# 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><li>Horndean Downs</li><li>Horndean Catherington and Lovedean</li><li>Horndean Hazleton and Blendworth</li><li>Horndean Murray</li><li>Horndean Kings</li><li>Rowlands Castle</li><li>Clanfield and Finchdean Ward</li></ul> |
| **New Forest** | <ul><li>Totton North</li><li>Totton East</li><li>Totton South</li><li>Totton West</li><li>Totton Central</li><li>Marchwood</li><li>Dibden and Hythe East</li><li>Hythe West and Langdown</li><li>Butts Ash and Dibden Purlieu</li><li>Furzedown and Hardley</li><li>Holbury and North Blackfield</li><li>Fawley, Blackfield and Langley Ward</li></ul> |
| **Test Valley** | <ul><li>Romsey Extra</li><li>Cupernham</li><li>Abbey</li><li>Tadburn</li><li>North Baddesley</li><li>Valley Park</li><li>Chilworth, Nursling and Rownhams</li><li>Ampfield and Braishfield</li></ul> |
| **Winchester** | <ul><li>Colden Common and Twyford</li><li>Owslebury and Curdridge</li><li>Bishops Waltham</li><li>Shedfield</li><li>Whiteley</li><li>Denmead</li><li>Boarhunt and Southwick</li><li>Swanmore and Newtown</li><li>Wickham</li></ul> |

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

| Local Authority | Wards |
|---|---|
| **Gosport** | All |
| **Havant** | All |
| **Portsmouth** | All |
| **Fareham (East Wards)** | • Porchester East<br>• Porchester West<br>• Fareham East<br>• Fareham North<br>• Fareham North West<br>• Fareham West<br>• Fareham South<br>• Stubbington<br>• Hill Head<br>• Tichfield* |
| **East Hampshire (Part)** | • Horndean Downs<br>• Horndean Catherington and Lovedean<br>• Horndean Hazleton and Blendworth<br>• Horndean Murray<br>• Horndean Kings<br>• Rowlands Castle<br>• Clanfield and Finchdean Ward |
| **Winchester (East Wards)** | • Denmead<br>• Boarhunt and Southwick<br>• Swanmore and Newtown*<br>• Wickham |

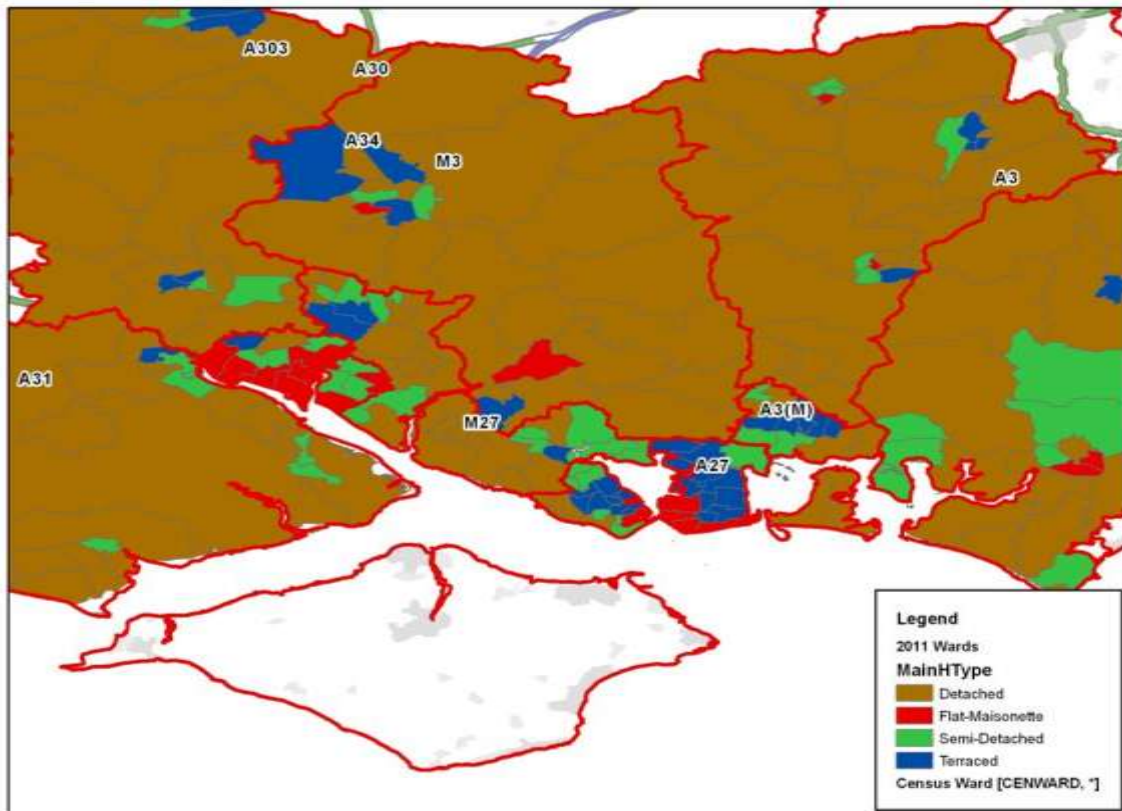### APPENDIX C: DEFINITION OF THE SOUTHAMPTON HMA (PUSH WEST)

| Local Authority | Wards |
|---|---|
| **Eastleigh** | All |
| **Southampton** | All |
| **Fareham (West Wards)** | • Warsash<br>• Titchfield Common<br>• Locks Heath<br>• Park Gate<br>• Sarisbury |
| **New Forest (Part)** | • Totton North<br>• Totton East<br>• Totton South<br>• Totton West<br>• Totton Central<br>• Marchwood<br>• Dibden and Hythe East<br>• Hythe West and Langdown<br>• Butts Ash and Dibden Purlieu<br>• Furzedown and Hardley<br>• Holbury and North Blackfield<br>• Fawley, Blackfield and Langley Ward |
| **Test Valley** | • Romsey Extra<br>• Cupernham<br>• Abbey<br>• Tadburn<br>• North Baddesley<br>• Valley Park<br>• Chilworth, Nursling and Rownhams<br>• Ampfield and Braishfield |
| **Winchester (West Wards)** | • Colden Common and Twyford<br>• Owslebury and Curdridge<br>• Bishops Waltham<br>• Shedfield<br>• 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 |
| | | Curdridge | £568,324 |

## APPENDIX E: PREDOMINANT HOUSE TYPE (WARD LEVEL)

### 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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Legend
2011 Wards
CTXAB
< 13.3%
13.3 - 26.0%
26.0 - 46.7%
46.7 - 71.5%
> 71.5%
Census Ward [CENWARD, *]
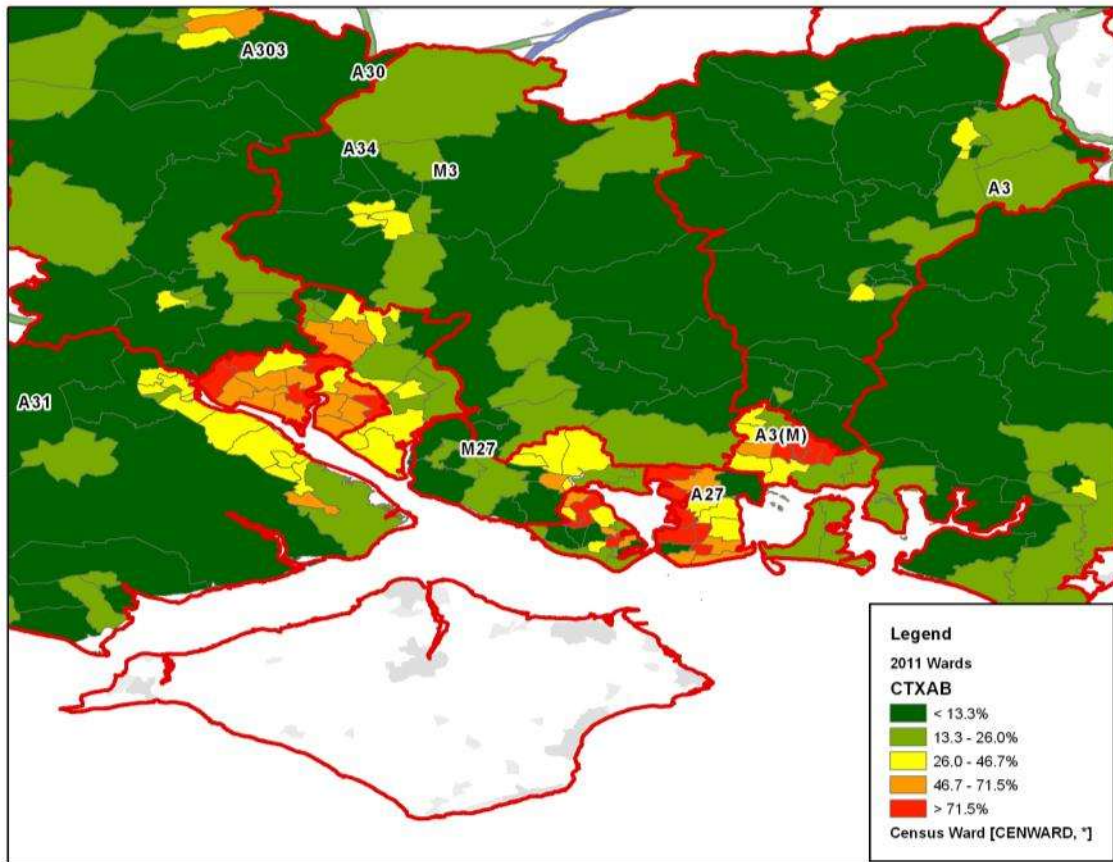
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### APPENDIX G:    ACORN MOSAIC GROUPS, WEST OF PUSH AREA

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

### APPENDIX I: ACORN MOSAIC GROUPS, EAST OF PUSH AREA



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

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Legend

Mosaic UK Groups
Mosaic UK Group

- A Alpha Territory
- B Professional Rewards
- C Rural Solitude
- D Small Town Diversity
- E Active Retirement
- F Suburban Mindsets
- G Careers and Kids
- H New Homemakers
- I Ex-Council Community
- J Claimant Cultures
- K Upper Floor Living
- L Elderly Needs
- M Industrial Heritage
- N Terraced Melting Pot
- O Liberal Opinions

