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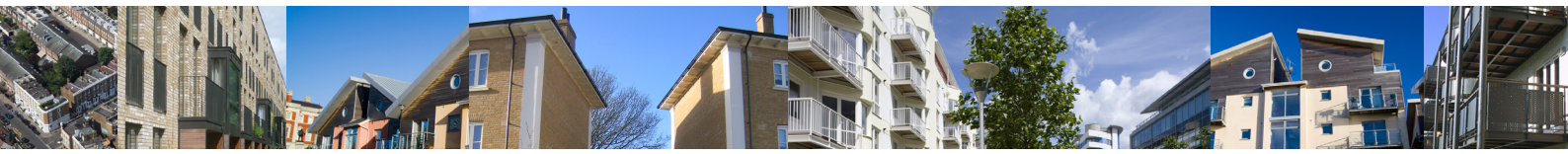

East Hampshire District Council and
South Downs National Park Authority

East Hampshire Strategic Housing Market Assessment and Local Housing Requirements Study

August 2013

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East Hampshire District Council

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East Hampshire SHMA & Local Housing Requirements Study – An Update

Nathaniel Lichfield & Partners (NLP) was appointed by East Hampshire District Council (EHDC) to prepare a Strategic Housing Market Assessment (SHMA) for the district. This assessment was undertaken in early 2013, being finalised in April 2013. Since completion of the SHMA a number of relevant data sets have been released which are important to considering housing needs. In addition to this progress on Local Plans in surrounding Local Planning Authorities has continued which has provided some important matters to consider in the context of this SHMA. In particular:

a On the 09 April 2013 Communities and Local Government (CLG) published the 2011-based Interim Household Projections, providing updated projections of future household change and partially superseding those considered within the SHMA;

b On the 30 April 2013 the Office for National Statistics (ONS) published the ONS mid-year estimates series for mid-2001 to mid-2010, revised following the Census 2011. This data set provides updated estimates of past migration within the district, following the findings of the Census 2011;

c On the 25 April 2013 a letter from the Inspector into the East Hampshire District Local Plan: Joint Core Strategy clarified a number of issues in respect matters that the SHMA should fully cover; and

d During June and July 2013 Examinations in Public into the Local Plans of neighbouring authorities Waverley Borough Council and Hart District Council were undertaken. Debates and findings from these Examinations are relevant to considering housing needs in the context of the wider housing market and interpretation of the NPPF.

These factors mean that it is appropriate for the SHMA to be updated in order to ensure the evidence contained within it is fully up-to-date in order to inform continued work on the East Hampshire District Local Plan: Joint Core Strategy.

In this respect, NLP was appointed to update the relevant elements of the SHMA. This update has been provided within a comprehensive new iteration of the SHMA as a whole, rather than an addendum, to ensure that all relevant up-to-date analysis is contained within a single document. Therefore, whilst much of the analysis remains unchanged, this SHMA supersedes the April 2013 version.

Non-Technical Summary

This report presents the results of a study carried out by Nathaniel Lichfield & Partners (NLP) for East Hampshire District Council (EHDC) to prepare a Strategic Housing Market Assessment (SHMA) for the district, including an objective assessment of the need for housing. Changes to the planning system, including the abolition of Regional Strategies (including the South East Plan) mean that it is the responsibility of local authorities to determine the development requirements for their district, based on evidence and taking account of national policy contained within National Planning Policy Framework (NPPF). The purpose of this SHMA study is to provide evidence on the housing market within East Hampshire and assess how much housing is needed to support the current and future population of the District over the period to 2028. NLP has also carried out an Employment Land Review for East Hampshire concurrently to this SHMA, and the two elements have been undertaken in tandem but are presented in separate reports.

Current Housing Market

There are currently 49,099 houses in East Hampshire. 74% of these are owner occupied (owned either outright or with a mortgage), 13% are rented privately and 13% are in affordable tenures such as social rented or shared ownership. Over the previous eleven years an average of 427 new houses each year have been built in the district.

The current average (median) house price in the District is £250,000 with lower quartile prices (the value at which 25% of houses will be cheaper whilst 75% will be more expensive) is £190,000. The average (median) cost to rent a house in East Hampshire is £207 per week with a lower quartile cost of £160 per week.

Based upon such prices, in order for a household in East Hampshire to be able to afford to buy an 'entry-level' house it would need to be earning at least £46,100 each year combined (e.g. a couple's joint income). When looking at the cost to rent an 'entry-level' 1-bed flat, a household would need to be earning a combined £26,400 each year. Comparing this with household earnings, 7 out of every 10 of households would be unable to afford to buy a home in East Hampshire, whilst 4 out of every 10 would be unable to afford to privately rent a home in the District.

Housing in East Hampshire District is relatively more expensive than Hampshire as a whole. In 2011 average house prices in East Hampshire were 9.99 times greater than the average person's income compared with 8.06 times greater in Hampshire overall. This shows how East Hampshire is relatively expensive for local people to access housing.

Future Need for Housing

In order to identify what might be the future need for housing in East Hampshire, a number of different scenarios for levels of population, housing and economic growth have been tested. These scenarios adopt a range of alternative assumptions about how the future may be different from the present. The intention is not to assume that a single scenario or set of assumptions is the 'best' to adopt. Rather, it is to use the scenarios to understand the likelihood and implications of different levels of change.

Eight scenarios have been tested, flowing from attempts to answer different questions:

- Demographic Led (Scenarios A, B, C, D and E): *"How much development is required to meet projected levels of population change?"*
- Economic-led Scenarios (Scenarios F and G): *"How much development is required to ensure forecasts of future employment change are supported by the local labour supply?"*
- Housing Led (Scenario H): *"How much development is required to meet current and future needs for 'affordable' (e.g. social rented) housing?"*

Scenarios A to G were modelled through a demographic model (POPGROUP) which is widely used by Government and local authorities across the country, whilst Scenario H looks at modelling how many households are unable to afford to rent or buy a house and therefore will need affordable housing (such as social rented, shared ownership or affordable rent). The outcomes of each scenario in terms of population change, household change and economic change over the period 2011 to 2028 are shown in the Table NTS1 below. The report also provides more detailed evidence on the housing requirements of specific groups across household types, ethnicity and disability.

Table NTS1 Scenario Outcomes 2011-2028.

Scenario:	Demographic Led					Economic Led		Housing Led
	A. 2010 SNPP	B. 2011 SNPP	C. Zero Net Migration	D. Long Term Migration Trend	E. Short Term Migration Trend	F. Baseline Experian Projection	G. Lower Experian Projection	H. Delivering Affordable Housing Needs
Pop. Change	+11,706	+15,416	-1,739	+8,464	+14,898	+25,853	+10,065	
of which Natural Change	-179	+1,200	-1,739	+32	+1,366	+1,804	-231	
of which Net Migration	+11,885	+14,216	-0	+8,432	+13,532	+24,049	+10,296	
Household Change	+7,813	+8,614	+2,759	+6,120	+8,145	+12,051	+6,603	
Dwelling Change	+8,105	+8,935	+2,862	+6,348	+8,450	+12,501	+6,849	
Dwellings p.a.	+477	+526	+168	+373	+497	+735	+403	*+548, +610, +688**
Dwellings p.a. inc. backlog allowance	+520	+569	+211	+416	+540	N/A	N/A	N/A
Labour Force	+277	+1,945	-6,475	-1,360	+1,969	+6,918	-483	
Jobs	+1,256	+2,675	-4,488	-136	+2,696	+6,905	+610	
Jobs p.a.	+74	+157	-264	-8	+159	+406	+36	

Source: NLP *based upon a 25%, 27.5% and 30% threshold of income spent on private rent for newly forming households.

Results of the Analysis

It is not the purpose of this report to define the policy or approach for East Hampshire District in its Core Strategy. Rather, it aims to provide an objective evidence base to inform the Council's plan-making, which will also need to take account of factors that are not considered in this assessment. In considering this report, the Council will need to reflect upon its policy objectives, but also the latest evidence on land supply, and assessing which parts of the district have the greatest need, capacity for, or constraints to development.

Despite this, based upon the analysis contained within this report it is clear that an objective assessment of the full need for housing within East Hampshire would fall within the range 520 to 610 new homes to be provided each year. This would be equivalent to between 8,840 to 10,370 additional houses over the plan period 2011 to 2028 representing an increase in the number of homes in the district of between 17.7% and 20.8% over 17 years.

This level of housing development would be necessary to meet projections of population growth taking into account both natural change (births and deaths), pressures faced from people moving into the District (in-migration), as well as existing residents forming new families and households (future household formation). It would also help to ensure that there remain enough local people to support a modest increase in the number of jobs in the District, against the backdrop of an ageing population and the prospect of many existing residents retiring during the life of the Plan.

However, this Study is just one part of the jigsaw and a number of factors will be relevant to the Council in defining its local housing target and may require further consideration:

- The wider policy objectives for the District, taking account of national policy and the implications of the statutory 'duty to cooperate' in terms of what is planned in neighbouring authorities;
- The constraints to housing delivery and other development, including assessments of infrastructure capacity, land supply, environmental capacity, and development viability;
- That 57% of the District is located within the South Downs National Park (SDNP) and that any strategy for growth will need to respond to the special nature of the SDNP;
- How future levels of housing delivery can support relevant economic and employment strategy objectives to maintain and enhance East Hampshire's economy, including for local businesses and providing local employment choices for residents;
- The views of local residents and other stakeholders as identified through consultation exercises.; and
- The policy provisions of the NPPF which state, among other things, that *"local planning authorities should positivity seek opportunities to meet the development needs of their area"* and *"Local Plans should meet objectively assessed needs… unless as adverse impact of doing so would significantly and demonstrably outweigh the benefits."*

Contents

1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) was appointed by East Hampshire District Council (EHDC) to undertake a Strategic Housing Market Assessment (SHMA) Update and Local Housing Requirements Study. The purpose of the study is to update the evidence contained within the Hampshire SHMA and subsequent Annul Monitoring Reports and to update the Local Housing Requirements Study by providing evidence on the potential scale of future housing need and demand in East Hampshire based upon a range of housing, economic and demographic factors, trends and forecasts. This will help EHDC to address the initial findings of the inspector at the examination of the Core Strategy and form an integrated and comprehensive evidence base to substantiate an objectively assessed housing need within the District. NLP has also carried out an Employment Land Review for East Hampshire concurrently to this SHMA. The two elements have been undertaken in tandem but are presented in separate reports.

National Planning Policy Framework (NPPF)

1.2 The Government's policy approach to planning has been focused on applying the principles of 'localism' to give Local Planning Authorities (LPAs) greater autonomy in planning for housing, and in particular setting local housing requirements in their local plans. This presents a major opportunity for local authorities to shape the agenda for their localities, but with it comes new responsibilities.

1.3 On 6 July 2010, the Secretary of State (SoS) for Communities and Local Government revoked the Regional Strategies (RS) with the intention that they no longer form part of the statutory development plan. Following a legal challenge by CALA Homes, on 10 November 2010 the Chief Planning Officer confirmed that RS are re-instated as part of the development plan, but that the Government intended to abolish these in line with the then proposed Localism Bill (now the Localism Act 2010). This process has been completed for the South East region, and the South East Plan (the RS for the region) was formally revoked on the 25 March 2013 and as such no longer forms part of the Development Plan. The implication of this removal of the housing requirements and job targets centrally-imposed by Regional Strategies, is that responsibility for establishing local development requirements, including housing and employment land targets, in Local Development Frameworks falls to local councils.

1.4 The policies set out in the National Planning Policy Framework (NPPF), published March 2012, outline the new approach to plan-making.

Plan Making and Using a Proportional Evidence Base

1.5 The NPPF outlines at paragraph 47 that LPAs should:

"Use their evidence base to ensure that their Local Plan meets the full, objectively assessed needs for market and affordable housing in the housing market area, as far as is consistent with the policies set out in this Framework…"

1.6 The NPPF (paragraph 159) outlines the evidence required to underpin a local housing target identifying that LPAs should:

"Prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries. The SHMA should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which;

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

1.7 The starting point for plan making is to use the evidence base to objectively assess the need for development within an area and then seek to meet that in full, where it is appropriate to do so. This is underlined in para 14 which identifies in respect of plan-making that local plans should, *"meet objectively assessed needs… unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits…"*

1.8 The NPPF also outlines with respect to economic growth (para 19 and para 21) that:

"The Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system… Planning policies should recognise and seek to address potential barriers to investment, including… any lack of infrastructure, services or housing."

1.9 With the planning system expected to do 'everything it can' to support economic growth and strategic plans required to address any potential barriers to achieving this, Local Plans need to demonstrate how they are effectively and positively planning to support the economy in their local area, including delivering sufficient housing to ensure economic potential is realised.

1.10 Where objectively assessed development needs are evidenced to not be achievable within the bounds of a Local Authority, the NPPF sets out the requirement to plan positively across boundaries to meet the need elsewhere in the market area. This ensures any shortfall in provision in one authority area is

still met in other local authority areas. This is practically achieved through the statutory 'duty to cooperate'.

Localism Act and Duty to Cooperate

1.11 The statutory duty to cooperate in respect of plan making is set out in Section 33A of the Localism Act (2011). Para 178 of the NPPF sets out how public bodies have a duty to cooperate on planning issues that cross administrative boundaries, particularly highlighting the strategic priorities of Local Plans which includes delivering the homes and jobs need in the area. The NPPF para 182 sets out the tests of soundness for Local Plans, crucially identifying that plans should be "positively prepared" based on a strategy which seeks to meet objectively assessed development needs, including unmet requirements from neighbouring authorities.

SHMA Practice Guidance

1.12 The NPPF identifies that Strategic Housing Market Assessments (SHMAs) are the vehicle through which LPAs should put forward evidence on objectively assessed housing needs. In this respect the SHMA Practice Guidance (Version 2) published by CLG in August 2007, provides a framework, along with a step-by-step approach, to follow in assessing housing need and demand.

1.13 The guidance sets out a wide ranging and holistic approach to assessing housing markets. It sets this out in a structure which broadly covers:

a How to assess current housing markets, including existing housing demand;

b How to estimate changes in household numbers to assess total future housing demand

c How to assess current and future levels of housing need; and

d How to consider the requirements of particular household groups.

1.14 The SHMA Guidance identifies a range of core outputs that it is necessary for a SHMA to cover, along with a SHMA process checklist. In respect of these the SHMA Guidance states:

"…a strategic housing market assessment should be considered robust and credible if, as a minimum, it provides all of the core outputs and meets the requirements of all of the process criteria in figures 1.1 and 1.2."

1.15 These core outputs and processes are identified in Figure 1.

Figure 1 SHMA Core Outputs and Process Checklist

Figure 1.1: Strategic Housing Market Assessment core outputs (further details are set out in Table 2.1, Chapter 2)	
1	Estimates of current dwellings in terms of size, type, condition, tenure
2	Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. Description of key drivers underpinning the housing market
3	Estimate of total future number of households, broken down by age and type where possible
4	Estimate of current number of households in housing need
5	Estimate of future households that will require affordable housing
6	Estimate of future households requiring market housing
7	Estimate of the size of affordable housing required
8	Estimate of household groups who have particular housing requirements eg families, older people, key workers, black and minority ethnic groups, disabled people, young people, etc.

NB. Estimates of household numbers (3, 4, 5 and 6) may be expressed as a number or a range.

Figure 1.2: Strategic Housing Market Assessment process checklist	
1	Approach to identifying housing market area(s) is consistent with other approaches to identifying housing market areas within the region
2	Housing market conditions are assessed within the context of the housing market area
3	Involves key stakeholders, including house builders
4	Contains a full technical explanation of the methods employed, with any limitations noted
5	Assumptions, judgements and findings are fully justified and presented in an open and transparent manner
6	Uses and reports upon effective quality control mechanisms
7	Explains how the assessment findings have been monitored and updated (where appropriate) since it was originally undertaken

Source: CLG SHMA Practice Guidance (2007)

1.16 Notwithstanding the requirements of the SHMA Guidance, the Taylor Review of Planning Practice Guidance (December 2012) concluded that the SHMA Guidance is *"out-of-date"* and that it is *"important to have a standardised approach"* with *"closer linkages between the SHMA and Employment Land Reviews / Economic Assessments."*

1.17 The above CLG SHMA Guidance is therefore not necessarily reflective of the current requirements in respect of the need for Local Planning Authorities to objectively assess their development needs.

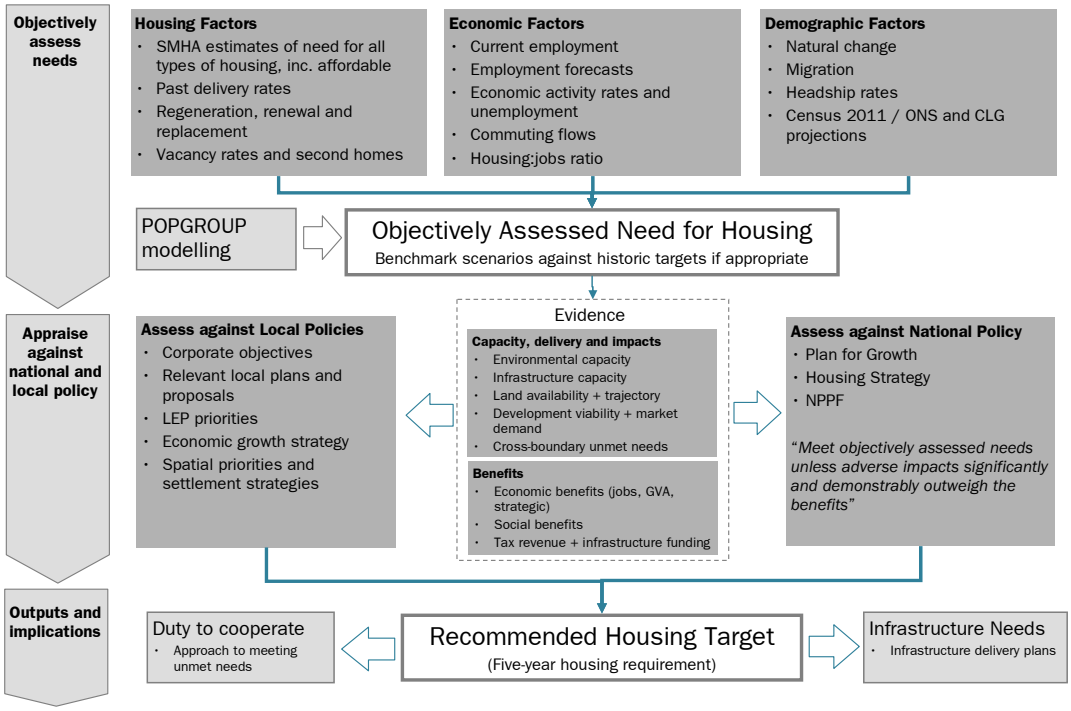
1.18 Against this background, the NPPF itself provides the starting point for considering the key requirements of what SHMAs now need to cover, namely (NPPF para 159) household and population projections taking account of migration, the need for all types housing including affordable and the housing needs of different groups. Para 50 of the NPPF also identifies other relevant considerations that will need to be evidenced around housing market trends and size/type/tenure requirements by location.

Approach to SHMA and Identifying Local Housing Needs

A Conceptual Framework

1.19 In response to the need to generate locally derived requirements for growth, NLP developed HEaDROOM, a conceptual framework for identifying local housing requirements providing a robust basis for planning through Local Development Frameworks. NLP's HEaDROOM framework (so-called given its focus on the Housing, Economic and Demographic factors underpinning the need for housing in a locality) has been applied in this study (See Figure 2) to identify the objectively assessed need for housing.

Figure 2 HEaDROOM Framework for Objective Assessment of Need for Housing



Source: NLP

1.20 The approach adopted is consistent with the requirements of the CLG SHMA Guidance and the NPPF, providing the necessary evidence and 'core outputs' to estimate future housing need and demand. The approach to arriving at a housing target for the plan will need to take into account consideration of relevant national and local policy factors, the deliverability of any target, as well as the duty to cooperate – these are factors outwith the immediate ambit of the SHMA but will be informed by it.

1.21 NLP has also been commissioned to undertake an Employment Land Review for East Hampshire concurrently to this SHMA, and the two elements have been undertaken in tandem. This approach acknowledges the common drivers behind the need for housing and employment growth and the alignment between them, cognisant of the conclusions of the Taylor Review of Planning

Guidance around closer linkages between SHMAs and Employment Land Reviews/Economic Assessments.

Overall Approach

1.22 In essence, the approach adopted is to derive a series of scenarios based on housing, economic and demographic factors, and identify what would be the potential housing and employment growth needs arising within the parameters of that given scenario.

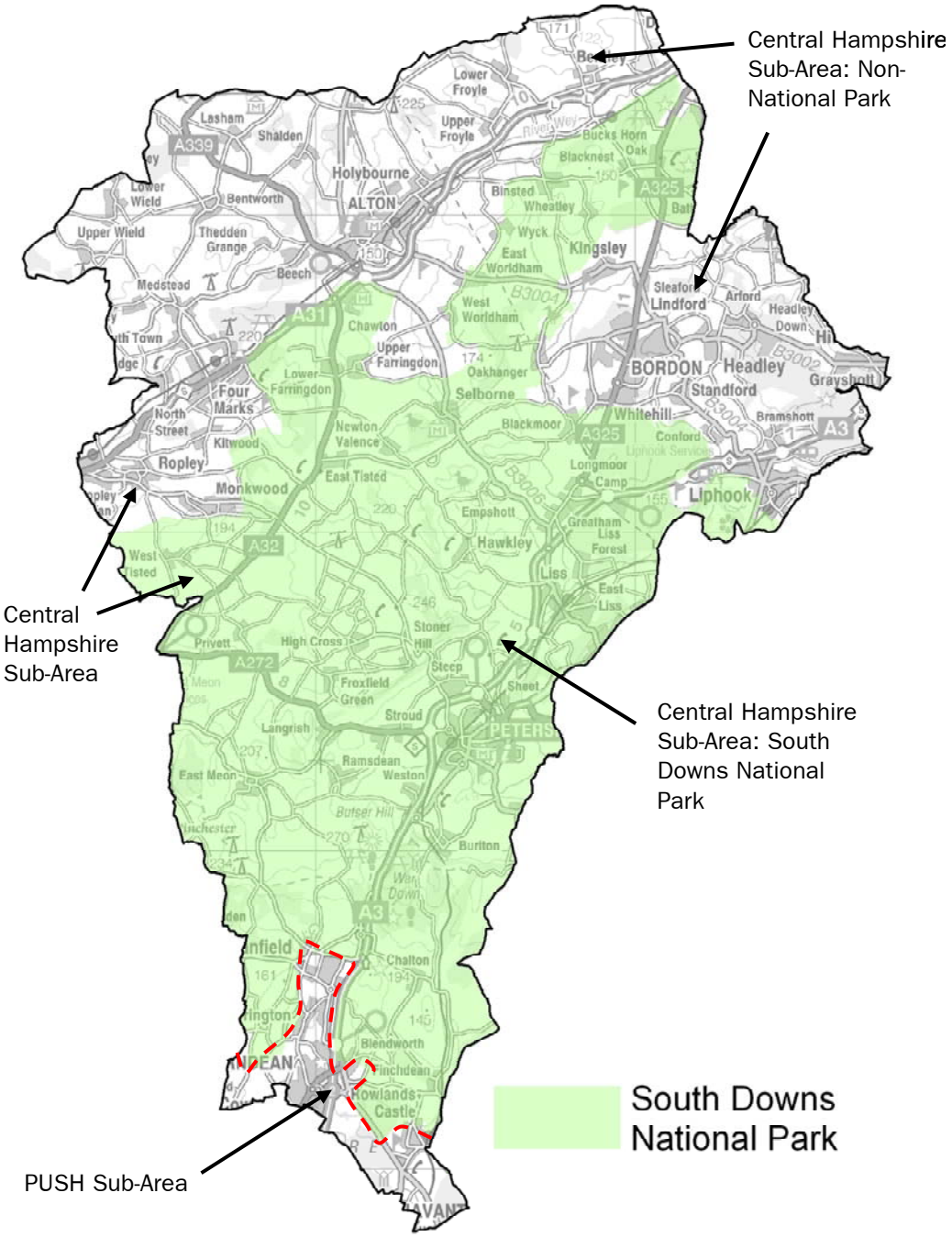
1.23 The key outputs of the study are also presented for the period 2011 to 2028. This is for two key reasons:

a to fit with the proposed Core Strategy plan period within East Hampshire which encompasses the period up to 2028;

b to reflect the base date for the demographic modelling which is 2011 due to the fact that this is the point in time for which the most recent comprehensive base data is available (e.g. data, including a population base, derived from the Census).

1.24 The analysis of housing market factors, the outputs of each of the scenarios and much of the assessment is undertaken cognisant of the geography of the District. Figure 3 provides map of the three core areas outputs and analysis has been considered at: the PUSH sub area; the South Downs National Park Authority area; and the part of East Hampshire outside of the National park.

Figure 3 East Hampshire Sub-District Areas



Source: NLP

2.0 Defining the Housing Market Area

2.1 The Localism Act 2011 includes the statutory duty to cooperate on strategic planning for cross-boundary issues, and this is a requirement reiterated in the NPPF in terms of addressing issues including housing figures and job growth. Paragraph 159 of the NPPF states the following with regards to Local Planning Authorities understanding their housing needs:

"To boost significantly the supply of housing, local planning authorities should: use their evidence base to ensure that their Local Plan meets the full, objectively assessed needs for market and affordable housing in the housing market area."

2.2 In recent months both the Waverley and Hart Examinations in Public (EiP) have concluded with Inspectors taking the view that SHMAs must be undertaken for the whole 'Housing Market Area' (HMA) and that objectively assessed housing needs should reflect such geographies. Although the Inspector for the East Hampshire District Council Core Strategy only requested a SHMA covering the District, it is still important that this study clarifies the extent of East Hampshire's HMA, in the context that different SHMAs have made different estimates of housing market areas over areas including East Hampshire.

CLG Guidance on defining Housing Market Areas

2.3 HMAs are inherently difficult to define. They are a geographic representation of people's choices and preferences on the location of their home, accounting for live and work patterns. They can be defined at varying geographical scales from the national scale, to sub-regional scale, down to local and settlement specific scales. HMA's are also not definitive. As well as a spatial hierarchy of different markets and sub-markets, they will inevitably overlap. However, CLG provide some advice in this regard.

2.4 The CLG 'Identifying sub-regional housing market areas' advice note (March 2007) recommends that a measure of migration flow patterns can identify the geographical relationships of where people move house within an area with a 70% containment rate of migratory activity typically representing a HMA. The quote below describes how to identify thresholds for containment rates.

"The typical threshold for self-containment is around 70 per cent of all movers in a given time period. This threshold applies to both the supply side (70 per cent of all those moving out of a dwelling move within that same area) and the demand side (70 per cent of all those moving into a dwelling have moved from that same area). Some areas may be relatively more or less self-contained, and it may be desirable to explore different thresholds."

Previous SHMAs and Housing Market Areas

2.5 East Hampshire has previously been identified as being located in two housing market areas in two different SHMA's, the Central and South Hampshire housing market areas.

2.6 The South Hampshire Housing Market Assessment (April 2005) includes an area to the south of East Hampshire (excluding the National Park), particularly Horndean. It includes this part of East Hampshire in the Eastern Pole of the housing market area based on commuting patterns between Portsmouth, Havant, Fareham, East Hampshire and Gosport.

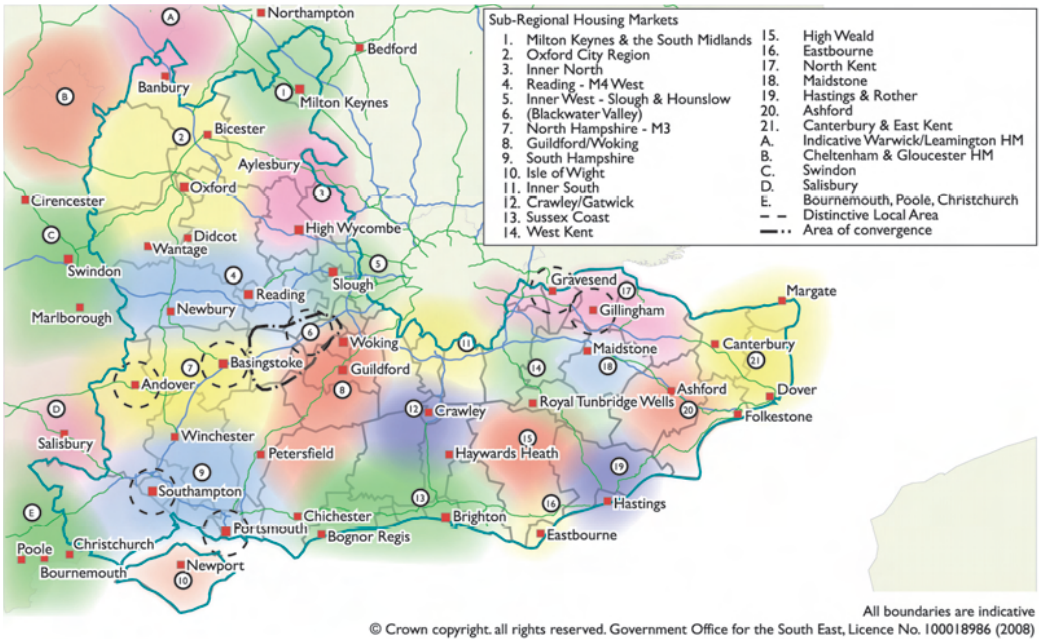
2.7 The Central Hampshire and New Forest Housing Market Monitoring Report (updated 2010) also stated that the southern fringe of the East Hampshire District belonged in the South Hampshire housing market area in terms of labour market and housing market terms. The Central Hampshire housing market area included Basingstoke and Deane, Test Valley, Winchester and the majority of East Hampshire.

2.8 Figure 4 illustrates the housing market areas as indicted in the South East Plan. From this map it is clear that East Hampshire had been shown as relating to three housing market areas, this includes the two mentioned above as well as the Guildford/Woking housing market area. It is also clear from the mapping that the boundaries of the various areas are markedly imprecise for plan making at a local level, and cannot be definitive as the basis for preparing SHMAs for local plan purposes. For example, a HMA contiguous with local authority boundaries was defined for Surrey Heath, Hart and Rushmoor districts despite those three areas also straddling three separate HMAs in the South East Plan document (Guildford/Woking, Reading, and North Hampshire) and was justified as such within the SHMA evidence for those three districts (this was unchallenged at the recent Hart Examination). This issue (the difference between HMA boundaries and units of plan-making) is explored more fully in research carried out for CLG in 2010[1].

2.9 The South East Plan was based on Census 2001 data and this remains one of the most up to date sources of information regarding local housing market areas in advance of the release of comparable statistics from the 2011 Census; it is therefore considered to still be relevant. The following analysis on migration and commuting patterns later in this SHMA report also supports this position, identifying East Hampshire's relationship with various sub-regional housing markets with linkages to the north east of the District towards Waverley, Guildford and Woking.

[1] CLG (2010) Housing market areas and regional spatial geographies: Geography of housing market areas in England – paper A

Figure 4 Sub-regional housing market areas as identified in the South East Plan



Source: The South East Plan May 2009

The East Hampshire Housing Market Area

2.10 At a Sub-Regional level East Hampshire District has previously been placed within three overlapping sub-regional markets, meaning East Hampshire's area of housing market influence could theoretically be adjudged to stretch as far reaching as New Forest to the south west to the outskirts of Greater London to the north east. However, such analysis has looked more widely across the

South East and it is useful to consider and analyse East Hampshire's role within these sub-regional HMAs to identify a relevant housing market area for East Hampshire in the context of the Core Strategy.

Migration and Commuting Patterns

2.11 Although commuting flows and travel to work areas provide one way of assessing the extent of the housing market within which East Hampshire and its adjoining authorities sit, a further way of considering this relationship is migration flows.

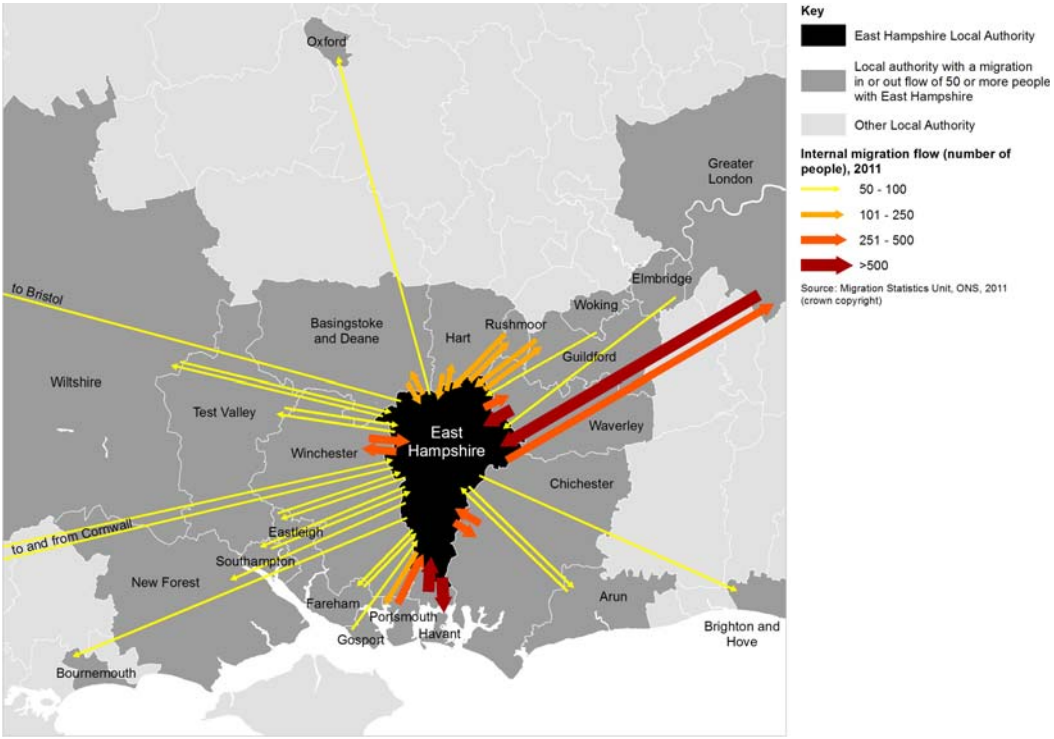
2.12 Patterns of migration are a function of a range of housing market factors combined with household circumstances. Key factors which influence migration patterns and the geography of housing markets include affordability, which itself is influenced by a range of factors, and accessibility, particularly related to place of work and ease of commuting.

2.13 District level migratory patterns for East Hampshire observed during 2011 are illustrated in Figure 5. This shows the notable level of inter-dependency with all of East Hampshire's adjoining authorities but very high levels of housing inter-dependency between the East Hampshire housing market and Waverley and Havant housing markets. Migratory flows into East Hampshire are greater in these two authorities than all other adjoining authorities, but additionally there is a high level of inter-dependency between East Hampshire and Greater London, with greater in migration to East Hampshire from this location than out migration. There is a lesser, but still strong housing market relationship between East Hampshire and Chichester and Winchester. There are smaller levels of market interdependency with Basingstoke and Deane and Hart as well as Rushmoor and Guildford, who do not directly adjoin East Hampshire.

2.14 The greatest proportion of migration into East Hampshire in 2011 came from Waverley which accounted for 10% of all in migration into East Hampshire and Havant had the second greatest proportion with 9%. Chichester and Winchester had the next greatest proportions with 6% and 5.9% respectively which were then followed by Portsmouth and Guildford.

2.15 Migration from East Hampshire into Havant in 2011 accounted for 9.9% of migration out of District (compared with 7.1% moving to Winchester, the second most popular destination for East Hampshire migrants). Migration from East Hampshire into Greater London accounts for 8.3% of all out migration from the District, however this is distributed across 26 different London Boroughs and is probably not a fair comparison to the proportions seen in the adjoining authorities. Other authorities to which there was notable out migration from East Hampshire include Waverley, Chichester and Portsmouth.

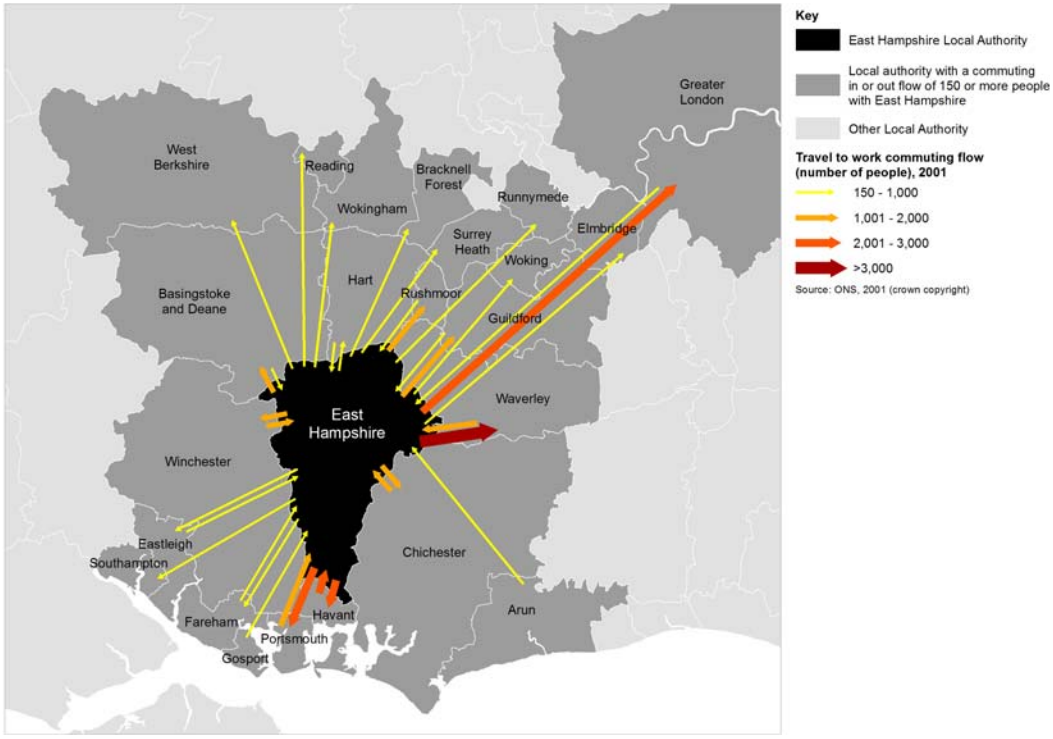
Figure 5 Migration in East Hampshire 2011



Source: ONS Migration Statistics Unit (2011)

2.16 Figure 6 illustrates the district level commuting relationship between East Hampshire and the wider area at the time of the Census in 2001. It shows significant commuting inter-dependency between East Hampshire and Havant as well as Waverley and Greater London. Lesser but still significant levels of interdependency are also seen between East Hampshire and Winchester and Chichester and finally, between East Hampshire and the adjoining authorities to the north of the District. This largely mirrors the migration flows observed.

Figure 6 East Hampshire commuting flows 2001



Source: Census 2001/NLP analysis

2.17 The 2001 Census identified that in 2001 commuting stood at 13,111 in-commuters and 24,802 out-commuters, leaving a net out-commute of 11,692 people. Within East Hampshire, approximately 21.2% of in-commuters came from Havant and 12% came from Waverley. To highlight the relationship between the other authorities adjoining East Hampshire, 8.6% of commuters in the District came from Chichester and 8.3% from Winchester City (the fifth and sixth authorities with the greatest proportion of in commuting).

2.18 The two most significant destinations of out commuting from East Hampshire are Waverley with 15.5% and Greater London with circa 10.1% of out commuters working in the London Boroughs. Other notable locations for out commuters from East Hampshire are Portsmouth, comprising 10.9% of out commuters, and Havant which accounts for 9.4%. The balance of commuting between Havant and East Hampshire leaves a net in-commute into East Hampshire of 447 people, but there is generally a greater proportion of out commuting from East Hampshire than in from the surrounding authorities.

Analysing the extent of the HMA

2.19 Although the above migratory analysis displayed in Figure 5 confirms East Hampshire's inter District migratory relationships with adjoining authorities in 2011, data around internal migratory patterns at a lower level, including within a District, is currently only available from the Census 2001. Analysis of these migratory relationships at a lower geographical level will help to ascertain where the majority of migratory moves are taking place locally and identify at which point the 70% containment rate applies. Table 1 below documents the

migratory patterns by both origin and destination of all of the authorities in the 3 sub-regional HMA's identified in previous analysis that have a relationship with East Hampshire using data from the 2001 Census.

2.20 The analysis in Table 1 indicates that the level of self-containment of migratory movements in East Hampshire is particularly high with supply side self-containment totalling 67.3% of all those moving out of a dwelling moving within East Hampshire and demand side self-containment totalling 65.3% of all those moving into a dwelling in East Hampshire moving from that same area. Although both these outcomes are marginally lower than the 70% containment rate the CLG Advice Note also makes the following statement regarding levels of self-containment in rural areas.

"… rural areas typically have less locally self-contained migration patterns, reflecting the influence of long-distance movers who are opting for lifestyle changes or retirement."

2.21 Given that East Hampshire is a predominantly rural District and can demonstrate very close to 70% containment in migratory patterns, the CLG advice note implies that East Hampshire as a District can be considered as a single HMA and that this is a reliable basis for providing evidence to establish the objectively assessed need for housing in the district.

2.22 In summary, as demonstrated, East Hampshire District can be seen to form a single HMA and as such, according to the NPPF, an assessment of full housing needs within the confines of the District is appropriate, whilst also recognising the importance of considering cross boundary relationships (as set out in Section 7.0).

