact of household structures within migrant households.
- 1.23 As set out in the main report, it is reasonable to project forward on the basis that headship rates will fall around midway between those implied in the 2008- and 2011-based CLG Household Projections. This results in a housing need for each of the authorities as shown in Table 19 below. This has been calculated by identifying the midpoint annual requirement based on the figures derived in Tables 15 and 16 above.

Table 19: Housing Need based on Demographic Trends (Midpoint Headship)

Annual Housing Need 2011-36 (PROJ 2)	
Midpoint of 2011-based and 2008-based Headship	
East Hampshire (Part)	85
Eastleigh	615
Fareham	395
Gosport	445
Havant	455
New Forest (Part)	300
Portsmouth	775
Southampton	795
Test Valley	155
Winchester	140
Winchester East	58
Winchester West	81
Fareham East	296
Fareham West	99
PUSH East (Portsmouth) HMA	2115
PUSH West (Southampton) HMA	2045
PUSH Total	4160

- 1.24 The identified needs in this table for each authority correspond to the conclusions regarding housing need in the main report. We consider that this projection represents a robust basis for forward planning based on the demographic evidence and market signals.
- 1.25 The figures for individual local authorities or part authorities should however be used with caution. They are based on past demographic trends which have been influenced in part by past policies on housing distribution and relative rates of housing delivery, which feed through into the projections.
- 1.26 It should be recognised that the figures are derived on policy-off basis and takes no account of land supply or development constraints within the PUSH area; nor 'Policy-On' aspirations for economic growth. The draft Planning Practice Guidance indicates that SHMAs should not apply constraints to the overall assessment of need such as issues related to land supply, infrastructure or environmental constraints. It should be noted that in some districts that when the annual housing need is aggregated over a plan period it would result in housing land requirements that cannot be met within that district. For example in Gosport, apart from the sites that have already been identified for development, physically there is a very limited amount of land that would be available for development notwithstanding other policy constraints and infrastructure requirements.

- 1.27 The figures for individual authorities are influenced by, and project forward to some extent, previous policies (which in particular impact on levels of migration). It is important therefore that they are considered in the context of the wider evidence. The wider evidence from the SHMA indicates that:
- Past relative housing delivery has been stronger in Gosport and Eastleigh, and weaker in Havant and that this influences the projections. In Gosport this is influenced by the release of former MOD properties and land onto the market;
 - The affordable housing needs evidence provides some evidence of a need to consider higher housing provision (relative to the above figures), particularly in Eastleigh, East Hampshire, Fareham and Test Valley albeit that there are policy choices here;
 - The level of growth in the workforce which might be expected is influenced in part by the population age structure, with the parts of New Forest, East Hampshire, Test Valley and Winchester – as well as Fareham and Havant – having an older age structure than other areas. However the relationship between housing/ population growth and the economy is sensitive to changes in employment rates and commuting.
- 1.28 These are relevant factors in considering the Policy-ON distribution of housing provision across the HMA, alongside issues related to land supply, infrastructure, development constraints and other strategy issues which will be undertaken through joint working at the PUSH level.
- 1.29 The authorities in working together to review the South Hampshire Strategy and developing their respective local plans will need to consider what scale of development can be sustainably accommodated, the interaction between the strategy for housing provision and economic growth and potential levels of affordable housing delivery. Economic forecasts have been commissioned by the LEP to support this. In considering how affordable housing needs can be met, it will be important to take account of available funding, what level can viably be delivered through mixed tenure schemes and the degree to which needs can be met in part through private rented sector lettings. The draft Planning Practice Guidance indicates that these may provide a basis for adjusting upwards the assessment of housing need.
- 1.30 How housing provision is ultimately distributed and met across the two housing market areas and the PUSH area as a whole should reasonably be decided at the local level and through dialogue between the authorities within the PUSH Partnership, taking account of constraints and land availability, the need to promote sustainable patterns of development and other policy aspirations (such as regeneration). The SHMA analysis is thus intended to provide a 'starting point' and input to this which is to be taken forward through the development and review of the South Hampshire Strategy and authorities' development plans.

What Homes Where?

- 1.31 If the projections herein are compared with findings from the What Homes Where Toolkit on the How Many Homes website (www.howmanyhomes.org) it is important to bear in mind that the Toolkit currently (at the time of writing in 2013) uses the CLG's 2008-based Household Projections. These

pre-date the release of information from the 2011 Census. The projections herein have sought to consider and update projections based on the latest demographic information.

APPENDIX V: DETAILED PROJECTION OUTPUTS (INDIVIDUAL DISTRICT)

1.32 This appendix summarises the demographic projection prepared for each authority (or part authority) within the PUSH Area. It provides figures for the 2011-36 period and on an annual basis, setting out expected population growth, housing need and employment/labour supply growth for each projection run.

Eastleigh

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	1,038	0.8%	474	0.9%	351	0.5%
PROJ 2 (SNPP adjusted)	1,254	1.0%	556	1.0%	474	0.7%
PROJ 3 (10-year migration trends)	1,033	0.8%	472	0.9%	350	0.5%
PROJ 4 (5-year migration trends)	1,280	1.0%	566	1.0%	490	0.7%
PROJ A (Jobs baseline)	1,489	1.2%	646	1.2%	606	0.9%
PROJ B (Residents in employment)	1,552	1.2%	670	1.2%	641	1.0%
PROJ X (Zero net migration)	296	0.2%	191	0.4%	-68	-0.1%
PROJ Y (Zero employment growth)	417	0.3%	237	0.4%	0	0.0%
PROJ Z (Past completions)	1,146	0.9%	515	1.0%	416	0.6%
PROJ 2A (2008-based headship)	1,254	1.0%	677	1.3%	474	0.7%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	25,941	20.6%	11,839	21.9%	8,786	13.4%
PROJ 2 (SNPP adjusted)	31,345	24.9%	13,898	25.7%	11,854	18.0%
PROJ 3 (10-year migration trends)	25,825	20.5%	11,795	21.8%	8,752	13.3%
PROJ 4 (5-year migration trends)	31,995	25.4%	14,146	26.2%	12,256	18.6%
PROJ A (Jobs baseline)	37,230	29.6%	16,159	29.9%	15,149	23.0%
PROJ B (Residents in employment)	38,790	30.8%	16,756	31.0%	16,031	24.4%
PROJ X (Zero net migration)	7,408	5.9%	4,777	8.8%	-1,705	-2.6%
PROJ Y (Zero employment growth)	10,430	8.3%	5,914	10.9%	0	0.0%
PROJ Z (Past completions)	28,640	22.8%	12,863	23.8%	10,395	15.8%
PROJ 2A (2008-based headship)	31,345	24.9%	16,937	31.4%	11,854	18.0%

Fareham

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	925	0.8%	452	0.9%	211	0.4%
PROJ 2 (SNPP adjusted)	690	0.6%	364	0.8%	80	0.1%
PROJ 3 (10-year migration trends)	203	0.2%	184	0.4%	-193	-0.3%
PROJ 4 (5-year migration trends)	557	0.5%	316	0.7%	5	0.0%
PROJ A (Jobs baseline)	1,450	1.3%	650	1.4%	504	0.9%
PROJ B (Residents in employment)	1,595	1.4%	704	1.5%	584	1.0%
PROJ X (Zero net migration)	-204	-0.2%	32	0.1%	-420	-0.7%
PROJ Y (Zero employment growth)	549	0.5%	310	0.6%	0	0.0%
PROJ Z (Past completions)	625	0.6%	338	0.7%	46	0.1%
PROJ 2A (2008-based headship)	690	0.6%	426	0.9%	80	0.1%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	23,122	20.7%	11,298	23.5%	5,287	9.4%
PROJ 2 (SNPP adjusted)	17,240	15.4%	9,108	18.9%	1,997	3.5%
PROJ 3 (10-year migration trends)	5,066	4.5%	4,593	9.5%	-4,823	-8.5%
PROJ 4 (5-year migration trends)	13,935	12.4%	7,894	16.4%	137	0.2%
PROJ A (Jobs baseline)	36,257	32.4%	16,246	33.8%	12,590	22.3%
PROJ B (Residents in employment)	39,870	35.6%	17,608	36.6%	14,609	25.9%
PROJ X (Zero net migration)	-5,099	-4.6%	809	1.7%	-10,507	-18.6%
PROJ Y (Zero employment growth)	13,732	12.3%	7,756	16.1%	0	0.0%
PROJ Z (Past completions)	15,634	14.0%	8,453	17.6%	1,142	2.0%
PROJ 2A (2008-based headship)	17,240	15.4%	10,653	22.1%	1,997	3.5%

Gosport

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	484	0.6%	303	0.8%	96	0.2%
PROJ 2 (SNPP adjusted)	772	0.9%	415	1.1%	240	0.6%
PROJ 3 (10-year migration trends)	673	0.8%	376	1.0%	192	0.5%
PROJ 4 (5-year migration trends)	575	0.7%	338	0.9%	142	0.4%
PROJ A (Jobs baseline)	680	0.8%	378	1.0%	193	0.5%
PROJ B (Residents in employment)	823	1.0%	433	1.2%	264	0.7%
PROJ X (Zero net migration)	209	0.3%	197	0.5%	-41	-0.1%
PROJ Y (Zero employment growth)	294	0.4%	229	0.6%	0	0.0%
PROJ Z (Past completions)	470	0.6%	298	0.8%	90	0.2%
PROJ 2A (2008-based headship)	772	0.9%	477	1.3%	240	0.6%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	12,105	14.6%	7,580	20.8%	2,408	6.0%
PROJ 2 (SNPP adjusted)	19,293	23.3%	10,364	28.4%	6,012	15.0%
PROJ 3 (10-year migration trends)	16,823	20.3%	9,412	25.8%	4,788	12.0%
PROJ 4 (5-year migration trends)	14,364	17.4%	8,460	23.2%	3,556	8.9%
PROJ A (Jobs baseline)	17,008	20.6%	9,460	25.9%	4,816	12.0%
PROJ B (Residents in employment)	20,564	24.9%	10,834	29.7%	6,591	16.5%
PROJ X (Zero net migration)	5,230	6.3%	4,922	13.5%	-1,022	-2.6%
PROJ Y (Zero employment growth)	7,359	8.9%	5,730	15.7%	0	0.0%
PROJ Z (Past completions)	11,747	14.2%	7,445	20.4%	2,246	5.6%
PROJ 2A (2008-based headship)	19,293	23.3%	11,918	32.6%	6,012	15.0%