2011 Wards
none
Census Ward [CENWARD, *]
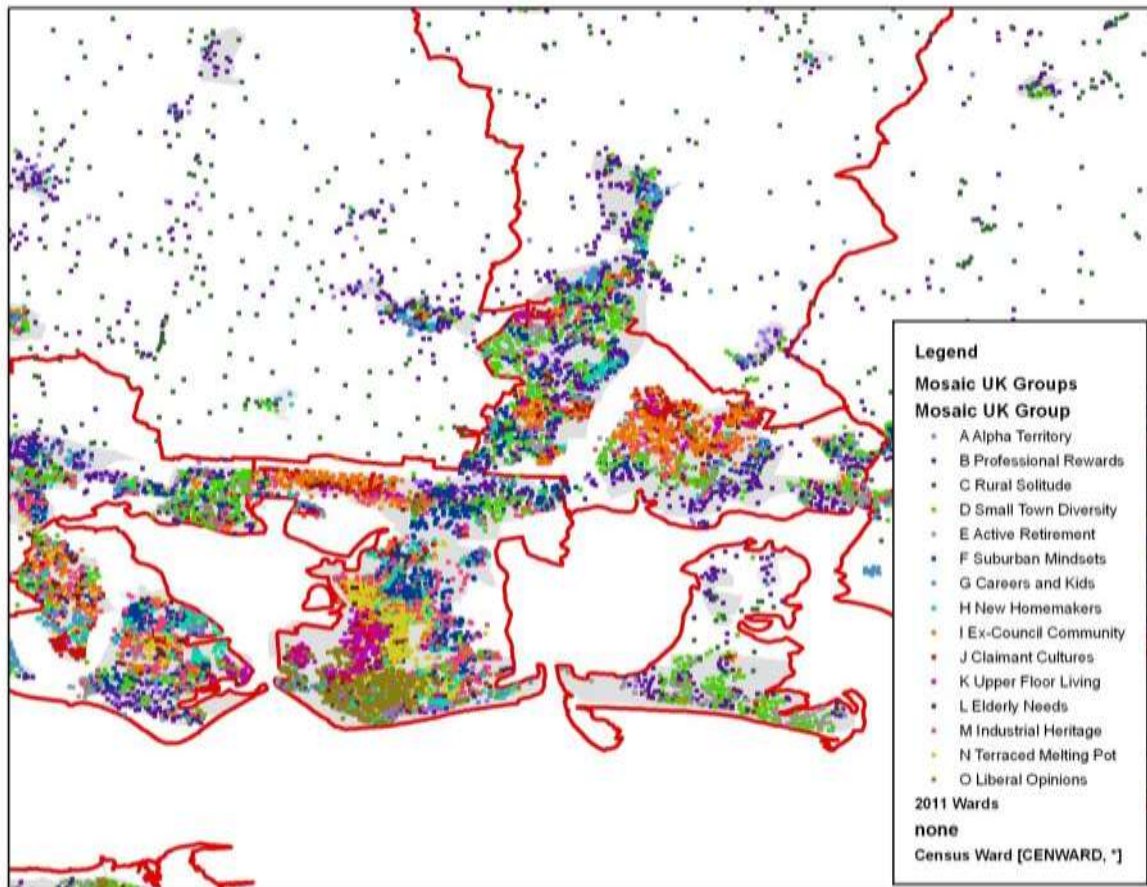
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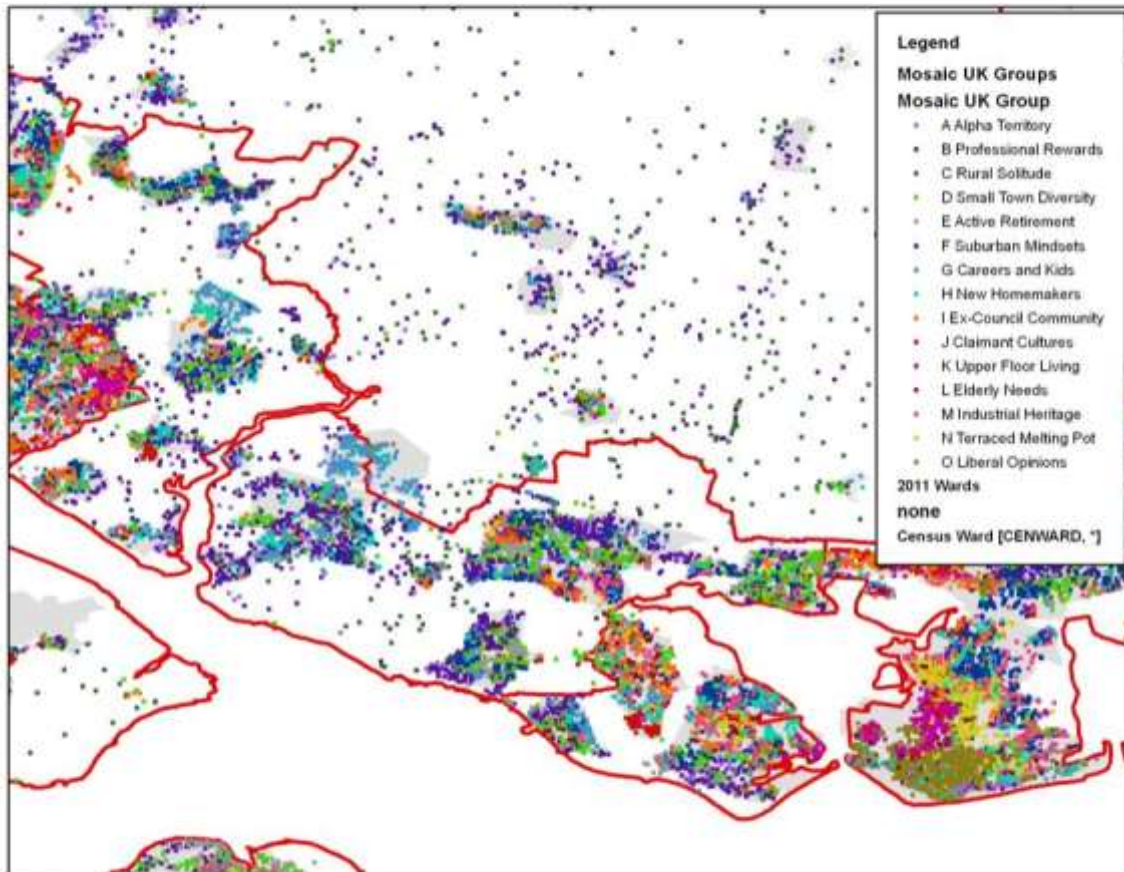### APPENDIX J:     POPULATION AGED 16-24 IN 2011 (WARD LEVEL)

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



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

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Legend
2011 Wards
Pop60Plus
6.1 - 16.8%
16.8 - 24.0%
24.0 - 30.9%
30.9 - 39.0%
39.0 - 55.0%
Census Ward [CENWARD, *]
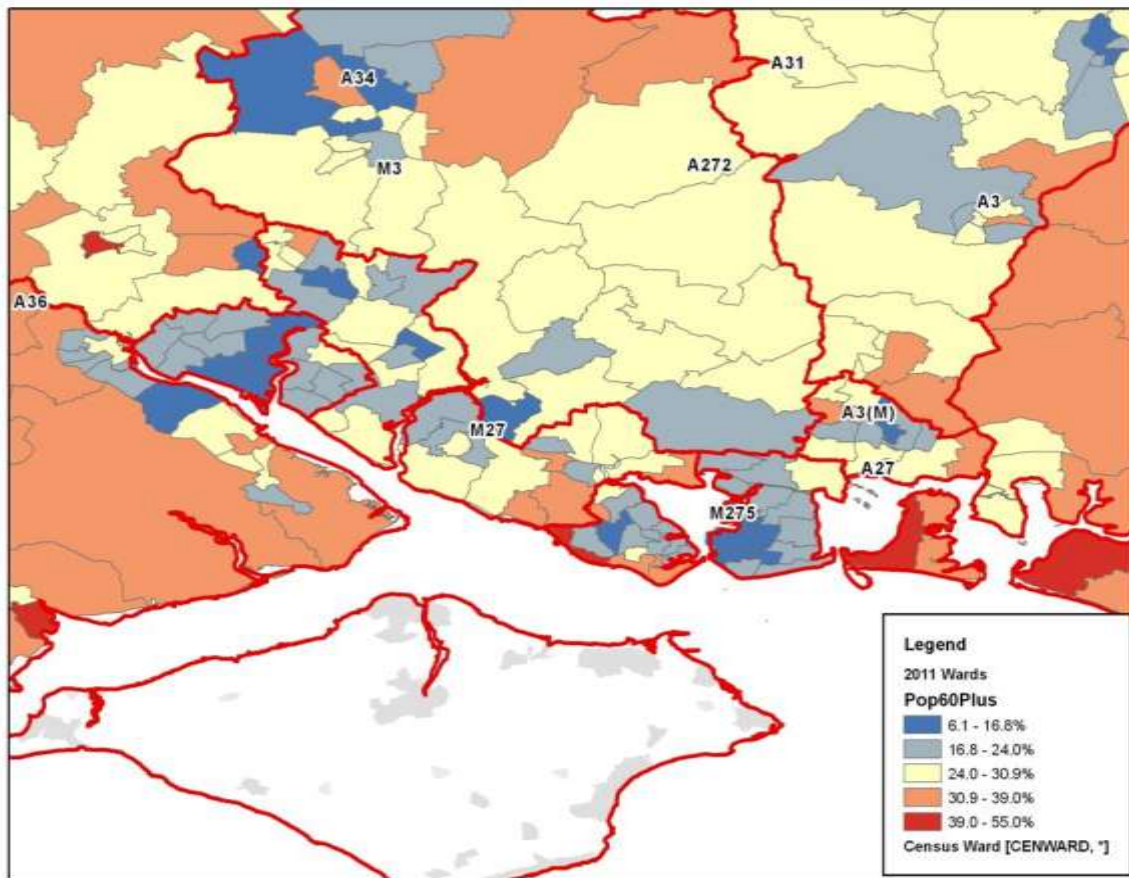
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## APPENDIX L:    UNEMPLOYMENT, 2011

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

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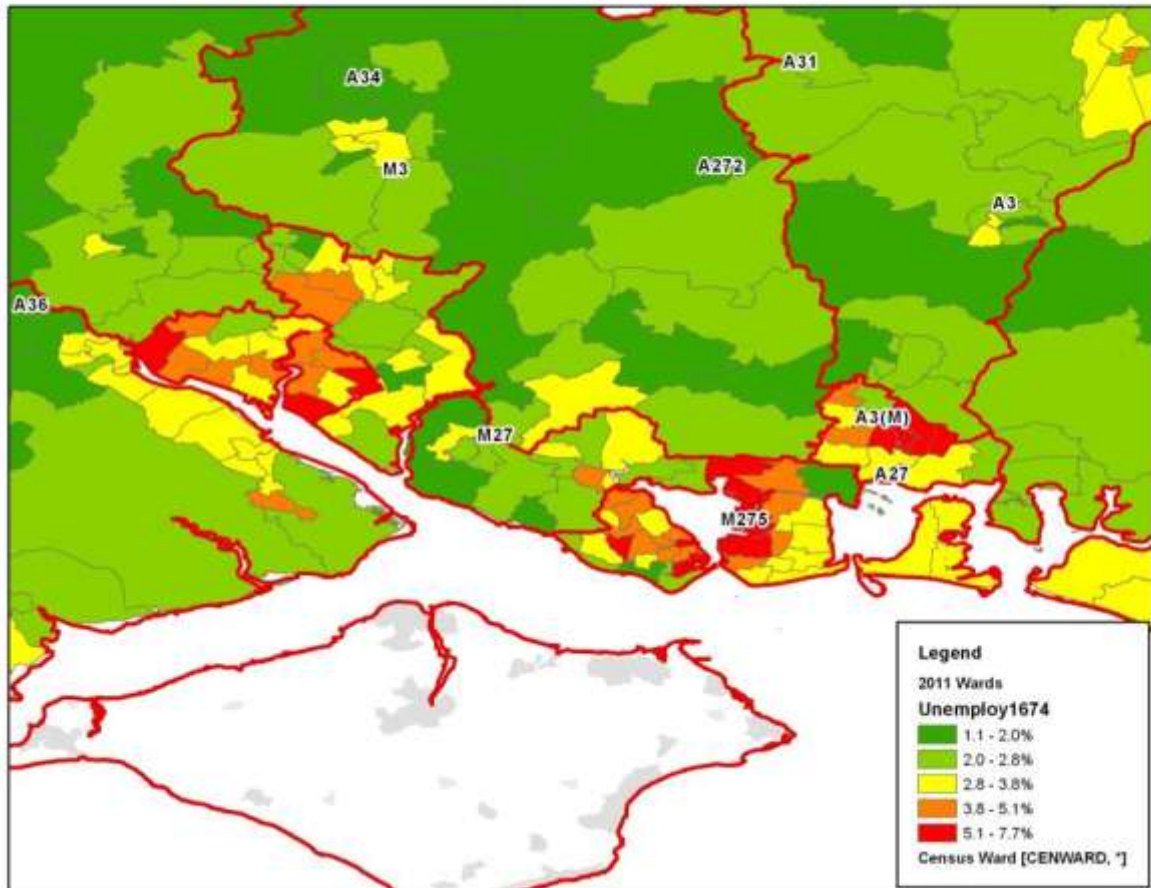