Table 1 Local Area Matrix of Migratory Origin and Destination across 3 sub-regional HMAs in 2001

		Destination																
		Basingstoke & Deane	Chichester	East Hampshire	Eastleigh	Fareham	Gosport	Guildford	Hart	Havant	Portsmouth	Rushmoor	Southampton	Test Valley	Waverley	Winchester	Woking	**Grand Total**	*% Containment across 3 Sub-Regional HMAs*
Origin	Basingstoke & Deane	9,673	39	117	69	32	39	56	305	33	73	73	121	294	58	298	39	**11,319**	*85.5%*
	Chichester	21	6,126	309	9	48	38	107	12	271	213	39	59	21	242	68	21	**7,604**	*80.6%*
	East Hampshire	116	309	5,476	32	104	42	125	93	508	320	132	73	42	459	270	37	**8,138**	***67.3%***
	Eastleigh	36	9	39	5,218	334	62	34	17	55	70	0	1,437	442	9	581	4	**8,347**	*62.5%*
	Fareham	45	51	57	251	4,625	792	21	12	218	631	10	299	74	28	351	0	**7,465**	*62.0%*
	Gosport	12	28	60	44	823	5,492	10	3	125	399	40	62	9	3	103	3	**7,216**	*76.1%*
	Guildford	57	124	233	19	21	27	7,184	149	30	70	740	83	39	1,050	42	511	**10,379**	*69.2%*
	Hart	354	30	197	23	28	18	160	3,198	25	36	600	66	41	164	69	28	**5,037**	*63.5%*
	Havant	28	294	463	31	237	164	32	7	5,656	1,785	12	80	15	21	190	3	**9,018**	*62.7%*
	Portsmouth	55	158	253	70	652	417	50	23	1,332	16,869	39	228	48	36	247	30	**20,507**	*82.3%*
	Rushmoor	123	52	174	11	22	35	431	704	21	61	4,814	62	61	318	50	94	**7,033**	*68.4%*
	Southampton	125	41	34	1,459	344	56	83	23	42	208	32	23,544	584	42	397	51	**27,065**	*87.0%*
	Test Valley	221	22	46	473	50	15	25	19	6	37	47	487	5,542	13	288	9	**7,300**	*75.9%*
	Waverley	28	317	668	6	21	3	871	195	34	45	429	78	45	5,086	51	103	**7,980**	*63.7%*
	Winchester	174	58	191	715	335	69	51	53	188	199	68	377	372	62	6,235	16	**9,163**	*68.0%*
	Woking	41	59	66	9	41	12	550	65	39	54	97	58	12	178	28	4,247	**5,556**	*76.4%*
	Grand Total	**11,109**	**7,717**	**8,383**	**8,439**	**7,717**	**7,281**	**9,790**	**4,878**	**8,583**	**21,070**	**7,172**	**27,114**	**7,641**	**7,769**	**9,268**	**5,196**	**159,127**	
	% Containment across 3 Sub-Regional HMAs	*87.1%*	*79.4%*	***65.3%***	*61.8%*	*59.9%*	*75.4%*	*73.4%*	*65.6%*	*65.9%*	*80.1%*	*67.1%*	*86.8%*	*72.5%*	*65.5%*	*67.3%*	*81.7%*		

Source: Census 2001

Cross Boundary Relationships

2.23 Although the objective assessment of housing need is focused on the needs of East Hampshire as a single HMA, this assessment still takes into full account the inter-migratory relationships of the District with adjoining authorities. The analysis of this SHMA and the migration scenarios used in the demographic modelling explores these relationships, with the modelling taking full account of inter district migration patterns through use of past trends in gross and net migration flows (both domestic and international) to inform the assessment of future housing needs.

Summary

2.24 The assessment of the extent of the housing market area for East Hampshire clearly demonstrates that whilst the District sits within a number of sub-regional housing markets originally defined for the South East region, it also experiences a relative degree of self-containment. In summary,

1 The NPPF sets out the approach to assessing and meeting housing needs in the 'Housing Market Area';

2 CLG Guidance defines a 'Housing Market Area' as a geography at which 70% of local moves are contained, whilst noting the benchmark for self containment may be less in more rural areas;

3 East Hampshire has previously been identified as part of three overlapping sub-regional HMAs. However, these HMAs are not fixed and in other parts of the region, SHMAs have been prepared to inform local plans for different areas. Moreover, looking at local moves and East Hampshire District's role within the three sub-regional areas, the District has a reasonable level of self-containment (65-67%) suggesting East Hampshire is a relatively self-contained market at a regional scale;

4 On this basis East Hampshire can be considered as a single HMA for the purpose of considering housing needs in the context of the Core Strategy;

5 Notwithstanding, an objective assessment of need for just the District will still fully account for cross boundary dynamics within assumptions around future migration patterns;

6 This SHMA has been carried out in response to the Inspectors preliminary findings (23 November 2012) into the East Hampshire Core Strategy which did not identify a need to undertake a wider sub-regional assessment; a district-wide SHMA was considered a proportionate evidence base.

3.0 The Current Housing Market

Introduction

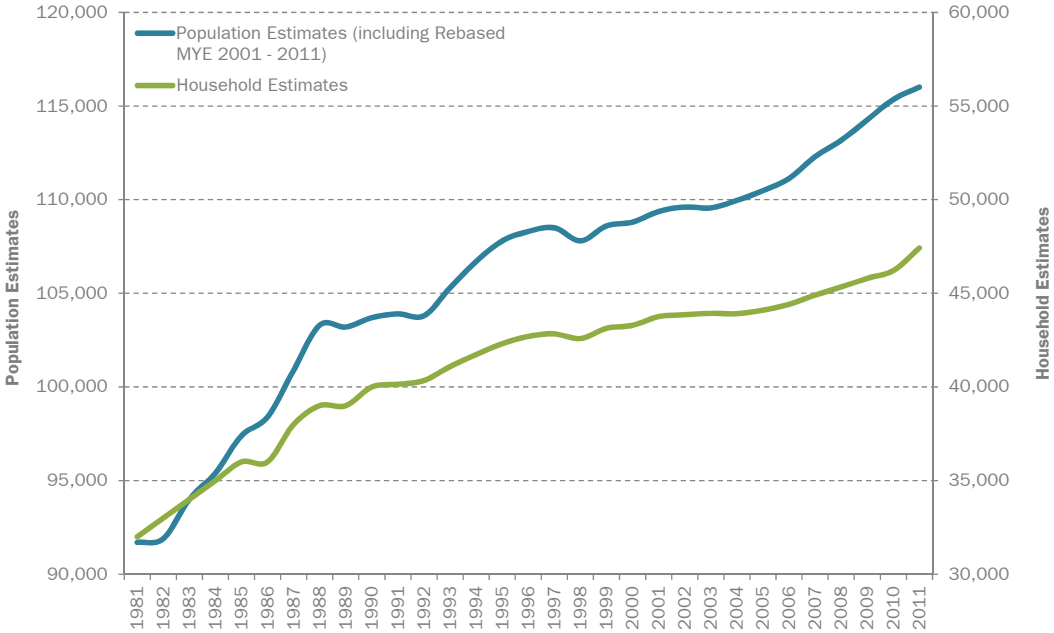
3.1 This review of the current housing market assesses the demographic, housing stock and supply/demand dynamics of the District to provide an understanding of the drivers that are underpinning the housing market within East Hampshire. In particular longer term trends have been considered to form the basis for what could occur in the future housing market.

The Demographic and Economic Context

Demographic Context

3.2 The Census-based Mid-Year Population Estimates for East Hampshire identifies that the population of the District was approximately 116,010 people in 2011. This represented a population increase of 24,310 people since 1981, an increase of 27%. East Hampshire has seen population growth consistently throughout this period, many of which came from the high rate of population growth experienced in the 1980's.

Figure 7 Population and Household Change in East Hampshire

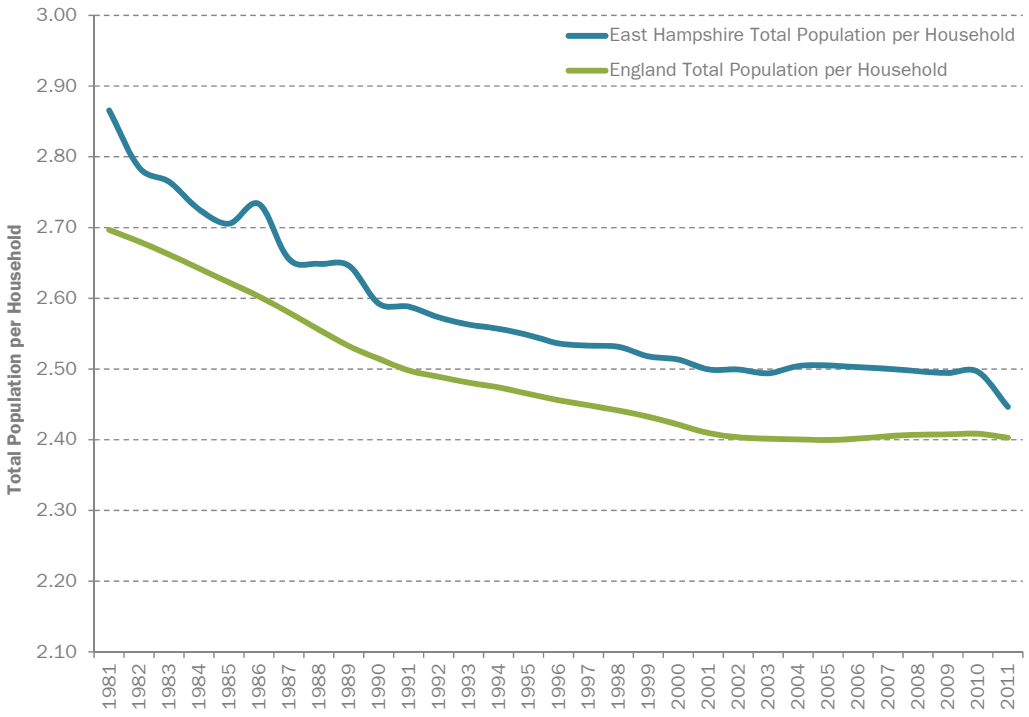


Source: ONS Mid-Year Estimates (1981-2000), Revised Estimates (2001-2011) and CLG Household Estimates

3.3 In respect of the number of households resident in the District, these have also been increasing and at a faster rate than population, with growth between 1981 and 2011 totalling circa 15,000 households, an increase of 47%. These trends demonstrate past household growth of circa 500 per annum. The impact of a faster rate of household growth than population growth has been a

trend towards smaller household sizes. Figure 8 illustrates that total population per household in East Hampshire have fallen from 2.87 of the population per household in 1981 to 2.45 total population per household. The trend for continual decline in the total population per household has faltered in recent years, with the estimates showing a constant total population per household of between 2.51 and 2.49 persons between 2001 to and 2011, although a decrease in household size has followed since. By comparison the total population per household for England also remained fairly constant between 2.41 and 2.40 between 2001 and 2011.

Figure 8 Estimated average household size in East Hampshire and England 1981-2011



Source: ONS Revised Mid-Year Population Estimates, and CLG Household Estimates

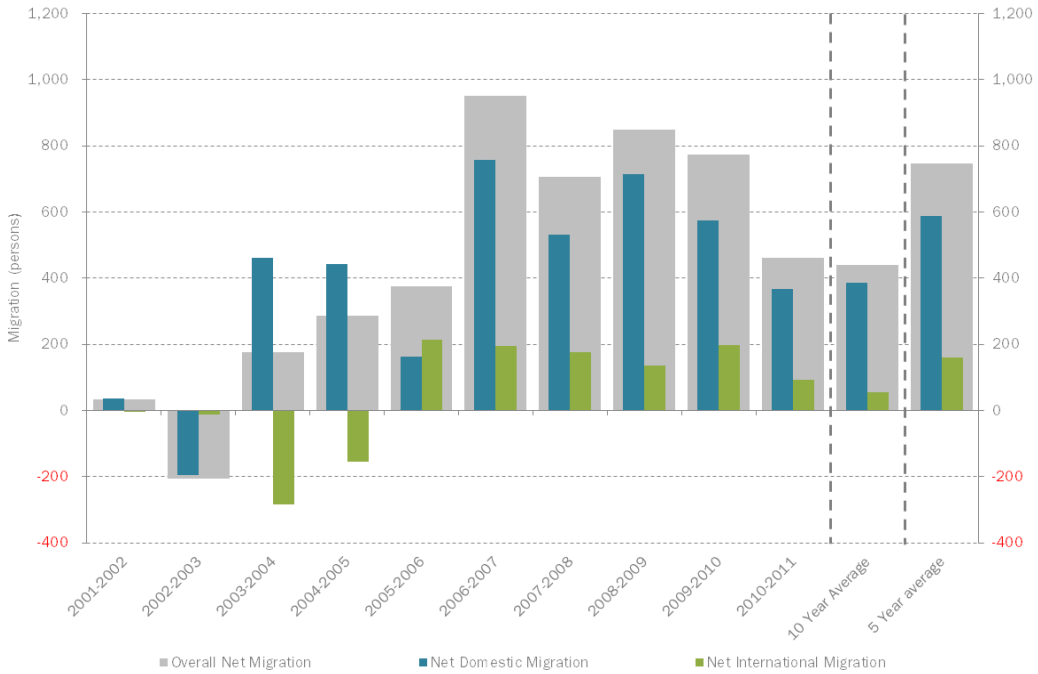
Migration

3.4 Whilst some of the population growth in East Hampshire over the past decade appears to be attributable to natural demographic change (i.e. the rate of births exceeding that of deaths), the majority of change is attributable to migration (i.e. more people moving into the District than moving out). Between 2001 and 2011 population growth totalled circa 6,640 people, with estimates of net in-migration totalling circa 4,400 people over the same period, equivalent to 66% of population growth.

3.5 As illustrated in Figure 9 net migration has been consistently inward over the previous 10 years. The revised mid-year population series following the 2011 Census were published in April 2013 and indicates the following estimates of migration trends between 2001 and 2011. This identifies an average of 440 people entering the District each year comprising a net domestic in migration of 385 people and net international in migration of 55 people. The more recent five year trend highlights a greater average arriving in the District at 748

people; this comprises an increased net domestic in migration with 589 people and a net international in migration of 159 people.

Figure 9 Net internal and international migration for East Hampshire 2001/02-2010/11



Source: ONS Migration Estimates – Revised Mid-Year Estimates Series following the Census 2011

2011-based Interim Household Projections and Household Formation

3.6 CLG released the 2011-based Interim Household Projections on 09 April 2013. These revised household projections have revised household formation rates underpinning them, which supersede the 2008-based rates utilised in the April 2013 version of the SHMA.

3.7 Looking at the headline household projections for East Hampshire, the household growth has increased from 400 per annum (2008-2033) in the 2008-based projections to 464 per annum in the new projections, albeit over a shorter period 2011-2021. Within this difference are changes to both projected population change and household formation.

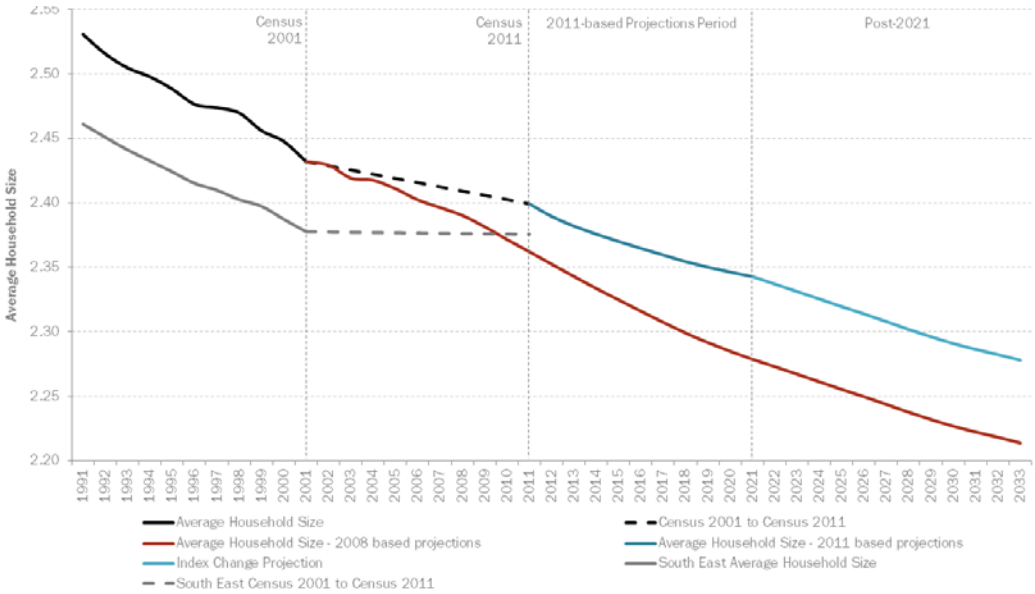
3.8 A stated the CLG 2011-based interim household projections cover the period 2011 to 2021. They are more recent than the previous 2008-based household projections which covered the period 2008 to 2033. The extent to which the associated trends in household formation will continue over the longer term is less clear and CLG, in their Quality Report accompanying the new household projections, caution against simply rolling forward the household growth projected for 2011 to 2021 over the longer term beyond 2021. Instead they identify:

"There are also particular limitations in the use of the 2011-based interim household projections. The projections only span for a 10-year period so users that require a longer time span would need to judge whether recent household formation trends are likely to continue."

3.9 Past trends in overall household formation in East Hampshire show a trend towards higher rates of formation and smaller household sizes up until 2001, with more recent trends highlighting the same pattern, albeit at a slower rate. This is at odds with the picture of change at the regional level, whereby household sizes have largely remained static since 2001 with a very slight increase, rather than continuing the long term trends in decreasing household size.

3.10 As stated previously, recent household formation rates between 2001 and 2011 are likely to reflect recent constraints on housing availability and affordability (both through supply-side factors such as reduced house building and demand-side factors such as mortgage availability and household incomes, both associated with the recession). This will have placed constraints on new households forming in the same manner as observed in previous trends, potentially leading to higher rates of concealed households, higher rates of household sharing and factors such as young adults staying at their parental home for much longer than has been seen historically. However, in East Hampshire the 2011-based projections continue to project an increasing household formation rate for East Hampshire and a continuing decrease in household size, albeit at a relatively slower rate than projected in the previous 2008-based household projections, suggesting the District has experienced some impact from supply and demand-side factors. This is illustrated in Figure 10.

Figure 10 Trends in Household Formation (Average Household Size) in East Hampshire (1991-2033)



Source: Census 2001, Census 2011 and ONS/CLG Population and Household Estimates and Projections

3.11 Considering East Hampshire has sustained a pattern of decreasing household size since 2001, including during the recession, it would be difficult to substantiate a plausible reason whereby average household size would not continue to decrease (with household formation rates increasing) post 2021.

3.12 For the purpose of this SHMA, NLP has considered which rates of household formation are appropriate for testing beyond 2021. Given long term trends, and the way the recession has impacted upon household formation, it is anticipated that formation rates will begin to increase again in the future reflecting change in line with long term trends. Over a longer period to 2028 it is likely household formation will begin to 'pick up' again, particularly as the wider economy returns to growth, peoples' circumstances improve, household incomes increase and there is better access to mortgage finance. Such factors will improve peoples' confidence and ability to form a new household. Notwithstanding, an assumption might be that this increase in household formation will potentially not be to the same degree as previously assumed in the 2008-based projections.

3.13 NLP has projected forward a scenario for household formation beyond 2021, which indexes formation against the 2008 projections beyond 2021. The household formation rates within these projections are applied to the projected population in East Hampshire to arrive at an estimate of likely growth in households at the local level.

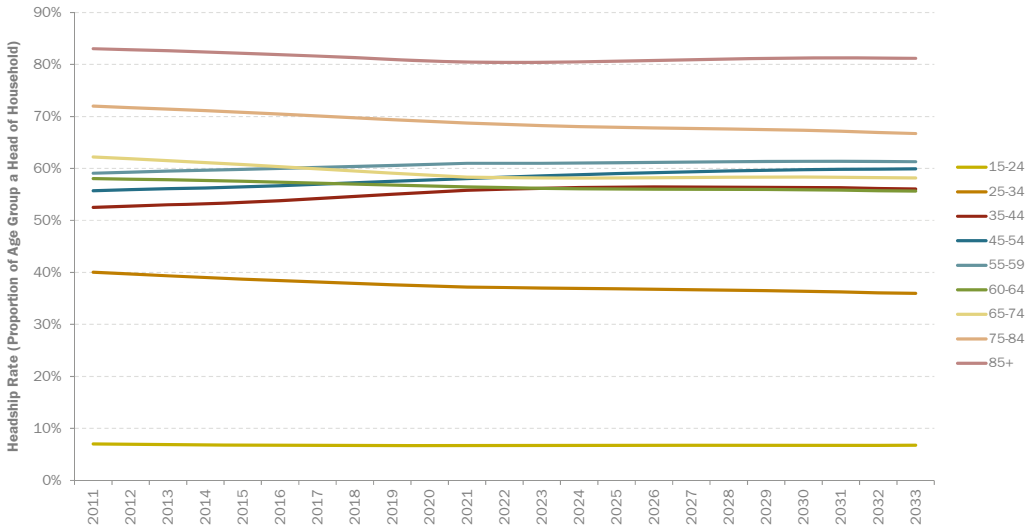
3.14 On the above basis, as a baseline position, NLP has assumed that beyond 2021, the rate of change in household formation for East Hampshire will again move in line with the rate of change assumed for that period within the 2008-based household projection. This essentially indexes post-2021 change to the 2008 projections on the assumption that household formation will increase in line with long term trends. This is considered reasonable in not perpetuating recession-based trends of suppressed household formation beyond 2021, whilst still being more conservative than some evidence may suggest. For example Cambridge Centre for Housing and Planning Research (CCHPR) reviewed work undertaken by NLP in relation to the Joint Core Strategy for Cheltenham Borough Council, Gloucester City Council and Tewkesbury Borough Council and concluded that the assumptions NLP made around indexing the 2011-based household projections post 2021 to the 2008 projections could be regarded as a cautious estimate in terms of a return to longer term household formation rates[2]. Notwithstanding, NLP's baseline position on household formation represents a balanced projection which falls between merely trending forward supressed household formation rates and assuming that household formation rates will fully recover to the rates projected in the 2008-based projections.

3.15 The indexed projection beyond 2021 applies the rate of annual change in household formation from the 2008-based household projections, to reflect such long term trends and in the absence of other long-term projections of household formation. This is illustrated for individual age cohorts in Figure 11, which shows increasing headship rates (the proportion of a population that will form a head of household) within East Hampshire among 35 to 59 year olds,

[2] http://www.gct-jcs.org/Documents/EvidenceBase/CGT-JCS-Final-Report.pdf

but a decreasing headship rate amongst all other age cohorts (albeit older cohorts continue to have significantly higher headship rates than younger groups, 15 to 34 year olds). These age specific projections of household headship are applied through each of the scenarios modelled through POPGROUP.

Figure 11 Projected Household Headship Rates for East Hampshire using indexed projections

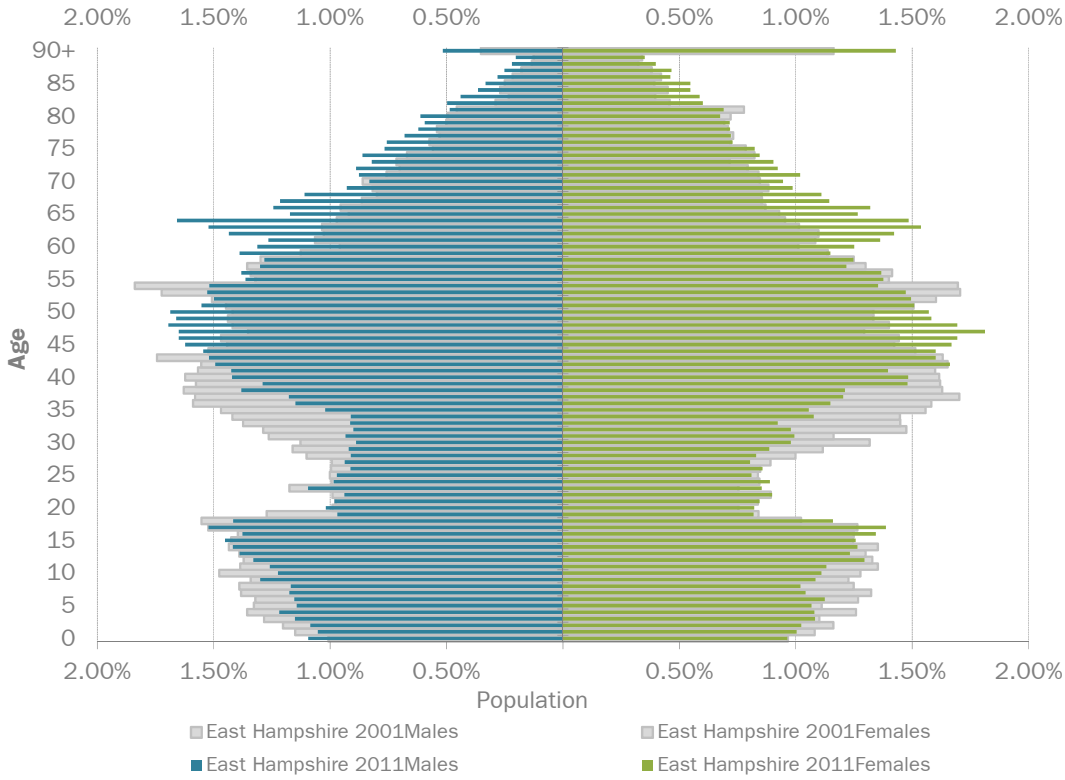


Source: CLG 2011-based Interim Household Projections and NLP Analysis

Current demographic Profile

3.16 These demographic trends have led to a 2011 population profile in East Hampshire as illustrated in Figure 12. The 2011 population profile is compared to the 2001 population profile, illustrating the relative change in population for each age group over the previous 10 years. In particular this highlights that the population profile in East Hampshire has been ageing, with a majority of population growth associated with age groups 60+ and marginal population growth in the younger age cohorts between ages 40-50. There has however been decline almost universally across the all age cohorts between 0 and 40.

Figure 12 East Hampshire Population Profile 2001 to 2011



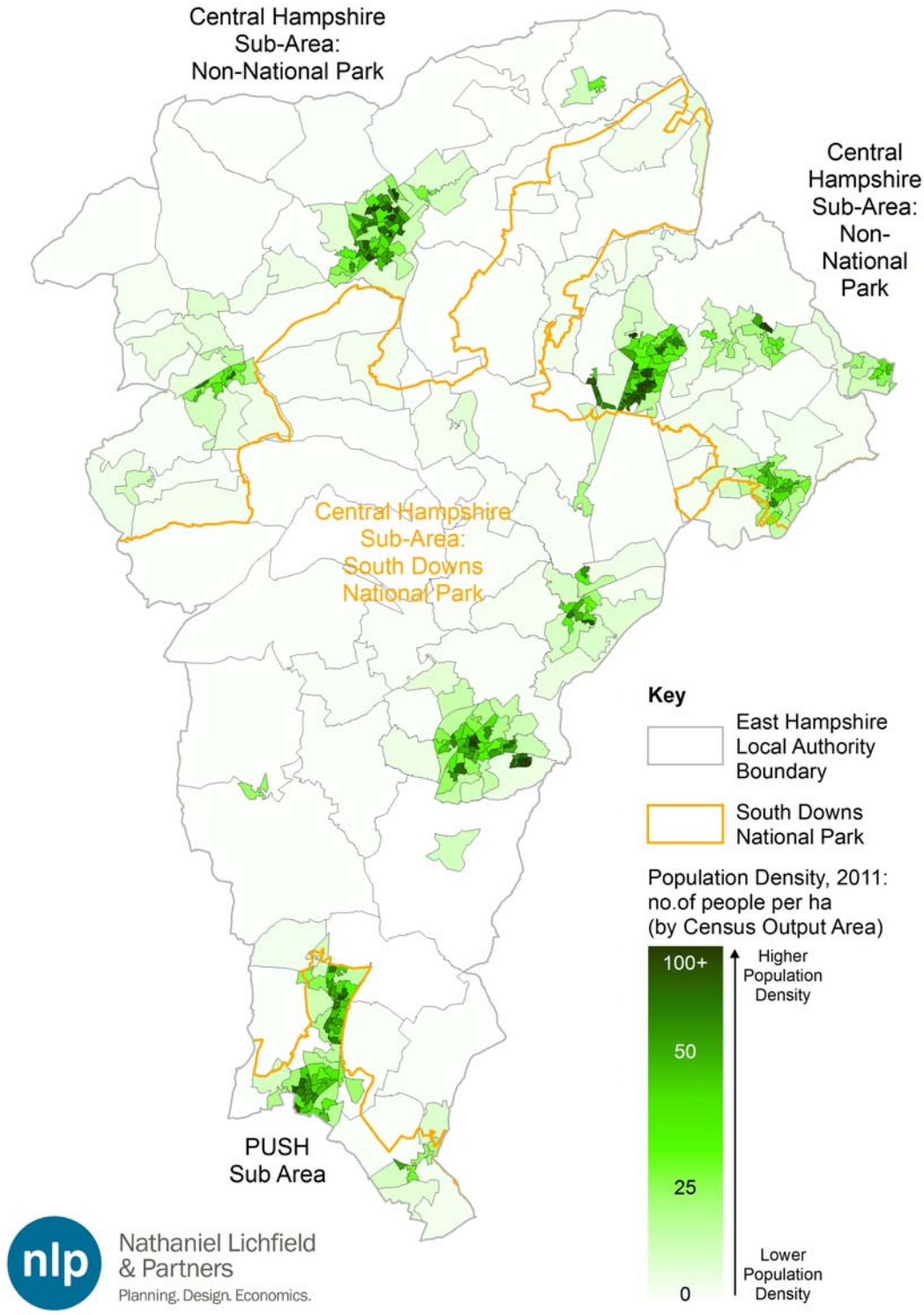
Source: Census 2001 and Census 2011 population estimates

3.17 If such population trends continue, East Hampshire will see an increasingly ageing population, with particular implications around delivering housing for the elderly. More broadly, population growth in general will drive need and demand for new houses, as will the changing household structures that a changing population can bring along with them.

3.18 Figure 13 below shows the distribution of this population within East Hampshire District. The main clusters of residence are outside of the South Downs National Park to the north and south of the National Park, with the exception of Petersfield which is inside the National Park. The largest proportion of the population is located in the Central Hampshire Sub-Area with 53.3%, the South Downs National Park hosts 29.9% of residents and the lowest proportion is found in PUSH Sub-Area with 16.8%[3].

[3] This is based on an attribution of 2011 Census Output Areas (COAs) to either within or outside of the National Park and does not follow the exact boundaries of the National Park. Where a COA is split across the National Park or PUSH/Non National Park Central Hampshire boundaries it is attributed to the area where the majority of the area lies (based on hectare size).

Figure 13 Population density in East Hampshire



Source: Census 2011

Economic Background

3.19 The most up to date data identifies that the number of economically active people in East Hampshire is 55,500 with 52,900 in employment, 95.3% of the economically active population. As such the unemployment rate in the district is

currently estimated by ONS as 4.7% of the economically active population. Unemployment estimates in the District range between an average of 1,043 claimant unemployed in December 2012 (based on ONS claimant count statistics) and 2,600 people (an ONS model-based estimate from the Annual Population Survey (October 2011- September 2012). In reality unemployment is likely to be better reflected in the higher model based estimate, as only a portion of unemployed residents will be eligible or will sign on for job seekers allowance. On this basis, the unemployment rate is estimated to be approximately 4.7% of the economically active population. This is greater than a pre-recession average circa 2.6% in East Hampshire but lower than the South East average at 5.8% and the national average at 7.9%.

Economic Context and Change

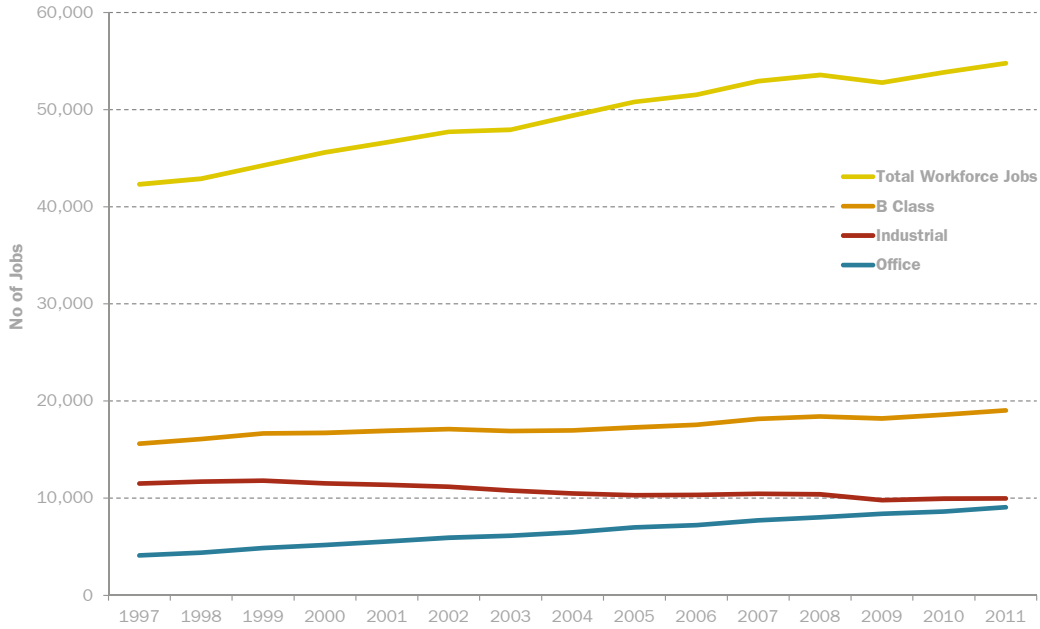
3.20 East Hampshire performs well across a range of economic indicators. Compared with the rest of the South East, East Hampshire has above average levels of economic activity, low unemployment and high levels of business start-ups (although these start-up companies tend to stay relatively small). The District's economy has remained relatively resilient during the recession, due in part to a strong tradition of innovation and entrepreneurial activity. The economic buoyancy of the area is reflected in the density and variety of business activity ranging from the agricultural base through to information technology and business services. Agriculture also represents an important sector of the local economy, given the rural nature of much of the District.

3.21 East Hampshire recorded 54,770 workforce jobs in 2011[4], representing an increase of 29% from its 1997 level, significantly outpacing growth in both the South East region (10.2%) and UK (9.5%) over this period. In terms of the recession, East Hampshire recorded a net gain of 900 workplace jobs during the period 1997-2010, and has continued to record employment growth since.

3.22 The proportion of B class jobs (i.e. offices, industrial and warehousing activities) in the District has remained relatively constant over the last 14 years, representing between 34% and 38% of all jobs in East Hampshire. B class jobs peaked at 19,040 in 2011, having increased by nearly 22% since 1997. During this period, office jobs have gradually represented an increasing contribution of all B class jobs, reflecting a simultaneous decline in industrial employment, see Figure 14.

[4] Experian 2013

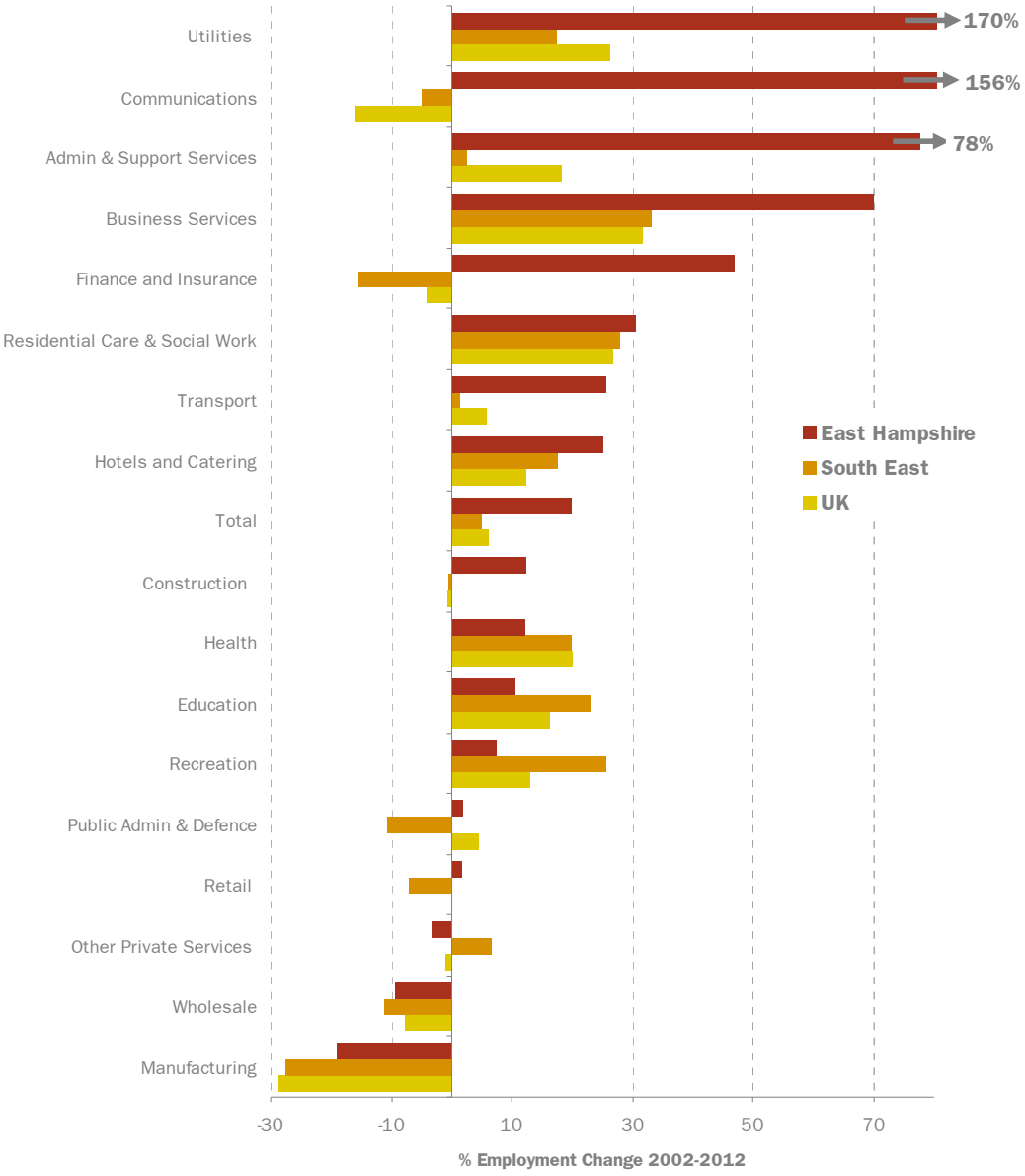
Figure 14 Total Workforce and B Class Jobs in East Hampshire, 1997-2011



Source: Experian 2013 / NLP analysis

3.23 In employment terms, the District's largest sectors in 2012 were admin and support services (19.3%), business services (13.3%) and education (8.9%), with manufacturing (8.5%) and retail (8.4%) also accounting for a significant share of employment. Strong employment growth over the last decade (2002-2012) has largely been driven by utilities (170% - albeit starting from a low base), communications (156%) and admin/support (78%) sectors, while job losses were seen in manufacturing, wholesale and other private service sectors, see Figure 15.

Figure 15 Employment change by sector in East Hampshire compared with the South East and UK, 2002-2012



Source: Experian 2013 / NLP analysis

3.24 Despite strong overall economic performance, East Hampshire also faces a number of challenges to continued growth and prosperity, including below average productivity (measured by GVA) compared to Hampshire and the South East Region, a reliance upon the public sector for employment and a mismatch between jobs available (many of which are lower skilled) and a more highly qualified and professional resident workforce. Poor transport and infrastructure present barriers to services in some rural parts of the District, while the loss of employment land to more economically viable uses such as housing in recent years is constraining development options across the District.

3.25 Furthermore, long term unemployment and worklessness remain entrenched in pockets of deprivation across the District, such as the areas of Whitehill

Bordon, some wards in Alton and Petersfield and a number of villages including Headley.

Existing Housing Stock

3.26 The Census 2011 identifies that on March 27th 2011 (Census Day) East Hampshire District had a stock of dwellings totalling 49,099, of which 49,090 dwellings were unshared, 9 dwellings were shared with two or more household spaces, totalling 49,114 household spaces (the accommodation used or available for use by an individual household) in East Hampshire.

3.27 The tenure profile of households in East Hampshire is shown in Table 2. The proportion of households that owner occupy their accommodation totals 73.9%, marginally higher than both the Hampshire and South East figures. Households in affordable tenures totalled 13% which is less than the Hampshire and South East figures (14.7% and 14.8% respectively). Finally the proportion of households privately renting/living rent free in East Hampshire is greater than the County and Regional equivalents.

Table 2 Tenure profile of households in East Hampshire, Hampshire and South East 2011

	East Hampshire		Hampshire		South East	
Tenure	#	%	#	%	#	%
Owned: Outright	17,520	37.1%	188,397	34.6%	1,156,081	32.5%
Owned: With a mortgage or loan	17,399	36.8%	201,368	36.9%	1,248,436	35.1%
Shared ownership (part owned and part rented)	431	0.9%	5,154	0.9%	39,280	1.1%
Social rented: From council (LA)	742	1.6%	26,078	4.8%	206,431	5.8%
Social rented: Other	4,939	10.5%	49,179	9.0%	281,042	7.9%
Private rented: landlord or letting agency	4,636	9.8%	57,616	10.6%	521,479	14.7%
Private rented: Other	881	1.9%	10,710	2.0%	57,113	1.6%
Living rent free	710	1.5%	6,752	1.2%	45,601	1.3%
Total	**47,258**	**100.0%**	**545,254**	**100.0%**	**3,555,463**	**100.0%**

Source: 2011 Census: KS402EW Tenure, local authorities in England and Wales

3.28 Table 3 illustrates the type of housing stock in East Hampshire, which comprises a relatively large proportion of detached properties, 42.5% which is greater than 34.3% for Hampshire and 28% seen regionally. Although the proportion of types of housing stock has remained fairly consistent between 2001 and 2011, the proportion of flats in East Hampshire is the only type to have increased from 12.8% in 2001 to 13.4% in 2011, albeit this is still below the County and Regional proportions (16% and 21.2% respectively). This reflects the types of new built properties that have been delivered over the previous decade.

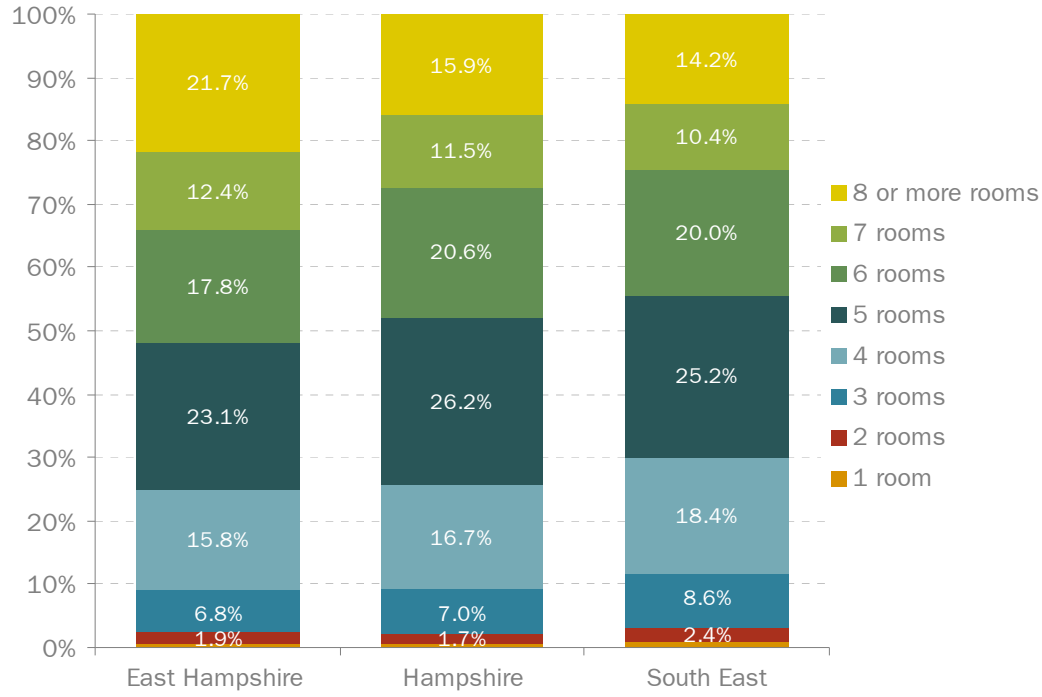
Table 3 Type of housing stock 2011

Type	Sub-Type	Census 2001		Census 2011					
		East Hampshire		East Hampshire		Hampshire		South East	
		#	%	#	%	#	%	#	%
House or Bungalow	Detached	19,755	44.0%	20,883	42.5%	193,666	34.3%	1,037,388	28.0%
	Semi-detached	11,111	24.7%	12,046	24.5%	149,048	26.4%	1,022,394	27.6%
	Terraced	7,826	17.4%	8,757	17.8%	126,291	22.4%	829,923	22.4%
Flat, maisonette or apartment	Purpose-built block of flats	4,505	10.0%	5,737	11.7%	76,749	13.6%	598,222	16.1%
	Part of a converted or shared house	811	1.8%	870	1.8%	8,629	1.5%	149,158	4.0%
	In a commercial building	455	1.0%	462	0.9%	5,210	0.9%	41,190	1.1%
Other	Caravan or other mobile/temp. structure	468	1.0%	359	0.7%	4,292	0.8%	25,898	0.7%
Total	**All Occupied Household Spaces**	**44,931**	**100.0%**	**49,114**	**100.0%**	**563,885**	**100.0%**	**3,704,173**	**100%**

Source: Census 2011: KS401EW Dwellings, household spaces and accommodation type, local authorities in England and Wales. Census 2001 Standard Tables S048

3.29 In respect of the size of accommodation, the most up-to-date and robust indication of the size distribution of stock is the Census 2001. Figure 16 illustrates that in 2001 East Hampshire had a higher proportion of 5 and 6 room homes (a size which broadly correlates to a 2 to 3 bed property assuming a kitchen and 1 or 2 reception rooms)than Hampshire and the South East. Large proportions of larger properties and lesser proportions of smaller properties broadly reflects East Hampshire's type of housing stock, with larger proportions of detached homes than County and Regional averages.