Havant

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	440	0.4%	262	0.5%	-51	-0.1%
PROJ 2 (SNPP adjusted)	837	0.7%	415	0.8%	144	0.3%
PROJ 3 (10-year migration trends)	383	0.3%	240	0.5%	-80	-0.1%
PROJ 4 (5-year migration trends)	543	0.4%	302	0.6%	-1	0.0%
PROJ A (Jobs baseline)	1,232	1.0%	567	1.1%	335	0.6%
PROJ B (Residents in employment)	1,415	1.2%	637	1.2%	425	0.8%
PROJ X (Zero net migration)	-49	0.0%	74	0.1%	-292	-0.5%
PROJ Y (Zero employment growth)	548	0.5%	304	0.6%	0	0.0%
PROJ Z (Past completions)	385	0.3%	241	0.5%	-78	-0.1%
PROJ 2A (2008-based headship)	837	0.7%	501	0.9%	144	0.3%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	11,000	9.1%	6,553	12.4%	-1,276	-2.3%
PROJ 2 (SNPP adjusted)	20,919	17.3%	10,367	19.6%	3,596	6.5%
PROJ 3 (10-year migration trends)	9,579	7.9%	6,011	11.4%	-1,991	-3.6%
PROJ 4 (5-year migration trends)	13,582	11.2%	7,551	14.3%	-24	0.0%
PROJ A (Jobs baseline)	30,795	25.5%	14,164	26.8%	8,385	15.1%
PROJ B (Residents in employment)	35,374	29.3%	15,926	30.1%	10,631	19.1%
PROJ X (Zero net migration)	-1,217	-1.0%	1,860	3.5%	-7,294	-13.1%
PROJ Y (Zero employment growth)	13,705	11.3%	7,589	14.4%	0	0.0%
PROJ Z (Past completions)	9,629	8.0%	6,025	11.4%	-1,940	-3.5%
PROJ 2A (2008-based headship)	20,919	17.3%	12,519	23.7%	3,596	6.5%

Portsmouth

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	1,335	0.6%	633	0.7%	498	0.5%
PROJ 2 (SNPP adjusted)	1,493	0.7%	696	0.8%	584	0.6%
PROJ 3 (10-year migration trends)	2,630	1.3%	1,156	1.3%	1,194	1.2%
PROJ 4 (5-year migration trends)	2,445	1.2%	1,081	1.2%	1,094	1.1%
PROJ A (Jobs baseline)	2,195	1.1%	983	1.1%	959	1.0%
PROJ B (Residents in employment)	1,874	0.9%	853	1.0%	786	0.8%
PROJ X (Zero net migration)	1,310	0.6%	624	0.7%	481	0.5%
PROJ Y (Zero employment growth)	415	0.2%	259	0.3%	0	0.0%
PROJ Z (Past completions)	1,295	0.6%	617	0.7%	476	0.5%
PROJ 2A (2008-based headship)	1,493	0.7%	859	1.0%	584	0.6%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	33,380	16.2%	15,820	17.9%	12,455	12.9%
PROJ 2 (SNPP adjusted)	37,332	18.2%	17,411	19.7%	14,591	15.1%
PROJ 3 (10-year migration trends)	65,742	32.0%	28,892	32.7%	29,858	30.9%
PROJ 4 (5-year migration trends)	61,121	29.8%	27,032	30.6%	27,361	28.3%
PROJ A (Jobs baseline)	54,876	26.7%	24,578	27.9%	23,968	24.8%
PROJ B (Residents in employment)	46,859	22.8%	21,320	24.2%	19,654	20.3%
PROJ X (Zero net migration)	32,738	15.9%	15,601	17.7%	12,022	12.4%
PROJ Y (Zero employment growth)	10,381	5.1%	6,487	7.4%	0	0.0%
PROJ Z (Past completions)	32,373	15.8%	15,413	17.5%	11,911	12.3%
PROJ 2A (2008-based headship)	37,332	18.2%	21,479	24.3%	14,591	15.1%

Southampton

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	1,615	0.7%	836	0.8%	701	0.6%
PROJ 2 (SNPP adjusted)	1,300	0.6%	708	0.7%	528	0.5%
PROJ 3 (10-year migration trends)	2,320	1.0%	1,127	1.1%	1,080	1.0%
PROJ 4 (5-year migration trends)	2,021	0.9%	1,005	1.0%	916	0.8%
PROJ A (Jobs baseline)	2,492	1.1%	1,199	1.2%	1,173	1.0%
PROJ B (Residents in employment)	2,238	0.9%	1,094	1.1%	1,035	0.9%
PROJ X (Zero net migration)	1,580	0.7%	825	0.8%	674	0.6%
PROJ Y (Zero employment growth)	341	0.1%	315	0.3%	0	0.0%
PROJ Z (Past completions)	1,681	0.7%	867	0.9%	735	0.7%
PROJ 2A (2008-based headship)	1,300	0.6%	881	0.9%	528	0.5%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	40,370	17.1%	20,905	20.7%	17,515	15.6%
PROJ 2 (SNPP adjusted)	32,504	13.8%	17,689	17.5%	13,197	11.7%
PROJ 3 (10-year migration trends)	58,008	24.6%	28,186	27.9%	27,006	24.0%
PROJ 4 (5-year migration trends)	50,530	21.4%	25,130	24.9%	22,902	20.3%
PROJ A (Jobs baseline)	62,308	26.4%	29,968	29.7%	29,337	26.1%
PROJ B (Residents in employment)	55,951	23.7%	27,358	27.1%	25,873	23.0%
PROJ X (Zero net migration)	39,498	16.7%	20,621	20.4%	16,847	15.0%
PROJ Y (Zero employment growth)	8,526	3.6%	7,872	7.8%	0	0.0%
PROJ Z (Past completions)	42,024	17.8%	21,670	21.5%	18,378	16.3%
PROJ 2A (2008-based headship)	32,504	13.8%	22,029	21.8%	13,197	11.7%

East Hants (part)

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	137	0.7%	73	0.9%	22	0.2%
PROJ 2 (SNPP adjusted)	160	0.8%	81	1.0%	34	0.3%
PROJ 3 (10-year migration trends)	80	0.4%	53	0.6%	-8	-0.1%
PROJ 4 (5-year migration trends)	137	0.7%	73	0.9%	22	0.2%
PROJ A (Jobs baseline)	236	1.2%	108	1.3%	74	0.7%
PROJ B (Residents in employment)	274	1.4%	122	1.5%	94	0.9%
PROJ X (Zero net migration)	-37	-0.2%	12	0.1%	-70	-0.7%
PROJ Y (Zero employment growth)	96	0.5%	59	0.7%	0	0.0%
PROJ Z (Past completions)	43	0.2%	40	0.5%	-27	-0.3%
PROJ 2A (2008-based headship)	160	0.8%	93	1.1%	34	0.3%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	3,427	17.4%	1,832	22.1%	552	5.6%
PROJ 2 (SNPP adjusted)	4,002	20.3%	2,034	24.5%	856	8.6%
PROJ 3 (10-year migration trends)	1,994	10.1%	1,332	16.0%	-209	-2.1%
PROJ 4 (5-year migration trends)	3,419	17.3%	1,832	22.1%	543	5.5%
PROJ A (Jobs baseline)	5,907	30.0%	2,711	32.6%	1,849	18.6%
PROJ B (Residents in employment)	6,858	34.8%	3,047	36.7%	2,349	23.6%
PROJ X (Zero net migration)	-920	-4.7%	310	3.7%	-1,747	-17.6%
PROJ Y (Zero employment growth)	2,388	12.1%	1,467	17.7%	0	0.0%
PROJ Z (Past completions)	1,080	5.5%	1,008	12.1%	-676	-6.8%
PROJ 2A (2008-based headship)	4,002	20.3%	2,325	28.0%	856	8.6%

New Forest (part)