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### APPENDIX M: DEPRIVATION IN THE PORTSMOUTH HMA, 2010
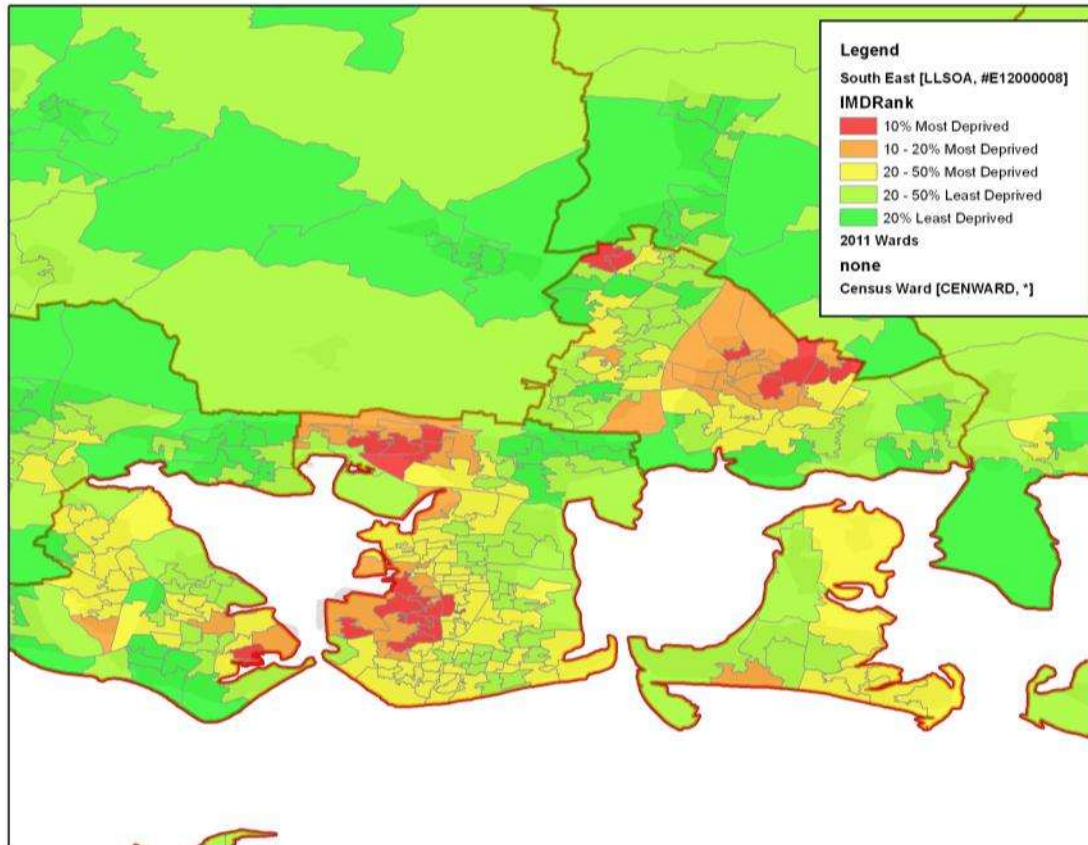
## APPENDIX N:    DEPRIVATION IN THE SOUTHAMPTON HMA, 2010
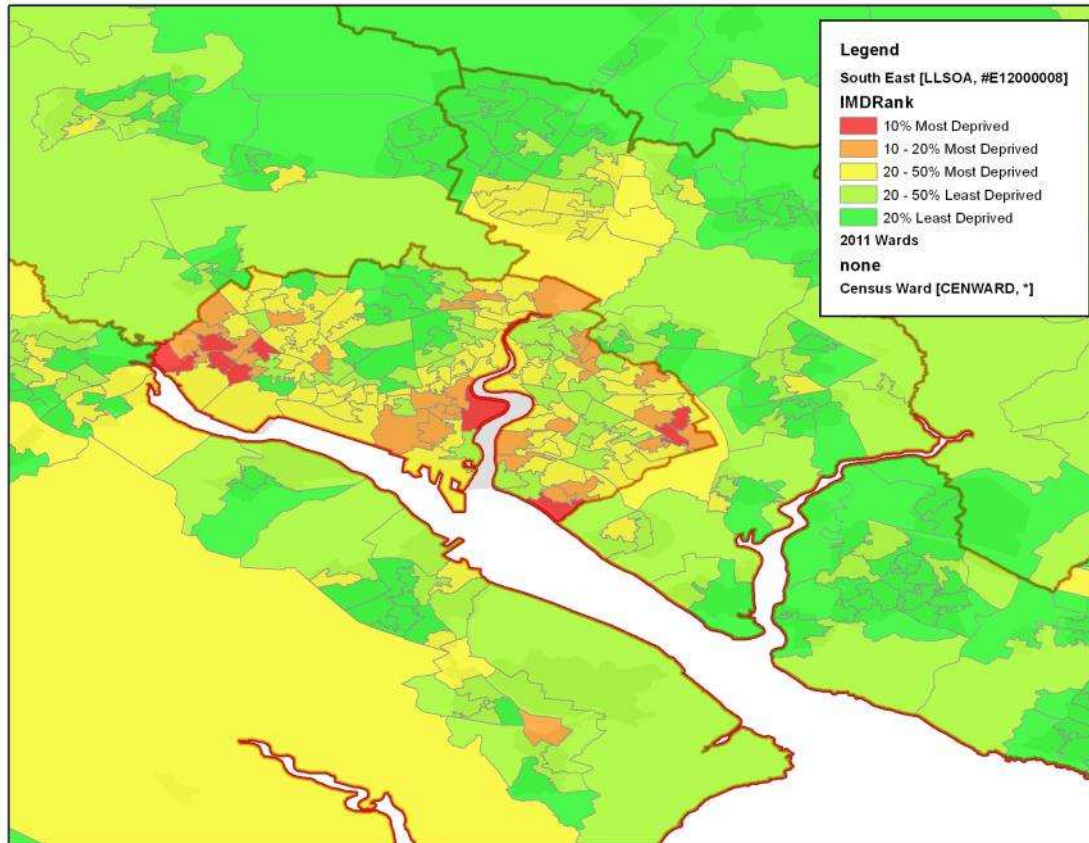
**APPENDIX O:    DETAILED TENURE PROFILE (DISTRICTS, 2011)**

|  | 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 Census[1]*

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[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**
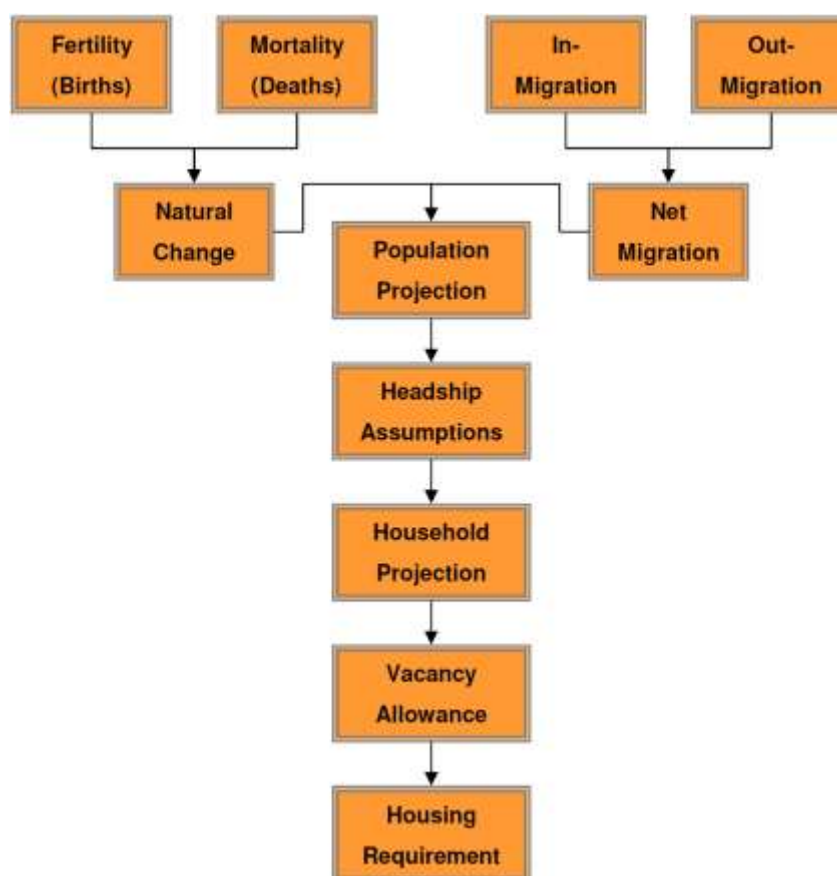
1.3     Much of the data for the projections draws on ONS information contained within the 2010- and 2011-based Sub-National Population Projections (SNPP) and the 2011-based CLG Household Projections. In particular we have used the SNPP to look at fertility rates, mortality rates and the profile of in- 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 dicuss in detail the assumptions and inputs underpinning th 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**

| Age group | Female | Male |
|-----------|--------|--------|
| Ages 85+ | 17,336 | 8,597 |
| Ages 80-84 | 15,662 | 11,138 |
| Ages 75-79 | 18,720 | 15,479 |
| Ages 70-74 | 21,091 | 18,848 |
| Ages 65-69 | 26,259 | 24,534 |
| Ages 60-64 | 31,353 | 30,122 |
| Ages 55-59 | 29,005 | 28,625 |
| Ages 50-54 | 33,492 | 34,017 |
| Ages 45-49 | 37,942 | 37,282 |
| Ages 40-44 | 36,654 | 35,999 |
| Ages 35-39 | 33,010 | 33,102 |
| Ages 30-34 | 32,135 | 32,789 |
| Ages 25-29 | 34,572 | 36,091 |
| Ages 20-24 | 41,111 | 44,593 |
| Ages 15-19 | 33,425 | 35,389 |
| Ages 10-14 | 28,117 | 29,874 |
| Ages 5-9 | 27,032 | 28,743 |
| Ages 0-4 | 30,687 | 32,567 |
| | | |
| All Ages | 517,790 | 527,603 |



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)**
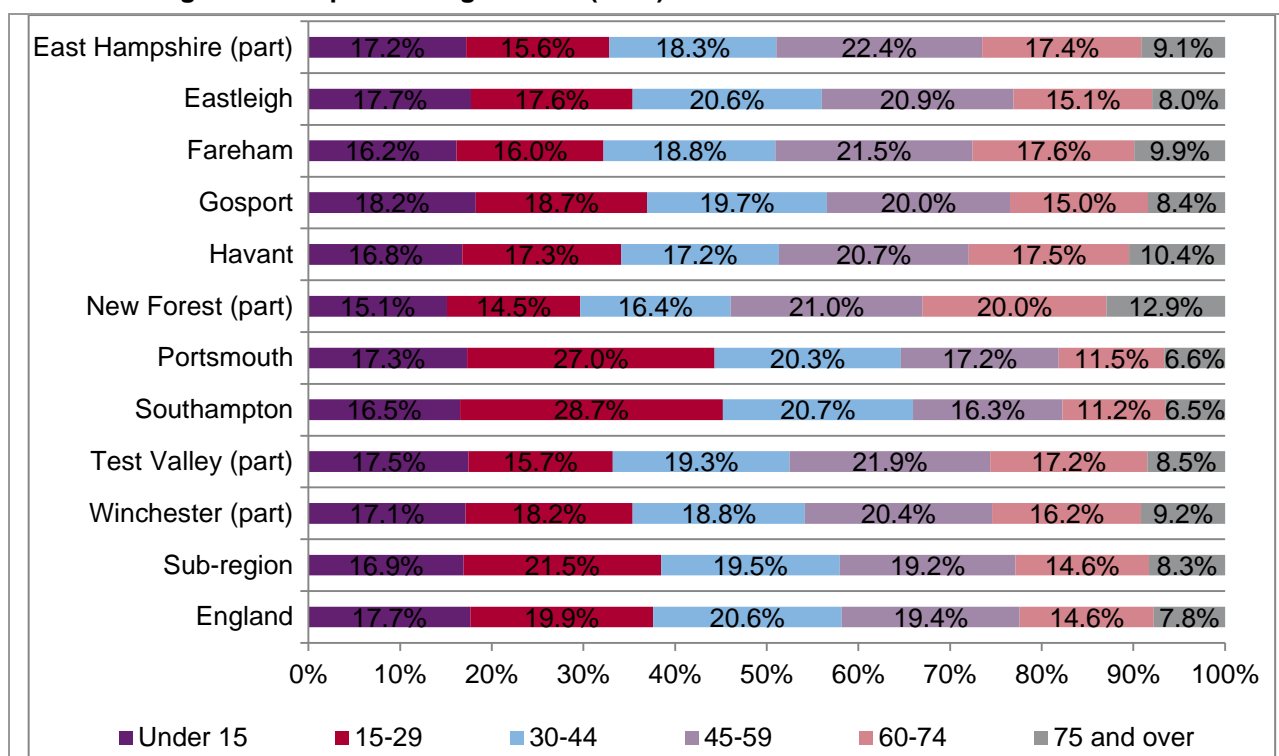


Source: 2011-Mid-Year Population Estimates

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 2036[2]. 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.