Figure 16 Size of accommodation 2001



Source: 2001 Census: SO51 Tenure and household size by number of rooms (rooms excludes bathrooms, toilets, halls, landings and storage space).

3.30 Table 4 documents the size of dwelling completions in East Hampshire from 2001 onwards, this enables an up to date comparison with Census 2001 data to ascertain size of dwellings across East Hampshire as at 2012. There appears to be a broad similarity between the size of dwellings completed since 2001 with the majority of dwellings completed being two or three bedroom properties. Additionally dwellings with four bedrooms or more total nearly a quarter of all completions with one bedroom properties only accounting for just under 14% of the gross completions, similar to the proportions seen in Figure 16.

Table 4 Size of gross dwelling completions in East Hampshire between 2001 and 2012

Dwelling Size	Gross Completions 2001/2012	
	#	%
1 bed	642	13.6
2 bed	1,524	32.3
3 bed	1,354	28.7
4 bed	911	19.3
5+ bed	261	5.5
Unknown	21	0.4
Total	**4,713**	**100**

Source: EHDC

3.31 The most up to date comprehensive survey of the condition of the dwelling stock in East Hampshire is contained within the 2011/12 Housing Strategy Statistical Appendix (HSSA) which indicates that 8,071 dwellings fall within

Category 1 hazards as designated by the Housing, Health and Safety Rating System (HHSRS). According to HSSA data this equates to 16.5% of all stock in East Hampshire.

3.32 Although there does not appear to be an up to date document on dwelling stock condition for East Hampshire produced by the Council, the Housing Strategy 2007 to 2011 states that 47 properties for HHSRS hazardous condition were inspected resulting in 10 legal notices being served.

Core Output 1: Estimates of current dwellings in terms of size, type, condition and tenure.

Current dwelling stock in East Hampshire: 49,099 dwellings; 49,114 household spaces.

Size of stock: 34.1% with 7 or more rooms (equivalent to a 4+ bed property); 40.9% with 5-6 rooms (equivalent to a 2-3 bed property); 25.0% with 4 or less rooms (equivalent to a 1-2 bed property).

Type of Stock: 42.5% detached house; 24.5% semi-detached house; 17.8% terraced house; 14.5% flats/apartments; 0.7% mobile or temporary structure.

Condition of Stock: 16.5% dwellings have Category 1 hazards (HHSRS).

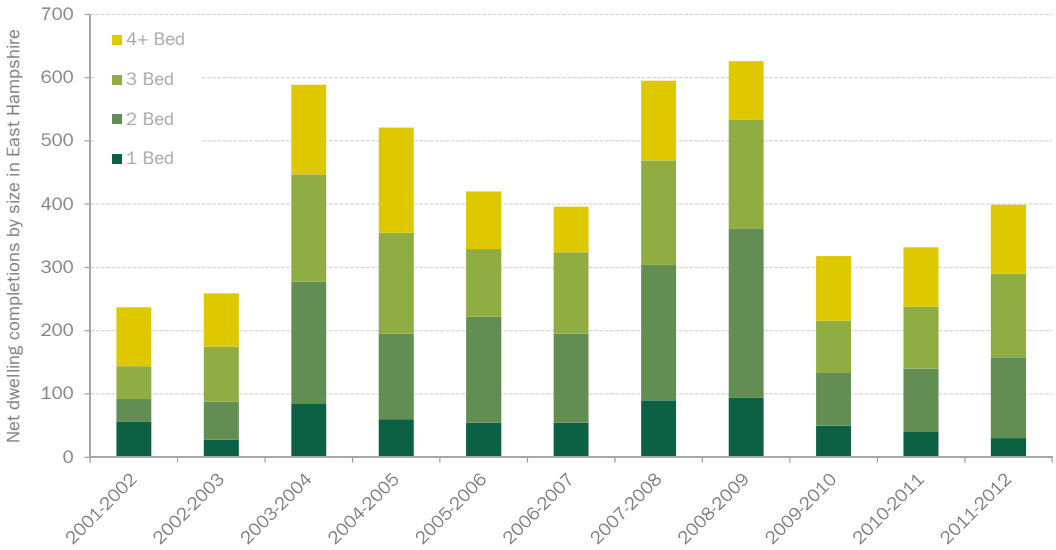
Tenure of Stock: 73.9% owner occupied; 12.9% affordable tenures (of which 0.9% shared ownership); 13.2% private rented or rent free.

The Active Housing Market

Change in Stock

3.33 The amount of dwelling completions in East Hampshire since 2001/02 has varied quite significantly. Completions on an annual basis have ranged from just 237 gross completions (in 2001/02) to 626 gross new dwellings (only eight years later in 2008/09 and in the midst of the recession). Over the period for which completions data has been collated, East Hampshire has averaged gross completions totalling 427 dwellings per annum, as illustrated in Figure 17. This figure is reduced to 367 dwellings per annum as net completions.

Figure 17 Gross housing completions in East Hampshire 2001/02 to 2011/12



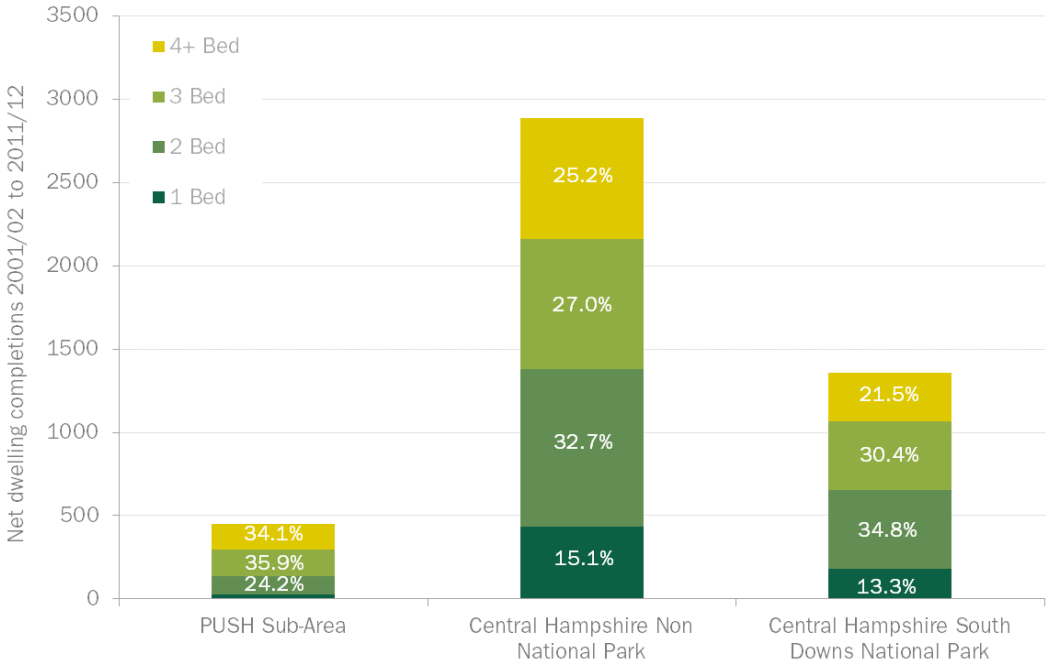
Source: Hampshire County Council Key Facts Data

3.34 Although past housing delivery will have been influenced by previous planning policy and past economic conditions, over a long term period it provides an indicator of the ability of the market to bring forward development within the District. This is an important framing factor for considering the deliverability of housing to meet needs in the future. Although this data only goes back just over a decade, markedly, just before the recession East Hampshire was delivering higher gross completions than the early 2000's.

3.35 Looking at the size of dwellings granted planning permission in 2011/12 within East Hampshire this broadly correlates with the size of stock identified in 2001, with 2 and 3 bed homes forming well over half of new supply coming forward.

3.36 Figure 18 highlights the location of dwelling completions in East Hampshire by area, looking at completions inside the National Park, to the North of the National Park in the Central Hampshire housing market area and to the south in the PUSH Sub-Area. The overall quantity of completions is greatest to the north of the District in the non-National Park Central Hampshire housing market area with 61.5%, as the smallest area it is perhaps not surprising that the PUSH Sub-Area delivered the lowest overall quantity. The proportions of the size of properties delivered across the District is fairly similar by area, however the proportion of one and two bed properties delivered in the SDNP and non-National Park Central Hampshire housing market area are notably greater to that of the PUSH Sub-Area which has seen greater completions of three and four bedroom properties.

Figure 18 Gross dwelling completions by size and area within East Hampshire

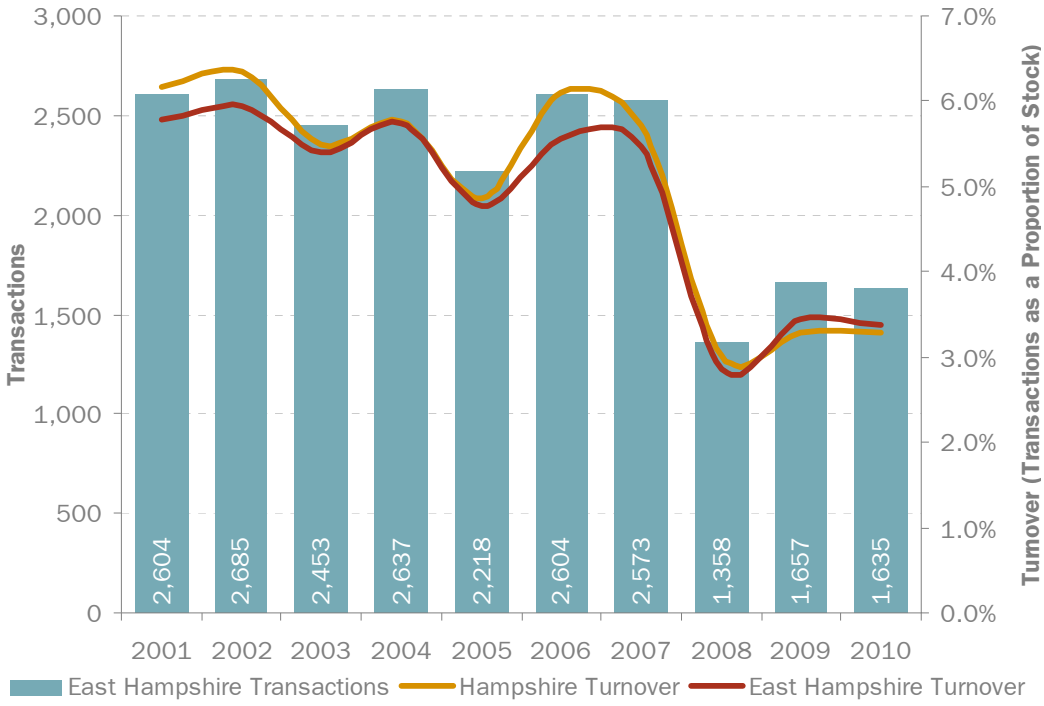


Source: EHDC

Transactions and Prices in the Private Market

3.37 Pre-recession dwelling sales across East Hampshire relatively consistently totalled between 2,200 and 2,700 transactions per annum, representing circa 4.5 to 5.5% of stock. During this period rates of turnover in East Hampshire were lower than for Hampshire as a whole. In comparison, since 2007 and throughout the period of recession, transactions have halved, averaging circa 1,550 per annum, equivalent to just 3% of stock in East Hampshire, which has brought the turnover rates in line with that of Hampshire, and since 2009 has exceeded it.

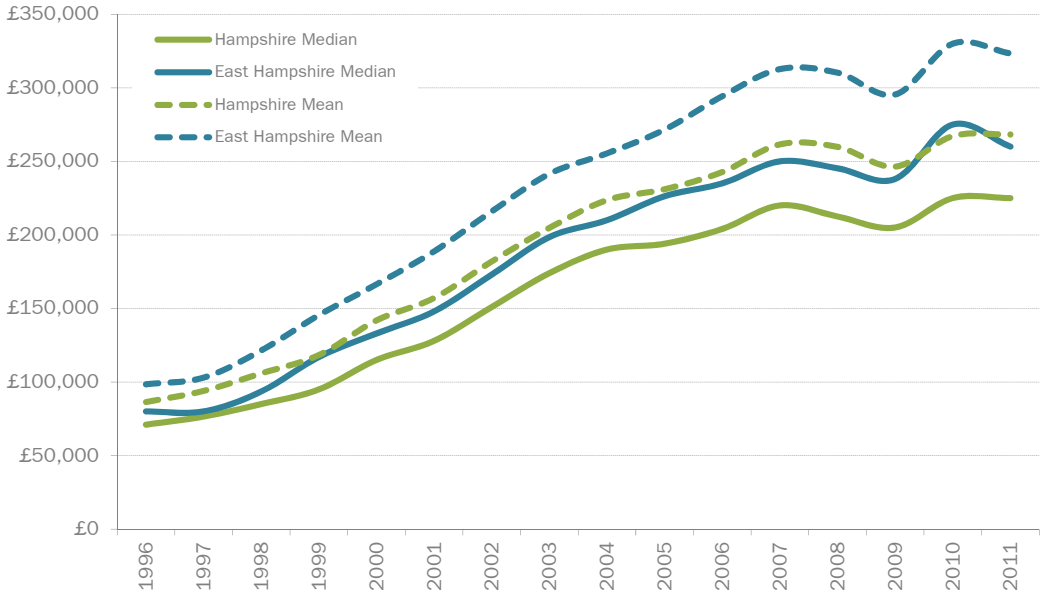
Figure 19 Property Sales and Stock Turnover 2001 to 2010



Source: CLG Live Table 588: Property sales based on Land Registry data, by district and CLG Live Table 125: Dwelling stock estimates by local authority

3.38 House prices between 1996 and 2007 increased rapidly within East Hampshire and the wider county as a whole, with East Hampshire having the greater average house price. Looking at the change in average house prices for East Hampshire and Hampshire it is evident there has been some clear impacts on the housing market associated with the recession. Figure 20 illustrates that East Hampshire housing largely followed the pattern seen across the county with the first decreases in housing prices in well over a decade.

Figure 20 Average House Prices in East Hampshire and Hampshire 1996 to 2011



Source: CLG Live Table 585: Mean house prices based on Land Registry data, by district and CLG Live Table 586: Median house prices based on Land Registry data, by district

3.39 The private market rental sector has also seen some fluctuations in recent years. Table 5 illustrates the median and lower quartile values over twelve month periods from June 2010 to December 2012. Although this data covers a very short time frame, both the median and lower quartile rental values appear to be rising, despite a dip in July 2011 to June 2012.

Table 5 Monthly rental costs in East Hampshire

	Average rental value	Lower Quartile rental value
July 2010 – June 2011	822	610
January 2011 – December 2011	847	600
July 2011 – June 2012	831	600
January 2012 – December 2012	836	625

Source: VOA private rental market statistics

3.40 Again, although the data in Table 6 is analysed over a short time period, there appears to be a trend towards rising private market rental values. The table shows the median private rental value of properties in East Hampshire by size over the last two years. Although the monthly cost of renting a studio or four bedroom houses does not appear to have changed over this two year period, there have been marginal increases in the rental cost of all other sizes of property. What is notable is that the cost of renting in the private market has not decreased at all despite the economic climate over this period. This indicates that the price of renting a property in East Hampshire in the private market is only likely to increase if supply is constrained.

Table 6 Median monthly rental values in East Hampshire

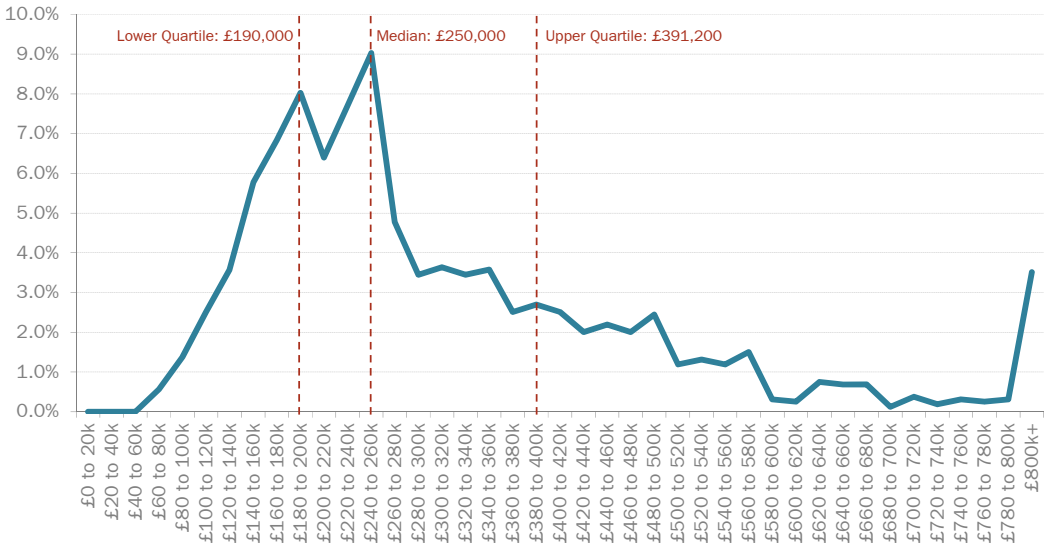
	Per room	Studio	1 Bed	2 Bed	3 Bed	4+ Bed	Summary of monthly rent
July 2010 – June 2011	347	450	565	720	850	1,400	725
January 2011 – December 2011	347	450	575	725	850	1,400	750
July 2011 – June 2012	390	450	575	750	895	1,400	750
January 2012 – December 2012	390	450	575	750	895	1,400	750
Change over two year period	**+43**	**~**	**+10**	**+30**	**+45**	**~**	**+25**

Source: VOA private rental market statistics

Current house prices and private rental values

3.41 The current median house price in East Hampshire is £250,000 with lower quartile house prices of £190,000, based upon Land Registry data for the 12 months to January 2013.

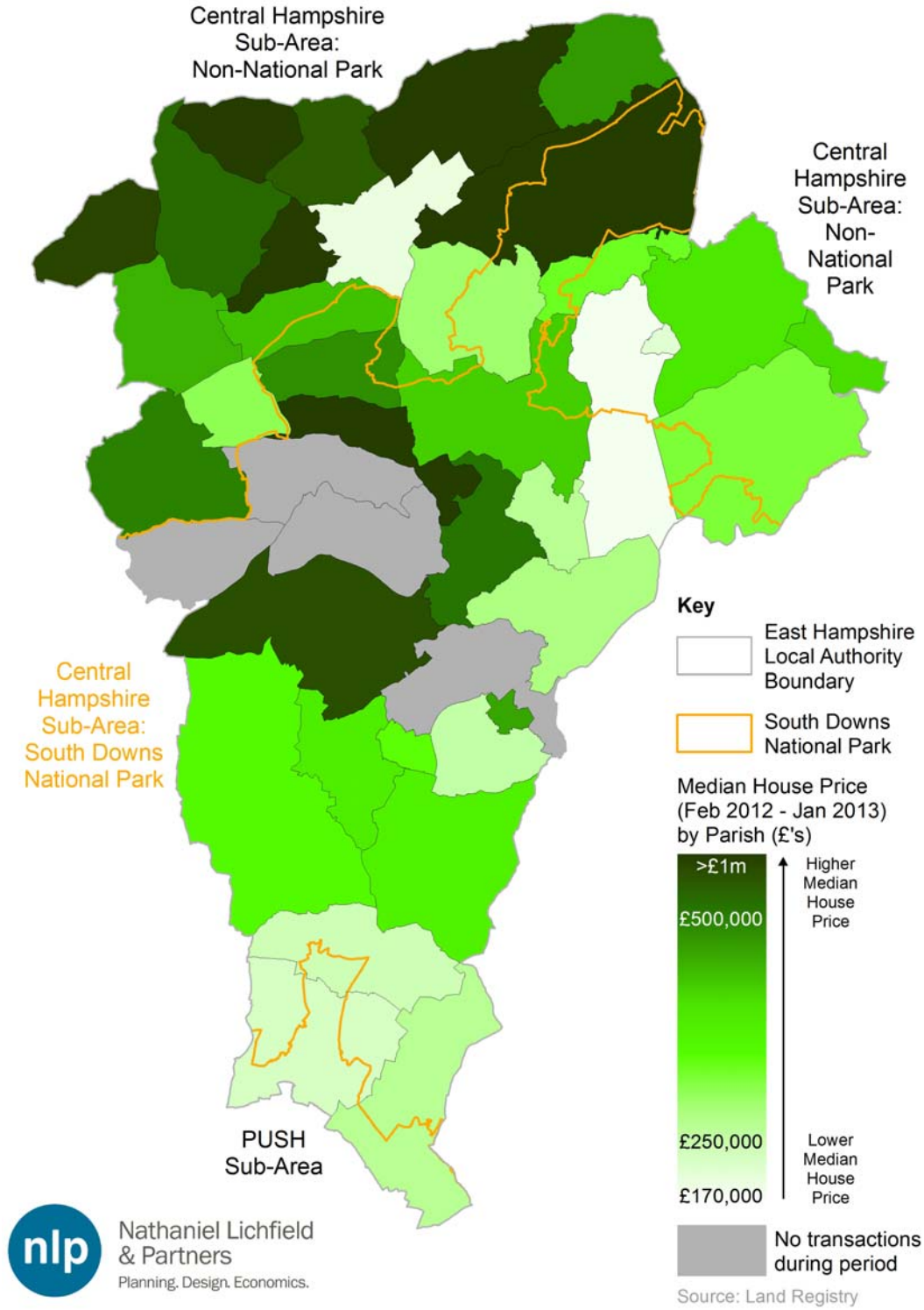
Figure 21 Distribution of House Prices 2012



Source: NLP Analysis from Land Registry Price Paid Data

3.42 The distribution of current house prices within East Hampshire by parish is displayed in Figure 22. This shows that the median house price per parish and indicates that the areas of the district with the most expensive housing, with a median value of circa £1,000,000, are found to the north of the District in the Central Hampshire Sub Area (Non-National Park) and in four parishes within the South Downs National Park itself. The Push Sub-Area to the south of East Hampshire has a much lower median house price by comparison which is more akin to £250,000 and under.

Figure 22 Median house price data in East Hampshire



Source: Land Registry

3.43 Current private rental values in East Hampshire are documented in Table 7. Primary data has been collected to ascertain average, median and lower quartile values whilst the most up to date VOA data for the period January 2012 to December 2012 was also collected for comparison. The outcomes of the two data sets are fairly similar with the exception of marginally higher average and

median values for three and four bedroom properties when looking at the primary data collected. This could be attributed to the fact that this size of property is becoming more expensive in the short term. In both the primary data and VOA data the average rental value is greater than the median, suggesting a skewed average towards much more expensive rental properties.

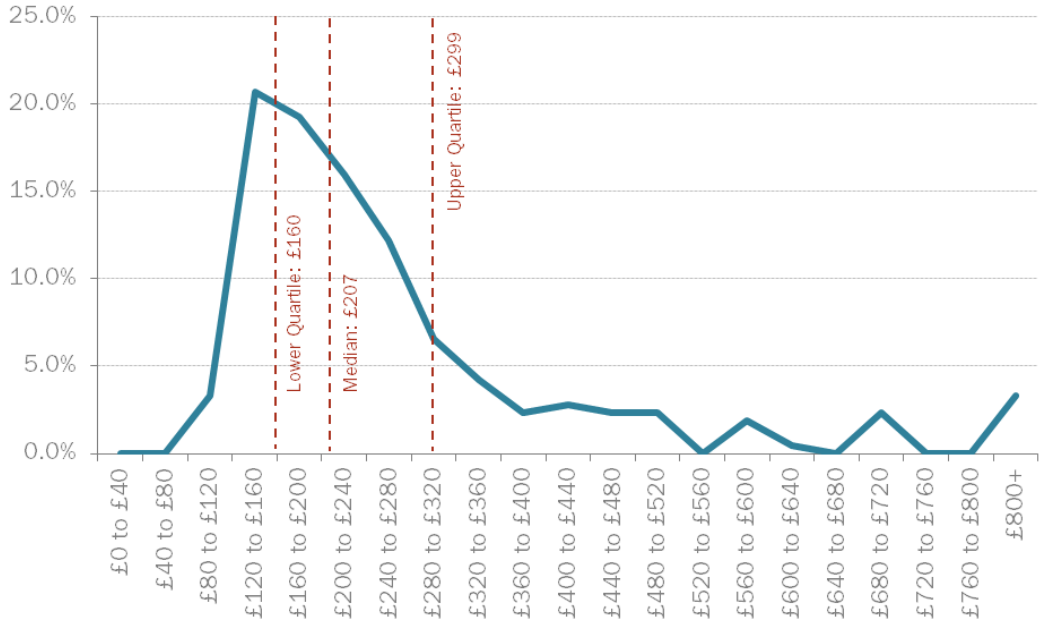
Table 7 Average monthly private rental value per size of unit

	Primary Data Collection for Monthly Rental Values (as at March 2012)			VOA Monthly Private Rental Market Statistics (2012)		
	Average	Median	Lower Quartile	Average	Median	Lower Quartile
Studio	456	473	436	461	450	420
1 Bedroom	631	575	550	587	575	550
2 Bedroom	838	775	698	752	750	688
3 Bedroom	1,042	975	885	946	895	825
4+ Bedroom	2,093	1,600	1,250	1,486	1,400	1,200

Source: NLP primary research and VOA

3.44 Figure 23 below displays primary weekly private rental data for all types of property as at the first quarter of 2013. It is clear from the chart that the majority of private rental properties are at the lower end of the weekly rental values, however, a fair proportion of more expensive properties have distorted the average private rental value. As such the quartiles and median data values have been displayed to address the skewed average. The lower quartile private rental value is £160 per week which equates to a monthly rent of circa £695 with the median reaching £207 per week, or circa £895 per month. The upper quartile gives an indication of the cost of renting in the higher value price bracket of East Hampshire at £299 per week, circa £1,295 per month.

Figure 23 Distribution of private market rents in East Hampshire



Source: NLP primary research

3.45 The monthly rental costs are also considered by areas within East Hampshire in Table 8. This indicates that the most expensive part of the District to rent is the South Downs National Park with the PUSH Sub-Area being the cheapest. However there is quite a disparity between the average and lower quartile rental values in Central Hampshire which indicates that this area is skewed by much more expensive dwellings to rent.

Table 8 Private market monthly rental values by area in East Hampshire

Area of East Hampshire	Primary Data Collection for Monthly Rental Values (as at March 2012)		
	Average	Median	Lower Quartile
Central Hampshire Sub-Area: Non National Park	1,186	875	663
Central Hampshire Sub Area: South Downs National Park	1,455	1,095	735
PUSH Sub-Area	890	850	673

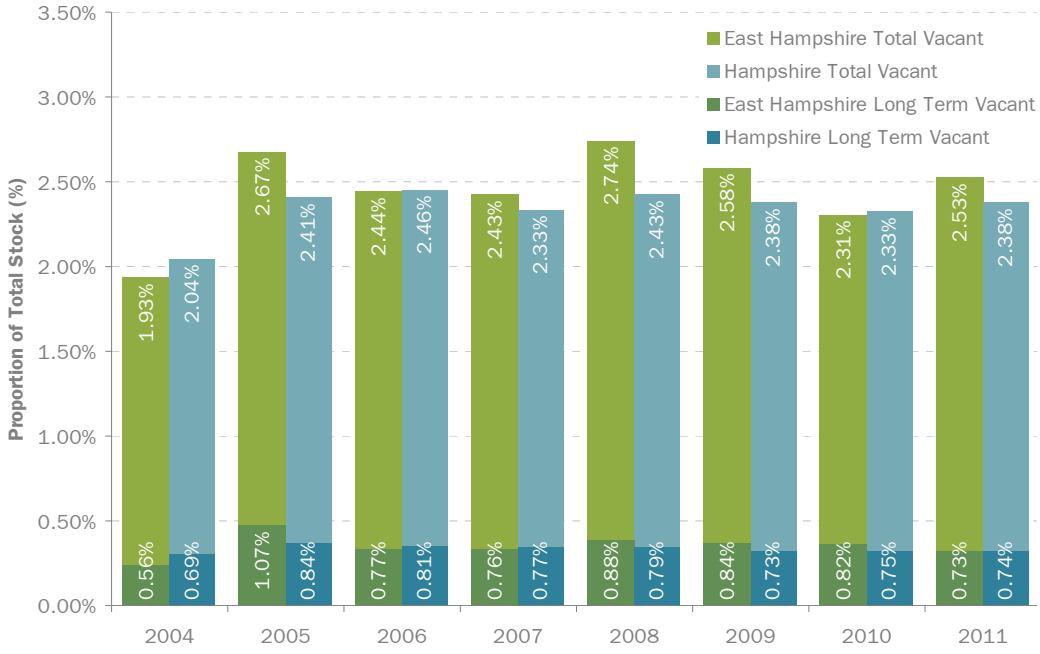
Source: NLP primary research

Vacancy

3.46 In 2012 dwelling vacancy totalled 1,230 dwellings in East Hampshire, of which 316 had been long term vacant (vacant for longer than 6 months). Homes become vacant for many reasons, including natural vacancy in the market (e.g. a void between tenancies or short term vacancies as people move home). However, long term vacancies may indicate either structural weaknesses in the housing market (e.g. low demand) or may be reflective of problems with the stock of housing.

3.47 In East Hampshire overall vacancy rates have fluctuated, but have stayed within 1.9% to 2.8% of the total stock since 2004. Vacancy rates for long term vacant properties have represented a component of vacancy throughout this period, albeit also fluctuating over the period with the lowest rate since 2004 at 0.73% in 2011, which is akin to the Hampshire rate.

Figure 24 Total and long term vacancy rates in East Hampshire District and Hampshire



Source: CLG Live Table 615: Vacant dwellings by local authority district and CLG Live Table 125: Dwelling stock estimates by local authority district

3.48 In terms of the differences in tenure on vacant homes, CLG data shows in East Hampshire that only 11 housing association general needs properties were vacant on 01st October 2012 with none of those being long term vacancies. This suggests a very low level of vacancy within affordable tenures, with most vacancy associated with the private market.

3.49 Alternative statistics from HSSA data suggest that the overall vacancy rate in East Hampshire has been as low as 2.7% over the previous 3 years with an average of 3.1%. This low level of vacancy could indicate high levels of demand in comparison to supply, but also suggests that there are not major structure deficiencies within the existing housing stock within East Hampshire. In any case a certain level of vacancy is required to ensure the efficient and effective operation of any housing market, with a vacancy level of c.3% a typical rate which will enable this.

Supply and Demand for Affordable Dwellings

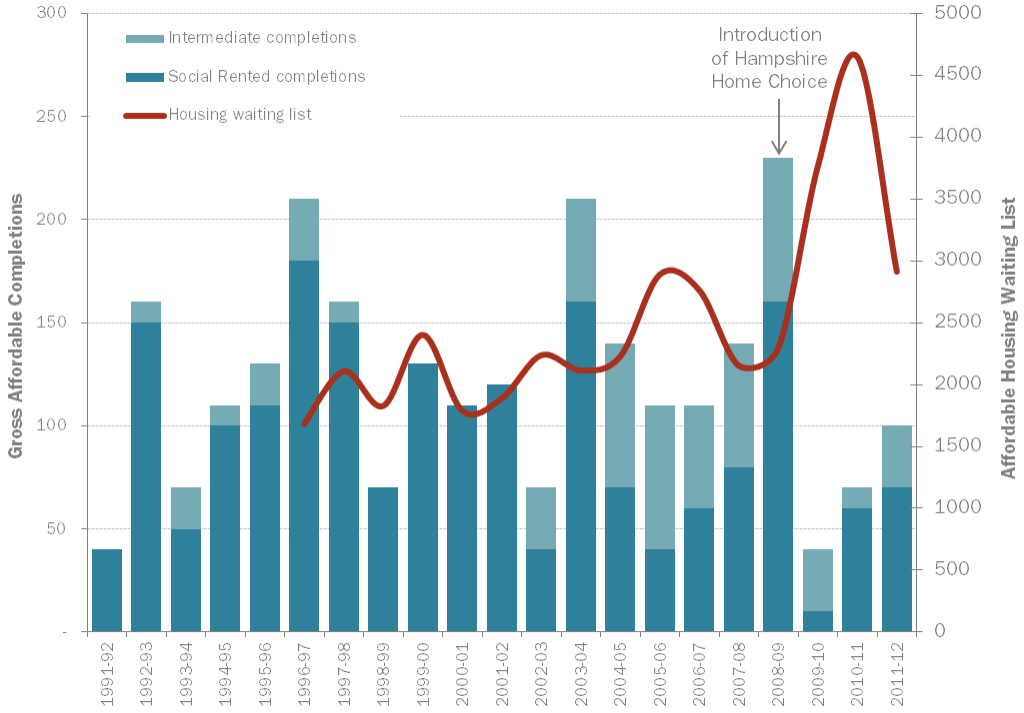
3.50 The supply of new build affordable housing has fluctuated over the past 2 decades. As illustrated in Figure 25 gross affordable housing completions have had several peaks in the mid 1990's, mid 2000's and again in 2008/09, yet this level of completion was never sustained in the preceding years. Over this

period gross affordable housing completions have averaged circa 121 per annum since 1991/92.

3.51 Comparing these completions over past 2 decades to the numbers of applicants on the housing waiting list in East Hampshire, Figure 25 illustrates that relatively low levels of supply have coincided with an increase in the size of the housing waiting list, which peaked at 4,650 in 2010/11 before falling back to 2,914 in 2011/12. It should, however, be noted that from April 2009 Hampshire Home Choice (HHC) introduced a choice based lettings system in East Hampshire District, whereby anyone can apply to go on any local authority waiting list, which likely contributed towards the sharp rise in the waiting list from 2009 onwards.

3.52 In March 2012 a review was undertaken which removed any duplicate households or inactive members seeking affordable housing. This is a likely explanation for the dip in the number of people on the housing waiting list in 2011/12. Although it is a fair to deduce that between 2009 and 2012 the number of people on the housing waiting list has increased, it is not quite as substantial as the data would indicate.

Figure 25 Gross affordable housing completions in East Hampshire 1991/92 to 2011/12



Source: CLG Live Table 600 Rents, lettings and tenancies: numbers of households on local authorities' housing waiting lists, by district (Note: housing waiting list data not available before 97-98, Live Tables 1007 and 1008 for social rented and intermediate completions, completion figures rounded to nearest 10; due to differences in data collection techniques these may differ with Hampshire County Council/EHDC monitoring reports)

3.53 Looking at the components of affordable housing supply, there has been shift from the late 1990's and early 2000's where the majority of affordable completions were social rented tenures, to the late 2000's early 2010's where

a far greater proportion of affordable completions have been intermediate tenures.

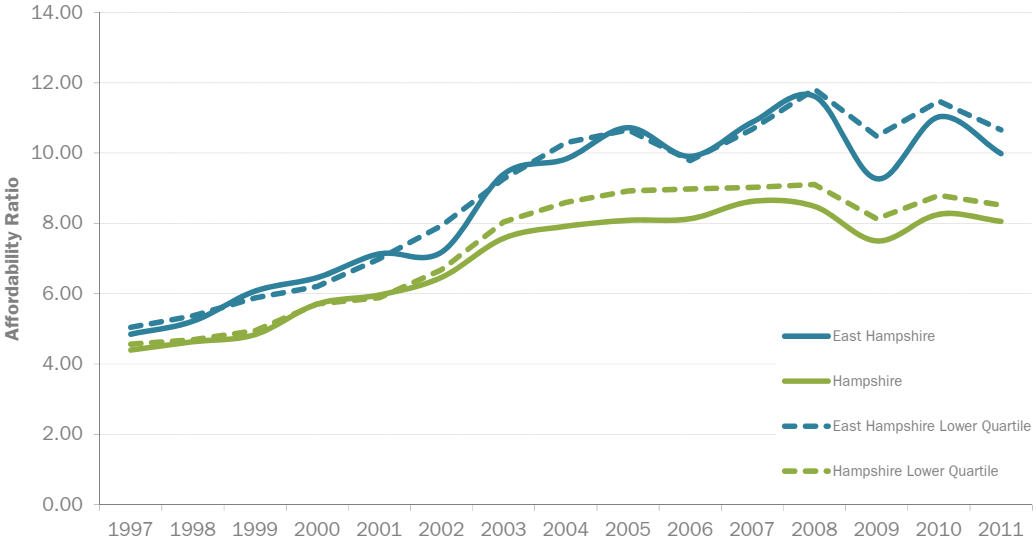
Modelling Affordability

3.54 The CLG SHMA Practice Guidance defines affordability as *"a measure of whether housing may be afforded by certain groups of households"*. In identifying affordability of housing there are two key elements, the amount of income a household has available to access housing and the cost of accessing housing. Comparing house costs against the ability to pay provides indications of the relative affordability. In particular, looking at the minimum incomes required to access housing at lower quartile prices provides an indication of entry-level prices to the property market. This can then be compared with the income distribution of both households overall and for newly forming households. Households unable to afford entry level prices on the private housing market, either renting or purchasing, will find themselves needing affordable housing tenures.

Affordability Ratios

3.55 The above price dynamics can be compared with changes in earnings to provide an indicator of the relative affordability of housing. Lower quartile house prices peaked in 2008 at 11.82 times greater than lower quartile incomes in East Hampshire, whilst median house prices peaked in the same year at 11.62 times greater than median incomes. Over the period 2007-2011 this ratio has been exceptionally volatile reflecting price/income adjustments in both the labour market and the housing market. By 2011, the median ratio had fallen to 9.99 in East Hampshire and 8.06 in Hampshire, reflecting an increase in affordability. Based on the above analysis that house prices appear to experienced rises and falls between 2007 as 2011 in a similar manner to the ratio of house prices to earning as illustrated in Figure 26. This infers that it is unlikely incomes in East Hampshire have substantially increased over this period and that the increasing affordability of homes is very much associated with house prices.

Figure 26 Housing affordability - ratio of house prices to earnings



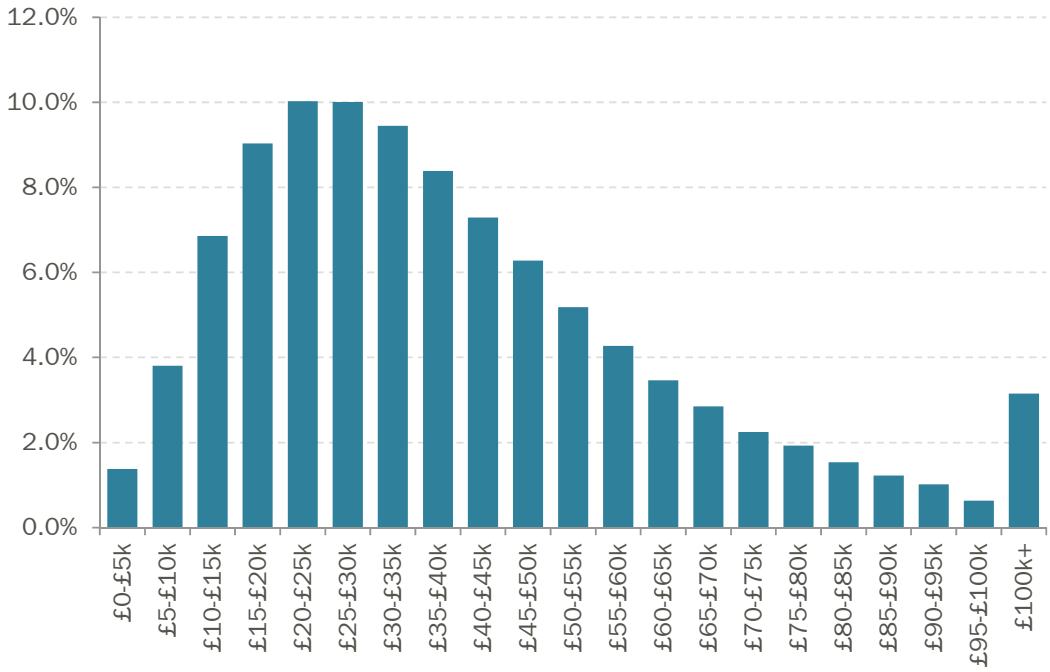
Source: CLG Live Table 577: Ratio of median house prices to median earnings by district and Live Table 576: Ratio of lower quartile house prices to lower quartile earnings by district

Incomes and Earnings

3.56 The income and earnings of households directly influence its relative ability to access housing. Information household incomes at a local level are not widely published and crucially do not provide information of the number of households within different bands of income, although there is some information on personal incomes from the ONS Annual Survey of Hours and Earnings (ASHE). In order to overcome this, NLP have drawn upon household income data which underpinned the Central Hampshire SHMA (2007), which drew upon data from CACI on the distribution of households incomes in East Hampshire district at 2006/07.

3.57 Data from ASHE shows that median resident gross incomes within East Hampshire increased by 7.9% from £28,868 per annum in 2006 to £31,144 per annum by 2012. By applying this scale of growth to the distribution of incomes in East Hampshire identified in the Central Hampshire SHMA, an estimated income distribution for 2012/13 has been identified. This is illustrated in Figure 27 which shows the proportion of households within each £5,000 income band. It demonstrates that household incomes (i.e. the combined income of those contained within a household) in East Hampshire have a distribution whereby almost 1/3 of households have an income of between £20,000 and £35,000, albeit there is a large proportion of households with much higher incomes, including a significant proportion within incomes in excess of £100,000.