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	587	0.8%	318	1.0%	128	0.4%
PROJ 2 (SNPP adjusted)	478	0.7%	275	0.9%	72	0.2%
PROJ 3 (10-year migration trends)	222	0.3%	173	0.5%	-63	-0.2%
PROJ 4 (5-year migration trends)	183	0.3%	158	0.5%	-84	-0.3%
PROJ A (Jobs baseline)	848	1.2%	423	1.3%	264	0.8%
PROJ B (Residents in employment)	948	1.3%	463	1.5%	316	1.0%
PROJ X (Zero net migration)	-315	-0.4%	-40	-0.1%	-344	-1.0%
PROJ Y (Zero employment growth)	343	0.5%	221	0.7%	0	0.0%
PROJ Z (Past completions)	135	0.2%	139	0.4%	-107	-0.3%
PROJ 2A (2008-based headship)	478	0.7%	327	1.0%	72	0.2%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	14,663	20.7%	7,960	25.1%	3,210	9.7%
PROJ 2 (SNPP adjusted)	11,949	16.9%	6,880	21.7%	1,789	5.4%
PROJ 3 (10-year migration trends)	5,541	7.8%	4,334	13.7%	-1,583	-4.8%
PROJ 4 (5-year migration trends)	4,574	6.5%	3,950	12.5%	-2,089	-6.3%
PROJ A (Jobs baseline)	21,195	30.0%	10,570	33.3%	6,588	19.8%
PROJ B (Residents in employment)	23,689	33.5%	11,565	36.5%	7,889	23.8%
PROJ X (Zero net migration)	-7,877	-11.1%	-1,006	-3.2%	-8,609	-25.9%
PROJ Y (Zero employment growth)	8,569	12.1%	5,533	17.5%	0	0.0%
PROJ Z (Past completions)	3,374	4.8%	3,463	10.9%	-2,675	-8.1%
PROJ 2A (2008-based headship)	11,949	16.9%	8,185	25.8%	1,789	5.4%

Test Valley (part)

Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	204	0.5%	120	0.7%	8	0.0%
PROJ 2 (SNPP adjusted)	264	0.6%	142	0.8%	40	0.2%
PROJ 3 (10-year migration trends)	154	0.4%	103	0.6%	-20	-0.1%
PROJ 4 (5-year migration trends)	119	0.3%	90	0.5%	-38	-0.2%
PROJ A (Jobs baseline)	458	1.1%	213	1.2%	145	0.7%
PROJ B (Residents in employment)	478	1.2%	221	1.3%	156	0.7%
PROJ X (Zero net migration)	-31	-0.1%	36	0.2%	-119	-0.6%
PROJ Y (Zero employment growth)	190	0.5%	116	0.7%	0	0.0%
PROJ Z (Past completions)	186	0.5%	114	0.7%	-2	0.0%
PROJ 2A (2008-based headship)	264	0.6%	168	1.0%	40	0.2%

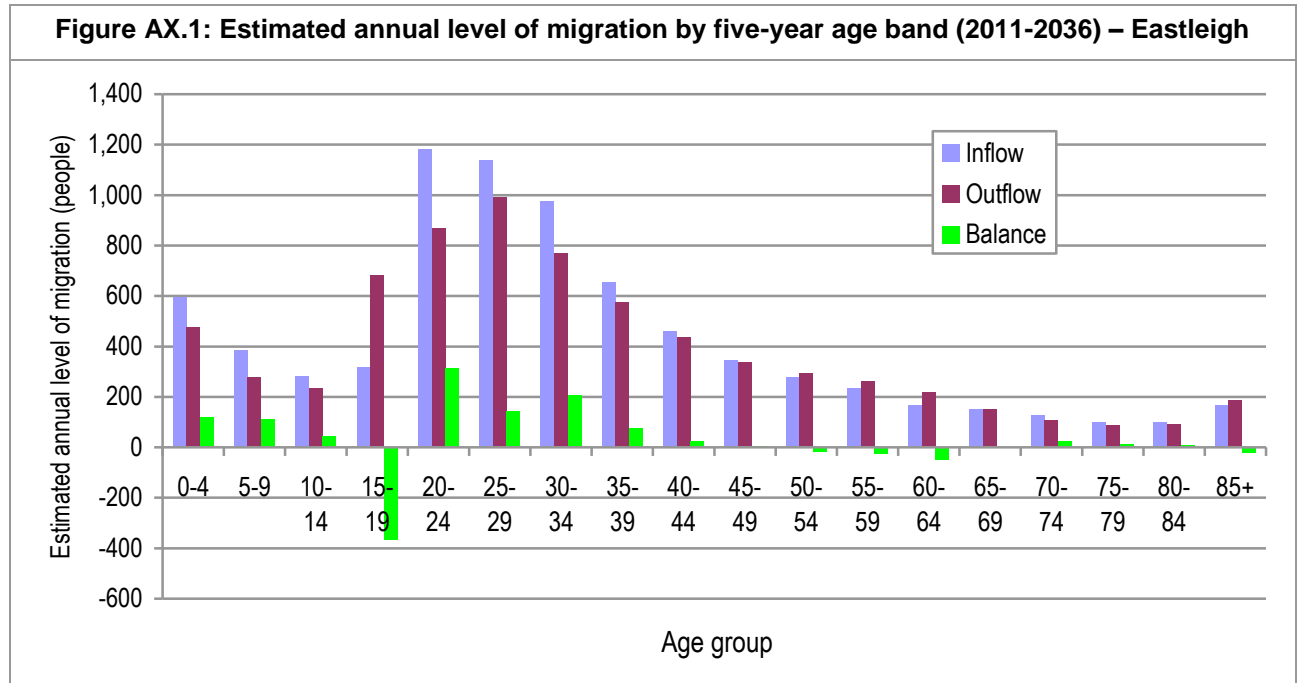
Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	5,097	12.5%	3,008	17.5%	192	0.9%
PROJ 2 (SNPP adjusted)	6,599	16.2%	3,550	20.6%	1,005	4.8%
PROJ 3 (10-year migration trends)	3,839	9.4%	2,572	14.9%	-488	-2.3%
PROJ 4 (5-year migration trends)	2,976	7.3%	2,260	13.1%	-954	-4.6%
PROJ A (Jobs baseline)	11,440	28.0%	5,326	30.9%	3,616	17.3%
PROJ B (Residents in employment)	11,954	29.3%	5,514	32.0%	3,894	18.7%
PROJ X (Zero net migration)	-767	-1.9%	908	5.3%	-2,978	-14.3%
PROJ Y (Zero employment growth)	4,759	11.7%	2,890	16.8%	0	0.0%
PROJ Z (Past completions)	4,649	11.4%	2,840	16.5%	-41	-0.2%
PROJ 2A (2008-based headship)	6,599	16.2%	4,209	24.5%	1,005	4.8%

Winchester (part)

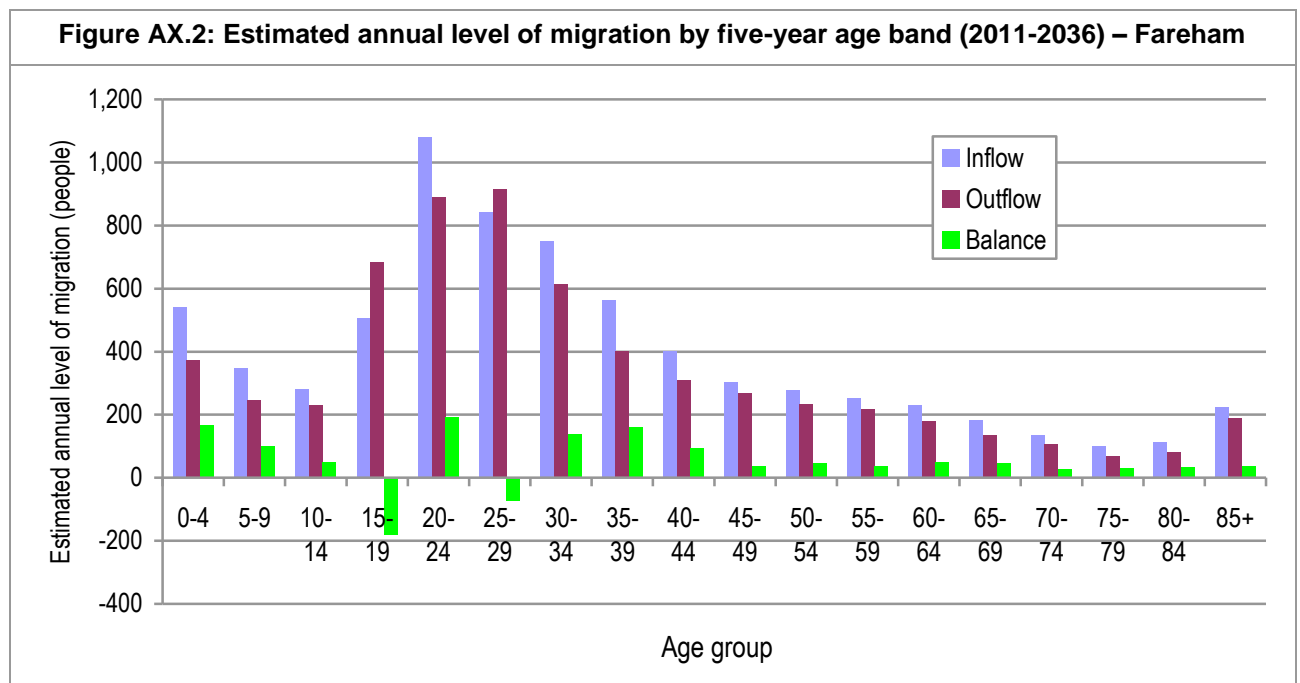
Summary of projections 2011 to 2036 – annual						
Projection	Population growth		Housing numbers		Employment growth	
	Per annum	% change	Per annum	% change	Per annum	% change
PROJ 1 (SNPP)	215	0.6%	117	0.8%	23	0.1%
PROJ 2 (SNPP adjusted)	245	0.7%	127	0.8%	39	0.2%
PROJ 3 (10-year migration trends)	294	0.8%	144	1.0%	65	0.4%
PROJ 4 (5-year migration trends)	380	1.1%	173	1.2%	110	0.6%
PROJ A (Jobs baseline)	611	1.7%	251	1.7%	229	1.3%
PROJ B (Residents in employment)	535	1.5%	225	1.5%	190	1.1%
PROJ X (Zero net migration)	-29	-0.1%	36	0.2%	-105	-0.6%
PROJ Y (Zero employment growth)	171	0.5%	103	0.7%	0	0.0%
PROJ Z (Past completions)	408	1.1%	182	1.2%	125	0.7%
PROJ 2A (2008-based headship)	245	0.7%	151	1.0%	39	0.2%