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[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**
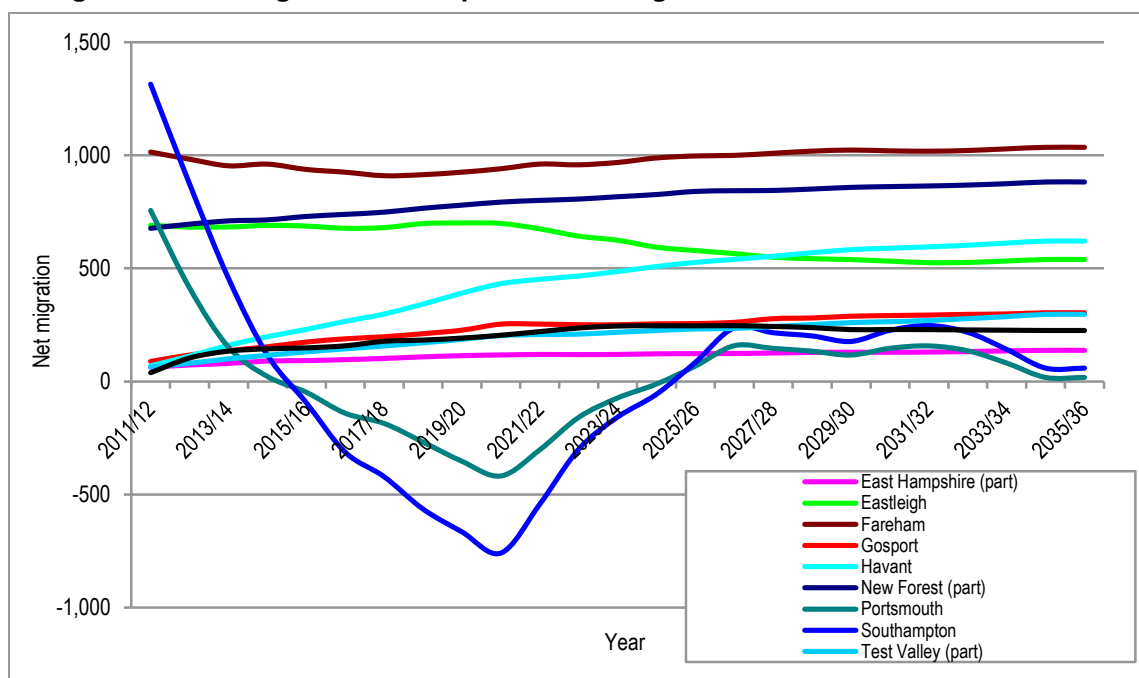


Source: ONS 2010- and 2011-based Sub-National Population Projections

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)**
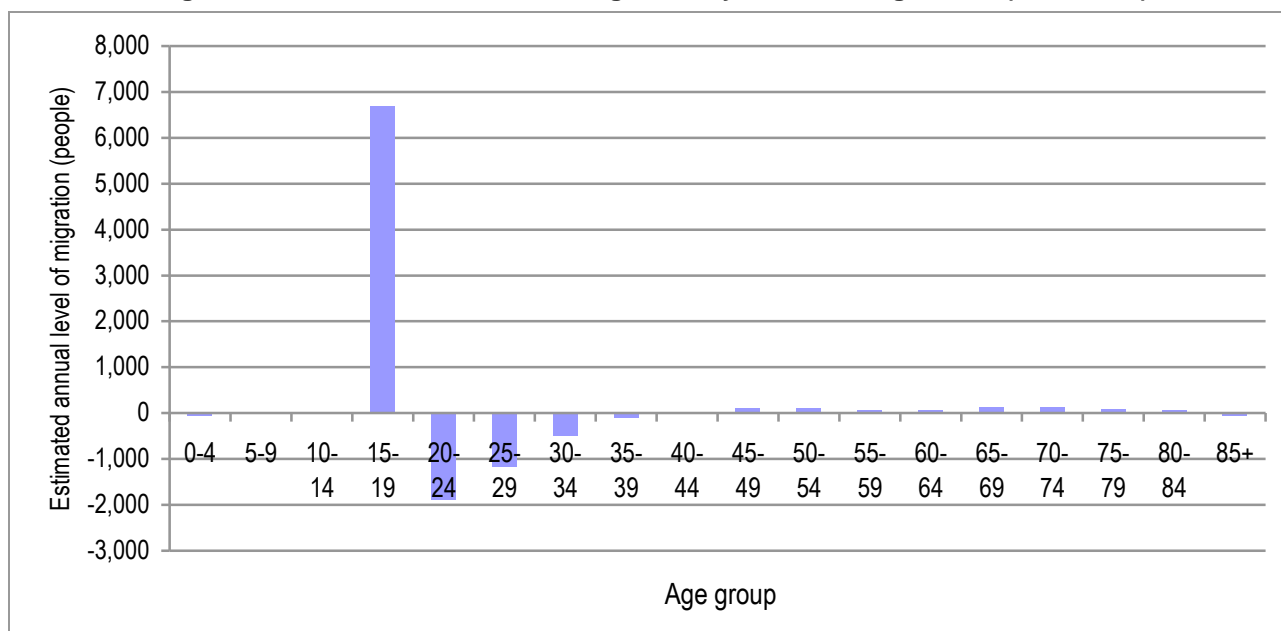


Source: Derived from ONS 2010-based Population Projections

## 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**
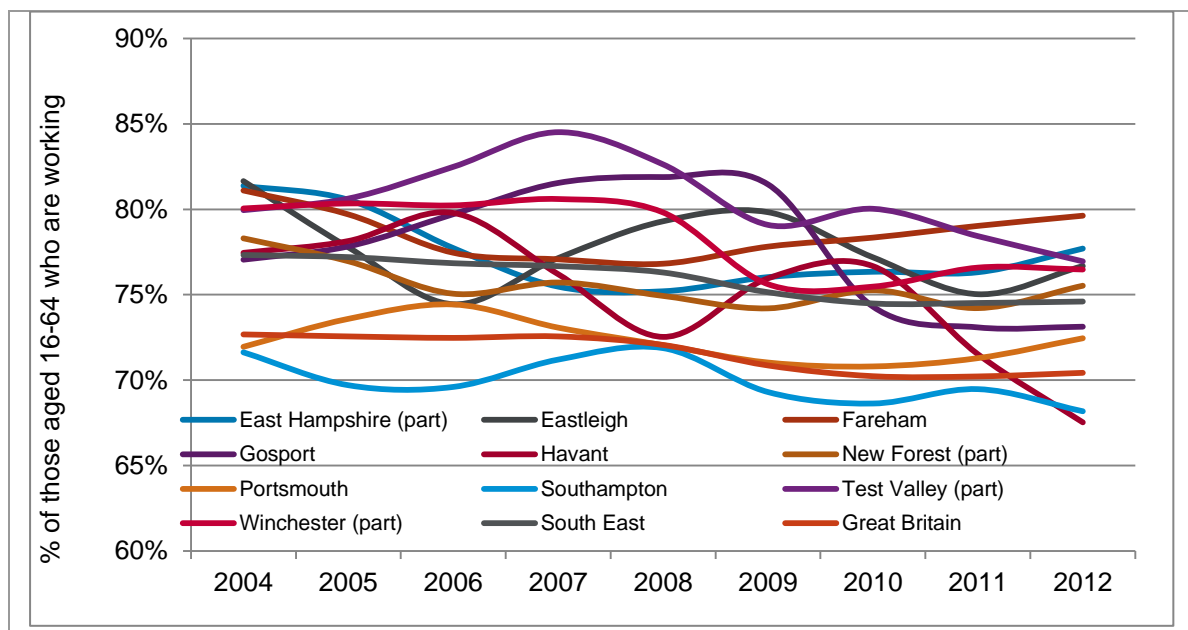


Source: Annual Population Survey

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**
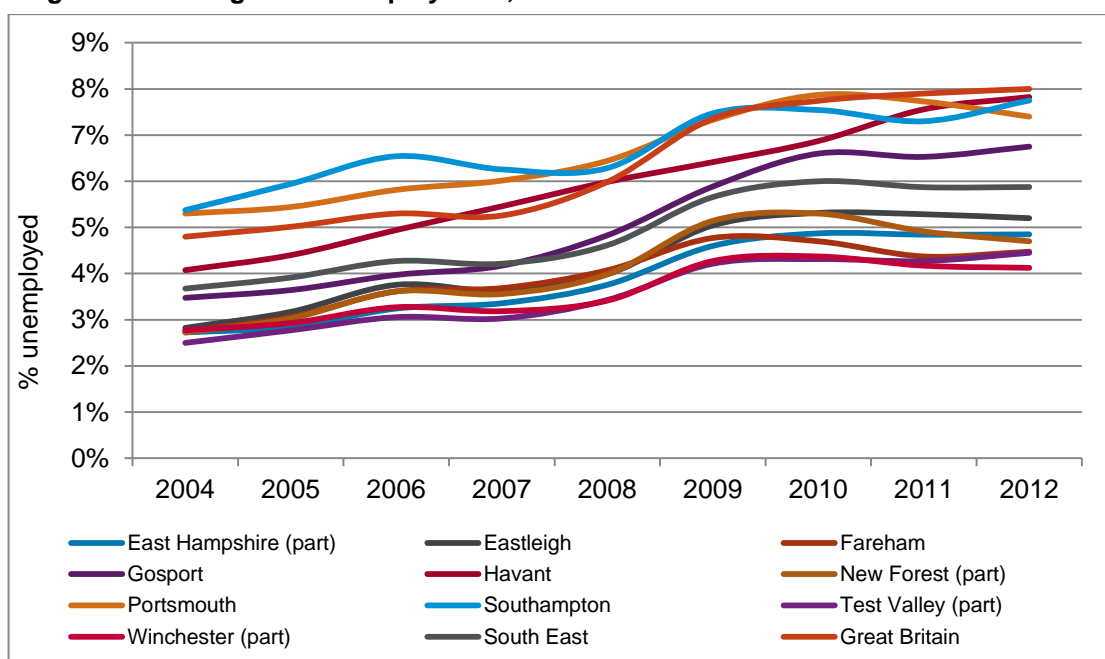


*Source*: Annual Population Survey (modelled data)

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**
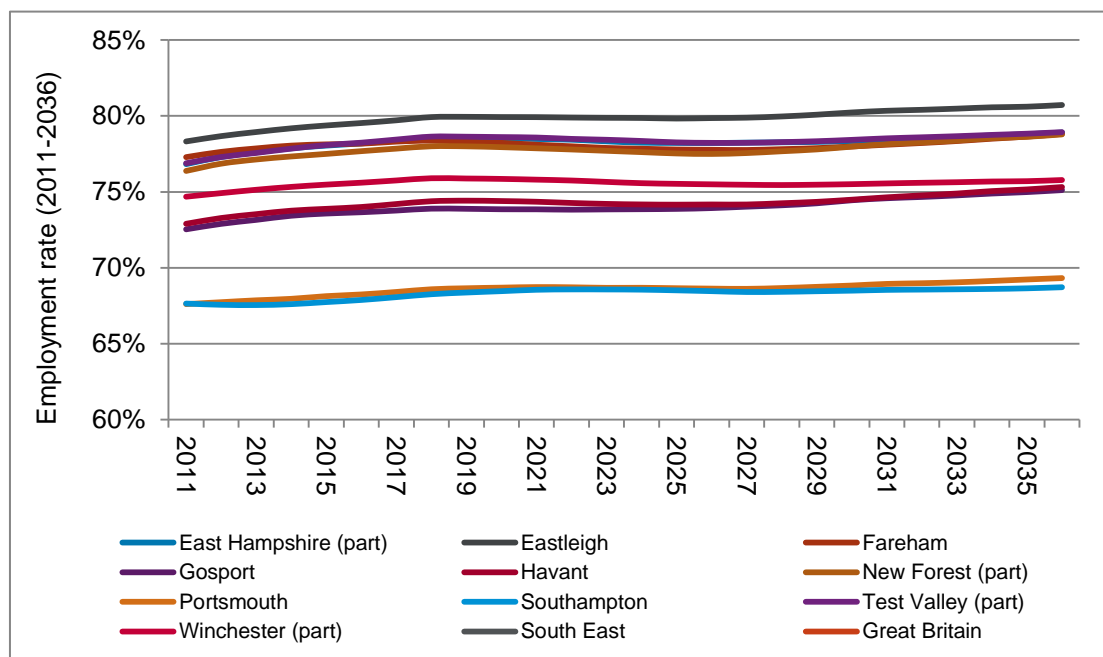