Figure 27 Distribution of Household Incomes in East Hampshire for 2012/13

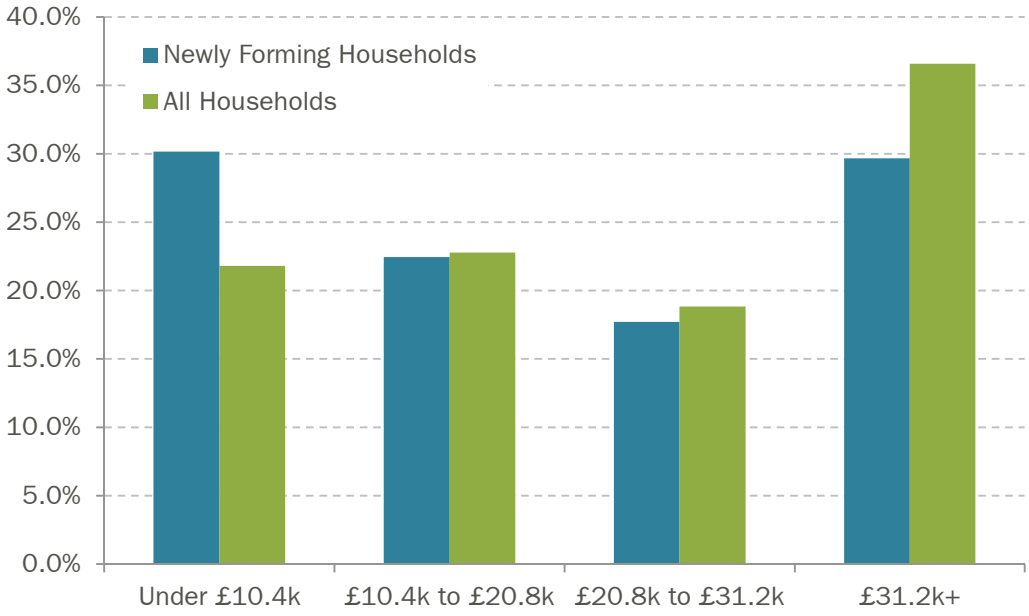


Source: Central Hampshire SHMA 2007/CACI, Annual Survey of Hours and Earnings, NLP Analysis

3.58 The distribution of household incomes identifies that median annual household incomes in East Hampshire are £32,500, whilst lower quartile incomes are £19,500.

3.59 This income distribution is, however, for all households within East Hampshire. Newly forming households are those that will typically drive the need for housing, as existing households will already occupy property, however these households typically have lower incomes and therefore have lower purchasing power in the housing market. Evidence from the English Housing Survey (and its predecessor the Survey of English Housing - SEH) demonstrates that over the previous decade the incomes of newly forming households have been relatively consistently between 60% and 70% of existing households. Looking further at data from the English Housing Survey (EHS) shows a substantially different distribution of incomes between newly forming households and existing households. This is illustrated in Figure 28.

Figure 28 Difference Between Income Profile of Newly Forming Households and Existing Households



Source: CLG English Housing Survey 2011-2012 Table FA4211 (December 2012)

3.60 To apply this differing profile of incomes to existing household incomes within East Hampshire, NLP has indexed the difference under each bracket identified in the EHS and applied this to the overall distribution identified in Figure 27 above, whilst assuming that newly forming household incomes will taper off substantially at levels above £50,000 per annum. This has given an estimated household income distribution specifically for newly forming households.

3.61 The outcome of this income modelling is that newly forming households are estimated to have a median income of £20,500 (equivalent to 63% of median income for households overall) whilst the lower quartile income is £15,000 (equivalent to 76% of lower quartile household income overall). This largely fits with the headline findings from the EHS/SEH, but provides a better fit for income distributions than just applying a reduction across the whole profile to arrive at incomes for newly forming households.

Affordability Thresholds

3.62 In order to consider affordability of housing in the market, entry level prices must be utilised. In this regard the CLG Practice Guidance identifies that lower quartile prices provide the best proxy for entry level prices, with prices below that marker often associated with housing that is poor quality. Drawing upon the review of current house prices and private rental values, lower quartile prices for a house (£190,000), a rental property (£8,340 per annum) and a 1-bed rental property (£6,600 per annum) have been used as an indicator of the entry price to market housing. Such houses are available within East Hampshire and such values are relatively typical of smaller 1 and 2 bed properties on the market, ideal for newly forming households seeking to move into a first property.

3.63 In order to understand what income would be required to sustain ownership or occupation of such properties, it is necessary to consider how much households can afford to spend on their housing. The CLG SHMA practice guidance sets out that a household can be considered able to afford to buy a home if it costs 3.5 times the gross household income for a single earner or 2.9 times the gross household income for a dual-income household. The household income data utilised for East Hampshire does not differentiate between single earners and dual earners, and as such a 3.5 multiplier is considered appropriate in order to test best case outcomes. NLP have complemented this with evidence from the Council of Mortgage Lenders[5], who identified that in Q1 2012, the median loan-to-value ratio for first time buyers was 80% with an income multiple of 3.3. Although there may be difficulties in newly forming households in being able to secure a 20% deposit, there are options available including Government initiatives such as Help to Buy as well as traditional sources of deposits such as parents. On this basis it is considered a useful sensitivity to test.

3.64 In respect of renting, the CLG SHMA practice guidance sets out that a household can be considered able to afford market house renting in cases where the rent payable was up to 25% of their gross household income. These affordability criteria have been applied to the identified housing costs to arrive at an income threshold to support ownership/occupation of entry level market housing, as shown in Table 9 below.

Table 9 Income Thresholds for Entry Level Market Housing

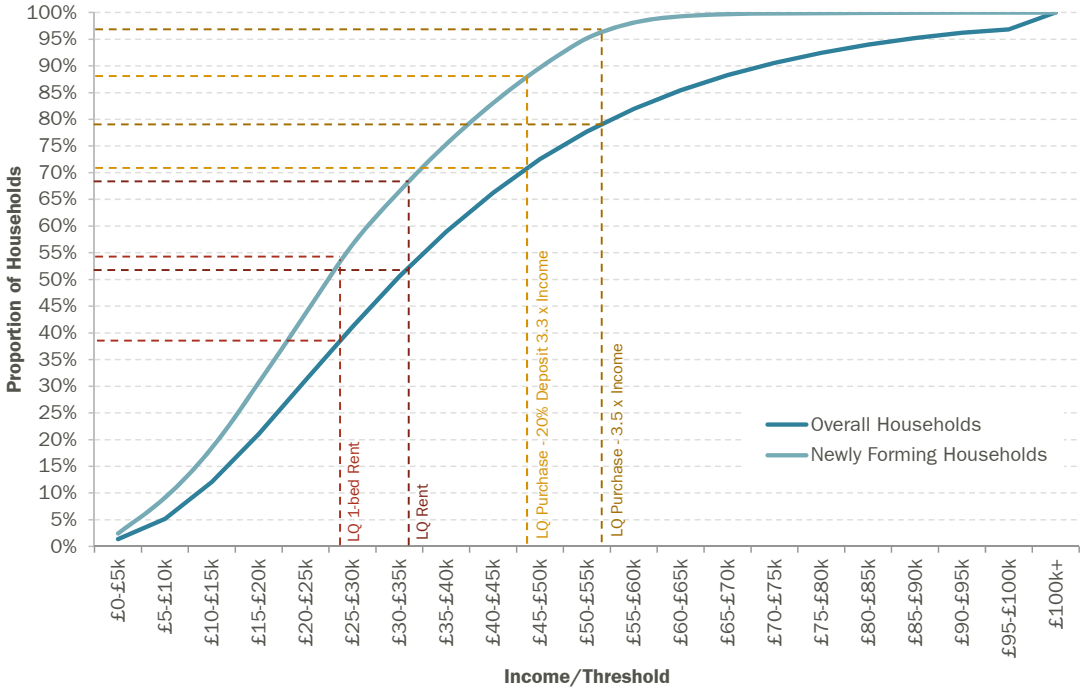
Market	Price/Product	Cost	Basis	Income Threshold
Private Buy	Lower Quartile House Prices	£190,000	3.5 x income (CLG Practice Guidance)	£54,300
			20% Deposit and 3.3 x income (CML)	£46,100
Private Rent	Lower Quartile Rental Prices	£8,340 p.a.	25% Income (CLG Practice Guidance)	£33,400
	Lower Quartile 1-bed Property Rent	£6,600 p.a.	25% Income (CLG Practice Guidance)	£26,400

Source: CLG SHMA Guidance, CML, NLP Analysis

3.65 NLP have applied these thresholds to the income distributions for existing households and newly forming households in East Hampshire to identify the proportion of such households that can afford to access market housing. This is graphically represented in Figure 29, which presents the income distributions as cumulative proportions, identifying the thresholds for each of the four tested entry level scenarios.

[5] Where do we go from here? How UK mortgage lenders see the UK mortgage market - past, present, and future – Council of Mortgage Lenders (December 2012)

Figure 29 Proportion of Households Unable to Afford Income Thresholds for Market Housing



Source: NLP Analysis

3.66 As Figure 29 illustrates, the income distribution of newly forming households is different from total households, reflecting their lesser incomes. This means that a greater proportion of newly forming households are unable to access market housing than households overall. The CLG SHMA Guidance, however, sets out clearly that the affordability of housing for newly forming households must be considered foremost, as it is these households that will most likely fall into housing need if their housing requirements are not met in the market.

Table 10 Proportion of Households Unable to Afford Market Housing

Property & Price	Income Threshold	% of Overall Households Unable to Afford	% of Newly Forming Households Unable to Afford
Buy a Lower Quartile Priced Property (£190,000) with 3.5 x Income	£54,300	79%	97%
Buy a Lower Quartile Priced Property (£190,000) with 20% Deposit and 3.3 x Income	£46,100	71%	88%
Rent a Lower Quartile Priced Property (£695 p.c.m. – equivalent to a 2-bed flat)	£33,400	52%	68%
Rent a Lower Quartile Priced 1-bed Property (£550 p.c.m.)	£26,400	38%	54%

Source: NLP Analysis

3.67 Table 10 illustrates that, a minimum of 71% of households overall, and 88% of newly forming households, are unable to afford to purchase a house within East

Hampshire. Looking at private market rents, a minimum of 38% of overall households are unable to afford to rent in the private market, with this increasing to 54% when considering newly forming households. This highlights the scale of affordability pressures that face households in East Hampshire.

Core Output 2: Analysis of past and current housing market trends, including balance between supply and demand in different housing sectors and price/affordability. Description of key drivers underpinning the housing market.

The above analysis on the current active housing market illustrates a number of key trends and dynamics which are underpinning the housing market within East Hampshire:

a The recession has had an effect upon the housing market in East Hampshire, with stock turnover below its pre-recession peak, yet average dwelling prices have now exceeded their pre-recession highs despite a dip in 2011. This suggests that demand for private market housing has declined, potentially associated with factors such as constrained mortgage availability.

b Notwithstanding price volatility and some decline during the recession, affordability of housing has not substantially improved. Reaching a peak in 2008 where median house prices were 11.62 greater than the median wage in East Hampshire, despite a dip during the recession the figure is again rising to this level. Affordability modelling shows 38% of all households are unable to afford housing in the private market, whilst this increases to 54% for newly forming households.

c Affordability trends are further supported by evidence of tightening supply, with completions falling from their 2008/09 high and the previously high vacancy rate falling slightly, demonstrating that it is possible that whilst demand has fallen in the private market, supply has also tightened.

d Such housing costs have fed through into the overall housing waiting list which has fluctuated between 2,900 and 4,650 applicants on the waiting list between 2007 and 2012.

e Long term trends in the affordable housing sector illustrates that relatively low levels of affordable housing supply since 1996/97 have coincided with significant increases in the housing waiting list, illustrating that new affordable housing supply has not necessarily been able to keep pace with demand for affordable housing. Although the peak post 2009 is likely attributed to the introduction of choice based lettings under Hampshire Home Choice in April 2009 and after a review to omit any double counting or inactive members was carried out the figure on the housing waiting list in 2012 stood at 2,914.

These factors and trends are potentially illustrative of a larger imbalance of supply and demand, which is not just a function of East Hampshire's housing market but is also seen at a national level where affordability has also been steadily worsening.

Bringing the Evidence Together

3.68 Overall the evidence on East Hampshire's current economic background and on the active housing market in the District provides a backdrop against which to consider future changes in East Hampshire's housing market and similarly its economy. Further factors highlight that there have been strong structural demographic drivers of the housing market, caused by declining household sizes, employment growth and in-migration leading to a growing population for the District.

3.69 These factors have influenced the operation of the housing market in East Hampshire and have directly affected the supply/demand balance. This has led to relative in-affordability in the private housing market, with median prices estimated to be 9.99 times median earnings in 2011, which outstrips Hampshire and the South East, representing the higher cost of housing in East Hampshire in comparison to other parts of the County and indeed, the South East. Current estimates suggest as many as 38% of all households are unable to afford to rent a property on the private market, whilst as many as 71% are unable to afford to buy a property. Affordability pressures for newly forming households are even more acute.

3.70 These affordability pressures have led to an increase in demand for affordable housing, with total waiting lists (rather than those just in a relevant priority banding) increasing from circa 1,700 applicants in 1997/98 to more than 2,900 in December 2012. An increase from 2009 can partially be attributed to the introduction of choice based lettings through Hampshire Home Choice which enables anyone to apply to go on the housing waiting list.

3.71 This forms the basis for considering future projections of East Hampshire's economic performance and future projections of East Hampshire's population.

4.0 The Future Housing Market

Introduction

4.1 Based on past trends and the baseline housing, economic and demographic context of East Hampshire District, a number of scenarios were identified and agreed with EHDC, reflecting alternatives for potential future growth within the District. These have been identified to reflect what has occurred previously, as well as what might occur in the future given the range of factors which affect population and household growth within the District. These scenarios are introduced in this section and assessed in terms of how they relate to housing requirements.

4.2 The scenarios are designed to give 'bookend' estimates to illustrate what may happen in demographic and economic terms if a given set of conditions prevail and are intended to provide the basis for assessing (and if necessary planning) what could be the implications of these.

Future Economic Performance

Baseline Economic Growth Scenario

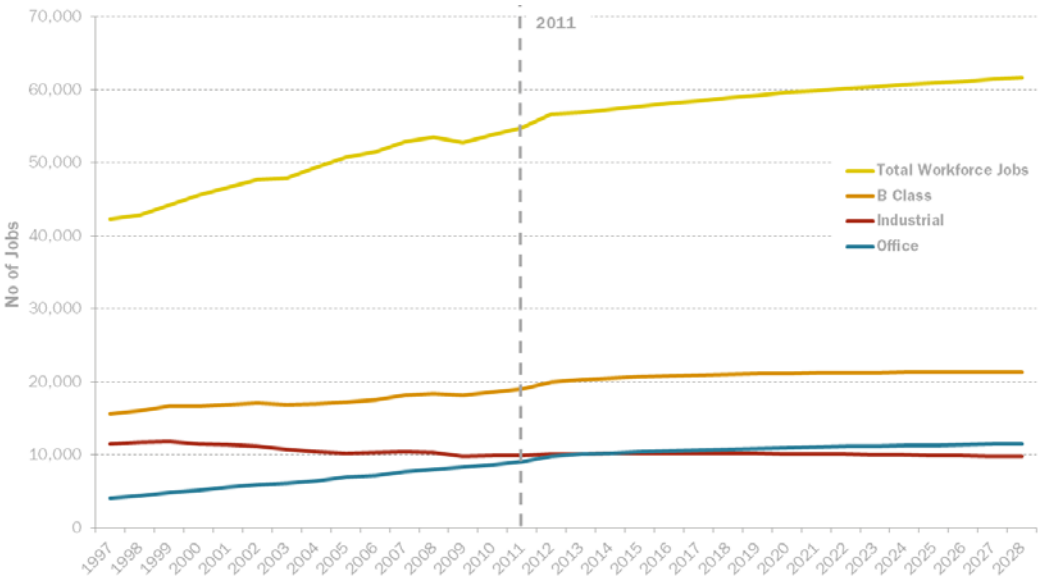
4.3 Latest forecasts of job growth for East Hampshire for the period up to 2028 have been sourced from Experian. These reflect recent trends and are based on projections at regional level, and how sectors in East Hampshire have fared relative to the region's growth in the past.

4.4 As set out in the East Hampshire Employment Land Review (2013), a slight adjustment has been made to these forecasts to account for a known discrepancy, a single business that is understood to employ c.4,000 people who are registered as employed in East Hampshire, but work outside of the district. These employees account for approximately 7% of all employment registered in the district in 2012 and around 40% of all jobs recorded within the individual sector in which this business operates. This sector is forecast for some growth over the plan-period, which may, in part, be driven by future expansion associated with this single business, but it is assumed that a significant proportion of these jobs will continue to be based outside of the District.

4.5 This represents a statistical idiosyncrasy for which the Experian employment forecasts do not take into account. The forecasts have therefore been adjusted by EHDC and NLP to discount approximately 40% of future job growth forecast for the sector in which the business in question operates, equivalent to just over 1,000 jobs between 2012 and 2028.

4.6 Including this adjustment, the overall change in East Hampshire resulting from these forecasts is shown in Figure 30 and Table 11, along with expected change in the main B-class sectors.[6] These indicate total growth in East Hampshire of 6,910 jobs over the period 2011-2028, or an annual average of 406 jobs. This is significantly lower than the growth of 890 jobs per annum achieved in East Hampshire over the period 1997-2011 reflecting the current post-recession economic climate and the significant uncertainty regarding future economic prospects.

Figure 30 Baseline Economic Growth Forecast Employment Change in East Hampshire, 2011-2028



Source: EHDC in-house and NLP Analysis (based upon Experian 2013 forecasts)

4.7 The forecasts indicate moderate B class job growth of 2,350 jobs (138 jobs per annum) over the period to 2028. This comprises an increase of 2,470 jobs in office-based sectors and 545 jobs in warehousing activities, but is offset by a decline of 665 industrial jobs, see Table 11.

Table 11 Baseline Economic Growth Scenario Employment Change in East Hampshire, 2011-2028

	No. of Jobs		Change
	2011	2028	2011-2028
Manufacturing (B1c/B2)	6,520	5,855	-665
Distribution (B8)	3,450	3,995	545
Offices (B1a/b)	9,070	11,540	2,470
Total B-class Jobs	**19,040**	**21,390**	**2,350**
Jobs in All Sectors	**54,350**	**61,260**	**6,910**

Source: Experian 2013 / NLP analysis

[6] Includes an allowance for jobs in other non B class sectors that typically utilise industrial or office space, such as some construction uses, vehicle repair, courier services, road transport and cargo handling and some public administration activities

Projections of Future Household and Population Change

4.8 Based upon the analysis of the context and past trends in earlier sections of this report which will continue to drive the need and demand for housing within East Hampshire, the scenarios and their outputs are outlined below.

Scenarios for Growth

4.9 The scenarios adopted for testing fall into three broad groups, demographic-led, economic-led and supply/policy-led. They are set out as follows:

- **Demographic-led** – "*How much development is required to meet projected levels of population change?*"
  - **Scenario A. 2010 SNPP** – A scenario utilising the ONS 2010-based sub-national population projections (SNPP);
  - **Scenario B. 2011 Interim SNPP** – A scenario utilising the ONS 2011-based Interim sub-national population projections, which are the most up-to-date government population projections at the current point;
  - **Scenario C. Zero Net-Migration** – A theoretical demographic scenario whereby in and out migration is balanced, meaning there is only population churn in the district and not growth from net in-migration;
  - **Scenario D. Long Term Migration Trend** – A scenario based upon migration trends observed for East Hampshire over the previous 10 years;
  - **Scenario E. Short Term Migration Trend** – A scenario based upon migration trends observed for East Hampshire over the previous 5 years;
- **Economic-led** – "*How much development is required to ensure forecasts of future employment change are supported by the local labour supply?*"
  - **Scenario F. Experian Economic Baseline** – A scenario based upon local forecasts of potential unconstrained employment growth in East Hampshire form the February 2013 forecast;
  - **Scenario G. Lower Economic Growth Scenario** – A scenario based upon the Experian 2011 baseline scenario to reflect the minimum economic potential of the District;

Demographic-led

4.10 The demographic scenarios use components of population change (births, deaths and migration) to project how the future population, their household composition, and consequently their requirements for housing, will shift in the future. It also projects the level of population who will be economically active and will support employment growth. The headline results for each scenario are outlined below.

Scenario A – 2010 SNPP Scenario

4.11 The scenario is predicated upon the rates of projected migration, births and deaths in East Hampshire District identified within the ONS 2010-based sub-national population projections (SNPP).

4.12 Under this scenario the population is projected to increase by 11,706 people over the period 2011 to 2028 consisting of a reduction in people through natural change by 179 and net in migration of 11,885 people. The negative natural change figure is attributed to the fact that the profile of East Hampshire's population is skewed towards the over fifties who are less likely to have children. The associated increase in households is projected to reach 7,813. This scenario would increase the labour force by 277 people; this would, assuming current commuting rates, support an increase of 74 jobs per annum. This scenario would lead to a demographic-led housing need of 8,105 additional dwellings, equivalent to 477 per annum.

Scenario A: 477 dwellings per annum 2011-2028

Scenario B – 2011 Interim Sub-National Population Projections

4.13 This scenario uses projected assumptions which have been updated by ONS to Census 2011 base; they are based on the 2011-based interim sub-national population projections published on 25 September 2012. These projections only run to 2021, albeit for modeling purposes, beyond that date we have assumed trends in population change will hold constant at the rates projected for 2021.

4.14 In comparison to Scenario A the population is projected to increase between 2011 and 2028 to an additional 15,416 people, population as a result of natural change will increase by 1,200 additional people and net in migration is also higher at 14,216 people. Household formation under this scenario equates to an additional 8,614 households. The labour force would increase by 1,945 people in this scenario with an additional 157 jobs per annum supported. The housing requirement under this scenario totals 8,935 dwellings, equivalent to 526 per annum.

Scenario B: 526 dwellings per annum 2011-2028

Scenario C – Zero Net Migration Scenario

4.15 The zero net migration scenario represents the population impacts only of natural change and churn (i.e. in- and out-migration is still occurring and thus altering the profile of the population over time due to the different profile of in-migrants and out-migrants, albeit that in and out flows are equal in numerical terms).

4.16 This scenario would lead to a population decrease of 1,739 people in the period 2011 to 2028 resulting only from natural change. This still leads to an increase of 2,759 new households resulting from a different profile of the

population. Zero net migration into East Hampshire would result in a reduction of 6,475 economically active people within the District over this period and reduce jobs by 264 per annum. This is attributed to the fact that East Hampshire currently has a very high proportion of residents who will retire during the 2011 to 2028 timeframe and the application of zero net migration means economically active people are unable to move in to take their place. This generates a requirement for 2,862 new dwellings over the period. If this is annualised, East Hampshire would need to deliver 168 dwellings per annum in order to meet the housing requirements of this scenario.

Scenario C: 168 dwellings per annum 2011-2028

Scenario D – Long Term Migration Trend Scenario

4.17 This scenario is based upon continuation into the future of the average past migration trends observed in East Hampshire over the longer term. This draws upon ONS estimates of domestic and international migration over the previous 10 years for the District.

4.18 Under this scenario the population is projected to increase by 8,8464people comprising just 32 additional people via natural change and 8,432 additional people as a result of net in migration. This would lead to an increase in households of 6,120. The decrease in the labour force totals 1,360 people, and 8 jobs per annum would be lost. The overall housing requirement for this scenario totals 6,348 new dwellings, equivalent to 373 per annum over the 2011 to 2028 period.

Scenario D: 373 dwellings per annum 2011-2028

Scenario E – Short Term Migration Trend Scenario

4.19 This scenario is based upon continuation into the future of the average past migration trends observed in East Hampshire over the shorter term. This draws upon ONS estimates of domestic and international migration over the previous 5 years for the District.

4.20 Under this scenario the population is projected to increase by 14,898 people comprising 1,366 additional people via natural change and an additional 13,532 people through net in migration. This would lead to an increase in households of 8,145. This would result in the labour force increasing by 1,969 people with an additional 159 new jobs per annum being supported. The overall housing requirement for this scenario totals 8,450 new dwellings, 497 per annum.

Scenario E: 497 dwellings per annum 2011-2028

Economic-led

4.21 The economic-led scenarios are based upon an understanding of the relationship between employment and housing. These scenarios are demographically modelled using the number of jobs as the fixed variable, with the projected migration constrained or inflated to a level, which alongside the profile of migrants moving in and out and natural change within the population produces a labour force which is sufficient to support a given level of employment growth within the District. This assumes that the current commuting dynamic inferred by the balance of workers and jobs in East Hampshire (the Labour Force ratio) will either remain static or shift based on the assessed outcomes of the scenarios.

Scenario F – Experian Economic Baseline Scenario

4.22 This scenario is based upon up-to-date February 2013 economic forecasts which projects job growth averaging circa 406 jobs per annum over the period 2011 to 2028. These represent unconstrained estimates of how the economy of East Hampshire District could perform in the future. They therefore present an objective forecast of how East Hampshire could perform in economic terms in the future based on the nature of its economy and current expectations of future national and regional economic performance. As stated in paragraph 4.4 above, a proportion of employment registered in the district at 2012 is related to a single business that employs c.4,000 people who are registered as employed in East Hampshire, but work outside of the district. An adjustment has been made in the above job forecast by NLP and EHDC to take account of this discrepancy and the full approach for this is set out within Scenario 1 of the East Hampshire Employment Land Review (2013).

4.23 To underpin this level of job growth in East Hampshire, there would need to be an increase in the labour force by 6,918. To achieve this, the population projection as a result of this economic forecast would be significantly increased from the 2010 and 2011 SNPP scenarios at 25,853 people with 1,804 additional members of the population as a result of natural change and 24,049 people from net in migration. This would give rise to 12,051 new households. This results in an overall projected requirement for 12,501 dwellings, 735 per annum.

Scenario F: 735 dwellings per annum 2011-2028

Scenario G – Experian Lower Economic Growth Scenario

4.24 This scenario is based upon the 2011 economic forecasts from Experian which were used in East Hampshire's Local Housing Requirements Study (June 2011), this projects job growth averaging circa 36 jobs per annum over the period 2010 to 2026. This scenario has been included as a benchmark for a lower economic growth scenario, as it was used in the previous study too.

4.25 The forecast represent unconstrained estimates of how the economy of East Hampshire District could perform in the future based on the projections made in 2011. They therefore present an objective forecast of how East Hampshire could perform in economic terms in the future based on the nature of its economy and expectations of future national and regional economic performance at that time.

4.26 Underpinning this level of job growth in East Hampshire, there is a decrease in the labour force by 483 people but an increase in jobs of 36 per annum. This decrease in the economically active population is largely attributed to the age of the existing population whereby a significant proportion will retire over this period; the population is still predicted to increase by 10,065 people with a loss of 231 members of the population as a result of natural change and 10,296 people gained from net in migration. This would give rise to 6,603 new households. This results in an overall projected requirement for 6,849 dwellings or 403 per annum.

Scenario G: 403 dwellings per annum 2011-2028

Summary of Scenarios

4.27 The scenarios outlined above present a range of different housing outcomes based on their principal drivers. The outputs for which are summarised Table 12.

Table 12 Summary of scenario outputs

Scenario:	Demographic Led					Economic Led	
	A. 2010 SNPP	B. 2011 SNPP	C. Zero Net Migration	D. Long Term Migration Trend	E. Short Term Migration Trend	F. Baseline Experian Projection	G. Lower Experian Projection
Pop. Change	+11,706	+15,416	-1,739	+8,464	+14,898	+25,853	+10,065
of which Natural Change	-179	+1,200	-1,739	+32	+1,366	+1,804	-231
of which Net Migration	+11,885	+14,216	-0	+8,432	+13,532	+24,049	+10,296
Household Change	+7,813	+8,614	+2,759	+6,120	+8,145	+12,051	+6,603
Dwelling Change	+8,105	+8,935	+2,862	+6,348	+8,450	+12,501	+6,849
Dwellings p.a.	+477	+526	+168	+373	+497	+735	+403
Labour Force	+277	+1,945	-6,475	-1,360	+1,969	+6,918	-483
Jobs	+1,256	+2,675	-4,488	-136	+2,696	+6,905	+610
Jobs p.a.	+74	+157	-264	-8	+159	+406	+36

Source: NLP analysis

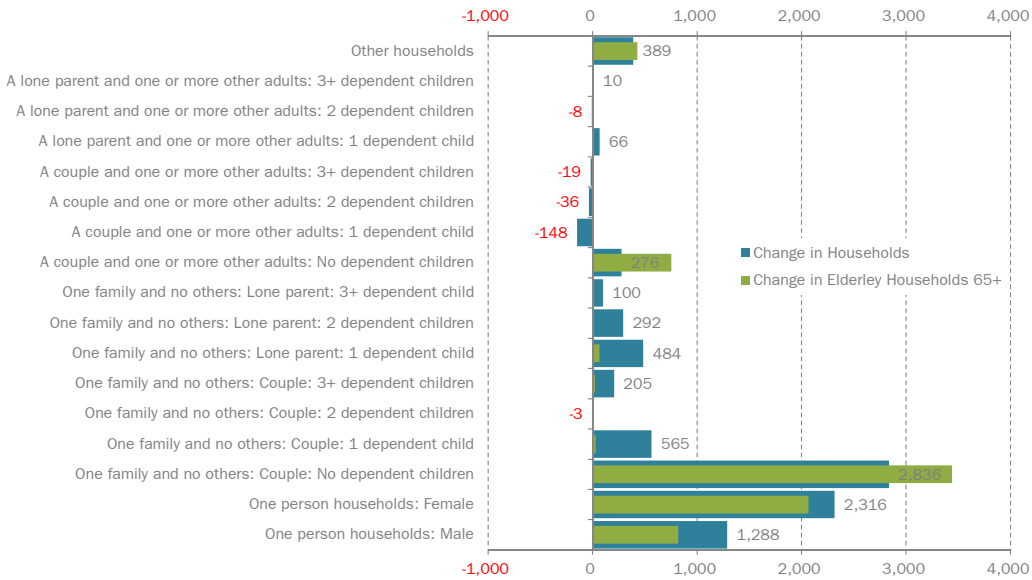
4.28 The lowest growth scenario is the zero net migration scenario, which would require delivery of just 168 dwellings per annum, albeit this may not represent

a reasonable and rational basis for estimating future housing requirements, with East Hampshire experiencing consistent levels of net in-migration previously. The highest growth scenario is the most recent Experian economic forecast, which would require 735 dwellings per annum, although this would involve an increase in population circa 10,500 greater than predicted in the 2011 SNPP scenario. Alternative demographic-led scenarios, as well as each of the economic-led scenarios, fall between these two 'book-ends'.

4.29 The wide variation in the demographic-led scenarios is primarily attributable to the different scales of net migration each one assumes. Each of these scenarios represents a different estimate of future migration, which is based upon observed past migration trends over different time periods. The issue of how these estimates of future need relate to 'backlog' of unmet need is considered in Section 7.0.

4.30 Whilst the above provides overall change, the SHMA guidance also requires housing assessments to break down estimates of future household growth into age and types where possible. Figure 31 illustrates the scale of net household change under the 2011 SNPP scenario, showing both change overall as well as change associated with retired and elderly households (aged 65+). This illustrates that the majority of net household growth is projected to be associated with one person households and couples with no dependent children, with smaller levels of growth associated with lone parent households and family households with one dependent child.

Figure 31 Net change in households in East Hampshire 2011 to 2028



Source: NLP analysis – 2011 SNPP scenario

4.31 Whilst the scale of household growth is variable depending on the scenario adopted, the above does represent broad trends in household formation for East Hampshire which underpin all of the scenarios, with a rise in smaller households, largely driven by an ageing population.

Core Output 3: Estimate of total future number of households, broken down by age and type where possible.

The demographic-led projections illustrate that total household change in East Hampshire is projected to total between 2,759 net additional households and 8,614 net additional households between 2011 and 2028.

The majority of net household growth is projected to be associated with smaller units with circa 42% of household growth under the 2011 SNPP scenario associated with single person households. There is also projected to be some growth in family households, particularly lone parents with one, two and three or more children and larger traditional family units with one or three or more children as well as couples living with one or more other adults.

The vast majority of net household change is projected to be associated with the 65+ age group, reflecting an ageing population in East Hampshire and the propensity of these cohorts to form smaller households, reflecting the stage of their life as well as social trends.

Bringing the evidence together

4.32 The outputs from the modelling show a range of outcomes, but also highlight a number of common trends, particularly the ageing population, which will have implications for planning for an elderly population, including elderly housing and constraints on the labour supply, with lower economic activity associated with an older demographic profile. The in-migration pressures East Hampshire is likely to come under comprise a significant component of future population change and is one of the key determinants of future housing need and demand in the District.

4.33 It is important to note that implied within each of the scenarios where net in-migration is a component is the position that East Hampshire will be meeting needs originating from outside of the District. Such migration flows are a key component of the existing, and varied, housing markets of which East Hampshire is part. Key migratory relationships with areas where East Hampshire receives net in-migration, such as Greater London and Waverley to north east and to a lesser extent Portsmouth to the south west, are integrated into the assessment of future needs, and therefore it is implicit that East Hampshire will need to plan for such needs as a component of the housing requirements associated with each scenario, rather than adding needs from those districts on top (unless those areas, through the duty to cooperate, will have additional unmet needs that might be met within East Hampshire and that are not already reflected in the relevant scenarios). Simply put, this SHMA and the assessments of need for East Hampshire, takes full account of the migratory relationship of East Hampshire with the rest of the whole housing market area. This is consistent with the NPPF, which states that objective assessments of need should take account of migration.

4.34 These population projections for a core component of evidence for informing what an objective assessment of overall housing need and demand in East Hampshire will be. Although they will have to be considered alongside other indications, including an assessment of affordable housing need, they provide 'book-end' scenarios of bottom-up, locally derived, estimates of future housing need based on structural demographic and economic drivers in the District.

5.0 Affordable Housing Need

Introduction

5.1 As well as considering overall structural need and demand for housing as derived from the scenarios of demographic and economic change identified in Section 4.0 of this report, there is an additional approach to considering housing need, taking into consideration the affordability of housing and how far local households will be able to access housing on the open market, or require affordable housing provided for them. This approach stems from considering how much affordable housing will be needed in an area, and therefore provides a complementary way of considering housing need and demand. A calculation of affordable housing need, in line with the CLG SHMA Practice Guidance, has been undertaken for East Hampshire in order to inform the an assessment of the scale of housing affordability in the District as well as arriving at an estimate of future net housing need. The basic approach to this is:

Total Current Housing Need (gross) to be addressed
Plus
Total Newly Arising Housing Need (gross per annum)
Less
Annual Supply of Affordable Housing
Equals
Net Housing Need

5.2 The last assessment of affordable housing needs for the District was undertaken in 2012 and the assessment contained here is intended to be an update to this. The assessment is split into two parts, an assessment of social rented/affordable rented needs and an assessment of intermediate tenure demand.

Current Housing Need

5.3 Current housing need seeks to identify those households in East Hampshire who currently lack their own housing or live in unsuitable housing and cannot afford to meet their needs in the housing market. Components of housing need are not definitive and can encompass drawing together statistics from a wide range of sources. Although potentially not including all households in need of housing, and conversely including those who do not fall within the definition of being in need of affordable housing, the local housing waiting list forms the starting point for estimating what the need and demand for affordable housing is. At the very least, if all of the households on the waiting list were accommodated, it would be reasonable to assume that all demand for affordable housing would be met, even if there remain households in need which are not reflected in the waiting list.

5.4 Therefore, we have considered the components of housing need as those in need and within a reasonable preference group for affordable housing (e.g. homeless households and overcrowded households), currently concealed households and other groups in need, for which the existing waiting list has been used as a best case proxy in the absence of alternative secondary data.

5.5 There are currently almost 2,900 applicants registered on the current housing waiting list in East Hampshire (Hampshire Home Choice – HHC). However, these include all applicants across all bandings (bands 1 to 5), and may include households whose circumstances do not fall within the criteria of housing needs. CLG guidance sets out the criteria for households in need of housing, which broadly corresponds with Bands 1 to 4 on the Hampshire Home Choice waiting list.

5.6 East Hampshire District Council identified that as of January 2013 a total of 1,837 households were on the housing waiting list and within a priority band of 1 to 4. These applicants have a clear priority need or are unable to meet their needs within the market on the basis of their income. Recent data from HHC shows that in East Hampshire 16.4% of households within priority bands 1 to 4 are transfers, meaning of this 1,837 household waiting list, 301 were existing social rented or affordable rent tenants seeking a transfer, with the remaining 1,536 being households from other tenures in need.

5.7 To provide an estimate of those within key priority bandings, data from CLG and the Census 2001 have been utilised to illustrate the extent to which households identified as in need are either homeless or within concealed households. Whilst this is consistent with the SHMA Practice Guidance, given the potential for double counting and the recency of data from the Census 2001, the current waiting list provides the most appropriate gross estimate of current housing need.

Table 13 Current Housing Need

	Component	Households	Source/Calculation
a.	Housing waiting list priority bands 1-4	1,837	East Hampshire/HHC – Waiting List
~	of which Homeless Households (inc. Temporary Accommodation)	94	Estimate from P1e Quarterly Homeless Returns (CLG Data) - Average past 4 years data (07/08 to 10/11)
~	of which Concealed Households	403	Estimate from Census 2001 based upon Concealed Families (272) & All households without sole use of bath/shower and toilet (131).
b.	**Gross Estimate of Current Housing Need**	**1,837**	a. (households in priority bandings)
c.	of which current occupiers of affordable housing	301	East Hampshire/HHC – Waiting List Transfers
d.	**Net Estimate of Current Housing Need (Backlog)**	**1,536**	b - c

Source: EHDC, Hampshire Home Choice (HHC), Census 2001 and CLG

5.8 Whilst the SHMA Practice Guidance suggests transfers should be added in at the supply stage (i.e. units becoming available when existing tenants are rehoused), NLP have presented this in the need stage to reflect the fact that some of those currently in need of affordable housing and on the waiting list are current occupiers, and that the net backlog is reduced accordingly. This backlog of current housing need will need to be factored into future provision in order to reduce the scale of those in need of housing.

Core Output 4: Estimate of current number of households in need.

There are currently an estimated 1,837 households in need of affordable housing within East Hampshire, as highlighted by the scale of the housing waiting list. A further 301 existing occupiers of affordable housing are seeking a transfer to a new property.

Future Housing Need

5.9 Future housing need is split into two components: newly forming households unable to access housing in the private market and existing households falling into need.

5.10 Newly forming households have been calculated using the demographic modelling undertaken earlier in the report. Each of the scenarios modelled provide outputs on estimates of household change by type and by age band. As set out in the SHMA Practice Guidance, gross household formation should be used as the measure of newly forming households, as opposed to net household growth which takes into account household dissolution. This is required to ensure that household dissolution is not double counted in the calculation, once as a net loss of households and potentially again on the

supply-side as a re-let of the house they may have occupied. Notwithstanding, gross household formation is typically much higher than net rates, and may equally represent an overestimate of the amount of households seeking new housing in each year within the District.

5.11 Each of the different scenarios of future population growth identified in Section 4 of this report produces different estimates of household growth. For the purposes of considering future newly forming households, the demographic led scenario based on the 2011 SNPP Scenario has been used, representing a reasonable mid-point of the various scenarios tested. Naturally, if an alternative scenario with lower or higher rates of household growth is adopted for the purposes of assessing future need, the inferred newly arising need would also be commensurately different.

5.12 The extent to which newly forming households are able to afford market housing is based on the analysis undertaken in Section 3.0 of the report. This analysis estimated that 54% of newly forming households are unable to meet their housing needs in the private market. This is applied to the gross household formation to identify the likely scale of newly forming households that will fall below the minimum income threshold for market housing, and will therefore require affordable housing.

5.13 Existing households falling into need is the second component. This can be drawn across from various sources. The East Hampshire Housing Needs Assessment Update (HNAU) 2012 adopts the approach advocated by CLG guidance, by estimating this from the net average number of households joining housing registers each year. It estimates on this basis that 165 existing households will fall into need each year, consistent with the past trends of applicants registering within bands 1-4 of the waiting list. The HNAU does however caution that this is likely to include double counting of newly arising need, with those newly registering on the housing waiting list potentially overlapping with those newly forming households falling into need (and as accounted for in the first component of future need in this section).

5.14 An alternative way of estimating existing households falling into need is analysing the recent trends of movements from the private sector into the social sector as a proxy for existing households falling into need. Figures from CORE data over the previous 4 years show that an average of 53 households each year have moved from private tenures into social tenures and this can be utilised as a reasonable proxy for existing households falling into need, without any element of double counting. Table 14 sets out the components of future housing need.

Table 14 Future Affordable Housing Needs – Gross Household Formation

	Component	#	Source/Calculation
e.	Newly forming households (Gross per annum)	2,598	NLP Demographic modelling using POPGROUP. 2011 SNPP Scenario.
f.	% unable to rent or buy in the private market	54%	NLP affordability modelling in Section 3.0
g.	Newly forming households unable to afford market housing (per annum)	1,403	e x f
h.	Existing households falling into need (annual average)	53	CORE Annual Average - Previous Private Tenure - 2007/08-2010/11
i.	**Estimate of Future Housing Need (p.a.)**	**1,456**	g + h

Source: NLP Analysis

5.15 These outputs of future housing need should be treated with caution. By utilising gross household formation from a single scenario, they take no account of potential population change under alternative scenarios, nor the balance of overall structural housing demand based upon demographic-led estimates, excluding as they do household dissolution. Such gross estimates may include people that form several different households over the period at different stages of their life, but does not account for their previous household no longer existing. By way of comparison, if net household formation from the 2011 SNPP scenario was utilised, this would total only 506 additional households each year, which if we assume 54% are unable to afford private market housing, this would reduce the estimated scale of needs considerably as shown in Table 22. It should be noted that this approach was utilised within the East Hampshire Housing Needs Assessment Update (HNAU) 2012.

Table 15 Alternative Future Affordable Housing Needs – Net Household Formation

	Component	#	Source/Calculation
e.	Newly forming households (Net per annum)	506	NLP Demographic modelling using POPGROUP. 2011 SNPP Scenario.
f.	% unable to rent or buy in the private market	54%	NLP affordability modelling in Section 3.0
g.	Newly forming households unable to afford market housing (per annum)	274	e x f
h.	Existing households falling into need (annual average)	53	CORE Annual Average - Previous Private Tenure - 2007/08-2010/11
i.	**Alternative Estimate of Future Housing Need (p.a.)**	**327**	g + h

Source: NLP Analysis

5.16 Based upon the above, these calculations of future need based upon gross household formation must therefore be seen only as one factor in assessing and considering an objective assessment of future housing need and demand. They also take no account of the deliverability of delivering 54% of total

dwellings as affordable tenures (as would be inferred by SHMA Practice Guidance's methodology) with factors such as viability affecting the proportion of housing that will be able to be delivered as affordable.

Core Output 5: Estimate of future households that will require affordable housing.

In the future, it is estimated that 1,456 households each year will newly require affordable housing under the gross household formation identified within the 2011 SNPP demographic scenario (comparable with the 2011 based SNPP) which represents a mid-point of potential need.

By comparison, using net household formation would identify a scale of future housing needs totalling 326 households per annum.

5.17 Whilst the above provides an estimate of the future households that will require affordable housing, the remaining households that can afford to rent or buy in the private market will require market housing. In simple terms, at 46% of gross household formation being able to afford market housing this would total demand for market housing from 1,195 households per annum.