Summary of projections 2011 to 2036 – total						
Projection	Population growth		Housing numbers		Employment growth	
	Total	% change	Total	% change	Total	% change
PROJ 1 (SNPP)	5,363	14.8%	2,926	19.5%	578	3.3%
PROJ 2 (SNPP adjusted)	6,122	16.9%	3,180	21.2%	978	5.5%
PROJ 3 (10-year migration trends)	7,358	20.3%	3,604	24.0%	1,616	9.1%
PROJ 4 (5-year migration trends)	9,508	26.3%	4,322	28.8%	2,747	15.5%
PROJ A (Jobs baseline)	15,274	42.2%	6,270	41.8%	5,735	32.3%
PROJ B (Residents in employment)	13,380	36.9%	5,633	37.6%	4,747	26.7%
PROJ X (Zero net migration)	-722	-2.0%	904	6.0%	-2,637	-14.8%
PROJ Y (Zero employment growth)	4,281	11.8%	2,571	17.1%	0	0.0%
PROJ Z (Past completions)	10,198	28.2%	4,543	30.3%	3,123	17.6%
PROJ 2A (2008-based headship)	6,122	16.9%	3,763	25.1%	978	5.5%

APPENDIX X: DETAILED MIGRATION ASSUMPTIONS (FULL AUTHORITIES ONLY)

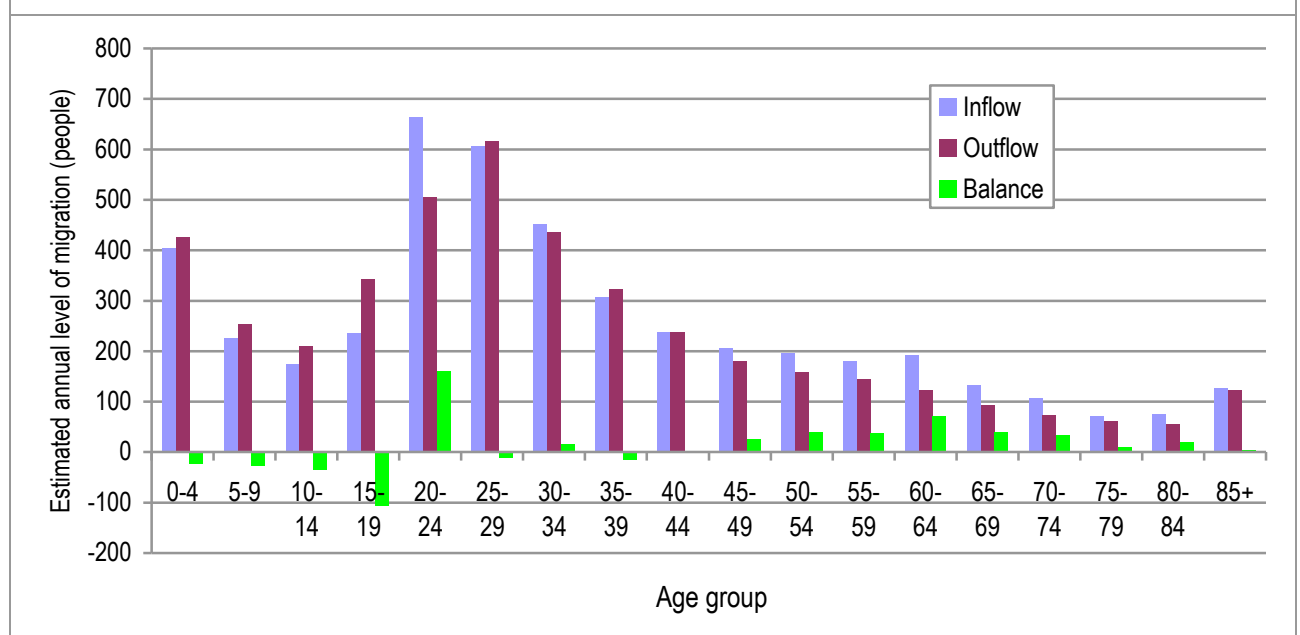


Source: Derived from ONS 2010-based population projections



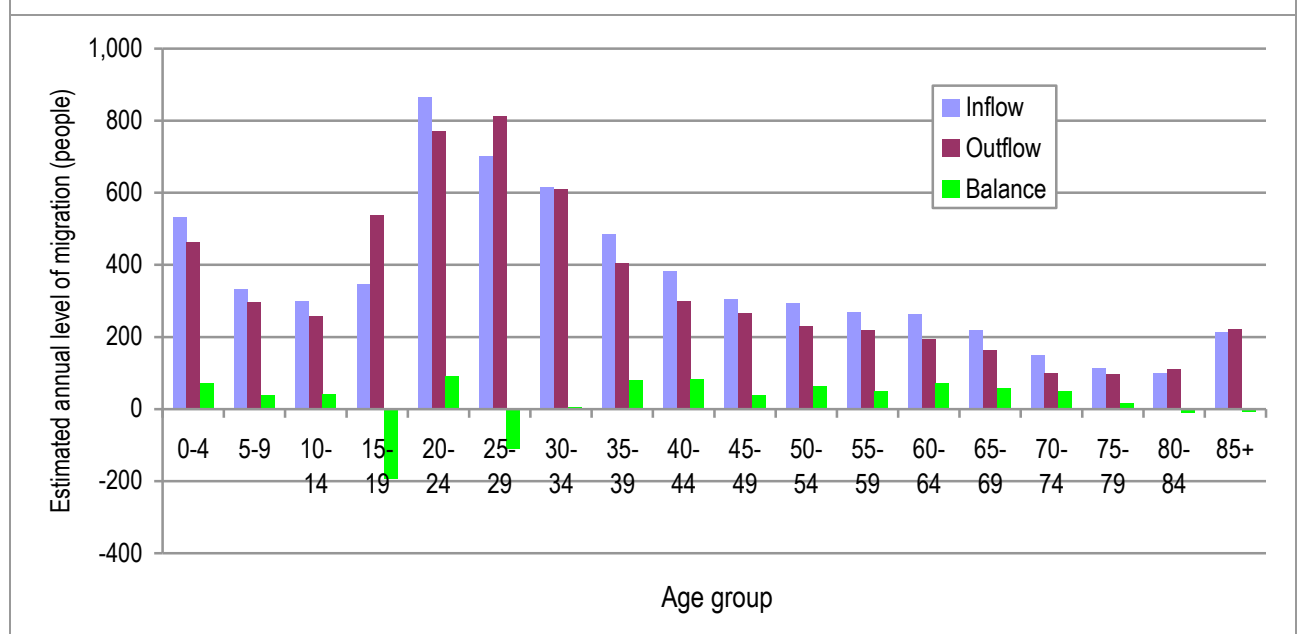
Source: Derived from ONS 2010-based population projections

Figure AX.3: Estimated annual level of migration by five-year age band (2011-2036) – Gosport



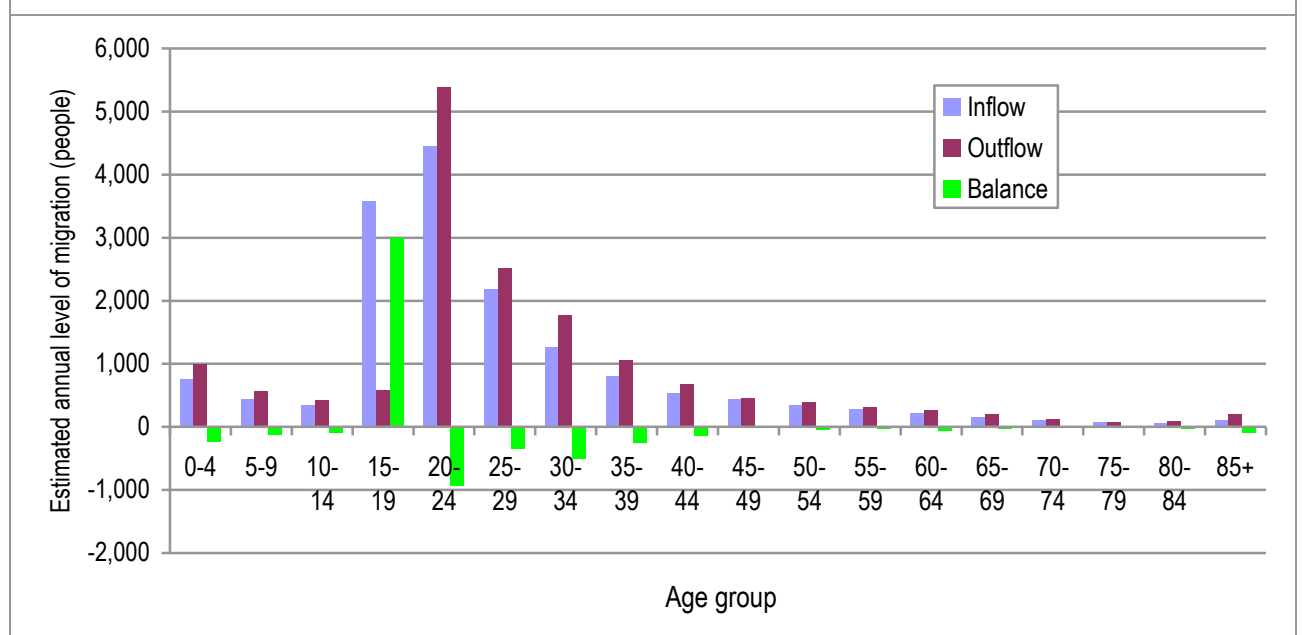
Source: Derived from ONS 2010-based population projections