*Source:* JGC

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 indiciative 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**
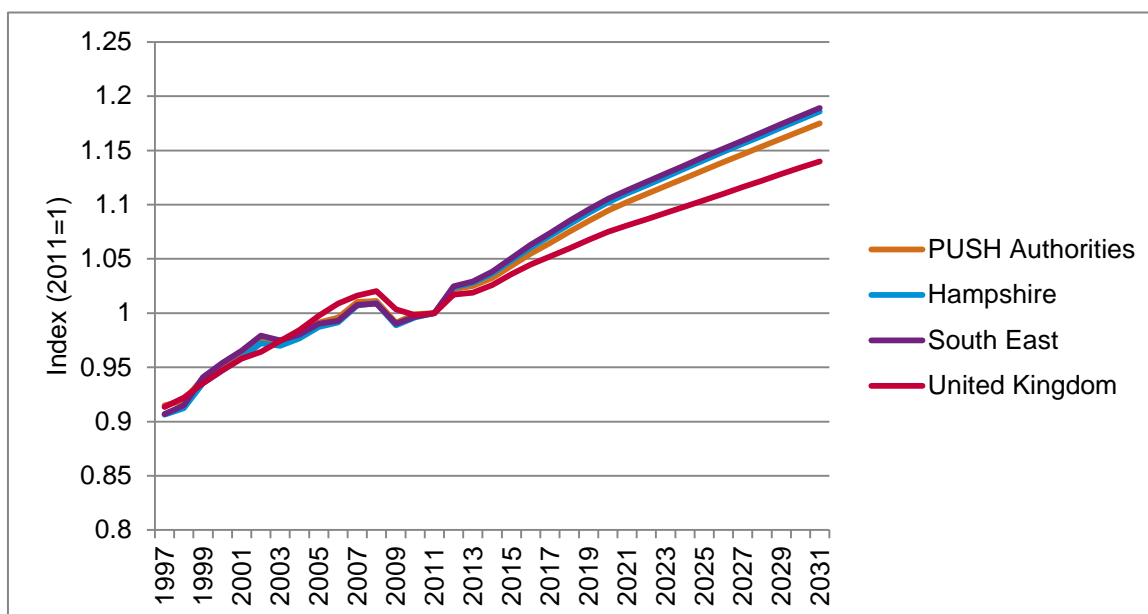


*Source:* Experian

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 emplyoment 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**
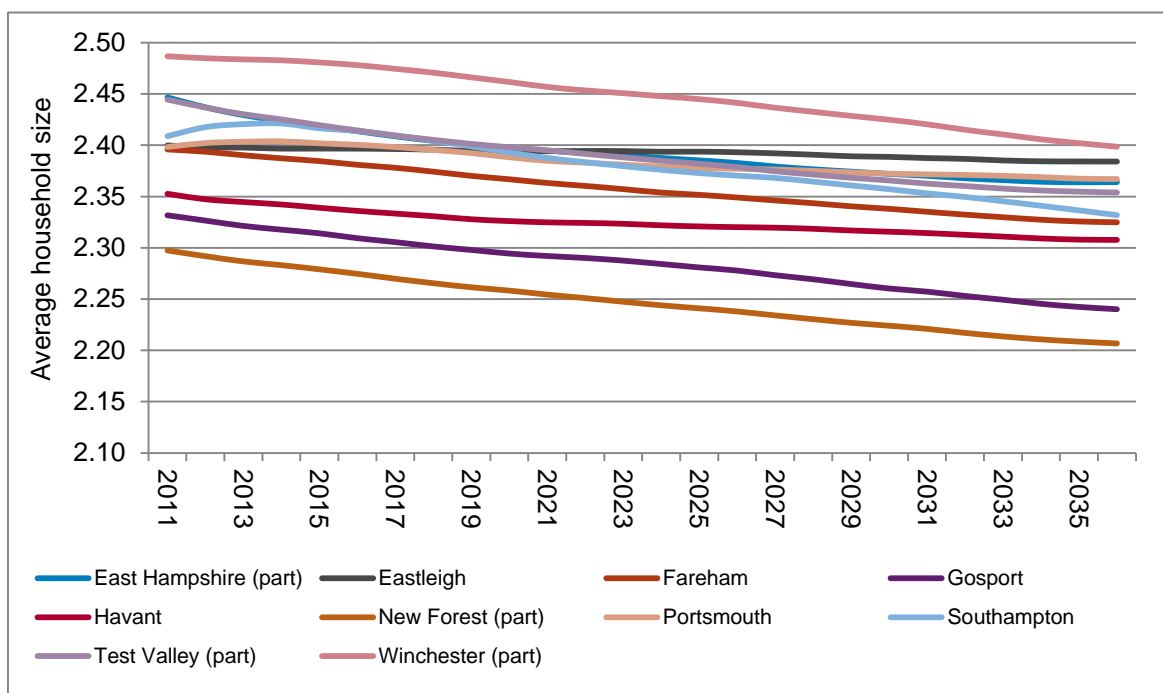


*Source*: Derived from 2011-based CLG Household Projections

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-migraiton 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. |
|---|---|---|---|---|---|---|---|---|---|---|---|

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

**Figure 11: Population Change, 2011 – 2036**
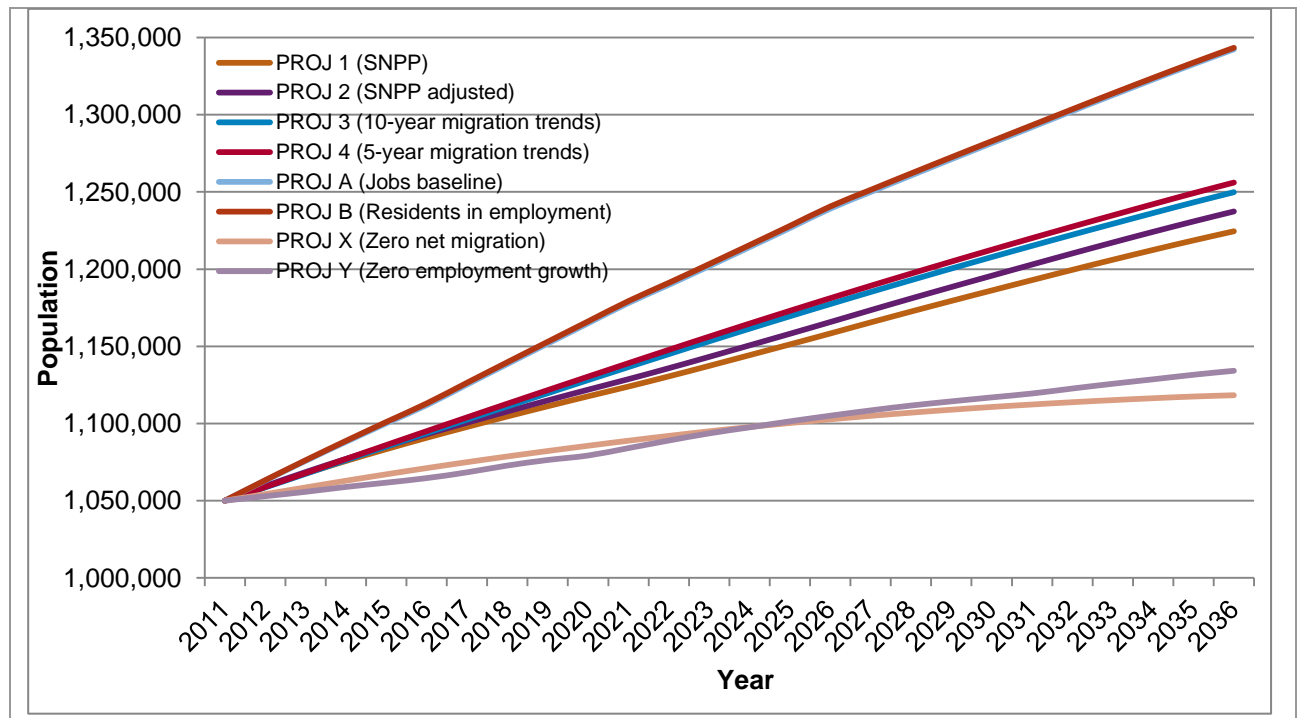
**Impact on Population Age Structure**

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)**
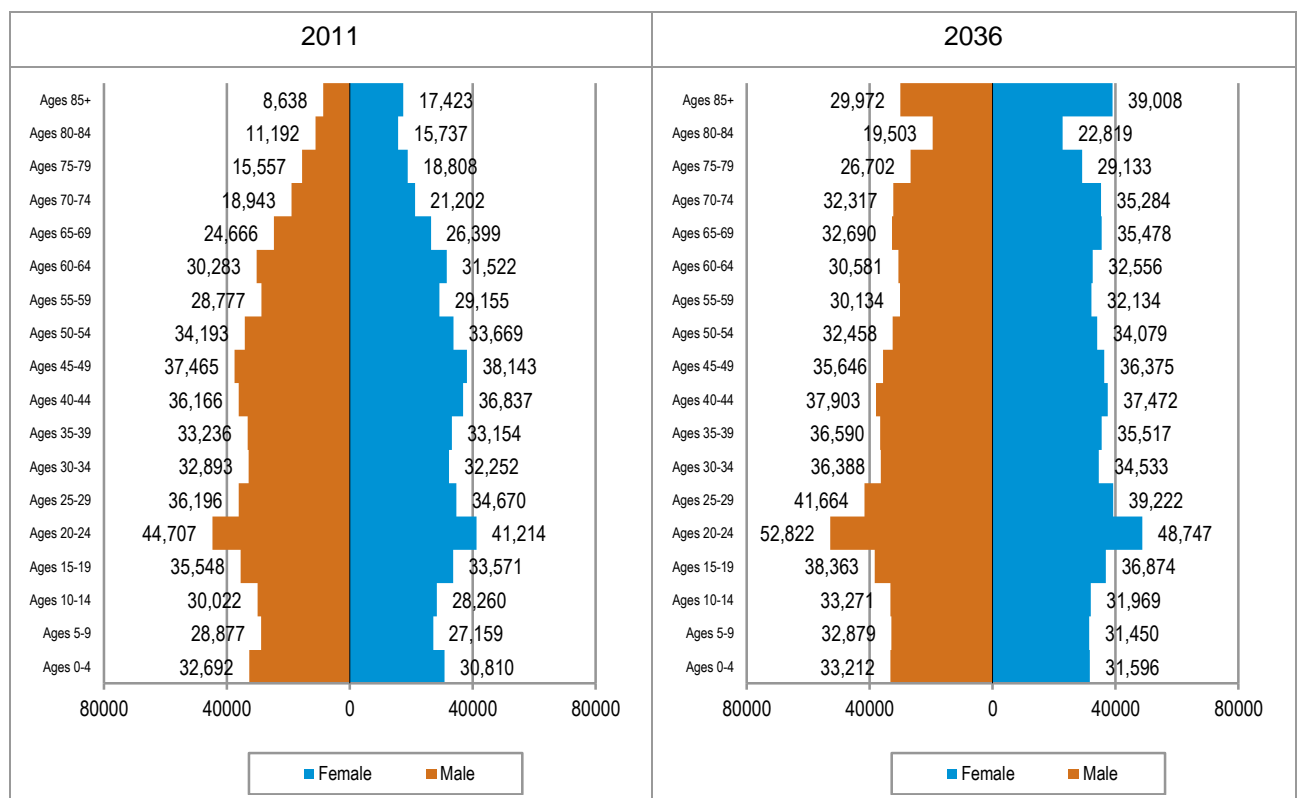