5.18 However, as set out above this does not take into account household dissolution, with many properties in the market coming back up for sale or let as households dissolve and vacate property. Net household formation under this 2011 SNPP scenario totals 506 per annum over the period 2011-2028, requiring 526 dwellings per annum. This highlights that the number of future households requiring market housing could be substantially lower than that identified through gross household formation rates.

5.19 Based upon the range of scenarios identified in Section 3, housing needs under different scenarios could be as divergent as 168 dwellings per annum and 735 dwellings per annum to accommodate household growth. If the proportion of newly forming households unable to buy in the market (54%) holds true for net household formation rates, this would imply household demand for affordable homes of between 91 dwellings per annum and 397 dwellings per annum. This again takes no account of the deliverability of 54% of all new housing actually being provided as affordable tenures against 46% being provided as market tenures.

Core Output 6: Estimate of future households that will require market housing.

Based upon the estimates of future households that will require affordable housing, the remaining households will be able to afford and will require market housing. This is estimated at 1,195 households each year based on gross formation under the 2011 SNPP Scenario.

Based upon net household formation, between 91 and 397 dwellings per annum could be required within market tenures to meet structural demands at

current affordability levels. This would depend upon the scenario adopted and the level of housing ultimately planned for in East Hampshire.

Affordable Housing Supply

5.20 Future affordable housing supply consists of the annual re-lets to new tenants entering social housing. These re-let figures are based upon an average of six years Housing Strategy Statistical Appendix (HSSA) and Local Authority Housing Survey (LAHS) data which provides figures for housing association stock lets per annum against which new supply (i.e. first lets) can be netted off to arrive at a figure for re-lets. Over the previous 6 years this has averaged 142 dwellings per annum.

5.21 There are limited other components of supply for affordable housing in East Hampshire. Vacancy/void rates in the affordable sector are very low (less than representing less than 1% of the stock in East Hampshire), with limited scope to decrease this further given the need for a certain level of voids to facilitate churn and maintenance.

5.22 Committed supply of affordable housing is also excluded, as, although it will form a component of supply in the future, the intended purpose of this SHMA is to consider an assessment of the need and demand for new housing, and netting off committed new supply (which would in part meet future needs) would artificially reduce objectively assessed future needs. Notwithstanding, there is currently 340 new social/affordable rented homes in the pipeline and 123 new intermediate tenure homes.

5.23 Overall future housing supply is set out in Table 16.

Table 16 Alternative Future Affordable Housing Needs – Net Household Formation

	Component	#	Source/Calculation
j.	Annual supply of Re-Lets	142	CORE Average of Re-Lets
k.	**Estimate of Future Supply (p.a.)**	**142**	
l.	Committed supply of new affordable housing	463	Estimate from EHDC Affordable Housing Development Programme (February 2013)

Source: NLP Analysis

Impact of Affordable Rent Model

5.24 The Government introduced a new Affordable Rent Model in April 2011 to be offered to Registered Providers. Affordable Rent offers shorter term tenancies at a rent higher than social rent, with the value set at up to 80% of market rental values. The intention of this is that in a period where capital funding is reduced (with grant funding for social rented schemes no longer available), the additional revenue streams will continue to ensure new affordable homes are delivered. It is the Government's intention that the additional rental income will contribute to the delivery of 150,000 new affordable homes over the period

2011-15, despite the reduction in the capital funding available to 2014/15 for the development of new social housing to £4.5bn (down from £8.4bn).

5.25 In terms of the impact on affordability and households, this will depend upon income. Those able to afford 80% of market rents will be able to access such properties without any housing benefit, whilst households unable to afford the rent will continue to be eligible for housing benefit to pay the higher rental value. In short, the Affordable Rent model is a shift in central funding for new affordable homes away from capital (e.g. grant funding for new social housing build) towards revenue (e.g. higher housing benefit budgets to meet 80% market rents).

5.26 On this basis, NLP have undertaken further affordability modelling around the Affordable Rent model in East Hampshire. This has been applied to the Lower Quartile rental prices identified in Section 3.0, which is compared with average social rents. Rental data for each is illustrated in Table 17.

Table 17 Monthly Rents under Different Tenures (2012)

Property Type	Market Rent - Lower Quartile	Affordable Rent (80% Market) - Lower Quartile	Social Rent - Average	% Increase between Social & Affordable Rent
All	£695 p.c.m.	£556 p.c.m.	£459 p.c.m	+21%
1-bed	£550 p.c.m.	£440 p.c.m.	£393 p.c.m	+12%

Source: Social Rents: CORE data for 2012 (excl. charges) Market Rents: NLP analysis using Rightmove

5.27 Using these rental estimates, we have identified the income thresholds for each tenure of housing (excluding any housing benefit) and have subsequently identified what proportion of households unable to afford a market rental property would be able to afford a property under Affordable Rent without any housing benefit. This is also compared with the same measure under social rent. This is illustrated in Table 18.

Table 18 Impact of Affordable Rent Model on Affordability (excluding housing benefit)

Property	Basis	Income Threshold (p.a.)	% of Overall Households Unable to Afford	% of Newly Forming Households Unable to Afford
Rent a Lower Quartile Priced Property – equivalent to a 2-bed flat	Market	£33,400	52%	68%
	Affordable Rent (80%)	£26,700	38%	55%
	Difference	**£6,700**	**14%**	**13%**
	Social	£22,000	29%	42%
Rent a Lower Quartile Priced 1-bed Property	Market	£26,400	38%	54%
	Affordable Rent (80%)	£21,100	28%	40%
	Difference	**£5,300**	**10%**	**14%**
	Social	£18,900	22%	32%

Source: NLP Analysis

5.28 Based upon the above, Affordable Rent means that, excluding housing benefit payments, a greater proportion of households are able to afford to access such housing (subject to meeting the need criteria). Affordable Rent tenure reduces the proportion of newly forming households unable to afford entry level rental properties without housing benefit from 54% to 40%. This is significantly above such levels under social rented stock, where rents are lower and as such only 32% of newly forming households are unable to afford entry rents without housing benefit.

5.29 The above does infer that as many as 26% of all households unable to afford market housing, may be able to afford Affordable Rent products without the need for housing benefit. Whilst such forms of delivery would help to reduce the scale of need for social rented stock exclusively, creating an affordable product between social rented and traditional intermediate tenures, the corollary for central budgets is that housing benefit payments may have to increase for those unable to afford Affordable Rent.

Intermediate Housing

Shared Ownership Need & Demand

5.30 Intermediate tenures, such as shared ownership, often help to fill the gap between social tenures and private tenures, but also provide alternative forms of ownership through part purchase. Although some of the households identified as being in need of social housing above may be able to afford intermediate tenures, the majority will still require social or affordable rented properties, either with or without housing benefit. Notwithstanding, intermediate tenures continue to have a role in enabling households to access home ownership, or secure a more suitable property for their income banding

(e.g. where they may be overcrowded in the private rented sector, but able to afford a suitably sized house in an intermediate tenure), who may not be otherwise able to afford to do so.

5.31 HomesinHants is the local HomeBuy Agent covering East Hampshire. HomesinHants keep data on all households with a registered interest in intermediate housing within East Hampshire. To be eligible, households must have incomes of less than £60,000.

5.32 Current data from HomesinHants shows that there are currently 300 households actively interested in access to intermediate housing products specifically within East Hampshire. Table 19 illustrates that the majority of households require 2-bed properties, with lesser, but still significant, proportions of households seeking 1-bed and 3-bed intermediate properties.

Table 19 Intermediate Housing Requirements

Type	Applicants	%
1 Bed	50	17%
2 Bed	180	60%
3 Bed	70	23%
Total	**300**	**100%**

Source: HomesinHants

5.33 Over the previous 5 years, CORE data shows a total of 44 shared ownership properties have been sold in East Hampshire, at an overall average value of £175,800. Of these 44 shared ownership properties, the majority have been 2-bedroom properties, totalling 32 of the 44 sales. Average annual transactions in shared ownership housing has therefore only been circa 9 dwellings each year, which is relatively minimal in the context of both shared ownership demand as well as overall housing needs.

Shared Ownership Affordability

5.34 Many of these households identified on the intermediate register can afford to access housing in the private sector, either to buy or to rent. This is highlighted by the £60,000 maximum income for being eligible for intermediate housing being far in excess of the £46,100 income threshold to be able to buy and the £26,400 income threshold to be able to privately rent.

5.35 To test the extent to which there may be some households unable to afford housing on the private market that can afford shared ownership, intermediate housing costs have been estimates based on a number of assumptions. Property values have been obtained from CORE data setting out the market value of shared-ownership purchases over the 5 years. Average values have been utilised as the sample of values is small and also the CORE data suggests there is little in the way of distribution of prices within different property sizes. This perhaps reflects the relative homogeneity of shared ownership properties in comparison to those available on the open market or

private rental market (e.g. a 1-bed Shared Ownership property in East Hampshire will be largely similar in nature and value to all the other 1-bed Shared Ownership properties in East Hampshire).

5.36 Indicative monthly housing costs have been identified using average shared-ownership market values and based on the purchaser buying a 50% equity share in the property. Monthly mortgage costs are calculated based on 4% interest rate mortgage on the 50% equity over a notional 25 year repayment period. Rent levels are calculated on the basis that 3% of the equity retained by the Registered Provider is paid per year. For example, for a property valued at £120,000 where 50% is rented, rental costs are assumed to be £1,800 per year (3% of £60,000) or £150 per month. This is shown in Table 20.

Table 20 Average Values for Shared Ownership Properties

Property Type	Average Value	Monthly Mortgage Cost	Monthly Rent	Overall Monthly Cost
1-bed	£149,400	£394	£187	£581
2-bed	£179,000	£472	£224	£696

Source: CORE/NLP Analysis

5.37 These overall monthly housing cost have been used to identify an income threshold, based on the same assumption that 25% of gross household income is spend on housing costs. The outcome of this in terms of proportions of households able to afford is identified in Table 21.

Table 21 Shared Ownership Affordability

Property	Basis	Income Threshold (p.a.)	% of Overall Households Unable to Afford	% of Newly Forming Households Unable to Afford
1-bed Property	Shared Ownership	£27,900	42%	58%
2-bed Property	Shared Ownership	£33,400	52%	68%

Source: NLP Analysis

5.38 This affordability analysis demonstrates that the income threshold to purchase a shared ownership 1-bed property is above the income threshold to rent an entry level 1-bed property on the open market. Shared ownership is, therefore, unlikely to represent a tenure option which will reduce the need for general needs rented tenures (Social/Affordable Rent). It does, however, represent a viable alternative route into home ownership for those that can afford to rent but cannot afford to purchase outright, with the income threshold for privately renting a 2-bed property on the open market the same as to purchase a shared ownership 2-bed property.

Calculating Net Housing Need

5.39 Bringing the above elements together we can calculate net housing need. This is done on an annual basis, and as such it is necessary to convert the backlog of need into an annual quota based upon the period which this backlog will be addressed. This has, therefore, been split into a 5 year period, reflecting the suggested timeframe in the CLG SHMA Guidance, and a 17 year period, reflecting the potential timeframe of the Local Plan. Table 22 sets out the calculation of net annual affordable housing need, in line with the CLG SHMA Guidance.

Table 22 Calculation of SHMA Net Affordable Housing Need

	Component	SHMA – Gross Household Formation		SHMA – Net Household Formation		2012 HNA Update
		Over 5 yrs	Over 17 yr Plan	Over 5 yrs	Over 17 yr Plan	Over 5 yrs
Affordable Housing Need						
d.	Backlog of Need	1,536	1,536	1,536	1,536	3,086[7]
~	Annual quota of backlog	307	90	307	90	617
i.	Total newly arising need	1,456	1,456	327	327	262
k.	Total annual supply	142	142	142	142	440[8]
m.	**Net Annual Affordable Housing Needs** (d / period) + i - k	**1,621**	**1,404**	**492**	**275**	**439**
Affordable Needs of which Could be met by Affordable Rent without Housing Benefit:						
n.	26% of newly arising need	379	379	85	85	~
Other Intermediate Needs:						
o.	Intermediate need backlog	300				325

Source: NLP Analysis (Note: Methodologies between this SHMA and the 2012 HNA vary slightly due to availability of data in relation to each study, both approaches are valid and are largely consistent in terms of the overall outcome)

5.40 This illustrates that net need based on current data (2012/13) and over a 5 year period would total 1,621 affordable dwellings per annum. This largely reflects the high levels of gross household formation that are projected to occur. Addressing any backlog over a longer period commensurately reduces the need, with a 17 year period equalling a need for 1,404 affordable dwellings per annum. However, this assumes gross household formation and doesn't account for household dissolutions, with the implication that needs are likely to be inflated under this approach.

[7] Excludes transfers (i.e. current occupiers of affordable housing), whereas SHMA nets these off

[8] Includes committed supply and current occupiers of affordable housing, whereas SHMA approach does not

5.41 Undertaking the calculation on a similar basis to the East Hampshire 2012 Housing Needs Assessment Update, demonstrates that housing needs have increased slightly from 439 per annum over a 5 year period to 492 per annum. Over a 17 year plan period, this need would fall to 275 reflecting the reduction of the backlog over a longer period. These lower estimates reflect the use of net household formation rates, which are more indicative of overall need for housing, given they represent all the demographic factors underpinning structural needs for housing (including household dissolutions). In order to meet this affordable housing need at a notional delivery rate of 40% provision, as set out in the proposed EHDC Local Plan: Joint Core Strategy, this would require delivery of 688 dwellings per annum over the 17 year plan period.

5.42 If seeking to address the entire backlog over just 5 years, delivering 492 affordable dwellings per annum would necessitate total delivery of 1,230 dwellings per annum. However, subsequently a lower rate of delivery would be required seeking to address just net newly arising needs of 185 affordable dwellings per annum on the notional basis that there was no additional backlog created in the intervening period for whatever reason. Similarly this would require delivery of a total 463 dwellings per annum over subsequent years at 40% affordable provision.

5.43 This level of overall delivery of c.11,700 dwellings (c.4,675 affordable) over the 17 year plan period can be considered alongside the other scenarios within Section 4.0 as an estimate of objectively assessed housing needs, albeit using a different approach. However, whilst this represents an estimate of affordable housing needs in East Hampshire, the outcome is based upon a given set of assumptions utilising current data as well as the approach advocated in the CLG SHMA practice guidance. Adopting different assumptions may result in different and more positive outcomes for affordability.

5.44 In particular, the SHMA adopts assumed thresholds of 3.5 x household income for purchasing a house and 25% of household income for renting a house, which draws upon widely established and utilised benchmarks. In some cases, it may be that in the face of acute housing affordability pressures, households choose to stretch their finances in order to access housing. This may reduce the level of affordable housing need, suggesting affordable needs may be fully met even at lower levels of housing delivery than identified above, albeit with adverse consequences for those households in terms of discretionary income (i.e. after tax income available once essential spending such as rent and bills have been deducted). By way of example, increasing the proportion of income spent on rent from a 25% threshold to 30% would reduce the proportion of newly forming households unable to afford to rent in the private market from 54% to 43%.

5.45 A 30% threshold for renting would also appear reasonable in the context of recent survey data. Estimates from CLG's English Housing Survey (EHS) show that in 2010/11 the national mean average for households in private rented accommodation was that 34.4% of gross household income including state assistance was spent on rent payments. This rose to 42.5% when excluding

state assistance (i.e. excluding housing benefit paid to those in the private rented sector).[9] This suggests that up to 30% of household income is a reasonable, and potentially even conservative, reflection of what households may currently pay in order to access the private rented sector. As such, NLP has applied sensitivity tests at 27.5% and 30% thresholds of income spent on private rent. This analysis is shown in Table 23.

Table 23 Impact upon Housing Needs of Sensitivity Testing on Proportion of Income Spent on Rent

	Component	25% Threshold	27.5% Threshold	30% Threshold
d.	Annual Quota of Backlog	90	90	90
e.	Newly forming households (Net per annum)	506	506	506
f.	% unable to rent or buy in the private market	54%	48%	43%
g.	Newly forming households unable to afford market housing (per annum) (e x f)	274	243	218
h.	Existing households falling into need (annual average)	53	53	53
i.	Future Housing Needs (g + h)	327	296	271
k.	Annual Supply	142	142	142
m.	**Net Affordable Housing Needs** (d + i - k)	**275**	**244**	**219**
y.	Affordable Delivery Proportion	40%	40%	40%
z.	**Total Housing Needed to Deliver Affordable Element**	**688**	**610**	**548**

Source: NLP

5.46 Applying a 30% threshold over the whole 17 year plan period could reduce net affordable housing needs from 275 per annum to 219 per annum. This would also reduce overall dwelling requirements under this scenario to 548 dwellings per annum (assuming a notional delivery of 40% of housing being affordable). Applying a 27.5% threshold would reduce the proportion of newly forming households unable to afford to rent in the private sector to 48%. This would reduce net affordable housing needs to 244 dwelling per annum, reducing overall dwelling requirements under this scenario to 610 dwellings per annum.

5.47 Whilst stretching the proportion of household income spent on rent may not be a desirable outcome for households, it does highlight that households may have options open to them for accessing market housing where affordable housing may not be an accessible option. As a sensitivity, it also highlights that full affordable housing needs might also be able to be met at lower levels of overall housing delivery, such as those scenarios representing demographic-

[9] CLG English Housing Survey Household Report 2010-11 – Annex Table 2.3: mortgage/rent payments as a percentage of weekly household income, 2010-11

led needs. These sensitivities can therefore also be considered alongside other scenarios of objectively assessed needs for housing, to consider the range of needs that exist.

Scenario H: 688, 610 or 548 dwellings per annum 2011-2028

The Housing Requirements of Households

5.48 The housing requirements of those households in need will vary depending on the size and composition of the households. In terms of the backlog of need, the existing waiting list provides a breakdown of current size requirements for applicants. In respect of future need from newly forming households, interrogating the household projections from the POPGROUP analysis provides an indication of how households will change.

5.49 A breakdown of the housing waiting list by size is illustrated in Table 24 and shows that more than half of current need is for 1-bed properties with just under a third of current need for 2-bed properties. The requirement for 3 and 4 bed properties is much lower based upon the current waiting list.

Table 24 Affordable Housing Waiting List by size of dwelling required

Size	Proportional Total
1 bedroom need	53.4%
2 bedroom need	31.5%
3 bedroom need	11.2%
4 bedroom need	3.9%
Total	**100%**

Source: East Hampshire Waiting List

5.50 The introduction of welfare reforms in April 2013 has imposed a so-called 'bedroom tax' on affordable rented housing, meaning that tenants with a spare bedroom who are 'under-occupying' a property could have their housing benefit reduced. Hampshire Home Choice's allocations policy is being updated to reflect the changes, but it means a single person or couple can only occupy a 1-bed affordable rented property. Under the new rules, children of the same sex up to the age of 16 can share a bedroom and children of different sexes up to the age of 10 can share a bedroom. The intention of the reform is that it will better match the stock of affordable housing to affordable housing needs. It will however have an impact upon trying to match new supply of affordable homes to the bedroom requirement of the types of families in need of affordable rented homes. Notwithstanding, in the wider market, this will remain more difficult.

5.51 The demographic projections from the earlier chapter provide an indicator of the scale of change in household composition. The household change under the 2011 SNPP (Scenario B) is outlined in Figure 31 of this report and is broadly

reflective of the population and household dynamic which underpins each of the scenarios.

5.52 Using this scenario as a proxy for the likely types of households forming within the District over the assessment period, Table 25 demonstrates the types of new housing that might be required to support household change. This applies a theoretical assumption that household types occupy dwellings suited to their composition and takes no account of the suitability of the existing dwelling stock in meeting current household needs or the fact that, for example, many elderly households in the private market will continue to 'under-occupy' their existing family dwellings as they get older. This analysis looks at the types of households projected to form between 2011 and 2028 and what type of dwellings would satisfy (i.e. adequately meet but without exceeding) their need for housing across the whole market.

Table 25 Household composition and dwelling size and type across whole market

Household Type	Example Likely Dwelling Size Types within the Market	2011 SNPP Scenario Net Change 2011-2028	Estimated Proportion of Growth
One Person Households and Couple Households (under 65)	Small dwellings and apartments/flats (1-2 bed)	115	1-2%
Elderly (65+) One Person Households and Couple Households	Accessible dwellings built to lifetime home standards (or other such standard), small bungalows, retirement villages, sheltered accommodation, care homes (1-2 bed).	6,325	70-75%
Family unit (couple or lone parent) with 1 dependent child	Smaller family dwelling houses or in some cases larger apartments (2-3 bed).	1,049	10-15%
Family unit (couple or lone parent) with 2+ dependent children	Family dwelling houses (3+ bed)	594	8-10%
A couple with one or more other adults	Shared dwelling houses (3+ bed depending on number of other adults)	276	3-5%
Lone Parent or couple with one or more other adults and 1 dependent child	Family/Shared dwelling houses (3+ bed depending on number of other adults)	-81	0%
Lone Parent or couple with one or more other adults and 2+ dependent children	Larger family/shared dwelling houses (4+ bed depending on number of other adults)	-52	0%
Other households (e.g. houses in multiple occupation)	Various depending on composition of household	389	5-7%

Source: NLP Analysis Using PopGroup Demographic Modelling for SNPP Interim 2011 Scenario

Note: Welfare reform and the 'bedroom tax' means that certain households will be limited to smaller properties than would be seen across the wider market (e.g. children up to age 16 sharing bedrooms) – the above dwelling sizes provide only an indication for across all need for housing.

5.53 The above analysis highlights that the vast majority of need arising from the population and household estimates would be for smaller dwelling types, with the majority of households being 1 or 2 person households. Furthermore, much of this need is arising from elderly households, whose housing requirements may range from standard dwellings, to housing options more typically associated with the elderly, such as bungalows, retirement villages, sheltered housing schemes or care homes. There is a slight increase also in larger family households, with such households likely to require family homes.

5.54 This is supported by the current dwelling requirements suggested by the housing waiting list for East Hampshire District. As illustrated in Table 24 the majority of identified affordable housing requirement is for one bed properties (53.4% of waiting list) and two bed properties (31.5% of waiting list). 3 bed and particularly 4 bed properties are required by people on the waiting list much less, with only 11.2% and 3.9 % of the waiting list respectively.

5.55 Whilst an approach of matching closely household size to dwelling size may be applicable for affordable rented tenures (e.g. through the April 2013 welfare reforms), applying these metrics more widely to the whole market is too simplistic a way of estimating future dwelling size and type requirements: the operation of the housing market will not be perfectly efficient to match household size to dwelling size. The Central Hampshire and New Forest SHMA previously looked at such factors and the analysis continues to hold true. It identified that *"data shows that over 80% of dwellings in all the study areas are under-occupied, i.e. households are occupying more space than needed based on the bedroom standard."*[10] Particularly given that elderly people often have a tendency to continue to reside in family homes once children have grown up and moved away, so called 'empty nesting', this may have implications for the size and types of dwellings that need to provided. Growth in these types of smaller households living within larger properties, particularly in areas facing affordability pressures where older people can afford to purchase and retain such houses, may place further housing need pressures upon other households who require such larger dwelling sizes.

5.56 On this basis, it is difficult to translate projections of household sizes and types into projections of the market demand for property types. Households have different expectations and aspirations in respect of their home, which means that household composition does not necessarily correlate neatly with the demand for sizes and types of housing. This is further evidenced by research undertaken by NLP on the relationship between dwelling size and household size. This research and analysis is contained within a report by NLP

[10] Central Hampshire and New Forest SHMA, DTZ, 2007 (para 6.21) based upon Census 2001 data

for the Nottingham City Region[11] (although this report was undertaken for the Nottingham City Region the findings are considered relevant on a nationwide basis). It concluded that:

1. The relationship between household size and housing is a complex one, and in the context of the overall dynamics of the housing market, the impact of policy levers is inevitably marginal – although this does not mean that it is not legitimate;

2 Aspirations and changing lifestyles mean there is a demand for larger, more flexible housing;

3 Rising number of households, low/falling new build rates, limited access to housing finance means there is suppressed demand and concealed households;

4 Average household size may be falling, but overcrowding is still a factor for many households, and this coincides with a number of other important socio-economic factors, including lower incomes;

5 So-called 'under-occupation' of existing family stock is an important feature of the market, but one where there is limited scope to intervene, even where it is considered desirable to do so;

6 New build is important component of the market, but still relatively limited compared to the existing stock in meeting overall need. Conversion and adaptation of existing stock will also be an important policy tool

5.57 The report went on to identify that:

"Evidence on housing need and mix produces empirical data on future needs which are expressed quantitatively. The temptation is often to attach a great deal of weight to these estimates of housing need (whether it relates to affordable housing or the type and mix). Ultimately, however, there needs to be caution in applying detailed modelled outputs of housing need at a local level and especially to individual developments, without factoring in other relevant considerations in a way that is structured and systematic. Recent appeal decisions have identified that factors such as dwelling mix, size and type have in a number of recent cases been identified as less important factors in cases where the overall supply will see an increase in additional housing that will be delivered to the market."

5.58 The inference of this is that in planning for future housing, Councils should not necessarily be prescriptive in terms of the mix, size and type of dwellings which they consider should be provided as part of any new development, particularly in the context of market housing. The so-called 'bedroom tax' does, however, mean that Councils will need to carefully plan and negotiate with developers the appropriate size of affordable properties to match needs.

[11] The Relationship between Household Size and Dwelling Size in New Housing Provision, NLP, 2010
http://www.nottinghamcity.gov.uk/CHttpHandler.ashx?id=17772&p=0

5.59 Taking the above into account, although it is clear that the majority of household need will be for smaller dwellings (and in particular an acute need for housing solutions for older people), it is important to provide a range of dwellings, given the challenges in matching households to dwellings.

Core Output 7: Estimate of the size of affordable housing required.

Matching households to dwelling sizes is an inexact process subject to the range of assumptions set out, and therefore only broad estimates of the likely size of housing required in the future can be made.

Notwithstanding, the analysis of household composition change and the housing waiting list identifies that the majority of affordable housing need and demand will be for smaller units of 1-2 beds. Circa 80% of need appears to be for such dwelling sizes, which is set to continue in the future, if households that fall into need mirror the profile of households seen more widely.

There is also a smaller, but still significant, need for family housing of 2-3 bed properties.

Bringing the Evidence Together

5.60 The analysis of affordable housing needs continues to illustrate that the District continues to face acute pressures for affordable housing need, in line with previous assessments, including the 2012 Housing Needs Assessment Update. It is estimates that affordable housing need based upon gross household formation would total 1,621 affordable dwellings per annum over the forthcoming 5 year period, or 1,404 over a 17 year Plan period. Estimates using net household growth are lower at 492 and 275 affordable dwellings per annum based on the respective time periods.

6.0 Housing Requirements of Specific Groups

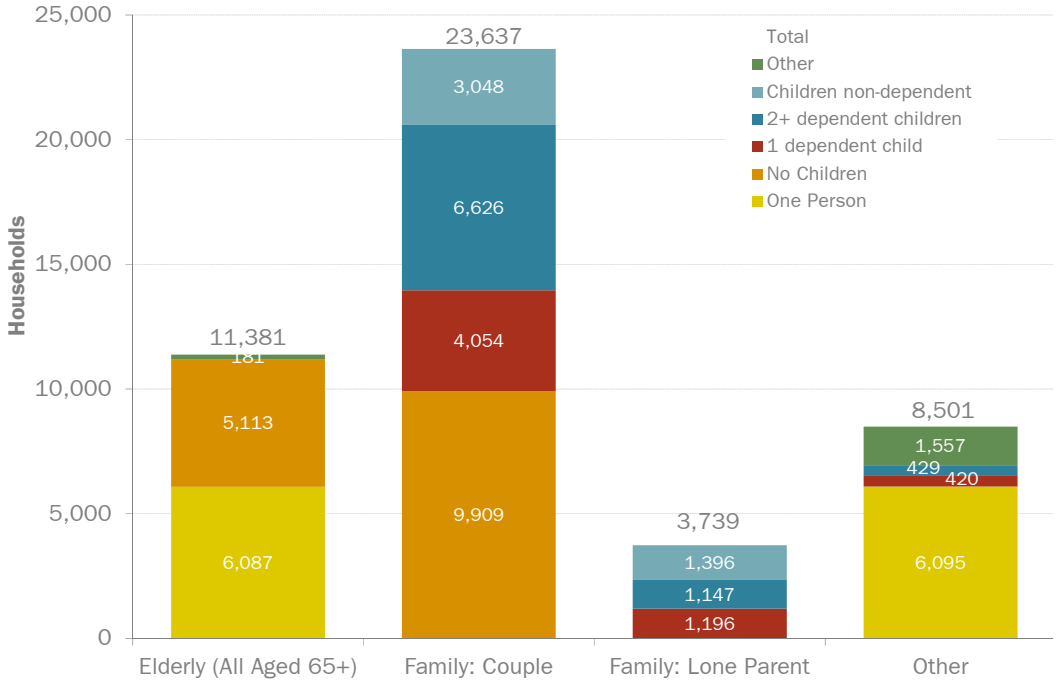
6.1 Overall housing requirements are useful for considering the scale of need; however, the composition of that need is a further important consideration. In particular different household groups have different needs and demands from their housing and therefore influence the housing market in different ways.

6.2 Using data from the Census 2011, current housing waiting list, and the demographic forecasts undertaken earlier in the report an analysis of the housing requirements of specific groups has been undertaken.

Household Types

6.3 The Census 2011 provides a breakdown of household composition as illustrated in Figure 32. This illustrates that the majority of households within East Hampshire are defined by ONS as family units, mainly couples (married, co-habiting or same-sex civil partnerships) with a smaller proportion being lone parent families. Elderly households, where all occupants are aged 65+, comprise over 20% of all households as 11,381 households.

Figure 32 Breakdown of Household Composition in East Hampshire 2011



Source: Census 2011

6.4 Families with dependent children total 13,872 (29.4% of all households) whilst families with non-dependent children total 4,444 households (9.4% of all households). Such families with non-dependent children will include young adults who still live at home with their parents and may be seeking to move out.

6.5 Core Output 7 of this SHMA provides an estimate as to the future change and growth in different household types, showing that small household types of one person/couple households (both younger and in elderly households) are set to account for the majority of future household growth.

Families

6.6 The number of families in East Hampshire (defined for the purpose of this assessment as any household which contains at least one dependent child) currently totals 13,872 accounting for 29.4% of households. The demographic projections under the 2010 SNPP Scenario suggest this is set to increase by circa 1,196 households and under the modelled 2011-based SNPP scenario these households are projected to increase by circa 1,509 between 2011 and 2028. The amount of newly forming family households is likely to be somewhere between these two estimates.

6.7 The Central Hampshire and New Forest SHMA encourages authorities to '*explore the scope for extending existing dwellings to help create dwellings for larger families'*.[12] However, it does acknowledge that not all types of households lend themselves easily to extensions. Moreover it identifies that larger dwellings that may be suitable for conversion are currently under occupied, which has been highlighted as a factor in East Hampshire. In the absence of these under occupied dwellings becoming available new build family housing will need to be accommodated.

Young People

6.8 The demographic projections suggest the number of households aged 15-24 is set to decrease against the 2010 2011 SNPP scenario by circa 135 dwellings. Under the projections of the 2011-based SNPP scenario the number of households is also set to decrease, but at a slightly lesser rate of circa 77 households.

6.9 The number of family households with non-dependent children still living at home highlights the difficulties faced by young people in accessing housing. Ineligibility for social housing, lower household incomes and the unaffordability of owner occupation for such age groups all contribute to the current trend for young people moving in with parents. The Central Hampshire and New Forest SHMA states that this is '*because they cannot afford market housing or to give them time to save'*[13]. This age cohort can also be forced into private rented shared households, often the only alternative means of meeting their housing needs, aside from residing with parents, where they would not form a head of household. Factors such as a balanced approach to housing in terms of

[12] Central Hampshire and New Forest SHMA, DTZ, 2007 (para 11.52)

[13] Central Hampshire and New Forest SHMA, DTZ, 2007 (Appendix E, p.2)

bedroom sizes and property types, along with high standards for Houses in Multiple Occupation (HMOs) will help younger households to access housing.

Elderly Households

6.10 The number of elderly households (defined as households where all members are aged 65 or more) currently totals 11,381 accounting for 24.1% of all households. The demographic projections suggest this is set to increase by circa 7,520 households under the modelled 2010 2011 SNPP scenario and 7,629 under the 2011 SNPP scenario, accounting for the vast majority of all net household growth.

6.11 The Central Hampshire and New Forest SHMA advocates encouraging elderly households to downsize where they may be under-occupying larger homes which could be used by families in need of housing, but acknowledges it is normally ineffective. This is not a change which can be brought about in the private market through local policy intervention, with many elderly households likely to choose to stay within larger properties. However, there is also growing demand for specialist housing provision for the elderly population; this may incentivise elderly households to release equity and down-size.

Housing Need by Ethnicity

6.12 Black and minority ethnic (BME) may have particular requirements in relation to housing needs, often reflecting different social norms and family structures. In East Hampshire, 96.5% of the population is self-classified as white. The remaining 3.5% of the population comprises a wide range of ethnicities, with no particular concentration in East Hampshire evident from Census 2011 data.

Table 26 Population and Housing Waiting List by Ethnicity in East Hampshire

Ethnic Group		Population (Census 2011)		Total on Housing Register*	Ratio HH on Register:Pop	% Difference
White	English/Welsh/Scottish/ N. Irish/British	107,568	93%	90.1%	0.024	-2.92%
	Irish	656	0.6%	0.5%	0.023	-0.04%
	Gypsy or Irish Traveller	267	0.2%	0.3%	0.030	0.05%
	Other White	3,144	2.7%	4.6%	0.042	1.88%
Mixed/ multiple ethnic group	White & Black Caribbean	312	0.3%	0.2%	0.016	-0.10%
	White & Black African	153	0.1%	0.2%	0.046	0.11%
	White & Asian	513	0.4%	0.0%	0.000	-0.44%
	Other Mixed	327	0.3%	0.2%	0.021	-0.04%
Asian/Asian British	Indian	481	0.4%	0.1%	0.008	-0.28%
	Pakistani	31	0.03%	0.1%	0.097	0.08%
	Bangladeshi	165	0.1%	0.1%	0.012	-0.07%
	Chinese	316	0.3%	0.2%	0.016	-0.10%
	Other Asian	866	0.7%	1.0%	0.032	0.23%
Black/ African/ Caribbean/ Black British	African	396	0.3%	1.3%	0.091	0.91%
	Caribbean	81	0.1%	0.1%	0.025	0.00%
	Other Black	40	0.03%	0.3%	0.250	0.31%
Other ethnic groups	Arab	141	0.1%	0.0%	0.000	-0.12%
	Any other ethnic group	151	0.1%	0.7%	0.126	0.53%
	Total	**115,608**		~	**0.025**	~
	Refused/Did Not Say	~	~	~	~	~

Source: Census 2011 and EHDC Housing Register

*the figures used for the Housing Waiting List are overall totals and include some double counting. Additionally it includes transfers and those not in priority bandings.

6.13 Table 26 compares the ethnic profile of the total population with the ethnic profile of the housing waiting list by:

- Identifying the ratio of households on the register to population for each ethnicity; and
- Comparing the proportional differences between the ethnic profiles of population and the housing register.

6.14 Although imprecise, this analysis seeks to identify any ethnicities which may be disproportionately represented on the housing register, and therefore may provide an indication of particular problems accessing housing. In this respect there are seven main ethnicities that have a significantly higher presence on the housing waiting list than the population in East Hampshire would suggest. In descending order these are other white ethnicities (e.g. European white), African, other black, other Asian, black and white African, Pakistani and Gypsy or Irish Traveller.

6.15 This may provide some indication of particular affordability or housing market pressures facing these groups. Table 27 summarises the size of dwelling required by those on the housing waiting list by ethnicity. There is no obvious instance whereby a certain ethnic group requires a certain size of housing, although the size of unit in greatest demand is one bed properties. There are large proportions of some groups requiring larger three and four bedroom family homes including Indian, Pakistani, Bangladeshi and Caribbean households. However these figures m explained by the very low overall quantity of people from each of these individual groups on the Housing Waiting List which skews the proportions.

Table 27 Size of housing requirement by ethnicity on the East Hampshire Housing Waiting List

Ethnic Group		Size of dwelling required by proportion %				
		1 Bed	2 Bed	3 Bed	4 Bed	5 Bed
White	English/Welsh/Scottish/ N. Irish/British	52.6%	25.0%	14.1%	8.2%	0.1%
	Irish	53.3%	26.7%	20.0%	0.0%	0.0%
	Gypsy or Irish Traveller	37.5%	25.0%	12.5%	25.0%	0.0%
	Other White	38.6%	37.9%	22.0%	1.5%	0.0%
Mixed/ multiple ethnic group	White & Black Caribbean	40.0%	40.0%	20.0%	0.0%	0.0%
	White & Black African	71.4%	0.0%	28.6%	0.0%	0.0%
	White & Asian	~	~	~	~	~
	Other Mixed	71.4%	28.6%	0.0%	0.0%	0.0%
Asian/Asian British	Indian	25.0%	25.0%	50.0%	0.0%	0.0%
	Pakistani	0.0%	33.3%	66.7%	0.0%	0.0%
	Bangladeshi	0.0%	50.0%	0.0%	50.0%	0.0%
	Chinese	60.0%	20.0%	0.0%	20.0%	0.0%
	Other Asian	21.4%	35.7%	39.3%	3.6%	0.0%
Black/ African/Caribbean/ Black British	African	30.6%	25.0%	36.1%	8.3%	0.0%
	Caribbean	50.0%	0.0%	0.0%	50.0%	0.0%
	Other Black	50.0%	30.0%	10.0%	10.0%	0.0%
Other ethnic groups	Arab	~	~	~	~	~
	Any other ethnic group	36.8%	26.3%	36.8%	0.0%	0.0%

Source: EHDC

Disability

6.16 The Census 2011 identifies that 6.4% of East Hampshire's population identified that they had a long term health problem or disability which limited day-to-day activities a lot, whilst a further 8.5% identified that they had a long term health problem or disability which limited day-to-day activities a little. There are 309 people on the East Hampshire Housing Waiting List with a

disability, when this is compared to the Census 2011 total of 12,243 people with disabilities that inhibit their day-to-day activities a lot and a little, only 1.8% of these people are on the Housing Waiting List.

6.17 Breaking the East Hampshire Housing Waiting List down by those with and without a disability, Table 28 shows the size of dwelling they require. Overall circa 10.7% of applicants registered on the Housing Waiting List have a disability.

Table 28 Proportion of those with a disability on the East Hampshire Housing Waiting List

	Size of dwelling required				
	1 Bed	2 Bed	3 Bed	4 Bed	5 Bed
Disability	**14.3%**	**8.6%**	**4.3%**	**5.8%**	**33.3%**
No Disability	50.5%	62.0%	68.1%	67.9%	66.7%
Not stated	35.3%	29.3%	27.6%	26.3%	0.0%
Total	100%	100%	100%	100%	100%

Source: EHDC

Bringing the Evidence Together

6.18 There are a range of specific housing requirements which are specific to certain groups in East Hampshire. In particular, East Hampshire faces growth in the number of elderly households and this will commensurately increase the need for both housing to accommodate such households, as well as potentially residential care solutions. Housing needs by ethnicity suggests that certain groups face disproportionate barriers to home ownership and occupation with African and white Europeans particularly facing barriers to housing. Disabled applicants account for a small proportion of the housing waiting list, with the implication that affordable stock, and more widely market stock, will need to be designed with standards to accommodate such groups in mind.

Core Output 8: Estimate of household groups who have particular housing requirements.

Growth in elderly households (more than 90% of net household growth), lone parent households and family households with three or more children will need particular consideration in the types of new housing brought forward.

Whilst the majority of the population (93%), and commensurately the majority of the housing waiting list (95.5%), is white, there are smaller ethnic groups which appear to face disproportionate barriers to housing market entry, in particular white European and African ethnic groups.

10.7% of applicants on the housing waiting list are disabled.

7.0 An Objective Assessment of Housing Need

7.1 The NPPF identifies that Local Authorities should use their evidence base to define the full, objectively assessed, needs for both business and housing in their area, and then seek to ensure that their Local Plan meets these needs.

7.2 This Strategic Housing Market Assessment Update and Development Needs Assessment provides the necessary evidence for considering the scale of objectively assessed development needs.

Housing Needs

7.3 An objective assessment of housing need must take account of all need that exists in a locality and there are two elements for quantifying this objective assessment of need. Firstly, any backlog of housing need should be accounted for and secondly, the future housing needs of the District will need to be quantified.

Addressing any backlog

7.4 In a letter to the Council from the Planning Inspector dated 25th April 2013 the Inspector confirmed that it is expected that the SHMA will take past unmet need into account. In respect of how this is practically achieved, the Planning Advisory Service (PAS) Guidance note on objectively assessed needs (July 2013)[14] discusses dealing with the issue of backlog or shortfall. It provides two views surrounding unmet need:

a that household projections, if they are based on the most up to date data, take into account unmet need and as such does not need adding into a future housing target based on these projections;

b that both demand and supply side constraints on housing development in recent years has forced people into sub-optimal housing arrangements which have manifested themselves in the household projections, with the PAS guidance stating this view is taken:

"…because there has been a lack of suitable accommodation, households have not formed which means that the trends on which the projections are based do not reflect the real need. This creates a 'pent-up demand' for housing, which should be measured or estimated, and added on to household projections."

7.5 Any calculation of affordable housing needs will inherently include allowance for backlog in affordable housing needs, with full account taken of the previous

[14] PAS (July 2013) Ten key principles for owning your housing number – finding your objectively assessed needs

unmet needs as reflected by the housing waiting list. In respect of the demographic led projections of future need, there is no definitive approach to dealing with the issue of backlog. The use of up-to-date data, and assumptions around how future household formation will change (e.g. NLP's approach which does not seek to simply trend forward any recently supressed household formation as outlined in Section 3 of this SHMA) means that to some extent a) above has validity. However, the demographic led projections are trend based so make no explicit attempt to deal with unmet need in the period on which the trend is based.

7.6 One way to overcome the difficulties of dealing with backlog needs is to compare past completions against the relevant housing requirement for that period; assuming that this housing requirement was a reasonable and fully tested basis for that period in order to meet development requirements. This provides an indicator of the extent to which there may have been previous unmet needs.

7.7 The following table states the housing target for East Hampshire, including Whitehill Borden, as set out in the South East Plan 2006 to 2026 and compares that to actual completions in the District between 2006/07 and 2010/11. The level of housing undersupply totals 731 units. Averaging this backlog across the plan period 2011 to 2028 would mean there is a requirement for an additional 43 dwellings per annum on top of the outcomes of the demographic-led modelled scenarios in the Future Housing Market section in order to account for the backlog of unmet needs.

Table 29 Backlog of unmet housing need in East Hampshire since the introduction of the South East Plan

	Year					
	2006/07	2007/08	2008/09	2009/10	2010/11	**Total**
South East Plan 2006-2026 Target for East Hampshire (10,700)	535	535	535	535	535	**2,675**
Completions	280	546	580	266	272	**1,944**
Residual	-255	+11	+45	-269	-263	**-731**

Source: EHDC Annual Monitoring Report (2011)

7.8 It should be noted that Whitehill Bordon was included as a separate requirement and against the 260 dwellings per annum requirement for East Hampshire excluding the Whitehill Bordon net completions between 2006 and 2011 which averaged 389 dwellings per annum exceeded the relevant target. Notwithstanding, Whitehill Bordon was still a component of supply that would have contributed towards meeting housing needs in the District, as will now be the case.