Figure AX.4: Estimated annual level of migration by five-year age band (2011-2036) – Havant



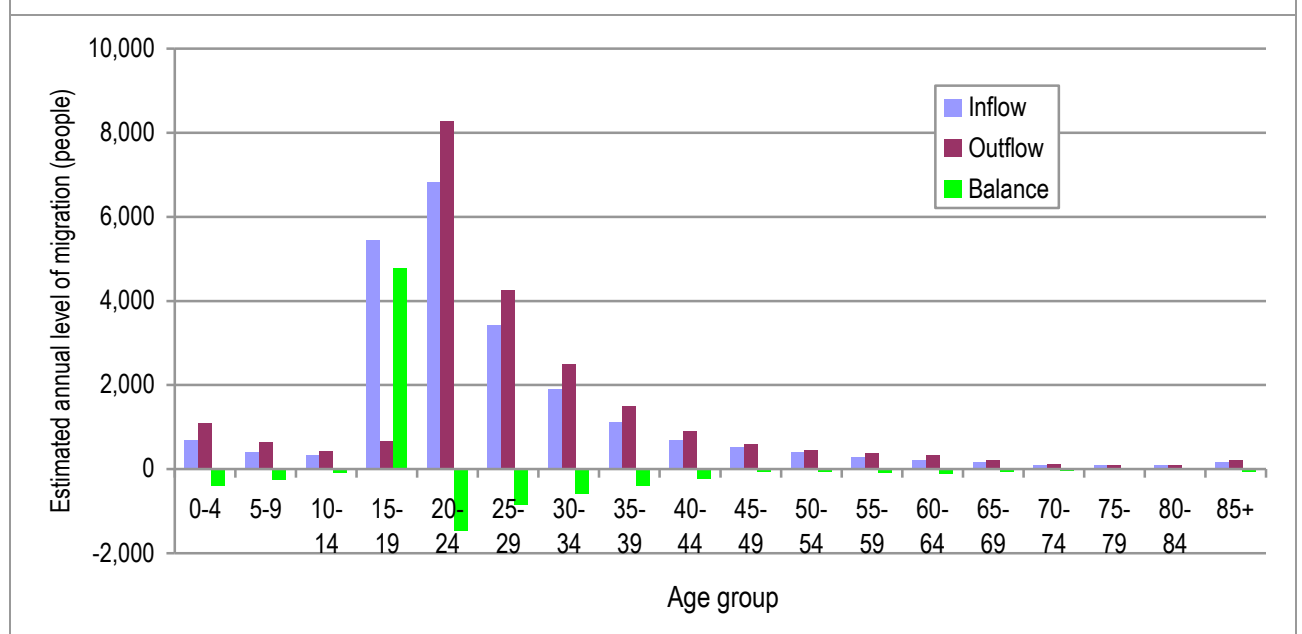
Source: Derived from ONS 2010-based population projections

Figure AX.5: Estimated annual level of migration by five-year age band (2011-2036) – Portsmouth



Source: Derived from ONS 2010-based population projections

Figure AX.6: Estimated annual level of migration by five-year age band (2011-2036) – Southampton



Source: Derived from ONS 2010-based population projections

APPENDIX X: DISTRICT LEVEL AFFORDABLE NEEDS ASSESSMENT OUTPUTS

Introduction

This appendix provides the same information as seen in **Section 8** of the report but at a smaller area level. For the purposes of this analysis a total of 12 different sub-areas were developed and these are listed below:

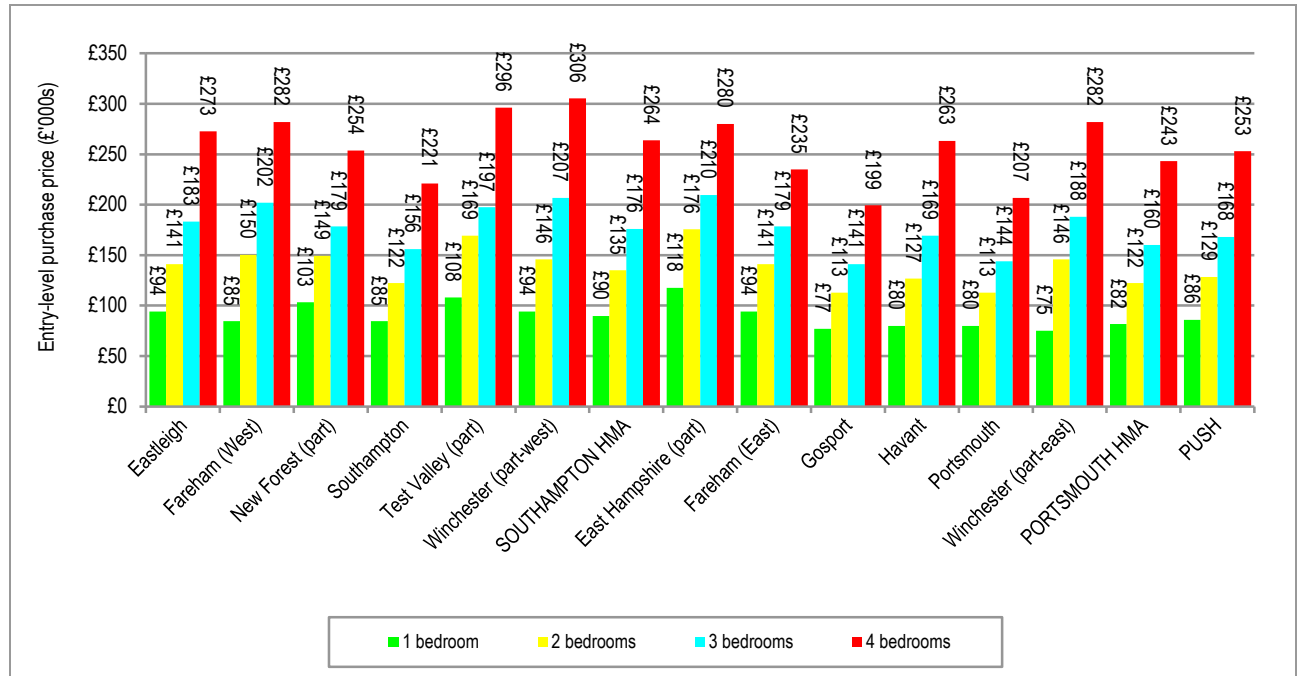
- Southampton HMA
 - Eastleigh (whole Borough)
 - Fareham (West wards)
 - New Forest (part)
 - Southampton (whole City)
 - Test Valley (part)
 - Winchester (part – West wards)

- Portsmouth HMA
 - East Hampshire (part)
 - Fareham (East wards)
 - Gosport (whole Borough)
 - Havant (whole Borough)
 - Portsmouth (whole City)
 - Winchester (part – East wards)

The analysis following simply provides the more local area level information. Details about the methodology employed at each stage of the analysis can be found in **Section 8** of the main report.