1.5     Table 11 below summarises the findings for key (15 year) age groups. The largest growth will be in people aged over 60. In 2036 it is estimated that there will be 366,000 people aged 60 and over. This is an increase of 125,700 from 2011, representing growth of 52%. The population aged 75 and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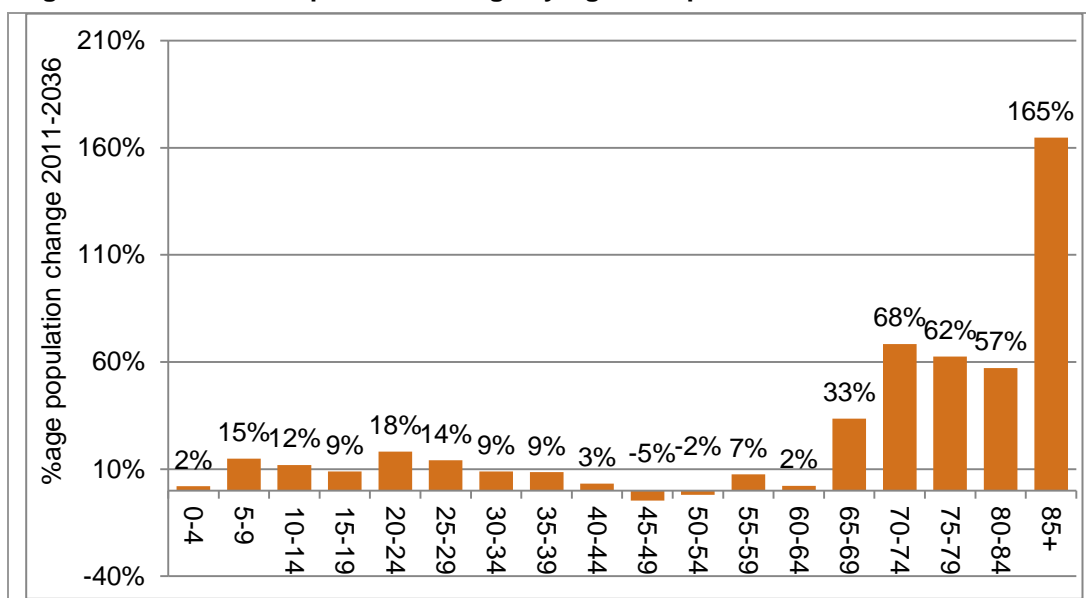
### Employment Changes

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

### Figure 14:  Employment Change, 2011 – 2036
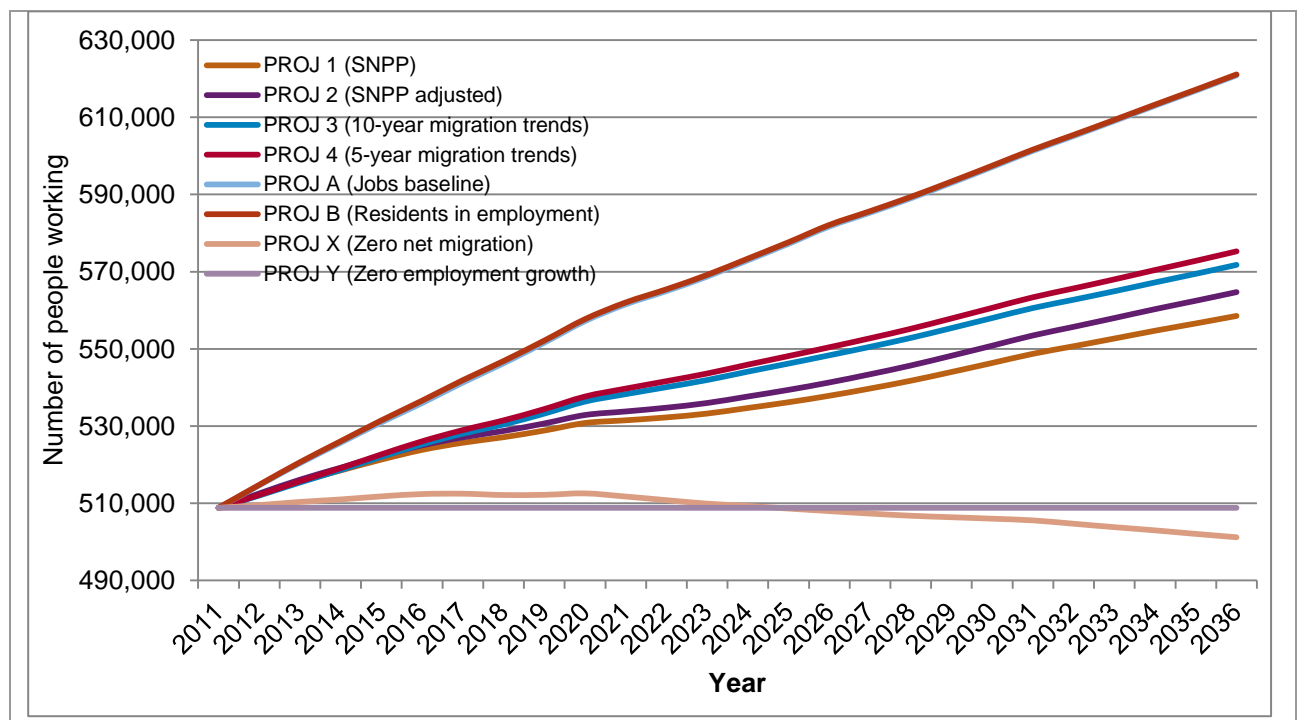
### Household Growth

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
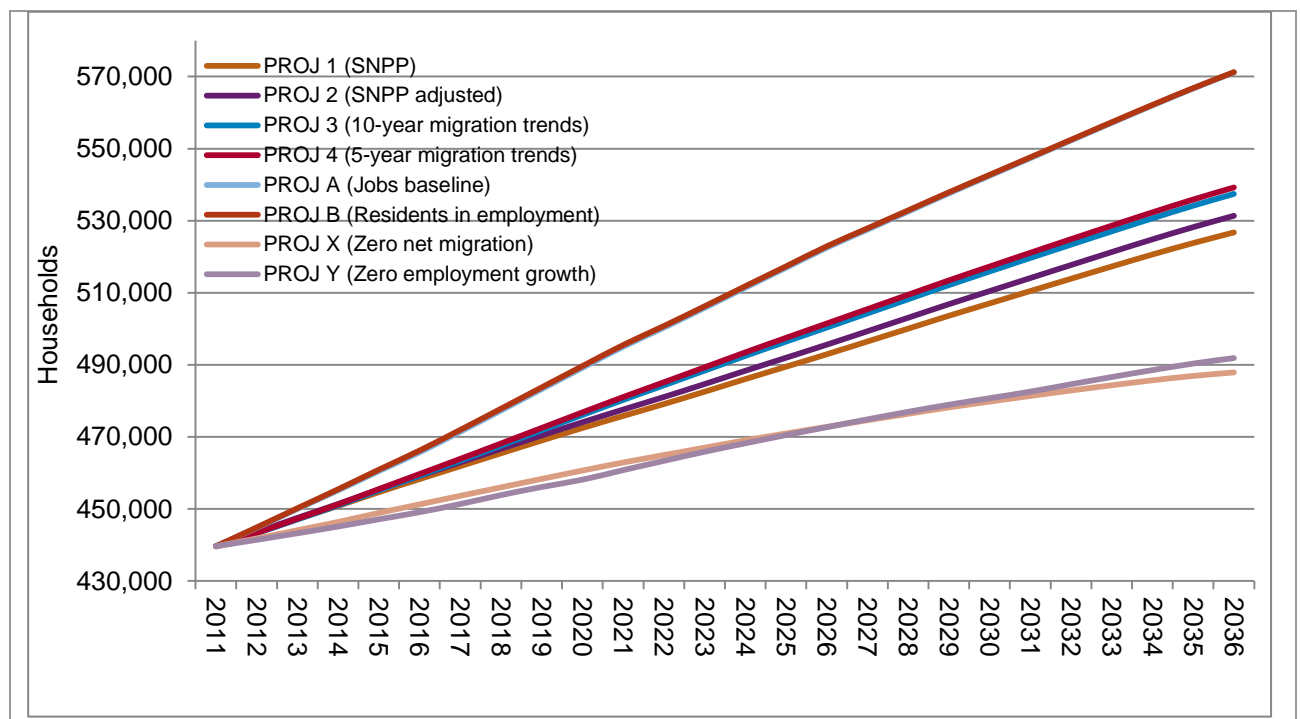
**Dwelling Growth**

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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | |
|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | |
|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | |
|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | |
|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | |
|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | |
|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | |
|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | |
|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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 | | | | | | |
|---|---|---|---|---|---|---|
| | Population growth | | Housing numbers | | Employment growth | |
| Projection | 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)
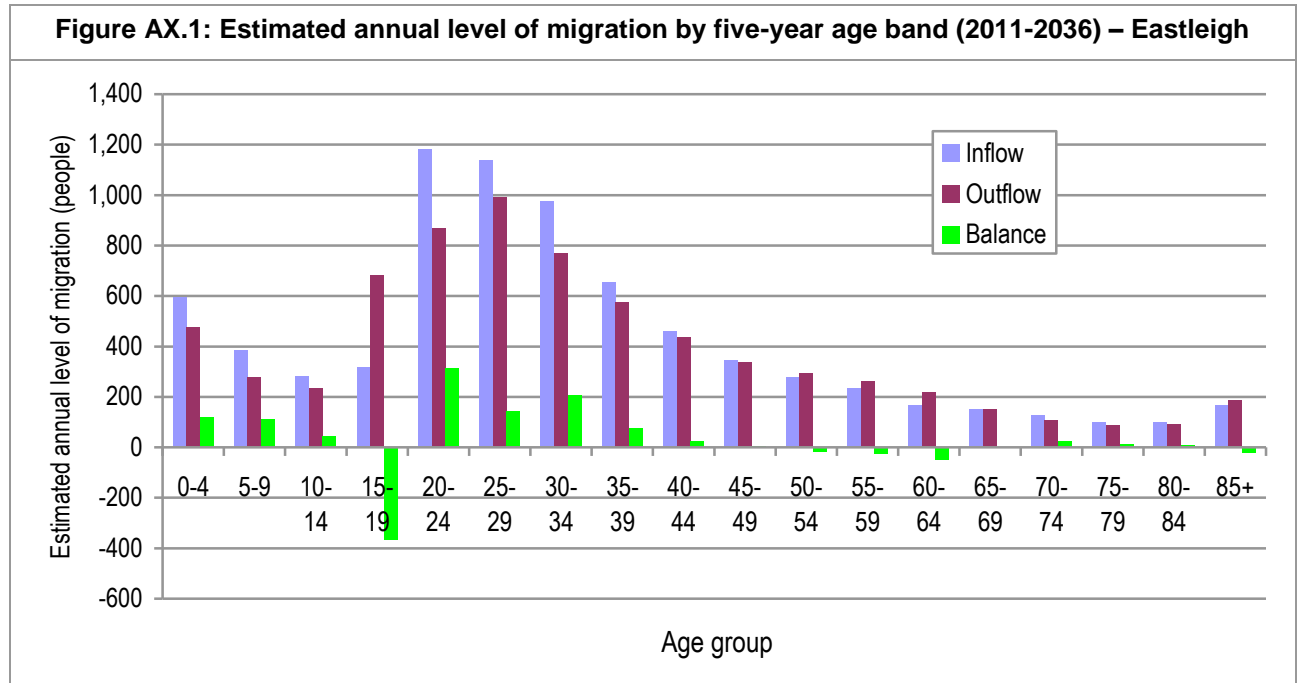
**Figure AX.1: Estimated annual level of migration by five-year age band (2011-2036) – Eastleigh**