Future Housing Needs

7.9 The backlog of housing need identified above (43 dwellings per annum) has been included in the total dwelling requirement per annum of each demographically modelled scenario as seen in the Future Housing Market section of this report. It is assumed that this backlog element is to meet needs that have been suppressed within the existing demographic characteristics of the district, and therefore would only meet change within the existing population such as allowing concealed households to emerge. An additional allowance for backlog of need has not been added to the economic or affordable housing scenarios. This is because both the economic scenarios are modelled to a constrained job number and housing need is measured against this figure, so adding on a backlog requirement would be unnecessary when the outcome of the scenario is solely linked to labour force jobs. Equally the housing-led Scenario H has already accounted for the backlog of affordable housing need as a result of its calculation, as indicated by the affordable housing waiting list set out in Section 4 of this SHMA.

7.10 The overall quantum of objectively assessed need for housing including backlog, for the period 2011 to 2028, varies dependent on the demographic and economic scenarios adopted. As summarised in Figure 33, the need and demand including backlog varies from 211 dwellings per annum under a zero net migration scenario, up to 735 per annum under the baseline Experian scenario for more optimistic economic growth in the District.

Figure 33 Summary of Housing Need and Demand Scenarios

Source: NLP Analysis

Table 30 Housing Need and Demand Scenario Outcomes

Scenario:	Demographic Led					Economic Led		Housing Led
	A. 2010 SNPP	B. 2011 SNPP	C. Zero Net Migration	D. Long Term Migration Trend	E. Short Term Migration Trend	F. Baseline Experian Projection	G. Lower Experian Projection	H. Delivering Affordable Housing Needs
Pop. Change	+11,706	+15,416	-1,739	+8,464	+14,898	+25,853	+10,065	
of which Natural Change	-179	+1,200	-1,739	+32	+1,366	+1,804	-231	
of which Net Migration	+11,885	+14,216	-0	+8,432	+13,532	+24,049	+10,296	
Household Change	+7,813	+8,614	+2,759	+6,120	+8,145	+12,051	+6,603	
Dwelling Change	+8,105	+8,935	+2,862	+6,348	+8,450	+12,501	+6,849	
Dwellings p.a.	+477	+526	+168	+373	+497	+735	+403	*+548, +610, +688**
Dwellings p.a. inc. backlog allowance	+520	+569	+211	+416	+540	N/A	N/A	N/A
Labour Force	+277	+1,945	-6,475	-1,360	+1,969	+6,918	-483	
Jobs	+1,256	+2,675	-4,488	-136	+2,696	+6,905	+610	
Jobs p.a.	+74	+157	-264	-8	+159	+406	+36	

Source: NLP Demographic Modelling - *based upon a 25%, 27.5% and 30% threshold of income spent on private rent for newly forming households

7.11 The main demographic scenarios (A, B, D and E) provide an objective assessment of demographic led needs, demonstrating that to meet projected demographic change (including migration), and to make up for any backlog of needs, would require the delivery of between 416 and 569 dwellings per annum. The CLG 2011-based household projections are the most up to date central government household forecasts at the time of writing and estimate future household growth totalling 464 households per annum over the period 2011 to 2021. This falls within the middle of the range of the demographic-led scenarios tested, albeit this may not be reflective of future demographic change, with scenarios based upon more recent migrations trends (e.g. the 2011-based interim SNPP and the 5-year migration trends) demonstrating that pressures from migration have recently been upward. The 10 year migration scenario has an annual dwelling requirement of 416 per annum and this could represent an absolute minimum estimate of likely demographic-led housing needs including an element of delivery to deal with backlog. However, reflecting recent migration trends it is considered more reasonable that the 520

dwellings per annum represented by the 2010 SNPP is viewed as a robust lower 'book-end' estimate of need.

7.12 Two potential economic growth targets were considered. These scenarios (F and G) show that to meet business needs, to maintain a balanced supply of housing and employment growth and to ensure there is sufficient labour supply within the District to support economic growth, there is a requirement for between 403 and 735 dwellings per annum. 403 dwellings per annum would support the lower economic potential of the District as set out by 2011 Experian economic forecasts. However a positive and pro-active strategy around delivering higher economic growth for East Hampshire could require 735 dwellings per annum which are derived from the more up to date, and more optimistic, Experian February 2013 forecast.

7.13 By comparison to the above scenarios, the affordable housing need assessment contained within Section 5.0 adopts a different methodology and approach to estimating housing needs based in part on housing affordability factors and the need for affordable housing. It highlights affordable housing needs based upon net household formation and meeting the backlog of needs presented by the current housing register over the whole plan period. Depending upon the affordability threshold for private market rents adopted (i.e. 30%, 27.5% or 25% of gross household income spent on rent) affordable housing needs would total of between 219 and 275 dwellings per annum. Market housing would be required to be delivered on top of this in order to meet overall needs and leverage affordable housing delivery against. The intention of the emerging Joint Core Strategy is that 40% of all new housing is delivered as affordable tenures, with this further supported by economic viability evidence within the Viability Study (June 2010). At this level of provision, a total of between 548 and 688 dwellings per annum would need to be delivered in order to support the delivery of sufficient affordable housing to meet affordable housing needs. At a mid-point threshold of 27.5% of gross household income spent on rent, which is a reasonable outcome for which to plan given evidence on current patterns suggesting households stretch themselves as far as 35-40% of income, full housing needs would total 610 dwellings per annum. This is considered an appropriate upper 'book-end' estimate of need.

7.14 Due to the various factors and assumptions which feed into the assessment of future needs, there is not a single figure which can be definitively identified as East Hampshire's objectively assessed development needs. This is noted in the CLG SHMA Guidance which identifies that estimates of need may be expressed either as a single number or as a range. On the above basis it is considered **an objective assessment of housing need and demand for East Hampshire District including backlog falls within the range 520 to 610 dwellings per annum** equivalent to 8,840 to 10,370 additional dwellings over the plan period 2011 to 2028. This range encompasses all demographic-led needs for development and at the lower end of the range would at minimum deliver sufficient labour force to support the employment growth set out by a lower economic growth forecast from Experian.

7.15 These housing needs are set out for the period 2011 to 2028 to match the horizon of the East Hampshire Local Plan, and further reflect the base date of 2011 for the demographic modelling. The assessment of needs has not been explicitly backdated, however, allowance is made for past unmet needs through an allowance for backlog against previous housing targets within demographic Scenarios A to E and Scenario H includes an assessment and allowance for the backlog of affordable housing needs. This SHMA provides a forward looking objective assessment of future housing needs using a base date of 2011 up to 2028.

Implications of Different Scales of Housing Provision

7.16 Although not a determinant of an 'objective assessment of need' it is useful to consider the implications of different scales of housing provision in order to provide some context to the needs identified. To give some shape to the implications for the District of different scales of housing provision and the choices available to EHDC within the range of scenarios, the housing requirements (including backlog allowance of 43 d.p.a.) have been grouped into four bands:

1 **Lower end: <420 dwellings p.a.** representing scenarios:
- C: Demographic Zero net migration (211 d.p.a.)
- D: Demographic 10 year migration trend (416 d.p.a.)
- G: Economic Lower Experian estimate (403 d.p.a.)

2 **Mid-Range Lower: c.520 dwellings p.a.** representing scenarios:
- A: Demographic 2010 SNPP (520 d.p.a.)

3 **Mid-Range Middle: c.540-610 dwellings p.a.** representing scenarios:
- E: Demographic 5 year migration trend (540 d.p.a.)
- B: Demographic Baseline 2011 SNPP (569 d.p.a.)
- H: Delivering Affordable Housing Needs (548 and 610 d.p.a.)

4 **Mid-Range Upper: c.690 dwellings p.a.** representing scenario:
- H: Delivering Affordable Housing Needs (688 d.p.a.)

5 **Upper End: c.740 dwellings p.a.** representing scenario:
- F: Economic Baseline Experian estimate (735 d.p.a.)

7.17 The implications focus on three main areas of narrative; the environmental, the economic and the social/housing implications of each scale of housing growth. Using the outputs from the demographic and housing needs modelling the analysis provides a brief review of the relative merits and drawbacks associated with each scale of growth.

Lower End: <420 dwellings per annum

7.18 This is a scale of development which would represent a reduction on the previous housing targets identified in the District. As such it would have some of the best environmental outcomes in terms of land-take needed to support

the growth, with the reduced target limiting any need for further greenfield site release.

7.19 However, weighed against this are a series of economic and social implications. The scale of the ageing population structure in East Hampshire will significantly reduce the number of local people in the workforce and could lead to loss of jobs in the District which could significantly harm the local economy. The demographic modelling suggests this reduction in labour force would mean that between 8 and 264 jobs per annum in East Hampshire would no longer be supported by an economically active resident to fulfil them, the implication being these would either be lost to the local economy (as employers either move their business, or the jobs cease to exist as businesses close such as self-employed people retiring) or to fill the labour gap, there is increased in-commuting creating potential environmental and infrastructure implications.

7.20 Socially, this scale of development would not appear to meet the emerging need for new homes, as defined by the range of higher scenarios. The local social impacts of this are that it could cause displacement effects, with in-migrants with higher purchasing power pricing out local households, leading to local residents being forced to move elsewhere to fulfil their housing needs. Under such a scenario East Hampshire District would not be providing sufficient housing to meet housing needs and would need to demonstrate in accordance with the NPPF that the adverse impacts of meeting need would significantly outweigh the benefits.

Mid-Range Lower: c.520 dwellings per annum

7.21 This is a scale of housing provision which would meet historic demographic scenarios and also provide for some, albeit lower, economic growth in the District. It is similarly a level below the previous South East Plan target for the District, and would therefore have some environmental benefits in terms of having less greenfield land requirements against the previous position within the SEP.

7.22 The implications of this level of growth would be that, against the backdrop of an ageing population, it would support some growth in jobs. However, this would be muted at only 74 jobs per annum assuming current commuting rates. This may not necessarily reflect the current economic potential of the District, with future economic growth in East Hampshire forecast by Experian to be higher, if East Hampshire's economic sectors perform in line with strategic expectations.

7.23 Such a level of development will meet at least a minimum level of housing need and demand in District and would outstrip requirements associated with the 2011-based CLG household projections by way of a benchmark. However, a key housing implication is that such a level would not deliver sufficient housing to meet affordable housing needs identified and would not substantially improve the affordability of housing in the District.

Mid-Range Middle: 540-610 dwellings per annum

7.24 This is a scale of housing provision which would meet the higher level demographic scenarios, whilst also providing a basis for supporting some economic growth in the District. The implication of this level of growth is that it would support some growth in jobs, estimated at c.160 jobs per annum. This level of employment growth is above that identified in the EHDC Assessment of Employment Needs and Floorspace Requirements (2008) but would not necessarily reflect the current economic potential of the District as identified by NLP's East Hampshire Employment Land Review (2013) and the newer economic forecasts.

7.25 This level of delivery would, however, meet a good level of housing need and demand in the District, exceeding Government's household projections and, at the upper end of this range, exceeding all estimates of structural demographic-led housing needs. Such a scale of housing delivery would appear a reasonable level that would meet housing need as based on latest projections. However, there remain risks that such a strategy may not deliver sufficient affordable housing to meet the full needs associated with affordability pressures in the District based upon the assumptions around income thresholds set out in this SHMA. Notwithstanding, such a level of housing delivery, particularly at the upper end of the range, could meet affordable housing needs if households were assumed to increase the proportion of their income they spend on housing beyond the 25% threshold set out in the CLG guidance (e.g. stretch their budgets). There is some evidence to suggest that this is already occurring at a national level (see para 5.45) and that a higher threshold may be a reasonable assumption to adopt, meaning more needs could be met in the private rented sector, reducing overall affordable housing needs. A level at the upper end of this range would also achieve a significant boost in the supply of new housing, both market and affordable.

7.26 This broad range is largely consistent with the previous SEP housing provision for the District, which totalled 535 dwellings per annum including provision at Whitehill/Bordon for 5,500 homes, as opposed to the 4,000 homes subsequently assessed under the Habitat Regulations as being appropriate to the environmental capacity of this sensitive area. The environmental implications would therefore appear to be largely in-line with those tested through the SEP, although at the upper end of the range a greater amount of suitable land, likely to be greenfield, would need to be identified.

Mid-Range Upper: c.690 dwellings per annum

7.27 This is a scale of housing provision which would meet and exceed all demographic led needs of East Hampshire District associated with projected migration and would be able to deliver sufficient affordable housing to broadly meet affordable housing needs, both projected in the future as well as to address the backlog of needs identified as part of the current housing waiting list. This level of development would therefore have significant positive

outcomes for meeting housing needs and delivering social and housing objectives.

7.28 The key implications of this level of delivery are that it would support a reasonable level of economic growth, likely to be part way between the estimates of future economic potential contained within the Experian economic forecasts that underpinned the 2008 EHDC Assessment of Employment Needs and Floorspace Requirements and the 2013 East Hampshire Employment Land Review. This level of development would also substantially boost the supply of new housing, which would help to tackle affordability.

7.29 The environmental implications of this scenario would be greater with more pressure on the District to absorb greater levels of development. It would require an increased rate of development over past trends and allocation of more greenfield sites for housing development.

Upper End: c.740 dwellings per annum

7.30 This scale of development would represent a high level of growth which would meet all future needs based upon in-migration as well as also affordable housing needs. Crucially, this level of housing development would support the delivery of the full economic growth potential of East Hampshire. The large growth in labour force would support delivery of over 400 jobs per annum.

7.31 As a level of housing delivery above the demographic-led housing need, such a scale of delivery would incentivise further in-migration. However, this would both support economic growth as well as help tackle affordability by increasing supply.

7.32 Clearly, there would be environmental and infrastructure implications of delivering this quantum of development, and EHDC would need to test the extent to which such a high level of development could be suitably accommodated within the District. There may also be questions over whether this scale of development is achievable and deliverable. 740 dwellings per annum would significantly exceed all previous housing completion rates which have averaged 367 net dwellings per annum over the previous decade. Further evidence would therefore be necessary to quantify the implications and deliverability of such a level of growth.

Sub-District Split

7.33 East Hampshire has previously been subject to a split housing requirement, with the Partnership for Urban South Hampshire (PUSH) sub-region including the southern part of East Hampshire District, particularly Horndean. In 2009 the South Downs was confirmed as a National Park (NP) and on the 1st of April 2011 the new South Downs National Park Authority (SDNPA), which includes a significant proportion of East Hampshire District, assumed the role of the local planning authority for the area within the National Park. This is illustrated earlier in the report in Figure 3.

7.34 A key component of identifying the housing requirement for East Hampshire is to consider what might be the sub-district split between the three constituent sub-areas. Whilst the modelling and potential housing needs has been considered at a district-wide scale, the National Park will ultimately, set its own housing requirement.

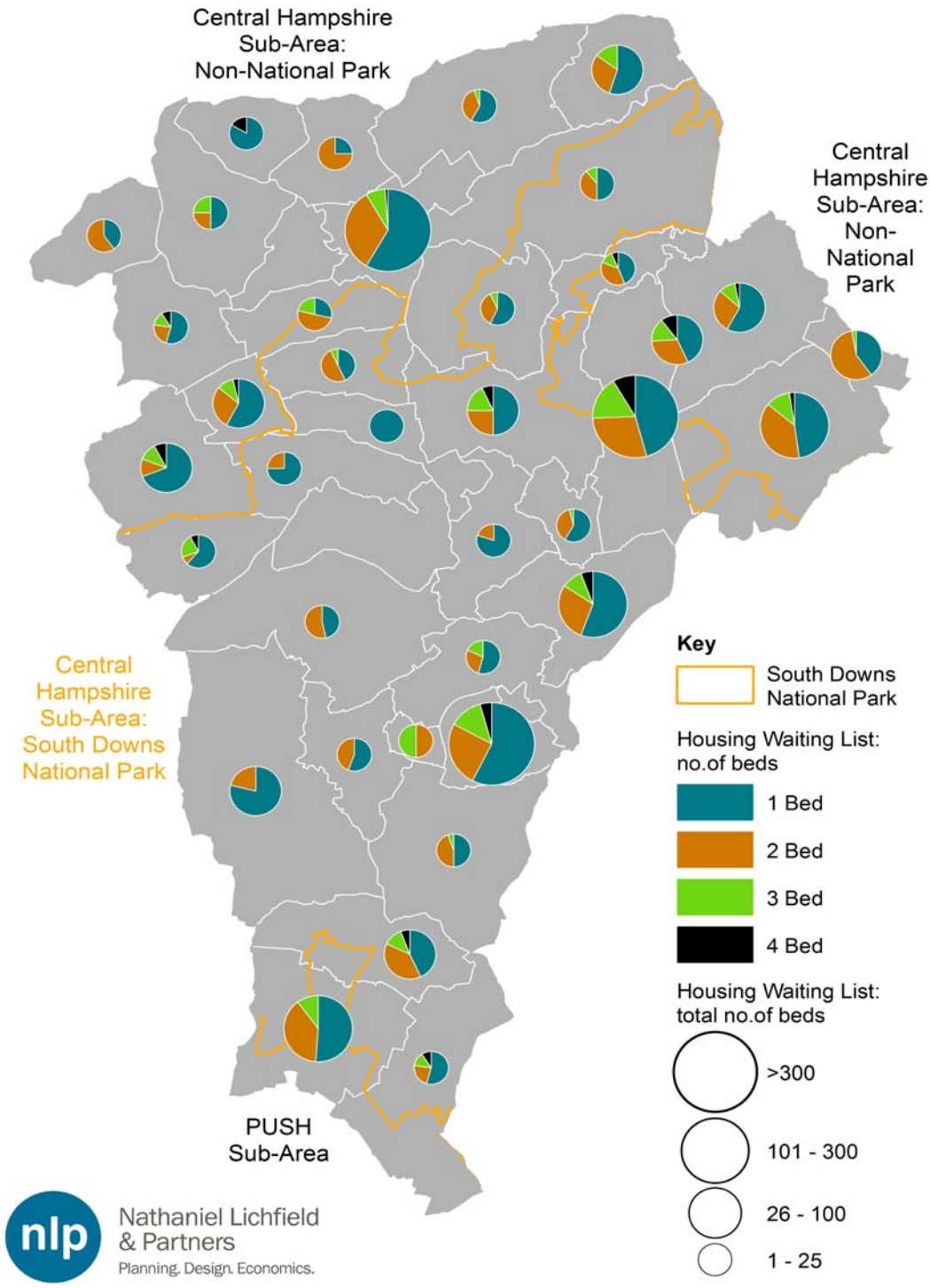
7.35 Notwithstanding this, it is useful to consider some of the metrics that will influence need at a sub-district level in East Hampshire, albeit no sub-district modelling has been undertaken, both due to limitations on the availability of data at a local level and also due to the range of other factors which will ultimately guide any apportionment.

7.36 As outlined in Figure 13 close to a third (29.9%) of the District's population lives within the National Park, whilst over half (53.3%) of the District's population live in the Central Hampshire sub-area outside of the National Park and the remainder (16.8%) living within the PUSH sub-area. Thus, based on this pattern of population distribution, the majority of housing need will also fall outside of the National Park and within the Central sub-area. Despite this, factors such as personal preference and affordability may mean demand for new dwellings is higher in some parts of the District, which may not necessarily follow existing population distributions.

7.37 A good proxy for this locational demand is the local housing waiting list for East Hampshire, which can be broken down by 'local connection'. This is where applicants have expressed an interest to live in East Hampshire and can demonstrate a local connection with a Parish, with a preference to live there. This is mapped by Parish and size of dwelling required in Figure 34 which shows where preference/demand for affordable housing is located within the District.

7.38 Overall the housing waiting list shows that 9.5% can demonstrate a local connection to the East Hampshire PUSH sub-area, 31.6% can demonstrate a local connection to the Central sub-area within the National Park and 58.9% can demonstrate a local connection to the Central sub-area outside of the National Park.

Figure 34 Hampshire Home Choice – Housing Waiting List by Local Connection and Size Requirement



Source: EHDC

7.39 With regards to housing needs and the delivery of housing development within the South Downs National Park (SDNP), any strategy for growth will need to respond to the special nature of the SDNP. Section 62 of the Environment Act 1995 places a duty of National Parks and other relevant authorities to have regard to the Nation Park purposes in undertaking their statutory duties. The two main purposes (Section 61) are:

1 To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park; and

2 To promote opportunities for the understanding and enjoyment of the special qualities of the National Park by the public.

7.40 In addition the National Park Authority has a duty to foster the social and economic well-being of communities within the National Park.

7.41 Although paragraphs 115 and 116 of the NPPF state that the landscape and scenic beauty of the National Park should be conserved, there is also a requirement to meet needs. As such it could be considered reasonable that the National Park fulfils only its own housing needs, delivering sufficient housing to meet the requirement for affordable housing provision within the National Park, and other parts of the District which are not constrained pick up any further unmet needs.

7.42 This is further re-iterated in 'English National Parks and the Broads: UK Government Vision and Circular' (March 2010) which identified (para 78) that:

"… The Government recognises that the Parks are not suitable locations for unrestricted housing and does not therefore provide general housing targets for them. The expectation is that new housing will be focussed on meeting affordable housing requirements, supporting local employment opportunities and key services."

7.43 Table 31 illustrates the range of potential sub-district apportionment to meet implied housing requirements within the various sub-areas of the District. These are presented as proportion splits, which can be applied to the total level of housing District-wide which East Hampshire may wish to plan for.

Table 31 Potential Sub-District Apportionment of Housing Need

Factor	Description	Implied Split
Existing Population Split	The distribution of population is indicative of where demand for new housing is most likely to arise. Based upon census output area estimates from Census 2011 data, 61,574 of the District's residents live in the Central area outside of the National Park, 34,604 live in the Central area within the National Park, whilst 19,430 live within the PUSH sub-area.	30% Central:NP 53% Central:Non-NP 17% PUSH
National Park Demographic Led Need for housing	If the NP area were notionally to only provide for its current level of population without accommodating projected in-migrants (i.e. a zero net migration scenario for the NP area) it would need to provide for its share (30%) of Scenario C, equivalent to 64 dwellings per annum. Comparing this to Scenario A, where it could be assumed that all in-migrants would move into new dwellings outside of the National Park (i.e. 64 of the 520 dwellings per annum would be built in the NP, the remainder outside), provides an estimate that only 12% of the total dwellings would need to be provided in National Park to meet the largely indigenous requirements for housing of the National Park. The apportionment between the Central Non:National Park sub-area and the PUSH sub-area, if following existing population patterns, would be 24% of the remainder in the PUSH sub-area, equivalent to 109 dwellings p.a. or 21% of the total, and 76% of the remainder in the Central Non:NP sub-area, equivalent to 347 dwellings p.a. or 67% of the total.	12% Central:NP 67% Central:Non-NP 21% PUSH
Housing Waiting Lists	The distribution of the housing waiting list by Parish is indicative of where there is identified need for new development, particularly affordable dwellings. 9.5% can demonstrate a local connection to the PUSH sub-area, 31.6% can demonstrate a local connection to the Central National Park sub-area and 58.9% can demonstrate a local connection to the Central Non-National Park sub-area.[15]	32% Central:NP 59% Central:Non-NP 9% PUSH

Source: NLP analysis

7.44 As the majority of projected population change is likely to be associated with in-migration, with only a small proportion of additional housing requirements associated with the natural change and population churn factors (as illustrated by the zero net migration scenario), there is the opportunity to utilise other factors to guide any apportionment.

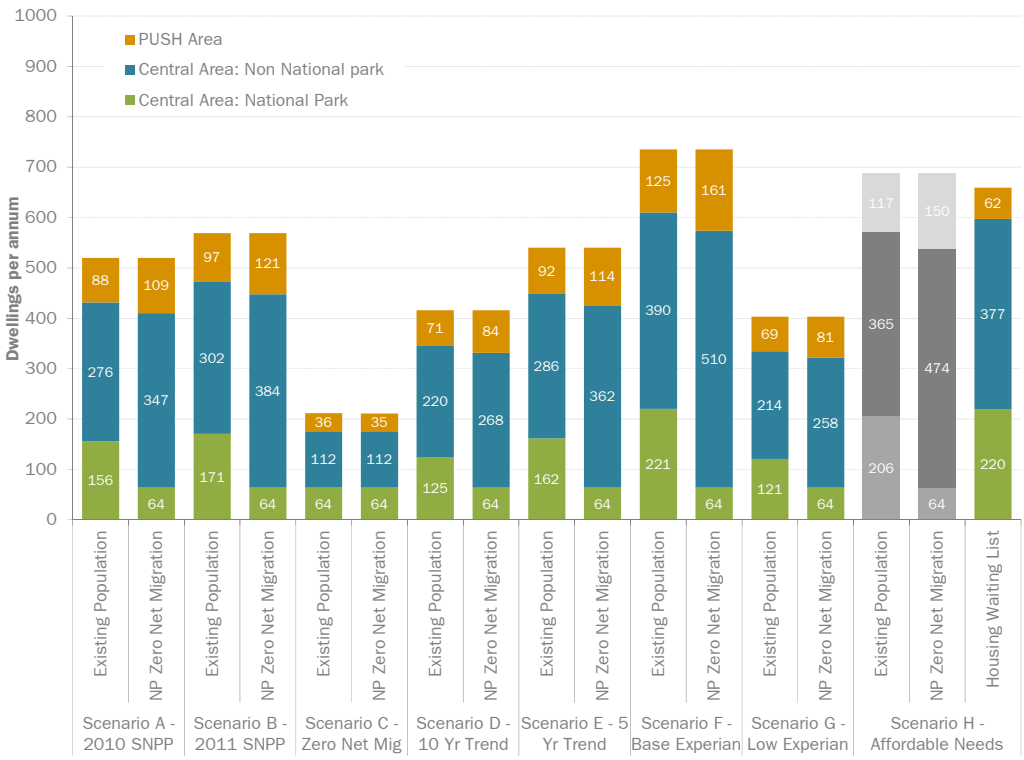
[15] This is an illustrative split but obviously only relates to affordable housing need rather than for market housing, so is only used in Figure 33 for Scenario H.

7.45 The above analysis, does suggest that the proportion of housing requirement for the National Park area should be between 12% and 32% of any total housing requirement. However, with Petersfield included within the National Park it is clear that there needs to be an appreciation of the role that housing can play in both meeting local needs and demand for housing, as well as the role housing can play in supporting opportunities for developing the town and in achieving economic and other policy objectives, including the delivery of affordable housing. This will clearly link to the development of a spatial strategy for Petersfield, which will define the aspirations and scope for Petersfield to accommodate growth.

7.46 As set out above, under an existing population distribution scenario, 30% of growth would be attributable to the National Park. However, if a zero net migration scenario is assumed for the National Park this would total just 64 dwellings per annum. This zero net migration scenario is indicated as an absolute minimum level of need for the area proving a basis to test the impact of other sub-areas having to meet the National Parks unmet needs.

7.47 If these are applied to the Scenarios (A-H) it would lead to the housing requirements in each of the sub-areas as illustrated in Figure 35. Notwithstanding, the National Parks Circular (March 2010) sets out that National Parks should meet needs for affordable housing, and therefore under Scenario H a split based upon the housing waiting list is indicative of affordable housing needs in the National Park area of East Hampshire District.

Figure 35 Sub-District housing requirement (per annum) by different split basis



Source: NLP

7.48 Whilst demand side factors are one element of consideration, supply side factors, and the ability to deliver housing is another. In this regard, and at a relatively local scale, spatial demand will follow supply to a certain extent. For example, whilst need and demand may originate in a specific sub-area, it may be entirely feasible to meet this requirement in a different spatial area. The Whitehill/Bordon strategic development area is within the Central sub-area outside of the National Park, but is suitably located in local housing market terms that it could meet some of the need and demand arising from the National Park area. It will also meet needs in that part of the district associated with the migratory pressures implicit within the modelling, potentially including net in-migration to East Hampshire from the rest of the identified Guildford/Woking housing market area.

7.49 For the reasons discussed above, any apportionment of housing requirement between the Central area within the National Park, the Central area outside of the National Park and the PUSH area will need to take account of a wide range of further factors, including:

a How far it is possible to ensure housing delivery actually goes towards meeting local needs, rather than incentivising further in-migration and pricing-out local households causing displacement and unintended housing outcomes (as may happen in areas of high demand and constrained supply, such as National Parks);

b Cooperation with contiguous authorities, particularly those in inter-related housing market areas, where levels of planned for development elsewhere may have need and demand implications for East Hampshire District. This includes the SDNP Authority and the other parts of National Park outside of the District;

c Past completions in the three sub-areas, illustrating the demand for house building activity within the areas and the past spatial distribution of development;

d The need for the National Park Authority to consider housing need across the whole Park area;

e The vision and strategy adopted for East Hampshire District, including the role that housing delivery can play in delivering spatial strategies, such as in Petersfield, supporting local economies and meeting wider needs, including the District's strategic development area at Whitehill/Bordon; and

f Development constraints and capacity such as land supply, environmental factors and infrastructure capacity.

7.50 Overall it is recommended that the factors above have more weight in the decision making process for any sub-district split of housing requirement, particularly given indigenous needs are minimal and housing delivery can support many of the aims and objectives for a future planning strategy in the District.

Cross Boundary Housing Dynamics

7.51 The NPPF states that housing needs should be met across housing market areas. It also sets out that where needs go unmet in one Local Authority area they should be met elsewhere in the housing market area (e.g. in a neighbouring local authority). There is a practical expectation that this should be substantiated through the duty-to-cooperate, albeit this must be undertaken in advance of submission of a Local Plan, with the duty-to-cooperate not able to be undertaken retrospectively (sections 20 (7B) and 33A of the Planning and Compensation Act 2004 refer, and the position is summarised in the recent Inspector's ruling in respect of the Selby Local plan).

7.52 Analysis of East Hampshire's role within numerous housing market areas is reviewed in Section 2.0, establishing that East Hampshire has a strong relationship with all of its immediate neighbours, albeit this is split between three identified market areas; Guildford/Woking, Hampshire North – M3; and Hampshire South. Ultimately however, as discussed in Section 2, when using the 70% containment figure as identified in the CLG advice note on HMAs, an HMA based on East Hampshire district boundaries is a reasonable and proportionate basis for SHMA evidence on objectively assessed need.

7.53 Despite East Hampshire forming its own District wide HMA, in order to understand the position of East Hampshire's housing needs within the context of its neighbouring authorities, an audit of the current position of their respective SHMAs and evidence on objectively assessed housing needs has been undertaken. This review seeks to factually capture the evidence available, the approach to arriving at a housing target being progressed by each authority and the degree of complementarity with the evidence presented as part of this SHMA. As part of this, NLP has consulted with Officers at each Local Authority to establish the position.

7.54 Crucially this SHMA contains a range of demographic scenarios which assume particular levels of net migration with other areas, drawing primarily on past trends and central government projections within the ONS sub national population projections. Where those areas which have key migratory relationships with East Hampshire adopt significantly different assumptions, it will be necessary to consider the impacts of doing so upon an assessment of future housing needs, and the extent to which any approach within any Local Authority meets the requirements of the NPPF.

7.55 Against this backdrop, the purpose of this review is to give EHDC a platform for considering the housing needs of East Hampshire in the context of its neighbours and consider the extent to which the various approaches adopted could indicate areas where unmet housing needs will arise (potentially creating pressures on East Hampshire) or where unmet needs from East Hampshire might be able to be accommodated. Notwithstanding, the extent to which this can be applied, will depend upon the current progress on preparation of the Development Plan. This review is set out in Table 32.

Table 32 Position of Neighbouring Authorities on SHMA and Housing Strategy

Local Authority	CLG 2011 HH projections p.a.	LPA view on its objectively assessed housing need		Current Local Plan position and preferred/adopted target		Complementarity with East Hampshire's housing position
		Basis for evidence	Figure	Stage	Target	
Basingstoke and Deane Borough Council	990	Committee chose a housing target of 730 to 770 dwellings per annum between 2011 and 2029 in October 2012. After commissioning further work, an Edge Analytics report has been published which recommends further work needs to be undertaken regarding the housing target. A Housing Needs Assessment has also been undertaken which together provide an update to the SHMA in terms of the borough's needs.	730 – 770 from 2011 to 2029 as at October 2012, but now in the process of being updated.	Pre-submission stage (estimated adoption Spring 2014)	~	The Edge review was not commissioned to recommend a housing number but to consider the methodologies employed in calculating the previous housing target and suggest additional data sets. The recommendations include use of a demographic model, for example PopGroup. If the authority takes on board these recommendations then the approach to calculating an objective assessment of housing need will be complementary to this SHMA.
Chichester District Council	553	The Coastal West Sussex SHMA (2012) uses different scenarios to ascertain varying projections based on past demographic trends. The Council considered the employment growth scenario (750 d.p.a) in the SHMA to be unrealistic of economic prospects and as such opted for a target which is akin to a lower level of growth. The District is constrained by waste water challenges and this has inhibited the authority even meeting the South East Plan target in the past.	395 per annum - additional 258 homes included on top to make up from the shortfall against the SEP since 2006.	Pre-submission stage. Preferred approach for Local Plan 2014 – 2029 out for consultation 22nd March to 3rd May 2013. Estimated adoption October 2014.	395 per annum	The housing target has been ascertained using migration trends from the Coastal West Sussex SHMA but applying a reduction to these projections as a result of constrains. The target appears to diverge away from the objective assessment of need calculation undertaken in this SHMA. However the constraints would likely impact this calculation.

Local Authority	CLG 2011 HH projections p.a.	LPA view on its objectively assessed housing need		Current Local Plan position and preferred/adopted target		Complementarity with East Hampshire's housing position
		Basis for evidence	Figure	Stage	Target	
Hart District Council	356	The Sustainability Appraisal Report (November 2012) sets out the housing scenarios tested to ascertain an overall housing target. After discounted some scenarios the following four were left. 1. Job Forecasts (166 per annum); 2. Zero Net Migration (236 per annum); 3. CLG Household Projections (444 per annum); and 4. Housing Need (840 per annum). Options 3 and 4 were identified as objective assessments of housing need.	236 per annum under a zero net migration scenario. It is stated in SA Report that this meets locally generated needs, not an objective assessment.	On 30th July 2013 The Planning Inspectorate wrote to Hart District Council with regards to the initial hearing sessions for the Hart District Local Plan (Core Strategy) Examination. The plan was found to not comply with the duty to cooperate.	236 per annum	In terms of housing provision it stated the following, 'the CS has not been positively prepared, it is not justified or effective and it is not consistent with national policy. It is therefore not sound'. To rectify the housing position work to identify the full housing needs of the District would be required along with consideration of how these could be met through cross-boundary cooperation. This requirement is in conformity with THE SHMA that NLP have produced for East Hampshire.
Havant Borough Council	261	The housing figure is the SEP target which was supported by the PUSH Economic Strategy 2004 and SHMA 2005 which both informed the SEP. The Push Area will be updating SHMA later in 2013 which will update housing projections across the housing market area.	315 per annum	Core Strategy 2006-2026 adopted in 2011. Currently progressing part 2 of the Core Strategy regarding allocations and any gaps in the Core Strategy as a result of the subsequent NPPF publication (pre submission estimated October 2013).	315 per annum	This figure relies upon the data and evidence which informed the SEP. Thus far analysis of housing needs has not been presented and as such there is not currently a complementary evidence base with this SHMA study, but may be if Havant produce an updated SHMA in due course using a similar position to East Hampshire. A SHMA for the wider PUSH area is anticipated to be completed towards the end of 2013.

Local Authority	CLG 2011 HH projections p.a.	LPA view on its objectively assessed housing need		Current Local Plan position and preferred/adopted target		Complementarity with East Hampshire's housing position
		Basis for evidence	Figure	Stage	Target	
Waverley Borough Council	463	Housing targets options are set out in 'Setting a Local Housing Target for the Waverley Borough LDF Core Strategy (2010). The three options considered included the following. Option 1: A target based on the SEP (230 to 250 dwellings per annum) Option 2: The capacity for new dwellings in settlements or suitable brownfield land (150 to 200 dwellings per annum), and Option 3: A target based on need/demand in the District including 2008 mid-year population estimates and household projections (300+ dwellings per annum).	230 per annum	Waverley Core Strategy hearing was held on 5th June 2013 and resulting from the findings of the Planning Inspectorate the Council wrote to the Inspector on the 17th July 2013 to state they wished to suspend the examination and put further work into their CS.	230 per annum	The Planning Inspectorate wrote to Waverley Borough Council on the 13th June 2013 in response to the Waverley Core Strategy hearing on the 5th June 2013. The CS passed the duty to cooperate but in terms of housing provision, it was stated that a new up to date SHMA would be required to update the 2009 version and that work with other authorities would be required on this project as the HMA crosses administrative boundaries. This is in conformity with the analysis NLP have undertaken for East Hampshire.
Winchester City Council	354	The Housing Technical Paper (June 2011) based on NLP reps submitted for CALA homes was used as a basis to ascertain an objective assessment of housing need. Four scenarios were undertaken including government projections using 2008 based sub national population projections, a zero net migration trend, economic based projections and an affordable housing led scenario.	550 per annum using the government projections scenario.	Local Plan 2011 – 2031 found sound subject to modifications including an increased housing target in February 2013. Plan was approved by Full Council on the 20th March 2013.	625 per annum, increased by Inspector from 550 per annum.	The Housing Technical Paper undertook various scenarios to establish an objective assessment of housing need. As such has been calculated in conformity with the method used in this SHMA and needs are being met in Winchester.

8.0 Conclusions

An Objective Assessment of the need for Housing

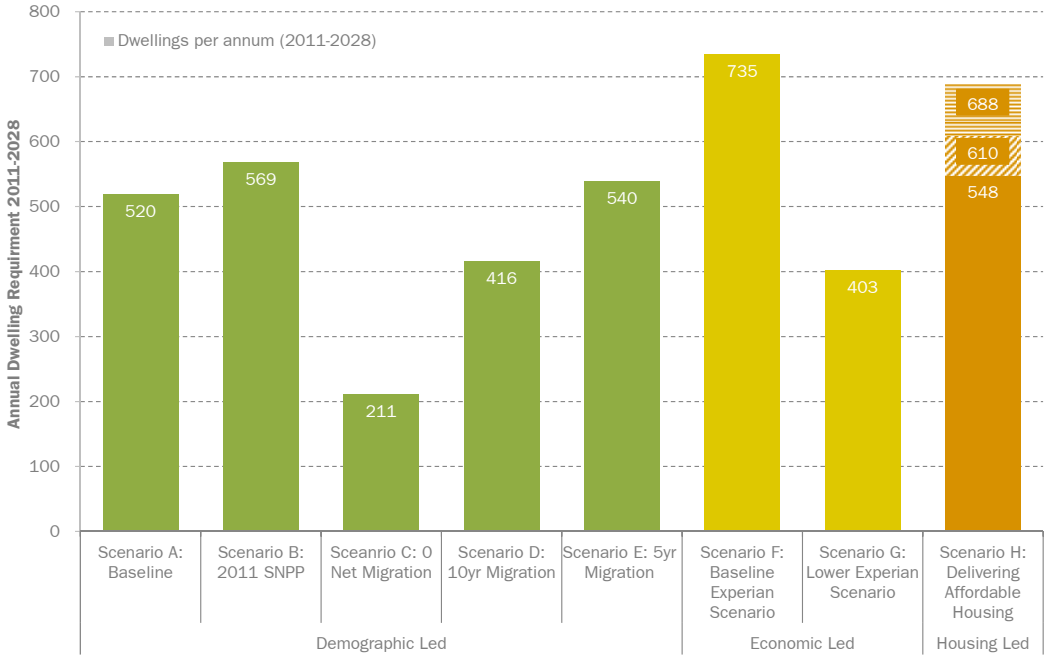
8.1 The NPPF identifies that Local Planning Authorities should use their evidence base to define the full, objectively assessed, needs for housing in their area, and then seek to ensure that the strategy within their Local Plan meets these needs, either through appropriate provision within the Local Authority area or elsewhere within the Housing Market Area.

8.2 This Strategic Housing Market Assessment and Local Housing Requirements Study provides the necessary evidence for considering the scale of objectively assessed development needs.

Housing Needs

8.3 The overall quantum of objectively assessed housing need and demand for the East Hampshire plan period 2011 to 2028 varies dependent on the scenario and driving factor adopted. As summarised in Figure 36 the need and demand for housing, making an allowance for backlog needs, varies from 211 dwellings per annum under a zero net migration scenario (although this would not meet the housing need and demand associated with migratory pressures as required by the NPPF) up to 735 dwellings per annum under a baseline Experian economic forecast.

Figure 36 Summary of Housing Need and Demand Scenarios including Backlog Element 2011-2028



Source: NLP Analysis

8.4 The principal demographic scenarios (A, B and E) alongside the CLG household projections provide an objective assessment of demographic-led needs, demonstrating that to meet demographic change would require between 520 and 570 dwellings per annum. Affordable housing needs, including the backlog of need, could be met by housing delivery across the upper end of this range, depending upon the assumptions adopted around the proportion of household income spent on housing. However, 610 dwellings per annum would ensure needs are met assuming a reasonable proportion of household income spent upon housing (a threshold of 27.5% being the mid-point of those tested).

8.5 On the basis set out within the SHMA it is considered that the bulk of scenarios support the conclusion that **an objective assessment of housing need and demand for East Hampshire District including backlog lies within the range 520 to 610 dwellings per annum** equivalent to 8,840 to 10,370 additional dwellings over the plan period 2011 to 2028. This range encompasses all demographic-led needs for development and at the lower end would at minimum deliver sufficient labour force to support the employment growth set out by a lower economic growth forecast from Experian. A level below this range, including a level around the 420 dwellings per annum indicated by the next lowest scenario, would place risks on achieving economic growth and is unlikely to meet full housing needs, cognisant of the NPPF's focus on planning 'doing everything it can' to support sustainable economic growth. Higher economic growth may be able to be supported by higher levels of housing delivery, with the Experian baseline scenario suggesting a need to attract significant net in-migration and deliver over 730 dwellings per annum to support higher employment growth. However, the extent to which this is realistic as an appropriate outcome for which the District could or should plan is less clear, given the structural demographic pressures for East Hampshire are substantially lower than this.

8.6 Although the most recent data on demographic-driven need demonstrates upward pressure on the need for housing in comparison with NLP's 2011 Local Housing Requirements Study, this is partly due to more recent migration trends showing increased population growth in East Hampshire from migration. Notwithstanding the range of more recent data available since NLP's previous assessment and utilised within this SHMA (which is the reason some scenarios on a comparable basis between the two assessments differ) the overall range of the scenarios is not substantially different, with evidence continuing to support the previous conclusion of demographic-led needs falling in the range 400 to 600 dwellings per annum. The lower end of this range, however, will not meet full needs with both affordable housing needs and economic growth potential placing upward pressure upon an appropriate target.

Setting an Appropriate Target

8.7 Whilst it is concluded that an objective assessment of housing need and demand would fall within the range 520 to 610 dwellings per annum for the plan period 2011 to 2028, there are other factors relevant to setting an appropriate level of housing for which the district should plan. Supply-side

factors, such as development constraints, infrastructure and environmental capacity, land supply, and development viability, amongst others, are beyond the ambit of a SHMA but may give an indication as to where a target may sit within this range. Similarly such factors may provide the rationale to deliver more or less than an objective assessment of need, based upon the whole range of evidence supporting a plan.