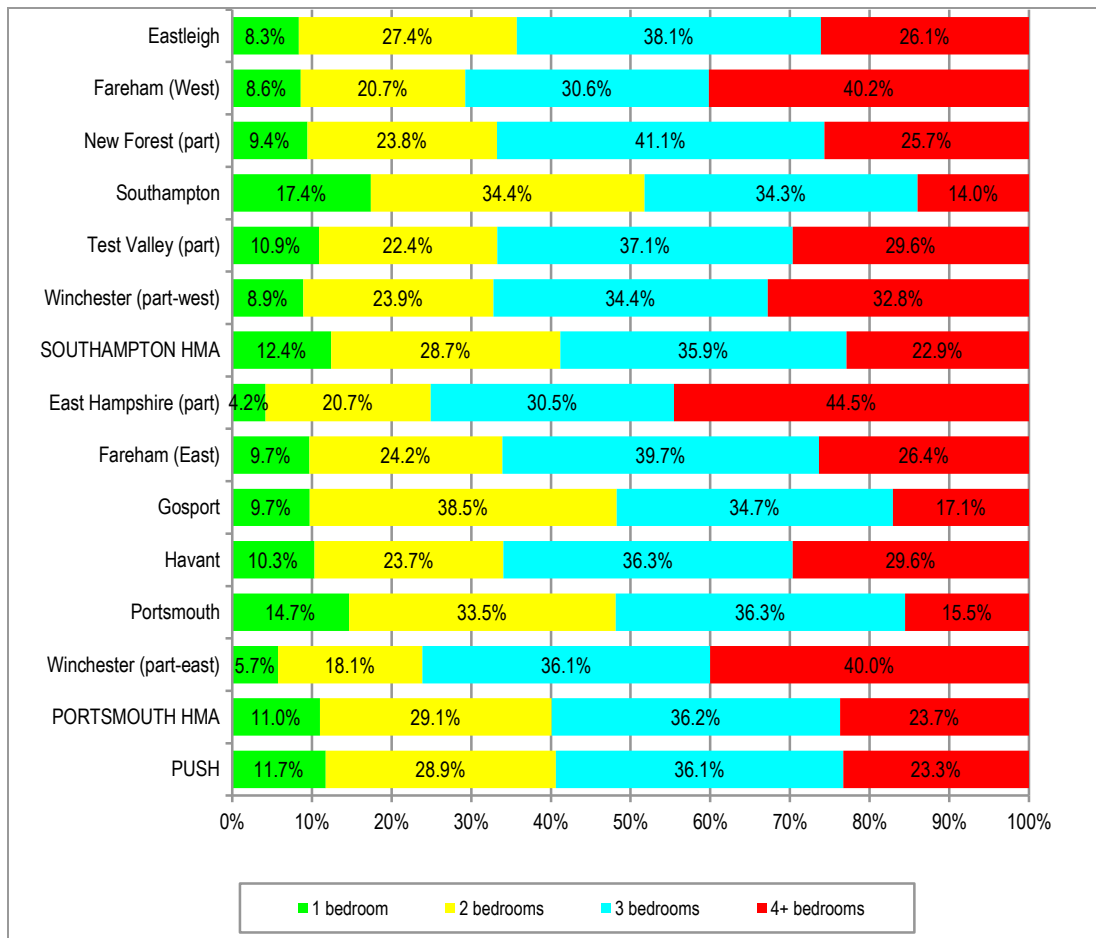
Survey of Local Prices & Rents

Figure 16: Entry-level Purchase Prices, 2013



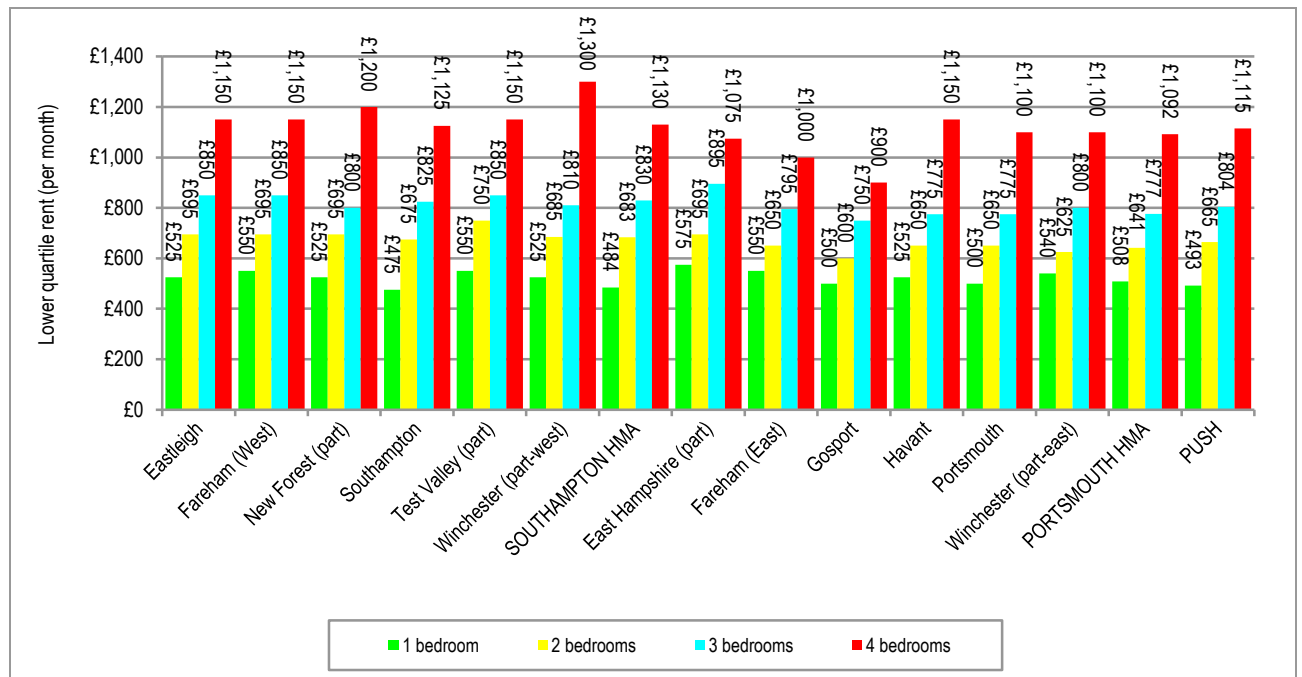
Source: Online Estate and Letting Agents Survey (June 2013)

Figure 17: Profile of Properties Advertised for Sale



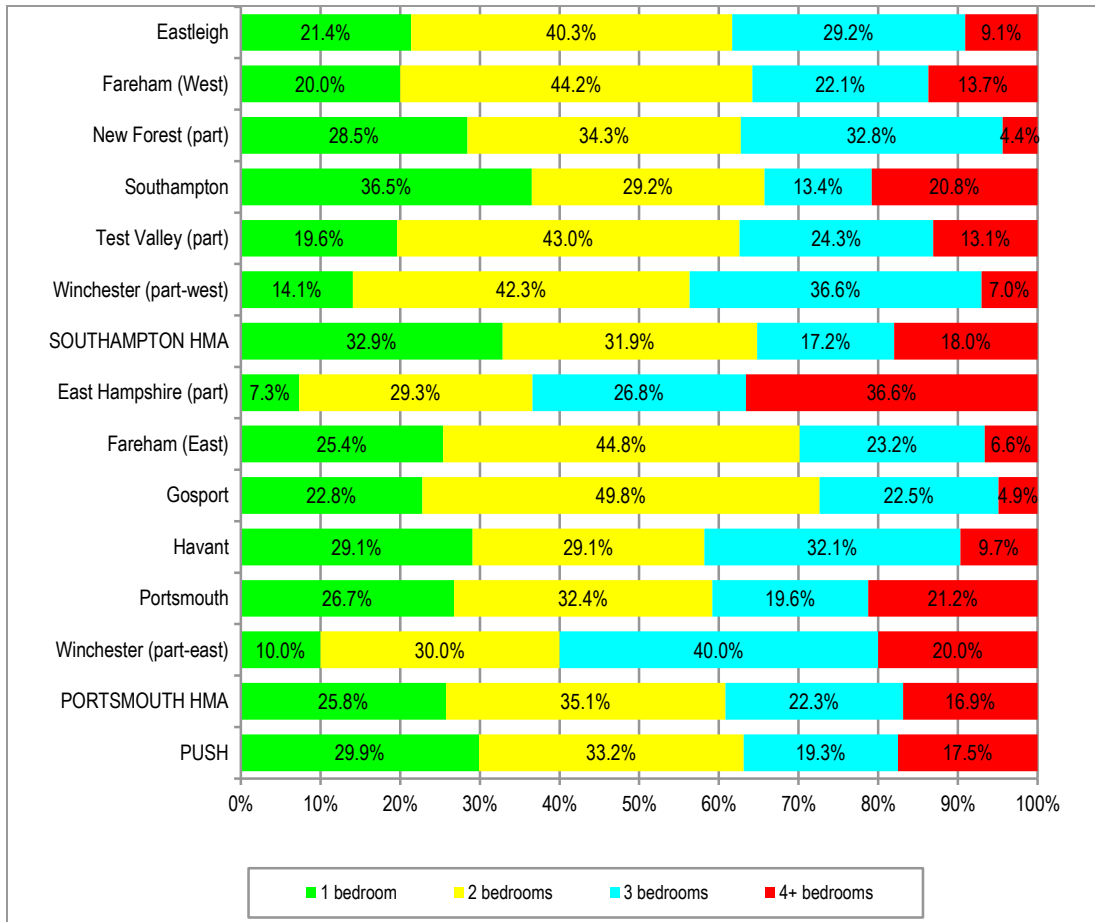
Source: Online Estate and Letting Agents Survey (June 2013)

Figure 18: Entry-level Private Rents



Source: Online Estate and Letting Agents Survey (June 2013)

Figure 19: Profile of Properties Advertised to Rent



Source: Online Estate and Letting Agents Survey (June 2013)

Cost of Affordable Housing

Table 20: Monthly average social rent levels

Area	1 bedroom	2 bedrooms	3+ bedrooms
Eastleigh	£405	£440	£490
Fareham (West)	£357	£440	£503
New Forest (part)	£372	£425	£473
Southampton	£345	£374	£421
Test Valley (part)	£389	£446	£511
Winchester (part-west)	£399	£446	£523
SOUTHAMPTON HMA	£362	£397	£447
East Hampshire (part)	£383	£454	£527
Fareham (East)	£357	£440	£503
Gosport	£355	£426	£424
Havant	£350	£432	£494
Portsmouth	£403	£456	£491
Winchester (part-east)	£399	£446	£523
PORTSMOUTH HMA	£376	£443	£483
PUSH	£369	£420	£465

Source: CORE (2013)

Table 21: Cost of Affordable Rented Housing by Size and Sub-Area (per month)

Area	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms
Eastleigh	£420	£556	£680	£920
Fareham (West)	£440	£556	£680	£920
New Forest (part)	£420	£556	£640	£960
Southampton	£380	£540	£660	£900
Test Valley (part)	£440	£600	£680	£920
Winchester (part-west)	£420	£548	£648	£1,040
SOUTHAMPTON HMA	£387	£547	£664	£904
East Hampshire (part)	£460	£556	£716	£860
Fareham (East)	£440	£520	£636	£800
Gosport	£400	£480	£600	£720
Havant	£420	£520	£620	£920
Portsmouth	£400	£520	£620	£880
Winchester (part-east)	£432	£500	£640	£880
PORTSMOUTH HMA	£406	£513	£621	£874
PUSH	£394	£532	£643	£892

Source: Derived from Online Estate and Letting Agents Survey (June 2013)