Source: Derived from ONS 2010-based population projections

**Figure AX.2: Estimated annual level of migration by five-year age band (2011-2036) – Fareham**
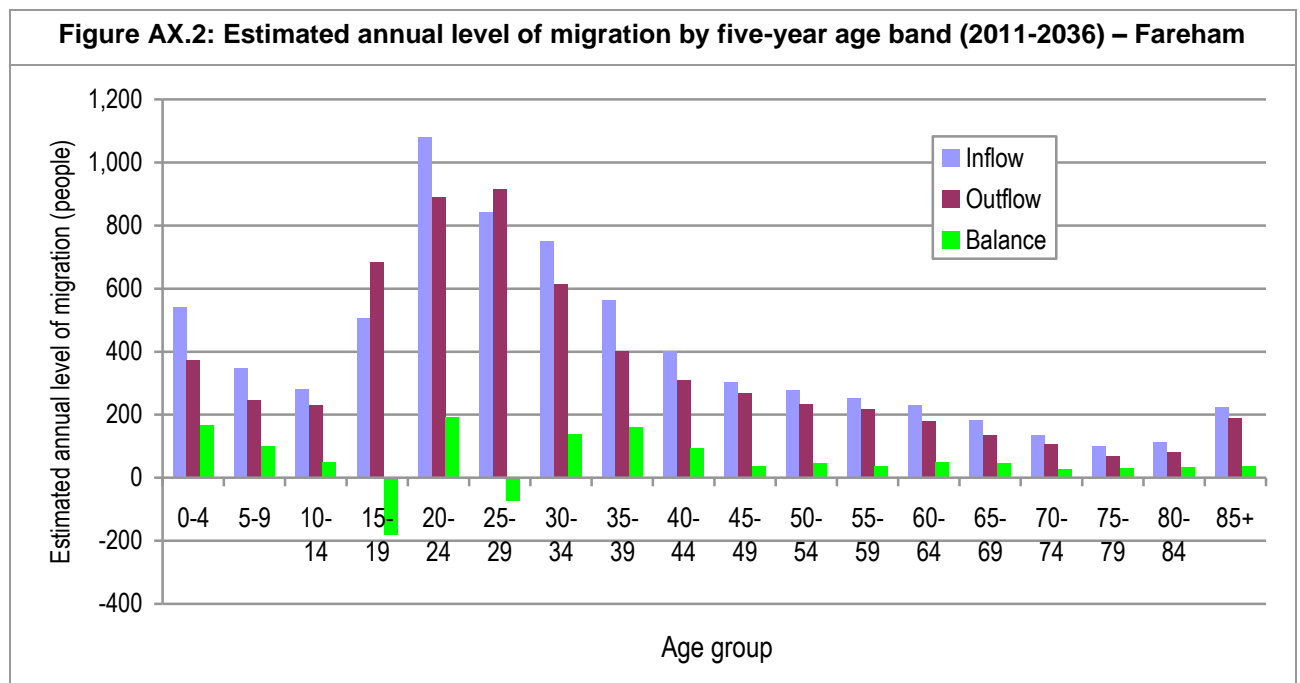


Source: Derived from ONS 2010-based population projections

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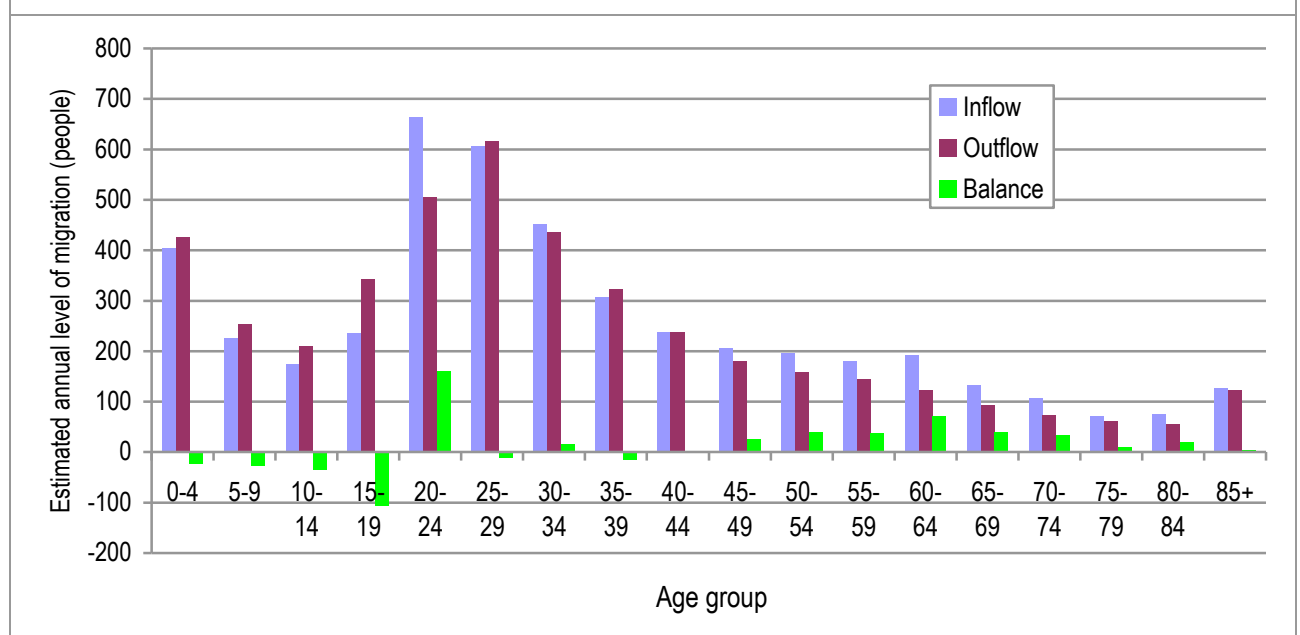


Source: Derived from ONS 2010-based population projections

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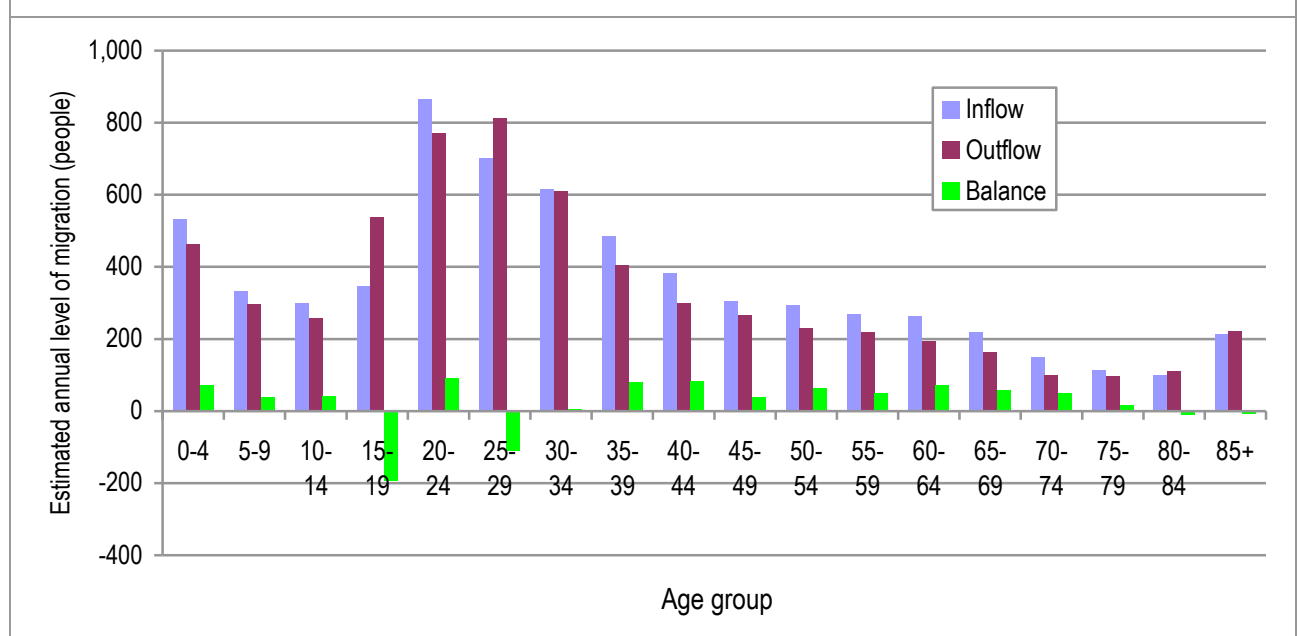


Source: Derived from ONS 2010-based population projections

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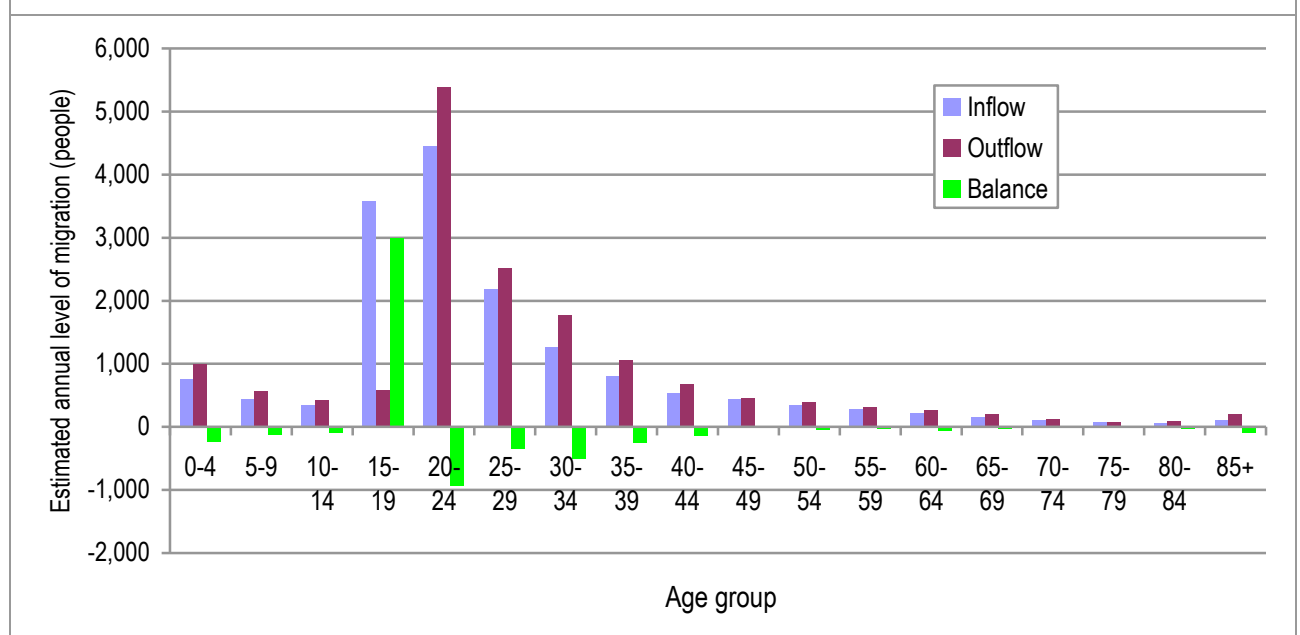


Source: Derived from ONS 2010-based population projections

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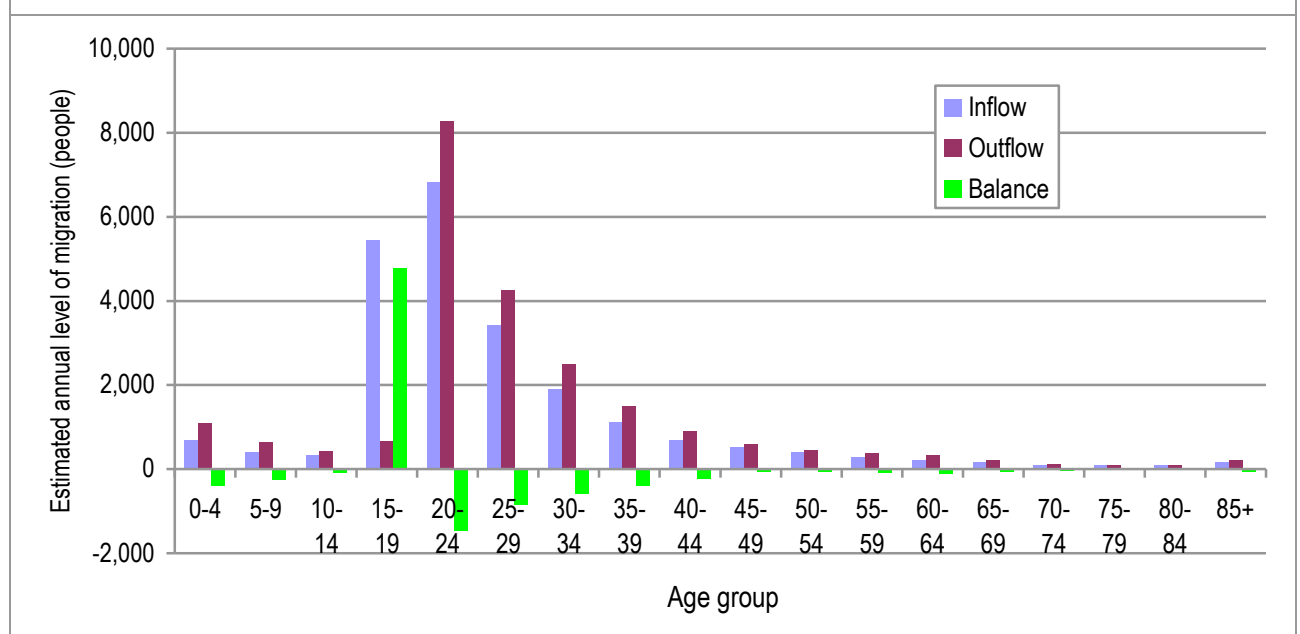