Appendix 1 Inputs and Assumptions

Component	Scenario A: Demographic-led (2010-based)	Scenario B: Demographic-led (2011-based)	Scenario C, D & E: Demographic-led (migration trend/zero net)	Scenarios F & G: Economic-led
Population				
Baseline Population	A 2011 baseline population is taken from the Census 2011-based Mid-Year Population Estimates data. This 2011 population is split by single year of age and gender.			
Births	Fertility Rates are applied to the population forecast using projected Fertility Rates and differentials for East Hampshire District from the ONS 2010-based Sub-National Population Projections (SNPP).	Fertility Rates are applied to the population forecast using projected Fertility Rates and differentials for East Hampshire District from the ONS 2010-based/2011-based Sub-National Population Projections (SNPP).	Fertility Rates are applied to the population forecast using projected Fertility Rates and differentials for East Hampshire District from the ONS 2010-based Sub-National Population Projections (SNPP).	
Deaths	A mortality rate is applied to the population forecast using projected Mortality Rates and differentials for East Hampshire District from the ONS 2010-based Sub-National Population Projections (SNPP).	A mortality rate is applied to the population forecast using projected Mortality Rates and differentials for East Hampshire District from the ONS 2010-based/2011-based Sub-National Population Projections (SNPP).	A mortality rate is applied to the population forecast using projected Mortality Rates and differentials for East Hampshire District from the ONS 2010-based Sub-National Population Projections (SNPP).	
Internal Migration	Gross domestic in and out migration flows are adopted based on forecast migration in East Hampshire District from the ONS 2010-based SNPP for 2011 to 2033.	Gross domestic in and out migration flows are adopted based on forecast migration in East Hampshire District from the ONS 2011-based SNPP for 2011 to 2031. Beyond a trend rate is applied.	Gross domestic in and out migration flows are adopted based on average gross past trends (for trend scenario) or splitting the difference on gross flows to equalise net migration from ONS 2011-based SNPP.	Internal in-migration and out-migration is flexed (inflated or deflated) to achieve the necessary number of economically active people to underpin the economy in the District in the employment scenario.

Component	Scenario A: Demographic-led (2010-based)	Scenario B: Demographic-led (2011-based)	Scenario C, D & E: Demographic-led (migration trend/zero net)	Scenarios F & G: Economic-led
International Migration	As above but for international flows	As above but for international flows	As above but for international flows, but 25% of attributable population from the revised MYE series is added to both international in migration and international out migration	As above +-but for international flows
Component	Scenario A: Demographic-led (2010-based)	Scenario B: Demographic-led (2011-based)	Scenario C & D : Demographic-led (migration trend/zero net)	Scenarios E & F: Economic-led
Propensity to Migrate (Age Specific Migration Rates)	Age Specific Migration Rates (ASMigR) for both in and out domestic migration are based upon the age profile of migrants to and from East Hampshire District in the 2010-based SNPP. These identify a migration rate for each age cohort within the District (for both in and out flows separately) which is applied to each individual age providing an Age Specific Migration Rate. This then drives the demographic profile of those people moving into and out of the District (but not the total numbers of migrants).			
Housing				
Headship Rates	Headship rates that are specific to East Hampshire District and forecast over the period to 2021 are taken from the government data which was used to underpin the 2011-based CLG household forecasts and applied to the demographic forecasts for each year as output by the POPGROUP model. These headship rates are split by age cohort and by household typology. These are the most up-to-date headship rates available at the time of writing. Beyond 2021 this is assumed to resume the long term trends identified within the 2008-based household projections with index trends from the 2008-based projections applied to the 2021 end point of the 2011-based household projections. This is with the exception of Scenario B(ii) which takes the linear trend of the 2011 to 2021 period from the CLG 2011-based projections, and projects it beyond 2021 up to 2033.			
Population Not in Households	The number of population not in households (e.g. those in institutional care) is similarly taken from the assumptions used to underpin the 2011-based CLG household forecasts. No change is assumed in the rate of this from the CLG identified rate.			
Vacancy / 2nd Home Rate	A vacancy and second homes rate is applied to the number of households, representing the natural vacancies/not permanently occupied homes which occur within the housing market and mean that more dwellings than households are required to meet needs. The vacancy rate in East Hampshire District totals 3.1% (estimated using HSSA Vacant Dwellings Data over the previous 3 years). The second home rate in the District is estimated at 0.5% (Census 2001 Table S048), meaning a combined rate of 3.6%. This is relatively low and therefore is held constant over the forecast period.			

Component	Scenario A: Demographic-led (2010-based)	Scenario B: Demographic-led (2011-based)	Scenario C, D & E: Demographic-led (migration trend/zero net)	Scenarios F & G: Economic-led
Economic				
Economic Activity Rate	Age and gender specific economic activity rates are used. The basis for this is ONS 2006-based National Labour Force Projections. The economic activity annual growth rates for each age cohort from these national projections are applied to the Census 2001 economic activity profile for East Hampshire District across the forecast period. At 2011 these have been rebased from their 2011 estimate using a uniform adjustment to all age cohorts to meet current total economic activity in the District from the Annual Population Survey (APS). These are assumed to remain the same as the projection with the exception of an adjustment to take account of changing pension ages beyond that already taken into account in the ONS 2006-based projections (i.e. to account for pension age increases for both men and women above age 65).			
Commuting Rate	A standard net commuting rate is inferred through the modelling using a Labour Force ratio which is worked out using the formula: (A) Number of employed workers living in area ÷ (B) Number of workers who work in the area (number of jobs). In East Hampshire District data from ONS Employment Estimates and the Annual Population Survey identifies an LF ratio of 1.145 for 2011 (52,900 employed people living in East Hampshire District ÷ 46,199 jobs within East Hampshire District). This has not been flexed over the forecasting period.			
Unemployment	The unemployment rate uses an ILO base definition using data from the ONS Annual Population Survey estimate of economically active people not in employment. This is estimated at 4.7%. A reduction in unemployment to the past average model based unemployment (APS) is assumed on the basis that as the economy grows out of recession unemployment will fall back to a similar rate as seen during this period. This is modelled as a fall to a target rate of 2.6% unemployment by 2020.			

Appendix 2 Modelling Outputs

Scenario A: 2010 SNPP

Population Estimates and Forecasts — **Nathaniel Lichfield & Partners**

Components of Population Change — **East Hampshire**

Year beginning July 1st .....

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	
Births																								
Male	620	621	620	612	611	606	601	598	596	594	592	588	584	580	575	571	568	567	566	565	565	566	568	
Female	590	591	590	583	582	577	572	569	567	566	563	560	556	552	548	544	541	540	539	538	538	539	541	
All Births	1,210	1,212	1,211	1,194	1,193	1,184	1,173	1,167	1,163	1,160	1,155	1,148	1,140	1,132	1,123	1,115	1,110	1,106	1,104	1,104	1,104	1,106	1,110	
TFR	2.12	2.13	2.14	2.11	2.12	2.10	2.08	2.07	2.07	2.07	2.07	2.06	2.07	2.07	2.08	2.09	2.11	2.13	2.15	2.16	2.18	2.19	2.19	
Births inpu	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	
Deaths																								
Male	495	496	495	506	514	521	526	534	544	553	561	572	584	596	607	619	632	644	658	670	685	700	714	
Female	583	586	588	585	595	601	605	610	615	623	632	640	649	658	668	681	694	708	723	738	755	772	790	
All deaths	1,078	1,082	1,083	1,091	1,110	1,121	1,131	1,144	1,159	1,176	1,193	1,212	1,233	1,254	1,275	1,299	1,327	1,352	1,381	1,408	1,440	1,473	1,504	
SMR: male	88.6	86.0	82.7	81.6	80.1	78.3	76.3	74.7	73.3	72.0	70.5	69.3	68.4	67.3	66.3	65.3	64.5	63.7	63.0	62.3	61.9	61.4	60.8	
SMR: fema	94.9	92.8	90.7	87.7	86.7	84.8	83.0	81.2	79.4	77.8	76.4	75.0	73.6	72.2	71.0	69.8	68.8	67.7	66.8	65.8	65.2	64.6	63.9	
SMR: male	91.9	89.6	86.9	84.8	83.5	81.7	79.7	78.0	76.4	75.0	73.5	72.2	71.0	69.8	68.7	67.6	66.7	65.7	64.9	64.1	63.6	63.0	62.4	
Expectation	82.3	82.5	82.7	82.9	83.0	83.2	83.3	83.5	83.6	83.7	83.8	83.9	84.0	84.1	84.2	84.3	84.4	84.5	84.6	84.7	84.7	84.8	84.9	
Deaths inp	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	
In-migration from the UK																								
Male	3,166	3,187	3,207	3,223	3,235	3,247	3,257	3,268	3,279	3,289	3,297	3,305	3,316	3,329	3,345	3,360	3,374	3,390	3,408	3,424	3,441	3,458	3,476	
Female	3,550	3,573	3,595	3,616	3,630	3,641	3,652	3,664	3,674	3,685	3,694	3,704	3,716	3,733	3,751	3,770	3,790	3,814	3,838	3,860	3,882	3,908	3,933	
All	6,715	6,761	6,802	6,839	6,865	6,888	6,909	6,932	6,953	6,974	6,991	7,009	7,032	7,062	7,096	7,129	7,164	7,204	7,245	7,283	7,323	7,366	7,409	
SMigR: ma	58.4	58.5	58.7	58.8	58.9	59.1	59.4	59.7	60.0	60.2	60.5	60.7	61.0	61.3	61.5	61.7	61.9	62.1	62.2	62.3	62.3	62.3	62.4	
SMigR: fem	64.4	64.9	65.4	65.9	66.2	66.5	66.9	67.4	67.9	68.2	68.6	68.8	68.9	69.1	69.2	69.2	69.3	69.4	69.4	69.3	69.2	69.2	69.3	
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	
Out-migration to the UK																								
Male	2,931	2,947	2,959	2,960	2,974	2,974	2,960	2,962	2,953	2,965	2,976	2,991	2,991	3,000	3,014	3,020	3,032	3,043	3,057	3,073	3,088	3,098	3,107	
Female	3,283	3,303	3,303	3,285	3,304	3,301	3,311	3,299	3,293	3,301	3,292	3,300	3,317	3,318	3,332	3,354	3,362	3,370	3,392	3,414	3,434	3,449	3,462	
All	6,214	6,250	6,262	6,246	6,279	6,275	6,271	6,261	6,246	6,267	6,268	6,291	6,308	6,318	6,346	6,375	6,394	6,412	6,449	6,487	6,521	6,547	6,569	
SMigR: ma	54.0	54.1	54.1	54.0	54.2	54.2	54.0	54.1	54.0	54.3	54.6	54.9	55.0	55.2	55.4	55.5	55.6	55.7	55.8	55.9	55.9	55.8	55.8	
SMigR: fem	59.6	60.0	60.1	59.9	60.3	60.3	60.7	60.7	60.8	61.1	61.1	61.3	61.5	61.5	61.5	61.6	61.5	61.3	61.3	61.3	61.2	61.1	61.0	
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	
In-migration from Overseas																								
Male	370	372	372	373	373	373	373	373	373	373	373	373	373	373	373	373	373	373	373	373	373	373	373	
Female	328	329	330	330	330	330	330	330	330	330	330	330	330	330	330	330	330	330	330	330	330	330	330	
All	699	701	702	704	704	703	703	703	703	703	703	703	703	703	703	703	703	703	703	703	703	703	703	
SMigR: ma	103.0	102.4	102.0	101.8	101.6	101.6	102.1	102.6	103.2	103.8	104.5	105.3	106.1	106.7	107.2	107.6	107.9	107.9	107.8	107.5	107.2	106.8	106.4	
SMigR: fem	92.8	93.0	93.1	93.5	93.8	94.1	94.7	95.4	96.1	96.9	97.8	98.5	99.2	99.8	100.3	100.6	100.7	100.6	100.3	100.0	99.5	99.0	98.6	
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	
Out-migration to Overseas																								
Male	346	351	356	360	366	372	372	372	372	372	372	372	372	372	372	372	372	372	372	372	372	372	372	
Female	280	284	288	292	298	303	303	303	303	303	303	303	303	303	303	303	303	303	303	303	303	303	303	
All	626	635	644	653	664	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	
SMigR: ma	96.3	96.7	97.4	98.3	99.7	101.4	101.8	102.3	103.0	103.6	104.3	105.1	105.8	106.5	107.0	107.3	107.6	107.7	107.6	107.3	106.9	106.6	106.1	
SMigR: fem	79.2	80.3	81.4	82.8	84.5	86.2	86.7	87.4	88.1	88.8	89.6	90.3	90.9	91.5	91.9	92.1	92.2	92.2	91.9	91.6	91.2	90.7	90.3	
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	
Migration - Net Flows																								***2011-2028***	***2011-2031***
UK	+502	+511	+540	+594	+587	+613	+639	+671	+707	+707	+723	+718	+724	+744	+750	+755	+770	+792	+796	+796	+802	+819	+840	+11,255	+13,638
Overseas	+72	+66	+58	+51	+40	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+29	+630	+716
Summary of population change																									
Natural ch	+132	+130	+128	+103	+83	+62	+43	+23	+4	-16	-38	-64	-93	-122	-152	-184	-217	-246	-277	-304	-336	-367	-394	-179	-1,006
Net migrat	+574	+576	+599	+645	+627	+642	+667	+700	+736	+735	+752	+747	+753	+773	+779	+783	+799	+820	+824	+824	+830	+847	+868	+11,885	+14,354
Net chang	+705	+706	+726	+748	+710	+704	+710	+722	+740	+719	+714	+683	+660	+651	+626	+599	+582	+574	+548	+520	+494	+480	+475	+11,706	+13,348

Summary of Population estimates/forecasts

Population at mid-year

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034		
0-4	6,195	6,271	6,345	6,474	6,535	6,605	6,577	6,535	6,486	6,451	6,414	6,381	6,353	6,325	6,291	6,252	6,210	6,170	6,135	6,108	6,089	6,079	6,077	6,083		
5-10	7,858	7,958	8,053	8,197	8,305	8,389	8,571	8,673	8,762	8,894	8,958	9,024	8,980	8,924	8,863	8,819	8,770	8,725	8,685	8,644	8,597	8,546	8,495	8,450		
11-15	7,416	7,324	7,164	6,974	6,897	6,923	6,961	7,068	7,293	7,361	7,476	7,585	7,697	7,799	7,959	8,031	8,112	8,079	8,028	7,969	7,926	7,881	7,842	7,808		
16-17	3,263	3,136	3,120	3,136	3,050	2,951	2,849	2,858	2,781	2,786	2,913	2,931	3,024	3,140	3,099	3,111	3,172	3,261	3,370	3,371	3,349	3,326	3,311	3,283		
18-59Fema	64,539	64,430	64,391	64,292	64,345	64,284	64,147	63,983	63,772	63,618	63,270	62,975	62,612	62,211	62,000	61,688	61,402	61,094	60,832	60,768	60,652	60,475	60,455	60,435		
60/65 -74	16,142	16,653	17,056	17,428	17,730	18,145	18,460	18,622	18,731	18,902	19,069	18,949	19,067	19,307	19,609	20,081	20,477	20,987	21,407	21,710	22,005	22,294	22,401	22,502		
75-84	7,376	7,605	7,821	8,033	8,249	8,336	8,597	8,967	9,429	9,812	10,209	10,929	11,471	11,916	12,181	12,467	12,606	12,645	12,642	12,703	12,751	12,587	12,561	12,621		
85+	3,221	3,337	3,473	3,615	3,786	3,974	4,148	4,313	4,488	4,660	4,893	5,142	5,394	5,637	5,906	6,087	6,384	6,754	7,191	7,565	7,989	8,664	9,190	9,624		
Total	116,010	116,715	117,422	118,148	118,896	119,606	120,310	121,020	121,742	122,482	123,202	123,916	124,598	125,258	125,909	126,535	127,134	127,716	128,290	128,838	129,358	129,852	130,332	130,807	+11,706	+13,348

Population impact of constraint

Number of persons

Households																								***2011-2028***	***2011-2031***
Number of	47,408	47,918	48,398	48,878	49,381	49,878	50,356	50,844	51,289	51,723	52,120	52,607	53,051	53,488	53,949	54,407	54,848	55,221	55,581	55,927	56,228	56,517	56,803	57,133	+7,813	+8,820
Change over previous		+511	+480	+480	+503	+497	+478	+488	+446	+434	+398	+487	+444	+437	+461	+458	+441	+373	+360	+346	+300	+289	+286	+330	p.a. +460	p.a. +441
Number of	49,178	49,708	50,205	50,703	51,225	51,740	52,237	52,743	53,205	53,654	54,067	54,572	55,032	55,485	55,963	56,438	56,896	57,283	57,656	58,016	58,328	58,628	58,924	59,267	+8,105	+9,150
Change over previous		+530	+498	+498	+522	+515	+496	+506	+462	+450	+412	+505	+460	+453	+478	+475	+458	+387	+374	+359	+312	+300	+297	+343	p.a. +477	p.a. +457

Labour Force																								***2011-2028***	***2011-2031***
Number of	55,635	55,822	55,979	56,120	56,262	56,338	56,372	56,369	56,452	56,564	56,478	56,423	56,327	56,217	56,163	56,052	55,992	55,913	55,842	55,807	55,753	55,718	55,687	55,642	+277	+118
Change over previous		+186	+158	+141	+142	+76	+34	-3	+84	+111	-86	-55	-96	-110	-54	-111	-60	-79	-71	-35	-54	-36	-30	-45	p.a. +16	p.a. +6
Number of	46,306	46,559	46,788	47,004	47,221	47,482	47,609	47,704	47,874	48,116	48,043	47,996	47,915	47,821	47,775	47,681	47,630	47,563	47,503	47,473	47,427	47,397	47,371	47,333	+1,256	+1,121
Change over previous		+252	+229	+216	+217	+261	+127	+96	+169	+243	-73	-46	-82	-94	-46	-94	-51	-67	-60	-30	-46	-30	-26	-38	p.a. +74	p.a. +56

Scenario B: 2011 SNPP

Population Estimates and Forecasts — **Nathaniel Lichfield & Partners**

Components of Population Change — **East Hampshire**

Year beginning July 1st ……..

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033		
Births																									
Male	666	666	666	666	666	666	615	615	615	615	615	615	615	615	615	615	615	615	615	615	615	615	615		
Female	634	634	634	634	634	634	585	585	585	585	585	585	585	585	585	585	585	585	585	585	585	585	585		
All Births	1,300	1,300	1,300	1,300	1,300	1,300	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200		
TFR	2.27	2.29	2.31	2.32	2.33	2.33	2.15	2.15	2.15	2.15	2.15	2.15	2.15	2.15	2.16	2.16	2.17	2.18	2.19	2.19	2.19	2.19	2.18		
Births inpu	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
Deaths																									
Male	501	503	502	509	510	512	559	563	565	567	568	569	571	573	574	574	574	573	573	572	572	572	571		
Female	599	597	598	591	590	588	641	637	635	633	632	631	629	627	626	626	626	627	627	628	628	628	629		
All deaths	1,100	1,100	1,100	1,100	1,100	1,100	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200		
SMR: male	89.7	87.2	84.1	82.5	79.7	77.5	81.8	79.4	77.1	74.7	72.3	69.9	67.8	65.6	63.3	61.0	58.7	56.5	54.3	52.1	50.2	48.2	46.2		
SMR: fema	97.5	95.2	93.2	89.7	87.4	84.8	90.1	87.2	84.4	81.6	79.0	76.3	73.4	70.6	67.9	65.2	62.6	60.1	57.6	55.2	52.9	50.7	48.4		
SMR: male	93.8	91.3	88.8	86.2	83.7	81.2	86.0	83.4	80.8	78.2	75.7	73.1	70.6	68.1	65.6	63.1	60.7	58.3	56.0	53.7	51.6	49.5	47.3		
Expectatior	82.2	82.5	82.6	82.9	83.1	83.3	82.9	83.1	83.3	83.5	83.8	84.0	84.2	84.4	84.7	84.9	85.2	85.4	85.6	85.9	86.1	86.4	86.6		
Deaths inp	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
In-migration from the UK																									
Male	3,140	3,139	3,176	3,212	3,209	3,212	3,291	3,299	3,329	3,333	3,355	3,358	3,363	3,369	3,372	3,370	3,370	3,370	3,368	3,367	3,365	3,362	3,361		
Female	3,657	3,644	3,679	3,717	3,714	3,714	3,793	3,799	3,827	3,826	3,845	3,842	3,837	3,831	3,828	3,830	3,830	3,830	3,832	3,833	3,835	3,838	3,839		
All	6,798	6,783	6,855	6,929	6,923	6,925	7,083	7,098	7,157	7,158	7,200	7,200	7,200	7,200	7,200	7,200	7,200	7,200	7,200	7,200	7,200	7,200	7,200		
SMigR: ma	57.9	57.6	58.1	58.5	58.3	58.2	59.6	59.6	60.1	60.0	60.3	60.2	60.1	59.9	59.5	59.2	58.8	58.4	57.9	57.3	56.7	56.2	55.7		
SMigR: fem	66.3	66.3	67.2	68.1	67.9	67.9	69.4	69.5	69.9	69.8	70.0	69.7	69.3	68.9	68.4	67.9	67.5	66.9	66.4	65.6	65.0	64.4	63.8		
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
Out-migration to the UK																									
Male	2,984	2,950	2,975	3,007	3,013	3,017	2,992	2,992	3,011	3,017	2,995	2,997	2,988	2,998	3,004	2,997	2,998	2,996	3,000	2,998	2,999	2,997	2,998		
Female	3,518	3,468	3,470	3,464	3,464	3,457	3,425	3,410	3,432	3,425	3,405	3,403	3,412	3,402	3,396	3,403	3,402	3,404	3,400	3,402	3,401	3,403	3,402		
All	6,502	6,417	6,445	6,471	6,477	6,475	6,417	6,402	6,443	6,442	6,400	6,400	6,400	6,400	6,400	6,400	6,400	6,400	6,400	6,400	6,400	6,400	6,400		
SMigR: ma	55.0	54.2	54.4	54.8	54.7	54.7	54.2	54.1	54.4	54.4	53.9	53.7	53.4	53.3	53.1	52.6	52.3	51.9	51.6	51.1	50.6	50.1	49.7		
SMigR: fem	63.8	63.1	63.4	63.4	63.4	63.2	62.6	62.4	62.7	62.5	62.0	61.7	61.6	61.2	60.7	60.4	59.9	59.5	58.9	58.3	57.6	57.1	56.5		
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
In-migration from Overseas																									
Male	360	361	362	363	363	363	364	364	364	364	364	365	365	366	366	367	367	367	368	368	368	368	368		
Female	340	339	338	337	337	337	336	336	336	336	336	335	335	334	334	333	333	333	332	332	332	332	332		
All	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700		
SMigR: ma	100.0	99.7	99.5	99.3	99.2	99.3	99.5	99.7	99.9	100.0	100.2	100.3	100.5	100.6	100.5	100.2	99.9	99.5	98.9	98.3	97.5	96.7	95.9		
SMigR: fem	96.1	96.0	95.9	96.2	96.3	96.4	96.6	96.8	96.9	97.1	97.2	97.3	97.3	97.3	97.3	97.1	96.8	96.5	95.9	95.2	94.4	93.7	93.0		
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
Out-migration to Overseas																									
Male	270	271	271	271	271	271	271	272	272	272	272	272	272	273	273	273	273	273	274	274	274	274	274		
Female	230	229	229	229	229	229	229	228	228	228	228	228	228	227	227	227	227	227	226	226	226	226	226		
All	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500		
SMigR: ma	75.0	74.7	74.4	74.2	74.1	74.1	74.3	74.4	74.6	74.6	74.8	74.8	75.0	75.0	74.9	74.7	74.4	74.1	73.7	73.2	72.6	72.0	71.4		
SMigR: fem	65.0	65.0	65.0	65.3	65.4	65.6	65.6	65.8	65.8	66.0	66.1	66.1	66.2	66.2	66.2	66.1	65.9	65.7	65.3	64.8	64.3	63.8	63.3		
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
Migration - Net Flows																								***2011-2028***	***2011-2031***
UK	+295	+365	+410	+457	+446	+451	+667	+696	+713	+716	+800	+800	+800	+800	+800	+800	+800	+800	+800	+800	+800	+800	+800	+10,816	+13,216
Overseas	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+200	+3,400	+4,000
Summary of population change																									
Natural ch	+200	+200	+200	+200	+200	+200	0	+0	0	0	+0	0	0	0	-0	-0	-0	0	0	0	0	-0	0	+1,200	+1,200
Net migrat	+495	+565	+610	+657	+646	+651	+867	+896	+913	+916	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+14,216	+17,216
Net chang	+695	+765	+810	+857	+846	+851	+867	+896	+913	+916	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+15,416	+18,416

Summary of Population estimates/forecasts

Population at mid-year

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034		
0-4	6,195	6,391	6,569	6,782	6,920	7,050	6,998	6,929	6,855	6,797	6,745	6,694	6,659	6,634	6,608	6,587	6,585	6,581	6,578	6,574	6,575	6,575	6,575	6,572		
5-10	7,858	7,978	8,089	8,250	8,370	8,479	8,748	8,948	9,126	9,322	9,462	9,587	9,536	9,462	9,383	9,314	9,232	9,165	9,114	9,074	9,038	9,008	8,999	8,988		
11-15	7,416	7,334	7,189	7,021	6,961	6,994	7,056	7,182	7,400	7,488	7,611	7,720	7,921	8,109	8,337	8,498	8,647	8,606	8,534	8,446	8,377	8,308	8,236	8,179		
16-17	3,263	3,138	3,128	3,144	3,068	2,979	2,886	2,882	2,825	2,857	2,964	2,992	3,086	3,185	3,173	3,182	3,237	3,412	3,593	3,601	3,579	3,548	3,517	3,473		
18-59Fema	64,539	64,307	64,216	64,105	64,181	64,177	64,123	64,054	63,962	63,902	63,727	63,659	63,517	63,367	63,340	63,247	63,175	63,077	63,016	63,204	63,341	63,438	63,653	63,869		
60/65 -74	16,142	16,650	17,054	17,428	17,731	18,145	18,457	18,631	18,750	18,933	19,109	19,002	19,133	19,384	19,719	20,196	20,628	21,136	21,577	21,916	22,249	22,552	22,691	22,813		
75-84	7,376	7,594	7,796	7,997	8,204	8,289	8,540	8,901	9,349	9,719	10,103	10,833	11,389	11,847	12,145	12,462	12,642	12,738	12,792	12,910	13,024	12,918	12,967	13,102		
85+	3,221	3,314	3,429	3,551	3,703	3,870	4,025	4,173	4,330	4,492	4,706	4,938	5,185	5,438	5,722	5,940	6,280	6,711	7,223	7,700	8,245	9,080	9,790	10,431		
Total	116,010	116,705	117,470	118,280	119,137	119,983	120,834	121,701	122,597	123,510	124,426	125,426	126,426	127,426	128,426	129,426	130,426	131,426	132,426	133,426	134,426	135,426	136,426	137,426	+15,416	+18,416
Population impact of constraint																										
Number of persons		-5	-35	-90	-143	-154	-149	-33	-4	-87	-84															
Households																									***2011-2028***	***2011-2031***
Number of	47,408	47,900	48,365	48,829	49,300	49,758	50,216	50,687	51,147	51,609	52,058	52,627	53,186	53,737	54,296	54,863	55,453	56,021	56,584	57,146	57,701	58,254	58,832	59,458	+8,614	+10,294
Change over previous		+492	+465	+464	+472	+457	+458	+471	+460	+462	+449	+569	+559	+551	+559	+567	+591	+568	+563	+562	+555	+553	+578	+626	p.a. +507	p.a. +515
Number of	49,178	49,688	50,171	50,652	51,142	51,616	52,091	52,580	53,057	53,536	54,002	54,592	55,172	55,744	56,323	56,911	57,524	58,113	58,698	59,280	59,856	60,430	61,029	61,679	+8,935	+10,678
Change over previous		+510	+483	+481	+489	+474	+475	+489	+477	+479	+466	+590	+580	+572	+580	+588	+613	+589	+584	+583	+576	+573	+599	+650	p.a. +526	p.a. +534
Labour Force																									***2011-2028***	***2011-2031***
Number of	55,635	55,741	55,840	55,966	56,124	56,246	56,332	56,403	56,579	56,778	56,812	56,922	57,021	57,103	57,215	57,289	57,443	57,580	57,720	57,887	58,043	58,222	58,404	58,568	+1,945	+2,407
Change over previous		+106	+99	+126	+158	+122	+86	+70	+176	+199	+34	+110	+99	+82	+112	+74	+154	+137	+140	+167	+155	+179	+182	+164	p.a. +114	p.a. +120
Number of	46,306	46,492	46,672	46,875	47,105	47,404	47,575	47,733	47,981	48,298	48,327	48,421	48,505	48,575	48,670	48,733	48,864	48,981	49,100	49,242	49,374	49,527	49,682	49,821	+2,675	+3,068
Change over previous		+185	+180	+203	+230	+299	+171	+158	+248	+317	+29	+94	+84	+70	+95	+63	+131	+117	+119	+142	+132	+153	+155	+139	p.a. +157	p.a. +153

Scenario C: Zero Net Migration

Population Estimates and Forecasts — **Nathaniel Lichfield & Partners**

Components of Population Change — **East Hampshire**

Year beginning July 1st ……..

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Births																							
Male	681	672	660	638	622	603	584	567	551	535	519	501	484	465	446	430	415	401	389	378	370	363	357
Female	649	640	628	607	593	575	556	540	525	510	494	478	460	443	425	409	395	382	370	360	352	346	340
All Births	1,330	1,312	1,288	1,245	1,215	1,178	1,141	1,106	1,075	1,045	1,013	979	944	907	872	839	810	783	759	739	722	708	698
TFR	2.33	2.33	2.33	2.29	2.28	2.25	2.22	2.20	2.19	2.18	2.17	2.16	2.15	2.14	2.13	2.12	2.12	2.12	2.12	2.12	2.12	2.12	2.12
Births input																							
Deaths																							
Male	506	508	505	515	521	528	530	538	546	554	561	569	580	589	599	609	620	629	641	650	665	679	691
Female	605	605	605	599	607	609	611	614	619	624	630	637	642	648	658	669	682	694	708	722	738	755	771
All deaths	1,111	1,113	1,109	1,114	1,128	1,136	1,141	1,152	1,165	1,177	1,191	1,205	1,222	1,237	1,256	1,278	1,302	1,323	1,349	1,372	1,404	1,433	1,462
SMR: male	90.6	88.3	85.0	84.0	82.4	80.9	78.8	77.5	76.1	74.9	73.5	72.3	71.5	70.5	69.6	68.7	68.0	67.1	66.6	65.8	65.7	65.3	64.9
SMR: fema	98.4	96.4	94.4	91.5	90.5	88.6	86.8	85.1	83.5	81.8	80.4	78.9	77.3	75.8	74.7	73.6	72.6	71.5	70.8	69.9	69.4	68.8	68.2
SMR: male	94.7	92.5	89.9	87.9	86.6	84.8	82.9	81.3	79.9	78.4	77.0	75.7	74.5	73.2	72.2	71.2	70.3	69.4	68.7	67.9	67.6	67.1	66.6
Expectatior	82.1	82.4	82.6	82.7	82.8	83.0	83.1	83.3	83.4	83.5	83.6	83.7	83.8	83.9	84.0	84.1	84.2	84.3	84.4	84.5	84.6	84.6	84.7
Deaths input																							
In-migration from the UK																							
Male	3,093	3,098	3,111	3,126	3,132	3,140	3,155	3,164	3,176	3,187	3,195	3,205	3,211	3,218	3,223	3,226	3,232	3,235	3,235	3,238	3,239	3,239	3,242
Female	3,617	3,612	3,599	3,584	3,578	3,570	3,555	3,546	3,534	3,523	3,515	3,505	3,499	3,492	3,487	3,484	3,478	3,475	3,475	3,472	3,471	3,471	3,468
All	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710
SMigR: ma	57.0	57.1	57.5	58.0	58.3	58.8	59.6	60.3	61.1	61.9	62.8	63.6	64.4	65.1	65.8	66.5	67.2	67.8	68.3	68.6	68.8	69.2	69.8
SMigR: fem	65.6	66.1	66.5	67.1	67.7	68.4	69.0	69.8	70.5	71.3	72.1	72.6	73.2	73.9	74.4	74.9	75.5	75.9	76.4	76.5	76.9	77.4	77.9
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Out-migration to the UK																							
Male	3,087	3,094	3,100	3,122	3,135	3,149	3,159	3,178	3,182	3,198	3,206	3,213	3,206	3,228	3,239	3,230	3,234	3,229	3,236	3,232	3,240	3,240	3,243
Female	3,623	3,616	3,610	3,588	3,575	3,561	3,551	3,532	3,528	3,512	3,504	3,497	3,504	3,482	3,471	3,480	3,476	3,481	3,474	3,478	3,470	3,470	3,467
All	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710	6,710
SMigR: ma	56.9	57.0	57.3	57.9	58.3	59.0	59.6	60.6	61.2	62.1	63.0	63.8	64.3	65.3	66.1	66.5	67.3	67.7	68.3	68.4	68.9	69.3	69.8
SMigR: fem	65.7	66.2	66.7	67.2	67.7	68.2	68.9	69.5	70.4	71.0	71.8	72.4	73.3	73.7	74.1	74.8	75.4	76.0	76.4	76.6	76.8	77.3	77.9
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
In-migration from Overseas																							
Male	309	310	311	312	313	315	316	317	318	320	321	322	323	324	325	326	327	328	329	330	330	331	332
Female	291	290	289	288	287	285	284	283	282	280	279	278	277	276	275	274	273	272	271	270	270	269	268
All	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600
SMigR: ma	85.7	85.9	86.3	86.7	87.5	88.8	90.3	91.8	93.5	95.3	97.2	99.2	101.1	102.9	104.7	106.5	108.3	109.8	111.0	112.1	112.9	113.9	115.0
SMigR: fem	82.3	82.7	83.1	84.1	85.1	86.1	87.4	88.9	90.5	92.0	93.6	95.3	96.8	98.5	100.1	101.5	102.8	104.1	105.3	106.2	107.1	108.0	108.9
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Out-migration to Overseas																							
Male	324	325	326	326	327	328	330	331	332	333	334	335	336	337	338	339	340	341	341	342	343	344	345
Female	276	275	274	274	273	272	270	269	268	267	266	265	264	263	262	261	260	259	259	258	257	256	255
All	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600
SMigR: ma	90.0	90.1	90.4	90.8	91.5	92.6	94.2	95.7	97.5	99.3	101.2	103.2	105.1	106.9	108.8	110.6	112.4	113.9	115.2	116.5	117.3	118.4	119.4
SMigR: fem	78.0	78.5	79.0	79.9	81.0	82.0	83.1	84.6	86.1	87.7	89.2	90.8	92.4	94.0	95.6	96.8	98.1	99.3	100.4	101.1	102.0	102.8	103.7
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Migration - Net Flows																							
UK	-0	0	+0	+0	+0	-0	-0	+0	-0	-0	+0	+0	-0	-0	-0	-0	+0	0	0	-0	+0	-0	+0
Overseas	-0	-0	0	-0	+0	+0	-0	-0	+0	-0	-0	-0	+0	+0	+0	+0	0	-0	+0	+0	+0	+0	+0
Summary of population change																							
Natural ch	+219	+199	+179	+131	+87	+42	-1	-46	-89	-132	-178	-226	-278	-330	-385	-439	-492	-540	-591	-633	-682	-725	-764
Net migrat	-0	-0	+0	+0	+0	-0	-0	+0	-0	-0	+0	+0	-0	-0	-0	-0	+0	-0	+0	-0	+0	-0	+0
Net chang	+219	+199	+179	+131	+87	+42	-1	-46	-89	-132	-178	-226	-278	-330	-385	-439	-492	-540	-591	-633	-682	-725	-764

	2011-2028	2011-2031
UK	-0	-0
Overseas	+0	+0
Natural ch	-1,739	-3,504
Net migrat	-0	-0
Net chang	-1,739	-3,504

Summary of Population estimates/forecasts

Population at mid-year

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
0-4	6,195	6,351	6,487	6,664	6,755	6,842	6,682	6,502	6,306	6,122	5,937	5,757	5,585	5,416	5,242	5,062	4,884	4,707	4,538	4,382	4,248	4,132	4,030	3,941
5-10	7,858	7,925	7,981	8,083	8,142	8,175	8,433	8,596	8,731	8,886	8,957	9,007	8,788	8,550	8,301	8,068	7,834	7,605	7,382	7,159	6,935	6,710	6,487	6,269
11-15	7,416	7,301	7,113	6,895	6,787	6,782	6,787	6,858	7,042	7,069	7,137	7,194	7,397	7,574	7,790	7,904	8,006	7,826	7,621	7,401	7,199	7,000	6,806	6,617
16-17	3,263	3,126	3,100	3,104	3,006	2,895	2,782	2,780	2,691	2,680	2,789	2,793	2,869	2,964	2,909	2,900	2,936	3,150	3,366	3,318	3,242	3,156	3,077	2,986
18-59Fema	64,539	64,009	63,566	63,049	62,648	62,143	61,549	60,910	60,207	59,537	58,683	57,874	57,008	56,097	55,360	54,523	53,705	52,861	52,045	51,558	50,977	50,307	49,751	49,163
60/65 -74	16,142	16,620	16,981	17,310	17,563	17,927	18,188	18,295	18,343	18,448	18,545	18,357	18,396	18,553	18,763	19,133	19,429	19,825	20,133	20,329	20,525	20,719	20,744	20,766
75-84	7,376	7,587	7,780	7,970	8,164	8,232	8,470	8,816	9,249	9,601	9,963	10,638	11,137	11,539	11,764	12,006	12,106	12,110	12,073	12,098	12,114	11,928	11,870	11,887
85+	3,221	3,311	3,420	3,533	3,674	3,830	3,974	4,108	4,250	4,388	4,588	4,800	5,015	5,223	5,457	5,605	5,863	6,187	6,572	6,894	7,266	7,874	8,336	8,706
Total	116,010	116,229	116,428	116,607	116,738	116,825	116,867	116,866	116,820	116,731	116,599	116,420	116,194	115,916	115,586	115,201	114,762	114,271	113,730	113,140	112,506	111,825	111,100	110,336

	2011-2028	2011-2031
Total	-1,739	-3,504

Population impact of constraint

Number of persons

Households

	2011-2028	2011-2031
Number of	+2,759	+2,662
Change over previous	p.a. +162	p.a. +133
Number of	+2,862	+2,762
Change over previous	p.a. +168	p.a. +138

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Number of	47,408	47,735	48,004	48,258	48,515	48,768	48,983	49,179	49,321	49,436	49,514	49,656	49,756	49,851	49,960	50,064	50,156	50,166	50,157	50,123	50,070	50,000	49,913	49,844
Change over previous		+327	+269	+254	+258	+253	+215	+196	+141	+116	+77	+142	+100	+94	+109	+104	+92	+11	-9	-34	-53	-69	-88	-68
Number of	49,178	49,517	49,796	50,060	50,327	50,589	50,812	51,016	51,162	51,283	51,363	51,511	51,614	51,712	51,826	51,933	52,029	52,040	52,030	51,994	51,939	51,868	51,776	51,706
Change over previous		+339	+279	+264	+267	+262	+223	+203	+147	+120	+80	+147	+104	+98	+113	+107	+95	+11	-10	-36	-55	-72	-91	-71

Labour Force

	2011-2028	2011-2031
Number of	-6,475	-7,931
Change over previous	p.a. -381	p.a. -397
Number of	-4,488	-5,726
Change over previous	p.a. -264	p.a. -286

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Number of	55,635	55,504	55,325	55,117	54,884	54,593	54,250	53,851	53,521	53,202	52,689	52,200	51,679	51,143	50,645	50,091	49,643	49,160	48,673	48,201	47,704	47,226	46,730	46,199
Change over previous		-131	-179	-208	-234	-291	-343	-399	-329	-319	-513	-489	-521	-536	-498	-554	-448	-482	-487	-472	-497	-478	-496	-531
Number of	46,306	46,294	46,241	46,164	46,064	46,011	45,817	45,573	45,388	45,256	44,820	44,404	43,961	43,505	43,081	42,610	42,229	41,819	41,404	41,002	40,580	40,173	39,751	39,299
Change over previous		-12	-53	-77	-100	-53	-194	-243	-185	-132	-436	-416	-443	-456	-424	-471	-381	-410	-414	-402	-423	-407	-422	-452

Scenario D: 10yr Migration Trend

Population Estimates and Forecasts — **Nathaniel Lichfield & Partners**

Components of Population Change — **East Hampshire**

Year beginning July 1st .....