Gaps in the Housing Market

Table 22: Indicative Income required to Purchase/Rent without Additional Subsidy

Sub-area	Lower quartile purchase price	Lower quartile private rent	Affordable rent	Lower quartile social rent
Eastleigh	£45,657	£27,000	£21,600	£16,811
Fareham (West)	£52,371	£27,000	£21,600	£15,412
New Forest (part)	£45,657	£25,000	£20,000	£15,423
Southampton	£38,943	£25,000	£20,000	£14,010
Test Valley (part)	£51,029	£27,800	£22,240	£16,005
Winchester (part-west)	£53,714	£27,000	£21,600	£16,244
SOUTHAMPTON HMA	£44,358	£25,333	£20,267	£14,829
East Hampshire (part)	£59,086	£32,000	£25,600	£15,988
Fareham (East)	£44,314	£24,000	£19,200	£15,412
Gosport	£33,571	£22,000	£17,600	£14,300
Havant	£41,629	£23,800	£19,040	£14,842
Portsmouth	£34,914	£24,000	£19,200	£16,206
Winchester (part-east)	£53,177	£28,000	£22,400	£16,244
PORTSMOUTH HMA	£40,005	£23,968	£19,175	£15,445
PUSH	£42,188	£24,829	£19,863	£15,133

Source: Online Estate and Letting Agents Survey (June 2013) and CORE

Income levels and Affordability

Table 23: Income levels by Area (Southampton HMA)

Income band	Eastleigh	Fareham (West)	New Forest (part)	Southampton	Test Valley (part)	Winchester (part-west)	SOUTHAMPTON HMA
Under £10k	2.9%	1.3%	4.9%	10.4%	1.7%	1.5%	6.2%
£10k to £20k	24.8%	17.5%	28.0%	30.2%	20.2%	19.3%	26.5%
£20k to £30k	18.2%	18.1%	18.9%	19.7%	18.0%	18.0%	18.9%
£30k to £40k	14.2%	13.5%	13.7%	13.8%	14.1%	13.9%	13.9%
£40k to £50k	10.7%	10.8%	10.8%	8.6%	10.4%	10.5%	9.8%
£50k to £60k	8.2%	8.7%	6.6%	4.9%	8.9%	9.0%	6.7%
£60k to £80k	8.5%	12.1%	7.0%	5.6%	10.8%	11.2%	7.6%
£80k to £100k	4.4%	6.0%	4.2%	4.0%	5.3%	5.5%	4.4%
Over £100k	8.2%	12.1%	6.0%	2.9%	10.7%	11.1%	6.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean	£42,809	£52,286	£38,145	£32,001	£48,788	£49,900	£38,806
Median	£32,560	£39,768	£29,013	£24,340	£37,107	£37,953	£28,961

Source: Derived from ASHE, Experian, SHE, CACI and ONS data

Table 24: Income levels by Area (Portsmouth HMA)

Income band	East Hampshire (part)	Fareham (East)	Gosport	Havant	Portsmouth	Winchester (part-east)	PORTSMOUTH HMA
Under £10k	2.1%	3.7%	6.9%	6.7%	9.3%	1.8%	6.9%
£10k to £20k	22.1%	26.3%	29.2%	29.1%	30.0%	20.6%	28.5%
£20k to £30k	18.0%	18.4%	19.5%	19.4%	19.6%	18.1%	19.3%
£30k to £40k	14.3%	14.0%	13.5%	13.5%	13.8%	14.1%	13.7%
£40k to £50k	10.4%	10.9%	10.1%	10.2%	9.1%	10.4%	9.9%
£50k to £60k	8.8%	7.5%	5.8%	5.9%	5.1%	8.9%	6.0%
£60k to £80k	9.8%	7.8%	6.3%	6.3%	5.7%	10.6%	6.6%
£80k to £100k	4.9%	4.3%	4.1%	4.2%	4.1%	5.2%	4.2%
Over £100k	9.7%	7.2%	4.6%	4.8%	3.4%	10.4%	4.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean	£46,319	£40,700	£35,434	£35,714	£32,952	£48,188	£36,114
Median	£35,230	£30,956	£26,951	£27,164	£25,063	£36,651	£27,236

Source: Derived from ASHE, Experian, SHE, CACI and ONS data

Table 25: Estimated Proportion of Household Unable to Afford Market Housing without Subsidy

Sub-area	Income required to access market	Number unable to afford	Estimated households (2013)	% of households unable to afford
Eastleigh	£27,000	21,978	53,670	41.0%
Fareham (West)	£27,000	4,794	14,912	32.2%
New Forest (part)	£25,000	12,828	30,007	42.7%
Southampton	£25,000	51,102	99,516	51.4%
Test Valley (part)	£27,800	6,371	17,430	36.5%
Winchester (part-west)	£27,000	3,310	9,663	34.2%
SOUTHAMPTON HMA	-	100,382	225,199	44.6%
East Hampshire (part)	£32,000	3,877	8,586	45.2%
Fareham (East)	£24,000	12,445	32,706	38.1%
Gosport	£22,000	14,605	36,287	40.3%
Havant	£23,800	22,633	52,090	43.5%
Portsmouth	£24,000	41,551	87,018	47.8%
Winchester (part-east)	£28,000	2,566	6,870	37.4%
PORTSMOUTH HMA	-	97,677	223,557	43.7%
PUSH	-	198,059	448,755	44.1%

Source: Online Estate and Letting Agents Survey (June 2013) and Income modelling

Current Housing Need (Backlog)

Table 26: Estimated number of households in unsuitable housing

	In unsuitable housing	Total number of households	% in unsuitable housing
Eastleigh	1,000	53,670	1.9%
Fareham (West)	213	14,912	1.4%
New Forest (part)	543	30,007	1.8%
Southampton	4,008	99,516	4.0%
Test Valley (part)	267	17,430	1.5%
Winchester (part-west)	168	9,663	1.7%
SOUTHAMPTON HMA	6,200	225,199	2.8%
East Hampshire (part)	107	8,586	1.2%
Fareham (East)	504	32,706	1.5%
Gosport	932	36,287	2.6%
Havant	938	52,090	1.8%
Portsmouth	3,255	87,018	3.7%
Winchester (part-east)	128	6,870	1.9%
PORTSMOUTH HMA	5,864	223,557	2.6%
PUSH	12,064	448,755	2.7%

Source: Census (2011) and data modelling

Table 27: Estimated Backlog Need by Sub-Area

	In unsuitable housing	% Unable to Afford	Revised Gross Need (including Affordability)
Eastleigh	1,000	59.1%	591
Fareham (West)	213	49.1%	105
New Forest (part)	543	60.7%	330
Southampton	4,008	69.2%	2,775
Test Valley (part)	267	54.2%	145
Winchester (part-west)	168	51.6%	87
SOUTHAMPTON HMA	6,200	65.0%	4,033
East Hampshire (part)	107	63.3%	68
Fareham (East)	504	56.0%	282
Gosport	932	58.4%	544
Havant	938	61.6%	577
Portsmouth	3,255	65.7%	2,140
Winchester (part-east)	128	55.3%	71
PORTSMOUTH HMA	5,864	62.8%	3,682
PUSH	12,064	63.9%	7,714

Source: Census (2011), data modelling and income analysis

Newly-Arising Need

Table 28: Estimated Level of Housing Need from Newly Forming Households (2013-2036)

	Number of new households	% unable to afford	Total in need
Eastleigh	25,341	49.4%	12,519
Fareham (West)	6,592	39.8%	2,624
New Forest (part)	11,528	51.3%	5,914
Southampton	44,422	59.9%	26,609
Test Valley (part)	6,201	44.3%	2,747
Winchester (part-west)	3,662	42.0%	1,538
SOUTHAMPTON HMA	97,745	53.1%	51,903
East Hampshire (part)	3,169	54.1%	1,715
Fareham (East)	11,845	46.0%	5,449
Gosport	14,292	48.6%	6,946
Havant	17,793	52.3%	9,306
Portsmouth	39,601	56.7%	22,454
Winchester (part-east)	2,548	45.3%	1,154
PORTSMOUTH HMA	89,249	52.6%	46,945
PUSH	186,995	52.9%	98,920

Source: Projection Modelling/Income analysis

Table 29: Estimated level of Housing Need from Existing Households (2013-36)

	Number of Existing Households falling into Need	% of Need
Eastleigh	4,020	8.6%
Fareham (West)	644	1.4%
New Forest (part)	2,217	4.7%
Southampton	18,570	39.8%
Test Valley (part)	929	2.0%
Winchester (part-west)	612	1.3%
SOUTHAMPTON HMA	26,997	57.8%
East Hampshire (part)	396	0.8%
Fareham (East)	2,318	5.0%
Gosport	3,119	6.7%
Havant	2,581	5.5%
Portsmouth	10,787	23.1%
Winchester (part-east)	497	1.1%
PORTSMOUTH HMA	19,702	42.2%
PUSH	46,699	100.0%

Source: CORE/affordability analysis

Table 30: Estimated Future Housing Need (2013-36)

	Newly-forming Households in Need	Existing Households falling into Need	Total Newly-Arising Need 2013-36
Eastleigh	12,519	4,020	16,539
Fareham (West)	2,624	644	3,268
New Forest (part)	5,914	2,217	8,131
Southampton	26,609	18,570	45,179
Test Valley (part)	2,747	929	3,676
Winchester (part-west)	1,538	612	2,150
SOUTHAMPTON HMA	51,903	26,997	78,900
East Hampshire (part)	1,715	396	2,111
Fareham (East)	5,449	2,318	7,767
Gosport	6,946	3,119	10,065
Havant	9,306	2,581	11,887
Portsmouth	22,454	10,787	33,241
Winchester (part-east)	1,154	497	1,651
PORTSMOUTH HMA	46,945	19,702	66,647
PUSH	98,920	46,699	145,619

Supply of Affordable Housing

Table 31: Analysis of past social rented housing supply (past 5 years) – Southampton HMA