Source: Derived from ONS 2010-based population projections

## 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**
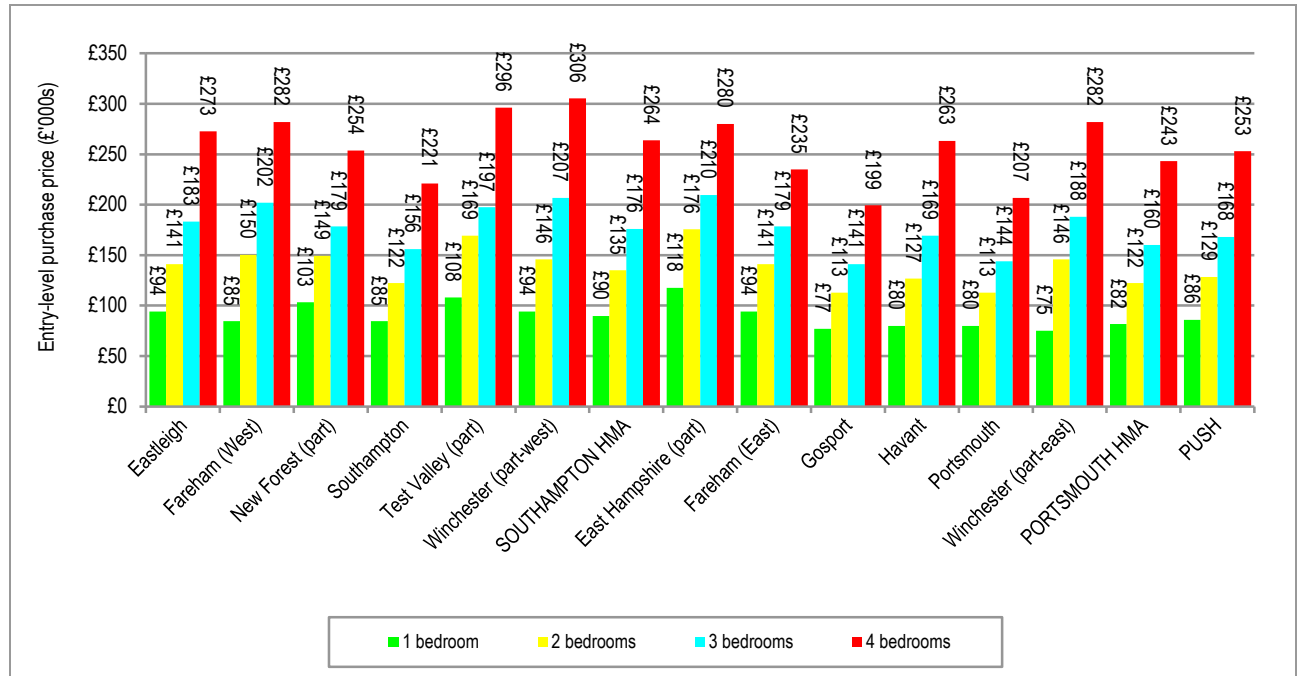


Source: Online Estate and Letting Agents Survey (June 2013)

**Figure 17: Profile of Properties Advertised for Sale**



| | 1 bedroom | 2 bedrooms | 3 bedrooms | 4+ bedrooms |
|---|---|---|---|---|
| Eastleigh | 8.3% | 27.4% | 38.1% | 26.1% |
| Fareham (West) | 8.6% | 20.7% | 30.6% | 40.2% |
| New Forest (part) | 9.4% | 23.8% | 41.1% | 25.7% |
| Southampton | 17.4% | 34.4% | 34.3% | 14.0% |
| Test Valley (part) | 10.9% | 22.4% | 37.1% | 29.6% |
| Winchester (part-west) | 8.9% | 23.9% | 34.4% | 32.8% |
| SOUTHAMPTON HMA | 12.4% | 28.7% | 35.9% | 22.9% |
| East Hampshire (part) | 4.2% | 20.7% | 30.5% | 44.5% |
| Fareham (East) | 9.7% | 24.2% | 39.7% | 26.4% |
| Gosport | 9.7% | 38.5% | 34.7% | 17.1% |
| Havant | 10.3% | 23.7% | 36.3% | 29.6% |
| Portsmouth | 14.7% | 33.5% | 36.3% | 15.5% |
| Winchester (part-east) | 5.7% | 18.1% | 36.1% | 40.0% |
| PORTSMOUTH HMA | 11.0% | 29.1% | 36.2% | 23.7% |
| PUSH | 11.7% | 28.9% | 36.1% | 23.3% |

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

**Figure 18:  Entry-level Private Rents**
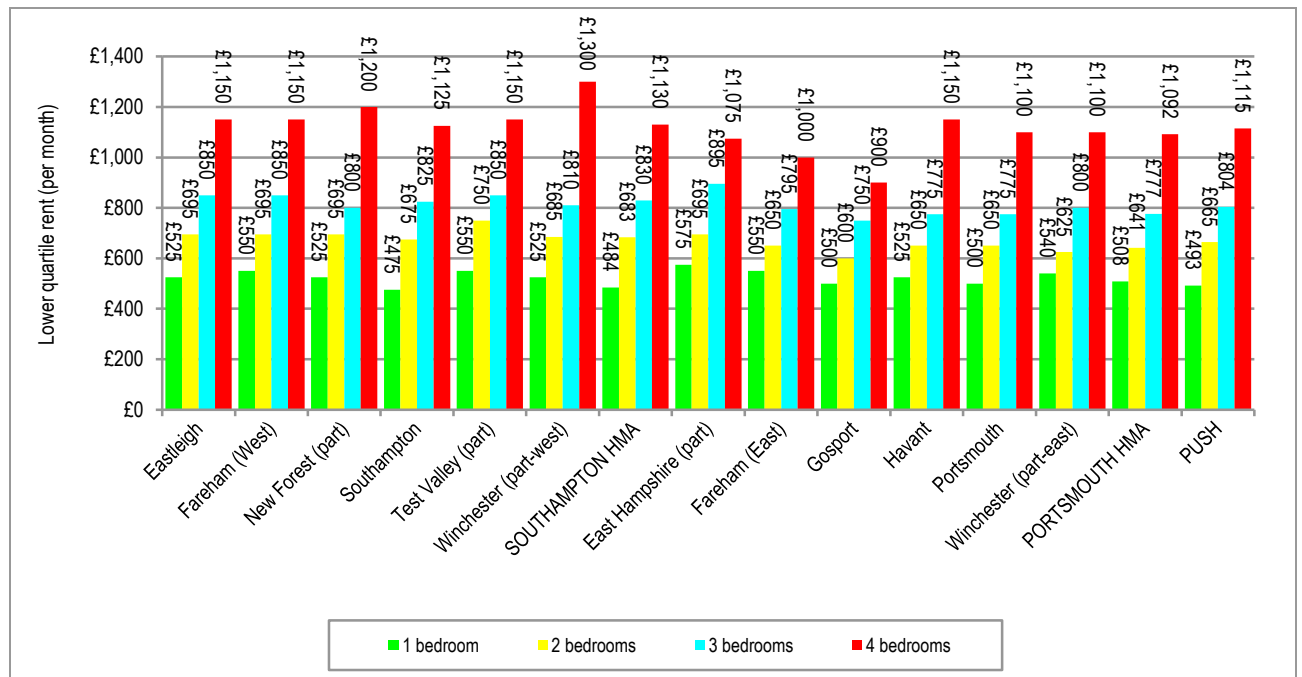


Source: Online Estate and Letting Agents Survey (June 2013)

**Figure 19: Profile of Properties Advertised to Rent**
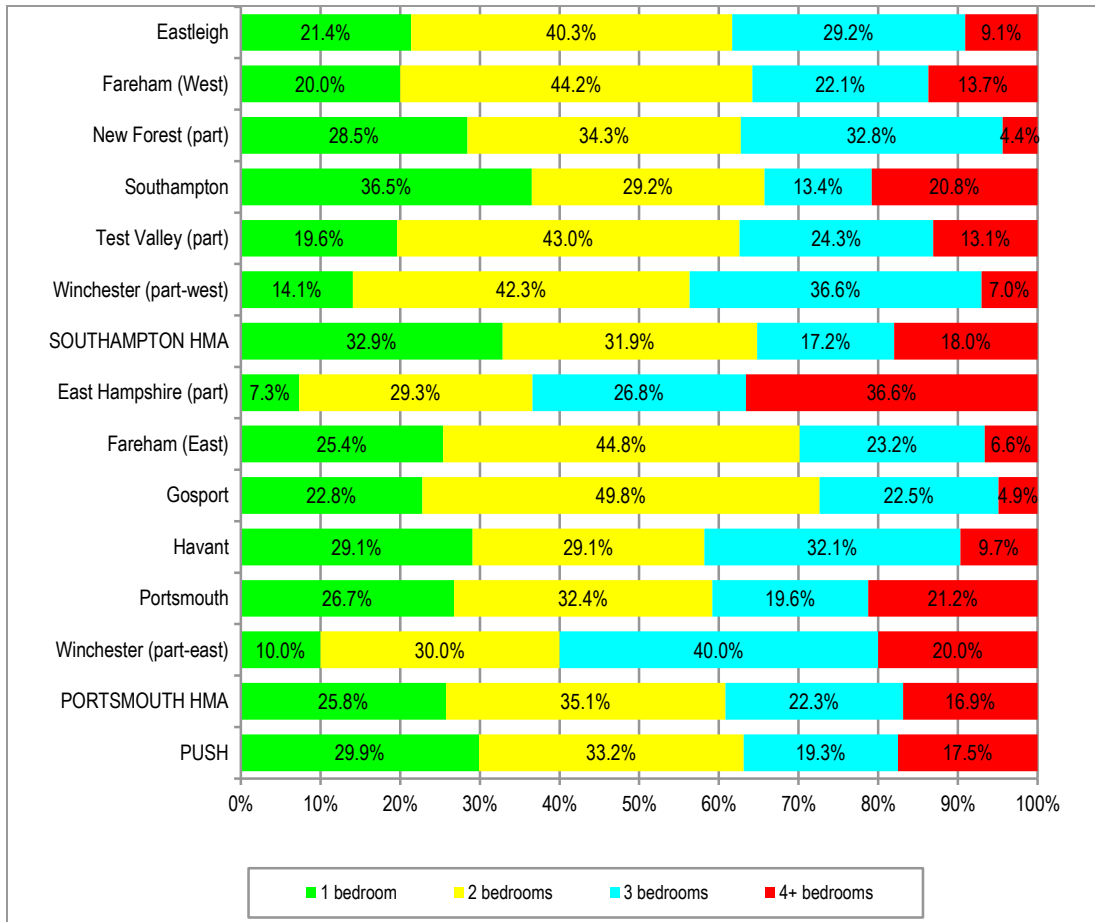


Source: Online Estate and Letting Agents Survey (June 2013)

**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) | South-ampton | Test Valley (part) | Winchester (part-west) | SOUTH-AMPTON 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 | Ports-mouth | Winchester (part-east) | PORTS-MOUTH 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) | South-ampton | Test Valley (part) | Winchester (part-west) | SOUTH-AMPTON 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 | Ports-mouth | Winchester (part-east) | PORTS-MOUTH 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