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Births																							
Male	681	679	675	660	653	642	630	621	613	605	596	586	575	563	550	539	528	518	510	504	499	495	494
Female	649	647	643	629	621	611	600	591	584	577	568	558	548	536	524	513	503	494	486	480	475	472	470
All Births	1,330	1,326	1,317	1,289	1,274	1,253	1,230	1,212	1,197	1,182	1,164	1,145	1,123	1,099	1,074	1,051	1,031	1,012	996	983	974	967	964
TFR	2.33	2.33	2.33	2.29	2.28	2.25	2.22	2.20	2.19	2.18	2.17	2.16	2.15	2.14	2.13	2.12	2.12	2.12	2.12	2.12	2.12	2.12	2.12
Births input																							
Deaths																							
Male	506	509	507	518	525	533	536	545	553	562	571	580	592	602	613	625	637	648	661	672	688	703	717
Female	605	605	606	602	610	612	616	619	624	630	637	644	650	656	666	678	691	704	719	733	750	767	783
All deaths	1,111	1,115	1,113	1,119	1,135	1,145	1,151	1,164	1,178	1,192	1,207	1,223	1,242	1,259	1,280	1,303	1,329	1,352	1,380	1,405	1,438	1,470	1,500
SMR: male	90.6	88.3	85.0	84.0	82.4	80.9	78.8	77.5	76.1	74.9	73.5	72.3	71.5	70.5	69.5	68.6	67.9	67.0	66.5	65.7	65.6	65.2	64.7
SMR: fema	98.4	96.4	94.4	91.5	90.4	88.5	86.8	85.0	83.5	81.7	80.3	78.8	77.3	75.7	74.6	73.5	72.4	71.4	70.6	69.7	69.3	68.7	68.0
SMR: male	94.7	92.5	89.9	87.9	86.5	84.8	82.9	81.3	79.8	78.3	76.9	75.6	74.4	73.1	72.1	71.1	70.2	69.2	68.6	67.7	67.4	67.0	66.4
Expectatior	82.1	82.4	82.6	82.7	82.8	83.0	83.1	83.3	83.4	83.5	83.6	83.7	83.8	83.9	84.0	84.1	84.2	84.3	84.4	84.5	84.6	84.6	84.7
Deaths input																							
In-migration from the UK																							
Male	3,029	3,030	3,038	3,048	3,049	3,053	3,064	3,069	3,078	3,086	3,091	3,099	3,103	3,107	3,110	3,110	3,115	3,116	3,114	3,115	3,113	3,110	3,110
Female	3,542	3,541	3,533	3,523	3,522	3,518	3,507	3,502	3,493	3,485	3,480	3,472	3,468	3,464	3,461	3,461	3,456	3,455	3,457	3,456	3,458	3,461	3,461
All	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571	6,571
SMgR: ma	55.8	55.5	55.4	55.3	55.2	55.2	55.4	55.7	56.0	56.2	56.5	56.8	57.1	57.2	57.4	57.5	57.7	57.8	57.7	57.6	57.3	57.1	57.1
SMgR: fem	64.2	64.3	64.2	64.3	64.4	64.5	64.6	64.9	65.1	65.3	65.6	65.6	65.7	65.8	65.9	65.8	65.8	65.7	65.7	65.3	65.1	65.0	64.9
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Out-migration to the UK																							
Male	2,846	2,847	2,849	2,865	2,873	2,882	2,888	2,901	2,903	2,915	2,920	2,926	2,917	2,935	2,943	2,935	2,936	2,931	2,935	2,930	2,935	2,932	2,932
Female	3,340	3,339	3,337	3,321	3,313	3,304	3,298	3,285	3,283	3,271	3,266	3,260	3,269	3,251	3,243	3,251	3,250	3,255	3,251	3,256	3,251	3,254	3,254
All	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186	6,186
SMgR: ma	52.4	52.1	51.9	52.0	52.0	52.1	52.3	52.6	52.8	53.1	53.4	53.7	53.7	54.1	54.3	54.3	54.4	54.4	54.4	54.2	54.0	53.9	53.8
SMgR: fem	60.6	60.6	60.6	60.6	60.6	60.6	60.8	60.9	61.2	61.3	61.6	61.6	61.9	61.8	61.7	61.8	61.9	61.9	61.8	61.5	61.2	61.1	61.0
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
In-migration from Overseas																							
Male	247	248	248	248	249	250	251	251	252	253	253	254	254	255	255	256	256	257	257	257	257	257	258
Female	233	232	232	232	231	230	229	229	228	227	227	226	226	225	225	224	224	223	223	223	223	223	222
All	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480
SMgR: ma	68.6	68.1	67.9	67.6	67.5	67.8	68.2	68.7	69.2	69.9	70.6	71.4	72.1	72.7	73.3	73.8	74.3	74.7	74.8	74.9	74.8	74.7	74.6
SMgR: fem	65.9	65.7	65.4	65.6	65.8	65.9	66.3	66.8	67.3	67.8	68.4	69.0	69.6	70.2	70.7	71.1	71.4	71.6	71.9	71.8	71.8	71.7	71.6
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Out-migration to Overseas																							
Male	199	199	200	200	200	201	201	202	202	202	203	203	203	204	204	204	205	205	205	206	206	206	206
Female	170	170	169	169	169	168	168	167	167	167	166	166	166	165	165	165	164	164	164	163	163	163	163
All	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369	369
SMgR: ma	55.3	54.9	54.6	54.4	54.2	54.4	54.7	55.0	55.5	56.0	56.5	57.1	57.6	58.1	58.5	59.0	59.4	59.7	59.8	59.9	59.8	59.8	59.7
SMgR: fem	48.0	47.9	47.8	47.9	48.1	48.3	48.5	48.9	49.3	49.7	50.2	50.6	51.1	51.5	51.9	52.2	52.4	52.6	52.7	52.6	52.6	52.5	52.4
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Migration - Net Flows																							
UK	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385	+385
Overseas	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111	+111
Summary of population change																							
Natural ch	+219	+211	+204	+169	+139	+108	+79	+48	+19	-10	-43	-78	-118	-160	-206	-252	-297	-340	-384	-422	-465	-503	-536
Net migrat	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496	+496
Net chang	+715	+707	+700	+665	+635	+604	+575	+544	+515	+486	+453	+418	+378	+336	+290	+244	+199	+156	+112	+74	+31	-7	-40

	2011-2028	2011-2031
UK	+6,545	+7,700
Overseas	+1,887	+2,220
Natural ch	+32	-1,113
Net migrat	+8,432	+9,920
Net chang	+8,464	+8,807

Summary of Population estimates/forecasts

Population at mid-year

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
0-4	6,195	6,375	6,548	6,772	6,921	7,076	6,991	6,886	6,767	6,661	6,555	6,454	6,360	6,266	6,162	6,048	5,930	5,809	5,690	5,579	5,487	5,409	5,345	5,294
5-10	7,858	7,945	8,020	8,143	8,222	8,278	8,564	8,767	8,952	9,171	9,317	9,455	9,327	9,182	9,029	8,892	8,754	8,620	8,489	8,355	8,214	8,066	7,914	7,761
11-15	7,416	7,320	7,152	6,952	6,860	6,871	6,890	6,976	7,177	7,218	7,302	7,378	7,605	7,819	8,085	8,258	8,433	8,327	8,198	8,055	7,932	7,812	7,698	7,589
16-17	3,263	3,134	3,114	3,126	3,036	2,931	2,826	2,831	2,746	2,740	2,857	2,866	2,949	3,051	2,999	2,996	3,039	3,270	3,515	3,496	3,447	3,390	3,341	3,281
18-59Fema	64,539	64,388	64,321	64,181	64,159	64,034	63,820	63,558	63,229	62,930	62,439	61,991	61,482	60,926	60,544	60,057	59,590	59,093	58,627	58,505	58,307	58,027	57,877	57,705
60/65 -74	16,142	16,653	17,051	17,417	17,709	18,115	18,422	18,575	18,673	18,830	18,982	18,844	18,939	19,154	19,424	19,860	20,218	20,681	21,052	21,307	21,559	21,810	21,885	21,959
75-84	7,376	7,595	7,798	7,998	8,202	8,280	8,530	8,889	9,337	9,705	10,087	10,789	11,316	11,747	11,999	12,272	12,401	12,436	12,431	12,490	12,539	12,382	12,358	12,411
85+	3,221	3,315	3,428	3,544	3,688	3,848	3,994	4,131	4,275	4,415	4,617	4,833	5,051	5,262	5,499	5,649	5,910	6,238	6,629	6,955	7,333	7,952	8,423	8,802
Total	116,010	116,725	117,432	118,133	118,798	119,433	120,037	120,612	121,156	121,671	122,157	122,610	123,027	123,405	123,741	124,031	124,275	124,474	124,631	124,742	124,817	124,848	124,842	124,802

	2011-2028	2011-2031
Total	+8,464	+8,807

Population impact of constraint

Number of persons

Households	2011-2028	2011-2031
Number of	+6,120	+6,711
Change over previous	+171 p.a.	+336 p.a.
Number of	+6,348	+6,962
Change over previous	+177 p.a.	+348 p.a.

Labour Force	2011-2028	2011-2031
Number of	-1,360	-1,884
Change over previous	-80 p.a.	-94 p.a.
Number of	-136	-582
Change over previous	-8 p.a.	-29 p.a.

Scenario E: 5yr Migration Trend

Population Estimates and Forecasts — **Nathaniel Lichfield & Partners**

Components of Population Change — **East Hampshire**

Year beginning July 1st .....

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033		
Births																									
Male	681	684	685	676	674	668	662	658	657	655	652	647	641	634	625	617	610	603	597	593	590	589	589		
Female	649	652	652	643	641	636	631	627	625	624	621	616	611	603	595	588	581	574	569	565	562	561	561		
All Births	1,330	1,336	1,337	1,319	1,315	1,304	1,293	1,285	1,282	1,279	1,272	1,263	1,252	1,237	1,220	1,205	1,191	1,178	1,166	1,158	1,152	1,150	1,151		
TFR	2.33	2.33	2.33	2.29	2.28	2.25	2.22	2.20	2.19	2.18	2.17	2.16	2.15	2.14	2.13	2.12	2.12	2.12	2.12	2.12	2.12	2.12	2.12		
Births input																									
Deaths																									
Male	506	510	508	519	527	535	539	548	557	566	575	585	597	608	620	632	645	656	670	681	698	714	728		
Female	605	606	607	603	611	614	617	620	626	631	639	646	652	659	669	681	694	707	722	736	753	770	786		
All deaths	1,111	1,116	1,115	1,122	1,138	1,148	1,156	1,168	1,183	1,198	1,214	1,231	1,249	1,267	1,289	1,313	1,339	1,363	1,392	1,417	1,451	1,483	1,514		
SMR: male	90.6	88.3	85.0	84.0	82.4	80.9	78.8	77.5	76.1	74.8	73.5	72.3	71.5	70.5	69.5	68.6	67.9	67.0	66.4	65.7	65.5	65.1	64.7		
SMR: fema	98.4	96.4	94.4	91.5	90.4	88.5	86.8	85.0	83.4	81.7	80.2	78.8	77.2	75.7	74.5	73.4	72.4	71.3	70.5	69.6	69.2	68.6	67.9		
SMR: male	94.7	92.5	89.9	87.9	86.5	84.8	82.9	81.3	79.8	78.3	76.9	75.6	74.3	73.1	72.0	71.0	70.1	69.2	68.5	67.7	67.4	66.9	66.3		
Expectation	82.1	82.4	82.6	82.7	82.9	83.0	83.2	83.3	83.4	83.5	83.6	83.7	83.8	84.0	84.1	84.2	84.2	84.3	84.4	84.5	84.6	84.7	84.7		
Deaths input																									
In-migration from the UK																									
Male	2,965	2,963	2,968	2,975	2,973	2,974	2,982	2,985	2,992	2,999	3,002	3,008	3,011	3,014	3,017	3,016	3,020	3,020	3,017	3,017	3,015	3,012	3,011		
Female	3,467	3,469	3,464	3,457	3,459	3,458	3,450	3,447	3,440	3,433	3,430	3,424	3,421	3,418	3,415	3,416	3,412	3,412	3,415	3,415	3,417	3,420	3,421		
All	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432	6,432		
SMigR: ma	54.6	54.0	53.6	53.3	52.8	52.6	52.5	52.4	52.5	52.5	52.5	52.5	52.5	52.4	52.3	52.2	52.2	52.1	51.8	51.5	51.1	50.7	50.4		
SMigR: fem	62.9	62.6	62.2	62.0	61.9	61.7	61.5	61.5	61.4	61.3	61.3	61.1	60.9	60.8	60.6	60.3	60.1	59.8	59.5	59.0	58.5	58.2	57.9		
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
Out-migration to the UK																									
Male	2,688	2,686	2,685	2,698	2,703	2,709	2,712	2,723	2,723	2,733	2,736	2,741	2,733	2,747	2,755	2,747	2,747	2,742	2,745	2,741	2,744	2,741	2,740		
Female	3,155	3,157	3,158	3,145	3,140	3,134	3,131	3,120	3,120	3,110	3,107	3,102	3,110	3,096	3,088	3,096	3,096	3,101	3,098	3,102	3,099	3,102	3,103		
All	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843	5,843		
SMigR: ma	49.5	49.0	48.5	48.3	48.0	47.9	47.8	47.8	47.7	47.8	47.8	47.8	47.7	47.8	47.8	47.6	47.5	47.3	47.2	46.8	46.5	46.2	45.9		
SMigR: fem	57.2	56.9	56.7	56.4	56.2	55.9	55.8	55.7	55.7	55.6	55.5	55.4	55.4	55.1	54.8	54.7	54.5	54.3	54.0	53.6	53.1	52.8	52.5		
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
In-migration from Overseas																									
Male	311	311	312	312	312	313	314	314	315	316	316	317	317	317	318	318	318	319	319	319	319	319	319		
Female	293	293	292	292	292	291	290	290	289	288	288	287	287	287	286	286	286	285	285	285	285	285	285		
All	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604	604		
SMigR: ma	86.3	85.2	84.4	83.5	82.9	82.7	82.6	82.7	82.9	83.2	83.6	84.0	84.4	84.7	85.0	85.2	85.4	85.5	85.2	85.0	84.5	84.0	83.6		
SMigR: fem	82.9	82.2	81.5	81.2	80.9	80.6	80.5	80.6	80.8	81.0	81.2	81.6	81.8	82.1	82.4	82.4	82.4	82.3	82.2	81.9	81.5	81.1	80.6		
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
Out-migration to Overseas																									
Male	214	214	214	214	215	215	215	215	216	216	216	217	217	217	217	217	217	218	218	218	218	218	218		
Female	183	183	183	183	182	182	182	182	181	181	181	180	180	180	180	180	180	179	179	179	179	179	179		
All	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397	397		
SMigR: ma	59.5	58.7	58.1	57.4	57.0	56.7	56.7	56.7	56.8	57.0	57.2	57.5	57.7	57.9	58.0	58.2	58.3	58.4	58.3	58.1	57.8	57.5	57.2		
SMigR: fem	51.6	51.3	50.9	50.7	50.6	50.5	50.4	50.5	50.7	50.8	51.0	51.2	51.4	51.6	51.8	51.8	51.8	51.8	51.6	51.4	51.1	50.8	50.5		
Migrants in	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*		
Migration - Net Flows																								***2011-2028***	***2011-2031***
UK	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+589	+10,013	+11,780
Overseas	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+207	+3,519	+4,140
Summary of population change																									
Natural ch	+219	+220	+223	+197	+177	+156	+137	+117	+99	+81	+58	+33	+2	-30	-68	-108	-148	-185	-225	-259	-299	-334	-363	+1,366	+696
Net migrat	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+796	+13,532	+15,920
Net chang	+1,015	+1,016	+1,019	+993	+973	+952	+933	+913	+895	+877	+854	+829	+798	+766	+728	+688	+648	+611	+571	+537	+497	+462	+433	+14,898	+16,616

Summary of Population estimates/forecasts

Population at mid-year

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034		
0-4	6,195	6,388	6,583	6,838	7,025	7,225	7,192	7,141	7,077	7,028	6,979	6,936	6,899	6,861	6,811	6,747	6,675	6,596	6,513	6,435	6,371	6,318	6,276	6,247		
5-10	7,858	7,954	8,039	8,171	8,261	8,327	8,627	8,852	9,068	9,328	9,524	9,721	9,658	9,580	9,496	9,431	9,364	9,302	9,241	9,175	9,098	9,008	8,911	8,807		
11-15	7,416	7,329	7,172	6,979	6,894	6,912	6,938	7,029	7,237	7,284	7,374	7,456	7,694	7,928	8,225	8,437	8,660	8,608	8,534	8,448	8,385	8,324	8,271	8,223		
16-17	3,263	3,140	3,125	3,141	3,054	2,953	2,850	2,858	2,775	2,770	2,891	2,902	2,987	3,091	3,040	3,039	3,085	3,324	3,586	3,586	3,558	3,523	3,497	3,460		
18-59Fema	64,539	64,631	64,808	64,912	65,138	65,264	65,300	65,287	65,206	65,154	64,906	64,698	64,430	64,111	63,966	63,714	63,483	63,218	62,986	63,106	63,162	63,144	63,268	63,380		
60/65 -74	16,142	16,666	17,079	17,461	17,768	18,192	18,517	18,689	18,808	18,987	19,162	19,047	19,167	19,409	19,708	20,174	20,561	21,055	21,457	21,739	22,015	22,290	22,385	22,477		
75-84	7,376	7,599	7,806	8,011	8,219	8,302	8,556	8,921	9,375	9,749	10,139	10,852	11,389	11,830	12,093	12,376	12,517	12,562	12,568	12,639	12,700	12,556	12,546	12,614		
85+	3,221	3,317	3,430	3,547	3,692	3,852	3,999	4,136	4,280	4,421	4,623	4,838	5,056	5,267	5,504	5,653	5,914	6,243	6,634	6,960	7,338	7,959	8,431	8,811		
Total	116,010	117,025	118,041	119,060	120,053	121,026	121,978	122,912	123,825	124,720	125,597	126,452	127,280	128,079	128,844	129,572	130,260	130,908	131,519	132,089	132,626	133,123	133,586	134,018	+14,898	+16,616

Population impact of constraint

Number of persons

Households																									***2011-2028***	***2011-2031***
Number of	47,408	47,978	48,502	49,019	49,542	50,066	50,572	51,086	51,554	52,000	52,406	52,896	53,342	53,788	54,253	54,713	55,170	55,553	55,921	56,269	56,581	56,885	57,176	57,499	+8,145	+9,174
Change over previous		+570	+525	+516	+523	+524	+506	+515	+467	+446	+406	+490	+447	+446	+465	+461	+457	+383	+368	+347	+313	+304	+292	+323	p.a. +479	p.a. +459
Number of	49,178	49,769	50,314	50,849	51,392	51,935	52,460	52,994	53,479	53,941	54,363	54,871	55,334	55,797	56,279	56,757	57,231	57,628	58,010	58,370	58,694	59,009	59,312	59,646	+8,450	+9,516
Change over previous		+591	+544	+535	+543	+544	+525	+534	+485	+463	+422	+508	+463	+462	+482	+478	+474	+397	+382	+360	+324	+315	+302	+335	p.a. +497	p.a. +476
Labour Force																									***2011-2028***	***2011-2031***
Number of	55,635	55,973	56,287	56,579	56,852	57,066	57,233	57,343	57,522	57,708	57,693	57,703	57,671	57,624	57,615	57,545	57,589	57,605	57,622	57,668	57,698	57,774	57,848	57,901	+1,969	+2,062
Change over previous		+338	+314	+292	+272	+214	+167	+110	+180	+185	-14	+9	-32	-47	-9	-71	+44	+16	+17	+46	+30	+76	+74	+54	p.a. +116	p.a. +103
Number of	46,306	46,685	47,045	47,388	47,716	48,095	48,336	48,528	48,781	49,089	49,077	49,085	49,058	49,018	49,011	48,951	48,988	49,002	49,016	49,055	49,081	49,146	49,208	49,254	+2,696	+2,775
Change over previous		+379	+360	+343	+327	+379	+241	+193	+253	+308	-12	+8	-27	-40	-8	-60	+38	+14	+15	+39	+25	+65	+63	+46	p.a. +159	p.a. +139

Scenario F: Baseline Experian Forecast

Population Estimates and Forecasts — **Nathaniel Lichfield & Partners**

Components of Population Change — **East Hampshire District**

Year beginning July 1st .....

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Births																							
Male	681	685	688	681	681	676	675	676	678	678	685	689	692	693	691	691	689	687	686	686	687	688	691
Female	649	653	655	648	648	644	643	644	646	645	652	656	659	660	658	659	656	655	653	653	654	655	658
All Births	1,330	1,338	1,343	1,329	1,329	1,320	1,317	1,320	1,324	1,323	1,336	1,345	1,351	1,353	1,350	1,350	1,346	1,342	1,339	1,338	1,341	1,343	1,349
TFR	2.31	2.32	2.32	2.28	2.27	2.25	2.23	2.21	2.21	2.20	2.20	2.19	2.18	2.17	2.15	2.14	2.13	2.13	2.12	2.11	2.11	2.11	2.10
Births input																							
Deaths																							
Male	506	511	509	521	530	539	544	555	566	576	588	600	615	629	643	659	674	687	703	717	737	755	772
Female	605	608	611	609	619	623	630	636	644	652	663	675	685	696	710	727	743	759	778	796	817	837	857
All deaths	1,111	1,118	1,120	1,130	1,149	1,162	1,174	1,192	1,210	1,227	1,251	1,274	1,300	1,326	1,353	1,385	1,417	1,447	1,482	1,513	1,554	1,592	1,629
SMR: male	90.6	88.3	85.1	84.0	82.5	81.0	78.9	77.6	76.2	75.0	73.7	72.4	71.6	70.6	69.7	68.8	68.1	67.2	66.6	65.8	65.7	65.3	64.8
SMR: fema	98.4	96.4	94.5	91.6	90.5	88.7	87.0	85.2	83.7	81.9	80.5	79.1	77.5	76.0	74.8	73.8	72.7	71.6	70.9	70.0	69.5	68.9	68.2
SMR: male	94.7	92.6	89.9	87.9	86.6	84.9	83.0	81.5	80.0	78.5	77.1	75.8	74.6	73.4	72.3	71.3	70.4	69.5	68.8	68.0	67.6	67.1	66.6
Expectation	82.1	82.4	82.6	82.7	82.9	83.0	83.2	83.3	83.4	83.5	83.6	83.7	83.9	84.0	84.1	84.2	84.3	84.3	84.4	84.5	84.6	84.7	84.7
Deaths input																							
In-migration from the UK																							
Male	3,323	3,364	3,410	3,442	3,417	3,578	3,649	3,592	3,543	3,894	3,888	3,964	4,020	4,010	4,108	4,032	4,077	4,107	4,110	4,196	4,203	4,237	4,282
Female	3,886	3,939	3,981	4,001	3,978	4,161	4,227	4,159	4,089	4,477	4,473	4,553	4,621	4,611	4,725	4,649	4,694	4,730	4,745	4,847	4,865	4,915	4,969
All	7,210	7,303	7,391	7,443	7,395	7,739	7,876	7,751	7,632	8,371	8,361	8,517	8,640	8,621	8,833	8,680	8,771	8,837	8,854	9,043	9,068	9,152	9,251
SMigR: ma	61.2	61.3	61.6	61.6	60.5	63.1	63.9	62.4	61.3	67.2	66.4	67.0	67.3	66.4	67.3	65.4	65.6	65.5	64.8	65.4	64.7	64.5	64.5
SMigR: fem	70.5	71.1	71.5	71.6	70.8	73.9	74.7	73.1	71.7	78.3	77.4	77.9	78.0	77.0	77.9	75.5	75.4	75.1	74.4	74.8	74.1	74.0	74.0
Migrants input																							
Out-migration to the UK																							
Male	2,940	2,950	2,964	2,980	3,009	3,022	3,040	3,056	3,060	3,078	3,097	3,135	3,166	3,209	3,258	3,289	3,306	3,332	3,371	3,438	3,497	3,531	3,560
Female	3,451	3,464	3,486	3,475	3,498	3,498	3,512	3,510	3,519	3,516	3,539	3,582	3,646	3,665	3,709	3,771	3,792	3,840	3,880	3,971	4,031	4,078	4,115
All	6,391	6,414	6,450	6,454	6,508	6,520	6,551	6,566	6,579	6,595	6,636	6,717	6,812	6,874	6,967	7,060	7,098	7,172	7,251	7,409	7,528	7,609	7,675
SMigR: ma	54.1	53.8	53.5	53.3	53.3	53.3	53.2	53.1	53.0	53.1	52.9	53.0	53.0	53.1	53.4	53.4	53.2	53.1	53.2	53.6	53.8	53.7	53.6
SMigR: fem	62.6	62.5	62.6	62.2	62.3	62.1	62.0	61.7	61.7	61.5	61.3	61.3	61.5	61.2	61.1	61.2	60.9	61.0	60.8	61.3	61.4	61.4	61.3
Migrants input																							
In-migration from Overseas																							
Male	370	373	377	381	384	384	387	390	391	392	396	399	403	406	409	412	415	418	420	422	425	428	430
Female	349	351	354	358	359	358	359	361	362	362	366	368	372	375	379	382	384	387	390	392	395	398	400
All	719	723	731	739	743	742	745	751	753	754	762	767	775	781	788	794	799	804	810	814	819	825	830
SMigR: ma	102.7	102.1	102.0	101.8	101.5	101.2	101.3	101.7	101.9	102.2	102.6	102.8	103.1	103.2	103.4	103.4	103.6	103.5	103.2	102.7	102.2	101.9	101.4
SMigR: fem	98.6	98.3	98.3	98.9	99.0	98.6	98.5	98.9	99.2	99.4	99.8	99.8	100.0	100.3	100.5	100.3	100.2	100.0	100.0	99.5	99.1	98.8	98.4
Migrants input																							
Out-migration to Overseas																							
Male	348	354	362	369	377	384	386	389	390	391	395	398	401	404	407	411	414	416	419	422	426	429	432
Female	296	301	308	315	322	326	327	329	330	330	333	336	340	343	346	349	351	353	356	357	360	362	365
All	644	655	670	684	699	710	713	718	720	721	728	734	741	747	753	759	765	770	775	780	786	791	797
SMigR: ma	96.6	96.9	97.8	98.6	99.8	101.1	101.2	101.4	101.6	101.9	102.2	102.5	102.7	102.8	103.0	103.0	103.3	103.2	103.1	102.8	102.4	102.2	101.9
SMigR: fem	83.7	84.5	85.6	87.0	88.6	89.9	89.8	90.2	90.4	90.7	90.9	91.1	91.4	91.6	91.7	91.6	91.5	91.4	91.2	90.7	90.4	90.1	89.8
Migrants input																							
Migration - Net Flows																							
UK	+819	+889	+941	+988	+887	+1,219	+1,324	+1,186	+1,054	+1,776	+1,725	+1,800	+1,828	+1,747	+1,866	+1,620	+1,673	+1,665	+1,603	+1,634	+1,540	+1,543	+1,576
Overseas	+75	+68	+61	+55	+44	+32	+32	+33	+33	+33	+34	+34	+34	+34	+35	+35	+35	+34	+35	+34	+34	+34	+33
Summary of population change																							
Natural ch	+219	+219	+223	+199	+180	+158	+143	+129	+114	+96	+85	+71	+51	+27	-4	-35	-71	-105	-143	-174	-213	-249	-279
Net migrat	+894	+958	+1,002	+1,043	+931	+1,251	+1,356	+1,218	+1,087	+1,810	+1,759	+1,834	+1,862	+1,781	+1,901	+1,655	+1,708	+1,699	+1,638	+1,668	+1,573	+1,577	+1,609
Net chang	+1,113	+1,177	+1,225	+1,242	+1,111	+1,408	+1,500	+1,347	+1,200	+1,905	+1,845	+1,905	+1,913	+1,809	+1,897	+1,620	+1,637	+1,594	+1,495	+1,494	+1,360	+1,329	+1,330

	2011-2028	2011-2031
UK	+23,343	+28,245
Overseas	+706	+810
Natural ch	+1,804	+1,381
Net migrat	+24,049	+29,055
Net chang	+25,853	+30,436

Summary of Population estimates/forecasts

Population at mid-year

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
0-4	6,195	6,417	6,644	6,937	7,162	7,391	7,404	7,409	7,386	7,362	7,401	7,444	7,504	7,564	7,604	7,637	7,634	7,618	7,593	7,562	7,548	7,536	7,530	7,536
5-10	7,858	7,970	8,079	8,242	8,371	8,476	8,848	9,155	9,447	9,775	10,087	10,397	10,436	10,467	10,485	10,534	10,570	10,619	10,671	10,709	10,736	10,741	10,726	10,696
11-15	7,416	7,338	7,190	7,008	6,938	6,969	7,025	7,157	7,405	7,488	7,657	7,822	8,163	8,507	8,915	9,240	9,567	9,593	9,598	9,590	9,610	9,633	9,670	9,720
16-17	3,263	3,144	3,132	3,153	3,073	2,974	2,878	2,895	2,820	2,826	2,972	3,003	3,117	3,259	3,236	3,273	3,356	3,655	3,978	4,010	4,014	4,007	4,010	4,003
18-59Fema	64,539	64,647	64,887	65,081	65,419	65,575	65,848	66,141	66,275	66,350	66,695	67,050	67,386	67,680	68,108	68,500	68,756	69,018	69,306	69,942	70,516	70,951	71,539	72,135
60/65 -74	16,142	16,668	17,085	17,474	17,793	18,220	18,568	18,768	18,904	19,093	19,323	19,259	19,442	19,754	20,122	20,674	21,135	21,718	22,211	22,582	22,959	23,336	23,527	23,723
75-84	7,376	7,609	7,826	8,041	8,259	8,348	8,619	9,003	9,473	9,858	10,283	11,031	11,604	12,083	12,377	12,697	12,860	12,926	12,950	13,041	13,125	12,990	12,997	13,091
85+	3,221	3,329	3,457	3,590	3,752	3,925	4,096	4,259	4,423	4,580	4,822	5,076	5,335	5,587	5,863	6,051	6,347	6,716	7,150	7,516	7,938	8,613	9,135	9,562
Total	116,010	117,123	118,300	119,525	120,767	121,878	123,286	124,786	126,133	127,333	129,238	131,083	132,987	134,900	136,709	138,606	140,226	141,863	143,457	144,952	146,446	147,807	149,135	150,465

	2011-2028	2011-2031
Total	+25,853	+30,436

Population impact of constraint

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Number of persons		+302	+293	+293	+276	+180	+494	+569	+366	+194	+896	+791	+863	+889	+770	+874	+616	+623	+590	+517	+626	+553	+539	+521

Labour Force

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Number of	55,635	56,006	56,375	56,743	57,109	57,354	57,717	58,078	58,437	58,735	59,212	59,690	60,167	60,644	61,121	61,599	62,076	62,553	63,031	63,508	63,985	64,462	64,940	65,417
Change over previous		+371	+369	+368	+366	+245	+363	+361	+360	+298	+477	+477	+477	+477	+477	+477	+477	+477	+477	+477	+477	+477	+477	+477
Number of	46,306	46,713	47,119	47,525	47,931	48,338	48,744	49,151	49,557	49,963	50,369	50,775	51,181	51,587	51,993	52,399	52,805	53,211	53,617	54,023	54,429	54,835	55,241	55,647
Change over previous		+406	+406	+406	+406	+406	+406	+407	+406	+406	+406	+406	+406	+406	+406	+406	+406	+406	+406	+406	+406	+406	+406	+406

	2011-2028	2011-2031
Number of	+6,918	+8,350
p.a.	+407	+417
Change over previous	+6,905	+8,123
p.a.	+406	+406

Households

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Number of	47,408	48,021	48,606	49,198	49,820	50,413	51,086	51,790	52,399	52,945	53,696	54,520	55,333	56,168	57,013	57,909	58,719	59,459	60,185	60,873	61,544	62,178	62,807	63,489
Change over previous		+614	+584	+593	+622	+593	+673	+704	+609	+546	+752	+824	+813	+835	+844	+897	+810	+739	+726	+689	+670	+635	+629	+682
Number of	49,178	49,815	50,421	51,036	51,681	52,296	52,994	53,724	54,356	54,922	55,702	56,556	57,399	58,266	59,142	60,072	60,912	61,679	62,432	63,147	63,842	64,500	65,153	65,860
Change over previous		+637	+606	+615	+645	+615	+698	+730	+632	+566	+780	+854	+843	+866	+876	+930	+840	+767	+753	+715	+695	+658	+652	+707

	2011-2028	2011-2031
Number of	+12,051	+14,136
p.a.	+709	+707
Change over previous	+12,501	+14,664
p.a.	+735	+733

Scenario G: Lower Experian Forecast

Population Estimates and Forecasts — **Nathaniel Lichfield & Partners**

Components of Population Change — **East Hampshire**

Year beginning July 1st .....

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Births																							
Male	681	674	665	646	635	620	608	599	590	581	578	574	570	565	559	556	552	549	547	547	548	550	553
Female	649	642	633	615	605	590	579	570	562	553	550	547	543	538	533	530	526	523	521	521	522	523	526
All Births	1,330	1,315	1,297	1,262	1,240	1,210	1,186	1,169	1,152	1,133	1,128	1,121	1,113	1,104	1,092	1,086	1,078	1,072	1,068	1,068	1,070	1,073	1,079
TFR	2.33	2.33	2.33	2.29	2.28	2.25	2.22	2.20	2.19	2.18	2.17	2.16	2.15	2.14	2.13	2.12	2.12	2.12	2.12	2.12	2.12	2.12	2.12
Births input																							
Deaths																							
Male	506	508	505	515	522	528	532	541	550	558	568	578	591	604	616	629	642	654	668	680	697	713	728
Female	605	604	604	599	606	608	611	615	621	626	635	644	653	662	674	688	702	717	733	749	767	785	803
All deaths	1,111	1,112	1,109	1,114	1,128	1,136	1,143	1,157	1,170	1,183	1,203	1,222	1,244	1,265	1,289	1,317	1,344	1,370	1,401	1,428	1,465	1,499	1,531
SMR: male	90.6	88.3	85.0	84.0	82.4	80.9	78.8	77.5	76.1	74.9	73.6	72.3	71.5	70.6	69.6	68.8	68.0	67.2	66.6	65.8	65.7	65.3	64.9
SMR: fema	98.4	96.4	94.4	91.5	90.4	88.5	86.8	85.0	83.5	81.7	80.3	78.9	77.3	75.8	74.7	73.6	72.6	71.5	70.8	69.9	69.4	68.8	68.2
SMR: male	94.7	92.5	89.9	87.9	86.5	84.8	82.9	81.3	79.9	78.4	77.0	75.7	74.5	73.2	72.2	71.2	70.3	69.4	68.7	67.9	67.6	67.1	66.6
Expectatior	82.1	82.4	82.6	82.7	82.8	83.0	83.1	83.3	83.4	83.5	83.6	83.7	83.8	83.9	84.0	84.2	84.2	84.3	84.4	84.5	84.6	84.7	84.7
Deaths input																							
In-migration from the UK																							
Male	2,947	2,968	2,991	2,999	2,954	3,088	3,133	3,055	2,986	3,303	3,275	3,327	3,361	3,335	3,412	3,328	3,360	3,376	3,367	3,436	3,433	3,455	3,487
Female	3,446	3,463	3,467	3,451	3,394	3,535	3,566	3,469	3,375	3,715	3,684	3,735	3,774	3,745	3,833	3,747	3,779	3,799	3,799	3,880	3,885	3,918	3,955
All	6,392	6,431	6,458	6,450	6,348	6,623	6,699	6,523	6,361	7,019	6,959	7,062	7,136	7,080	7,245	7,075	7,139	7,175	7,166	7,317	7,319	7,372	7,441
SMigR: ma	54.3	54.6	55.0	55.2	54.3	57.0	57.9	56.5	55.4	61.6	60.9	61.8	62.2	61.4	62.6	60.8	61.3	61.3	60.9	61.7	61.1	61.2	61.4
SMigR: fem	62.5	63.2	63.7	64.0	63.2	66.4	67.3	65.8	64.4	71.4	70.6	71.3	71.6	70.8	72.0	69.8	70.1	70.1	69.5	70.3	69.8	69.9	70.2
Migrants input																							
Out-migration to the UK																							
Male	2,940	2,924	2,914	2,906	2,911	2,898	2,891	2,884	2,865	2,861	2,857	2,873	2,882	2,902	2,929	2,940	2,937	2,943	2,961	3,004	3,039	3,051	3,058
Female	3,451	3,422	3,403	3,353	3,339	3,304	3,284	3,251	3,230	3,200	3,195	3,210	3,247	3,242	3,262	3,298	3,298	3,321	3,337	3,398	3,430	3,449	3,459
All	6,391	6,346	6,317	6,258	6,250	6,202	6,176	6,135	6,095	6,061	6,052	6,083	6,129	6,145	6,191	6,238	6,235	6,264	6,298	6,402	6,469	6,500	6,517
SMigR: ma	54.1	53.8	53.6	53.4	53.5	53.5	53.4	53.3	53.2	53.3	53.2	53.3	53.3	53.5	53.7	53.7	53.6	53.5	53.5	53.9	54.1	54.0	53.9
SMigR: fem	62.6	62.5	62.5	62.1	62.2	62.1	62.0	61.7	61.6	61.5	61.3	61.3	61.6	61.3	61.3	61.5	61.2	61.2	61.1	61.6	61.6	61.6	61.4
Migrants input																							
In-migration from Overseas																							
Male	370	369	369	369	368	365	364	364	362	360	361	361	362	362	363	364	364	364	365	365	365	366	367
Female	349	346	344	342	339	333	330	328	326	322	322	321	321	322	322	323	323	323	324	324	325	325	326
All	719	714	713	711	707	698	694	692	687	681	683	682	683	684	685	686	687	687	689	689	690	692	693
SMigR: ma	102.7	102.1	101.9	101.7	101.4	101.2	101.2	101.6	101.8	102.1	102.5	102.6	102.9	103.1	103.2	103.2	103.5	103.4	103.2	102.7	102.2	101.9	101.6
SMigR: fem	98.6	98.3	98.3	98.7	98.7	98.3	98.2	98.6	98.8	98.9	99.2	99.2	99.3	99.5	99.7	99.5	99.4	99.3	99.2	98.7	98.4	98.1	97.7
Migrants input																							
Out-migration to Overseas																							
Male	348	350	355	359	363	366	365	365	363	361	361	362	362	363	363	363	364	364	365	366	366	367	368
Female	296	297	300	302	305	305	302	301	299	295	295	295	296	296	296	297	297	297	298	297	298	299	299
All	644	648	654	661	668	672	668	666	662	656	657	657	658	659	659	660	661	661	662	663	664	666	668
SMigR: ma	96.6	97.0	98.0	98.9	100.2	101.5	101.6	101.9	102.1	102.3	102.6	102.8	103.1	103.1	103.2	103.2	103.5	103.4	103.2	102.9	102.4	102.2	101.9
SMigR: fem	83.7	84.5	85.7	87.1	88.8	90.1	90.0	90.4	90.6	90.9	91.0	91.2	91.4	91.6	91.7	91.5	91.4	91.3	91.1	90.6	90.3	90.0	89.7
Migrants input																							
Migration - Net Flows																							
UK	+2	+84	+141	+192	+98	+421	+524	+388	+266	+958	+907	+979	+1,007	+935	+1,054	+837	+904	+911	+868	+915	+849	+873	+925
Overseas	+75	+67	+58	+51	+39	+26	+26	+26	+26	+25	+26	+25	+25	+25	+26	+26	+26	+26	+26	+26	+26	+26	+26
Summary of population change																							
Natural ch	+219	+203	+189	+148	+112	+74	+43	+12	-18	-50	-75	-101	-131	-162	-197	-231	-266	-298	-333	-361	-395	-426	-452
Net migrat	+77	+151	+200	+243	+137	+447	+550	+414	+292	+983	+933	+1,004	+1,032	+961	+1,080	+863	+930	+937	+894	+941	+875	+899	+950
Net chang	+296	+354	+388	+391	+249	+521	+593	+427	+274	+933	+859	+903	+901	+799	+883	+632	+664	+639	+562	+580	+480	+473	+498

	2011-2028	2011-2031
UK	+9,697	+12,391
Overseas	+598	+676
	-231	-1,223
	+10,296	+13,068
	+10,065	+11,845

Summary of Population estimates/forecasts

Population at mid-year

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
0-4	6,195	6,346	6,489	6,682	6,800	6,910	6,808	6,699	6,566	6,436	6,367	6,306	6,264	6,231	6,188	6,151	6,095	6,041	5,990	5,944	5,922	5,908	5,905	5,916
5-10	7,858	7,923	7,979	8,083	8,145	8,175	8,450	8,645	8,809	8,995	9,154	9,302	9,193	9,077	8,953	8,860	8,763	8,684	8,618	8,550	8,488	8,421	8,354	8,289
11-15	7,416	7,301	7,116	6,903	6,801	6,796	6,814	6,902	7,097	7,126	7,230	7,322	7,566	7,797	8,073	8,263	8,442	8,342	8,223	8,096	7,997	7,904	7,830	7,773
16-17	3,263	3,127	3,104	3,111	3,015	2,905	2,799	2,803	2,718	2,710	2,835	2,849	2,940	3,052	3,008	3,015	3,062	3,300	3,550	3,529	3,482	3,426	3,379	3,325
18-59Fema	64,539	64,097	63,792	63,447	63,251	62,880	62,626	62,395	62,012	61,582	61,408	61,247	61,068	60,853	60,770	60,652	60,417	60,191	59,997	60,124	60,192	60,134	60,221	60,317
60/65 -74	16,142	16,620	16,987	17,324	17,590	17,961	18,251	18,394	18,473	18,604	18,774	18,656	18,778	19,025	19,325	19,802	20,191	20,692	21,104	21,397	21,689	21,974	22,081	22,188
75-84	7,376	7,585	7,779	7,972	8,170	8,239	8,489	8,850	9,294	9,652	10,048	10,758	11,295	11,738	11,999	12,284	12,415	12,453	12,450	12,511	12,566	12,412	12,393	12,457
85+	3,221	3,307	3,414	3,526	3,667	3,821	3,971	4,114	4,259	4,397	4,619	4,853	5,091	5,324	5,579	5,751	6,027	6,373	6,782	7,124	7,519	8,156	8,644	9,041
Total	116,010	116,306	116,660	117,048	117,439	117,688	118,208	118,801	119,228	119,502	120,435	121,293	122,196	123,097	123,896	124,779	125,411	126,075	126,713	127,275	127,855	128,335	128,808	129,306

	+10,065
	+11,845

Population impact of constraint

Number of persons	-516	-501	-483	-486	-564	-249	-166	-352	-500	+186	+98	+181	+219	+125	+242	+25	+58	+48	-2	+116	+68	+70	+72

Labour Force

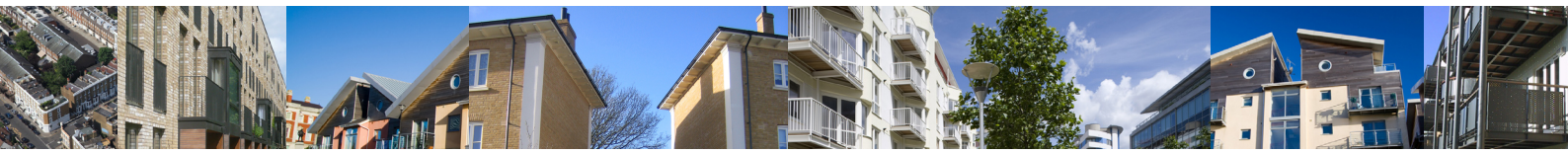
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Number of	55,635	55,562	55,488	55,415	55,342	55,155	55,083	55,012	54,941	54,814	54,856	54,899	54,941	54,983	55,026	55,068	55,110	55,153	55,195	55,237	55,280	55,322	55,364	55,407
Change over previous y		-74	-74	-73	-73	-187	-72	-71	-71	-127	+42	+42	+42	+42	+42	+42	+42	+42	+42	+42	+42	+42	+42	+42
Number of	46,306	46,342	46,377	46,413	46,448	46,484	46,520	46,556	46,592	46,628	46,664	46,700	46,736	46,772	46,808	46,844	46,880	46,916	46,952	46,988	47,024	47,060	47,096	47,132
Change over previous y		+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36	+36

	2011-2028	2011-2031
	-483	-356
p.a.	-28	p.a. -18
	+610	+718
p.a.	+36	p.a. +36

Households

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Number of	47,408	47,749	48,060	48,372	48,701	48,990	49,352	49,741	50,035	50,266	50,696	51,185	51,661	52,151	52,639	53,169	53,619	54,010	54,391	54,737	55,073	55,378	55,679	56,031
Change over previous y		+341	+311	+313	+328	+289	+362	+389	+294	+231	+430	+489	+476	+490	+488	+530	+450	+392	+381	+346	+337	+305	+301	+352
Number of	49,178	49,532	49,854	50,179	50,519	50,820	51,195	51,599	51,903	52,143	52,589	53,097	53,591	54,099	54,605	55,154	55,621	56,027	56,422	56,781	57,130	57,446	57,758	58,123
Change over previous y		+354	+323	+325	+341	+300	+376	+404	+305	+240	+446	+508	+494	+508	+506	+550	+467	+406	+395	+359	+349	+317	+312	+365

	2011-2028	2011-2031
	+6,603	+7,666
p.a.	+388	p.a. +383
	+6,849	+7,952
p.a.	+403	p.a. +398



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