		Eastleigh	Fareham (West)	New Forest (part)	Southampton	Test Valley (part)	Winchester (part-west)	SOUTHAMPTON HMA
General needs	Total lettings	1,402	242	768	6,002	438	223	9,075
	% as non-newbuild	56.8%	69.7%	86.6%	87.5%	72.4%	84.2%	81.4%
	Lettings in existing stock	797	169	666	5,252	317	188	7,388
	% non-transfers	73.9%	70.5%	68.6%	56.3%	61.0%	69.1%	60.2%
	Total lettings to new tenants	589	119	457	2,957	193	130	4,446
Supported	Total lettings	859	145	480	5,445	203	169	7,300
	% as non-newbuild	93.4%	93.8%	97.9%	97.0%	93.3%	96.6%	96.5%
	Lettings in existing stock	802	136	469	5,283	189	163	7,043
	% non-transfers	61.8%	71.5%	67.6%	68.9%	71.7%	66.3%	68.1%
	Total lettings to new tenants	495	97	317	3,641	136	108	4,795
Total lettings to new tenants		1,085	216	774	6,598	329	238	9,240
Total lettings per annum		217	43	155	1,320	66	48	1,848

Source: CORE

Table 32: Analysis of past social rented housing supply (past 5 years) – Portsmouth HMA

		East Hampshire (part)	Fareham (East)	Gosport	Havant	Portsmouth	Winchester (part-east)	PORTSMOUTH HMA
General needs	Total lettings	139	806	1,793	937	1,808	175	5,657
	% as non-newbuild	71.9%	69.7%	77.9%	78.2%	64.7%	84.2%	72.6%
	Lettings in existing stock	100	562	1,396	733	1,171	147	4,108
	% non-transfers	64.7%	70.5%	55.7%	63.4%	62.5%	69.1%	61.7%
	Total lettings to new tenants	65	396	778	464	731	102	2,535
Supported	Total lettings	117	483	387	659	3,611	132	5,388
	% as non-newbuild	98.6%	93.8%	79.9%	94.2%	99.2%	96.6%	96.6%
	Lettings in existing stock	115	453	309	621	3,581	128	5,207
	% non-transfers	69.5%	71.5%	52.7%	67.3%	81.5%	66.3%	76.6%
	Total lettings to new tenants	80	323	163	418	2,918	85	3,987
Total lettings to new tenants		145	719	941	882	3,649	186	6,522
Total lettings per annum		29	144	188	176	730	37	1,305

Source: CORE

Table 33: Supply of Affordable Housing by Area (2013-2036)

	Social rented relets	Intermediate housing 'relets'	Total supply (2013-2036)
Eastleigh	4,991	428	5,419
Fareham (West)	989	152	1,141
New Forest (part)	3,565	184	3,749
Southampton	30,360	1,343	31,703
Test Valley (part)	1,518	69	1,587
Winchester (part-west)	1,104	55	1,159
SOUTHAMPTON HMA	42,504	2,231	44,735
East Hampshire (part)	667	37	704
Fareham (East)	3,312	166	3,478
Gosport	4,324	285	4,609
Havant	4,048	115	4,163
Portsmouth	16,790	888	17,678
Winchester (part-east)	851	101	952
PORTSMOUTH HMA	30,015	1,587	31,602
PUSH	72,519	3,818	76,337

Net Housing Need

Table 34: Estimated level of Housing Need (2013-36) excluding Pipeline

Sub-area	Backlog need	Newly forming households	Existing households falling into need	Total Need	Supply	Net Need	Net Need per annum
Eastleigh	591	12,519	4,020	17,130	5,419	11,711	509
Fareham (West)	105	2,624	644	3,373	1,141	2,232	97
New Forest (part)	330	5,914	2,217	8,461	3,749	4,712	205
Southampton	2,775	26,609	18,570	47,954	31,703	16,251	707
Test Valley (part)	145	2,747	929	3,821	1,587	2,234	97
Winchester (part-west)	87	1,538	612	2,237	1,159	1,078	47
SOUTHAMPTON HMA	4,033	51,903	26,997	82,933	44,735	38,198	1,661
East Hampshire (part)	68	1,715	396	2,179	704	1,475	64
Fareham (East)	282	5,449	2,318	8,049	3,478	4,571	199
Gosport	544	6,946	3,119	10,609	4,609	6,000	261
Havant	577	9,306	2,581	12,464	4,163	8,301	361
Portsmouth	2,140	22,454	10,787	35,381	17,678	17,703	770
Winchester (part-east)	71	1,154	497	1,722	952	770	33
PORTSMOUTH HMA	3,682	46,945	19,702	70,329	31,602	38,727	1,684
PUSH	7,714	98,920	46,699	153,333	76,337	76,996	3,348

Source: Census (2011)/CORE/Projection Modelling and affordability analysis

Role of the Private Rented Sector in Meeting Housing Need

Table 35: Number of People claiming LHA in Private Rented Sector (Feb 2011 and Feb 2013)

	February 2011	February 2013	Absolute change	% change
Eastleigh	1,710	1,888	178	10.4%
Fareham (West)	425	481	57	13.3%
New Forest (part)	1,100	1,158	57	5.2%
Southampton	7,140	7,974	834	11.7%
Test Valley (part)	412	412	0	0.0%
Winchester (part-west)	216	216	0	0.2%
SOUTHAMPTON HMA	11,003	12,129	1,126	10.2%
East Hampshire (part)	140	144	4	3.2%
Fareham (East)	845	958	112	13.3%
Gosport	2,060	2,089	29	1.4%
Havant	2,370	2,480	110	4.6%
Portsmouth	7,590	8,063	473	6.2%
Winchester (part-east)	171	171	0	0.2%
PORTSMOUTH HMA	13,176	13,905	729	5.5%
PUSH	24,178	26,034	1,856	7.7%

Source: Department of Work and Pensions

Table 36: Private Rented Sector LHA claimants by Area (per annum)

	LHA claimants in PRS	Households in PRS	Claimants as % of households	Estimated lettings per annum	Estimated lettings to LHA households
Eastleigh	1,888	6,438	29.3%	837	196
Fareham (West)	481	1,554	31.0%	202	50
New Forest (part)	1,158	3,320	34.9%	432	121
Southampton	7,974	24,449	32.6%	3,178	829
Test Valley (part)	412	1,765	23.3%	229	43
Winchester (part-west)	216	1,087	19.9%	141	22
SOUTHAMPTON HMA	12,129	38,613	31.4%	5,020	1,261
East Hampshire (part)	144	653	22.1%	85	15
Fareham (East)	958	3,091	31.0%	402	100
Gosport	2,089	5,777	36.2%	751	217
Havant	2,480	5,087	48.8%	661	258
Portsmouth	8,063	21,098	38.2%	2,743	838
Winchester (part-east)	171	861	19.9%	112	18
PORTSMOUTH HMA	13,905	36,567	38.0%	4,754	1,445
PUSH	26,034	75,180	34.6%	9,773	2,705

Source: Census (2011), DWP

Need for Different Types of Affordable Housing

Table 37: Estimated level of Housing Need (2013-36) by Type of Affordable Housing (Numbers)

Sub-area	Intermediate			Social/affordable rented		
	Total need	Supply	Net need	Total need	Supply	Net need
Eastleigh	3,227	428	2,799	13,903	4,991	8,912
Fareham (West)	765	152	613	2,608	989	1,619
New Forest (part)	1,528	184	1,344	6,933	3,565	3,368
Southampton	6,771	1,343	5,428	41,183	30,360	10,823
Test Valley (part)	776	69	707	3,045	1,518	1,527
Winchester (part-west)	469	55	414	1,768	1,104	664
SOUTHAMPTON HMA	13,459	2,231	11,228	69,474	42,504	26,970
East Hampshire (part)	397	37	360	1,782	667	1,115
Fareham (East)	1,561	166	1,395	6,488	3,312	3,176
Gosport	1,966	285	1,681	8,643	4,324	4,319
Havant	2,296	115	2,181	10,168	4,048	6,120
Portsmouth	5,669	888	4,781	29,712	16,790	12,922
Winchester (part-east)	337	101	236	1,385	851	534
PORTSMOUTH HMA	12,187	1,587	10,600	58,142	30,015	28,127
PUSH	25,660	3,818	21,842	127,673	72,519	55,154

Source: Housing Needs Analysis

Table 38: Estimated level of Housing Need (2013-36) by Type of Affordable Housing (Percentages)

Sub-area	Intermediate	Affordable rent	Social rent	Total
Eastleigh	23.9%	19.2%	56.9%	100.0%
Fareham (West)	27.5%	32.0%	40.5%	100.0%
New Forest (part)	28.5%	17.8%	53.7%	100.0%
Southampton	33.4%	18.5%	48.1%	100.0%
Test Valley (part)	31.6%	25.3%	43.1%	100.0%
Winchester (part-west)	38.4%	20.6%	41.0%	100.0%
SOUTHAMPTON HMA	29.4%	19.9%	50.7%	100.0%
East Hampshire (part)	24.4%	33.5%	42.1%	100.0%
Fareham (East)	30.5%	16.1%	53.4%	100.0%
Gosport	28.0%	14.8%	57.1%	100.0%
Havant	26.3%	17.7%	56.0%	100.0%
Portsmouth	27.0%	10.7%	62.3%	100.0%
Winchester (part-east)	30.6%	23.9%	45.5%	100.0%
PORTSMOUTH HMA	27.4%	14.1%	58.5%	100.0%
PUSH	28.4%	17.3%	54.4%	100.0%

Source: Housing Needs Analysis