The Need for New Housing Provision in Winchester

A Technical Assessment

CALA Homes (South) Ltd

8 December 2010

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Glossary

PopGroup

Forecasting model to project future population levels, based upon assumptions regarding fertility, mortality and migration when used in conjunction with HouseGroup and LabGroup it will also project the future dwelling requirements associated with the population change and the economic activity/job effects of change.

HouseGroup

Forecasting model to project future household levels and resultant dwelling requirements.

LabGroup

Forecasting model to project future economic activity and the number of jobs likely to be sustained in a particular area.

Concealed Households

A household that neither owns nor rents the dwelling within which they reside AND which wants to move into their own accommodation and form a separate household.

Economic Activity Rate

The % of population (both employed and unemployed) that constitutes the manpower supply of the labour market.

Headship Rate

Head of a household expressed as % of each age – sex population category. For married/cohabiting couples, males are taken as heads of household.

Labour Force

The number of economically active persons in the area (including those in employment and those unemployed and seeking work).

Natural Change

The difference (in any given time period) between the number of births and the number of deaths. A natural change projection ignores migration and shows the future population where any births and deaths affect it.

Executive Summary

This report has been prepared by Nathaniel Lichfield and Partners (NLP) on behalf of Cala Homes (South) Ltd. It is intended to inform and accompany its representations to Winchester City Council's 'Blueprint' consultation process for reviewing the Core Strategy. Cala Homes (South) Ltd has land interests at Barton Farm, Winchester, but these are not considered specifically within this report, which looks more strategically at the evidence of housing need and the implications of four different scenarios of provision.

NLP's demographic modelling uses the industry-standard PopGroup software, alongside ONS and Hampshire County Council assumptions on population levels at 2009, fertility, mortality and migration. Four scenarios have been considered:

• Scenario A: Baseline Population using the ONS Sub-National Population Projections (SNPP);

• Scenario B: Zero Net Migration based on equalising the 2008-based ONS SNPP projections of internal and international migration;

• Scenario C: Economic Growth using Cambridge Econometrics LEFM baseline employment projections contained in the 2007 Winchester ELR;

• Scenario D: Affordable Housing Needs based on the level of affordable housing need identified in the 2010 Winchester SHMA.

The context for Winchester's housing need is a housing market that has a relatively significant relationship with London (attracting in-migrating higher earners from the capital) and a number of contiguous areas. Within the district, there are clear market separations between the south (related to the PUSH area) and the non-PUSH area to the north (which includes Winchester City) related to central Hampshire. These areas are subject to separate housing allocations through the South East Plan, and the evidence in the 2010 Winchester SHMA supports the general principle of separating PUSH and non-PUSH areas in terms of housing supply.

However, NLP modelling of demographic change using both baseline trends and economic forecasts from Winchester district's own Economic and Employment Land Study indicates that the need for housing in the non-PUSH part of the district is (at 387-545 units pa) well in excess of the levels planned for by the South East Plan. PPS3 indicates that planning authorities should take account of economic growth forecasts in determining local housing provision. The evidence on affordable housing need contained in the Winchester SHMA (which looks both at the backlog and newly arising needs) also supports high levels of housing provision – at 940-1250 dwellings across the district, with the majority in the non-PUSH area.

The headline results for the non-PUSH area and Winchester district overall are illustrated in Figure 1.

Figure 1   Summary of Scenarios

District 2010 to 2026: **8,899**
District 2010 to 2026: **3,771**
District 2010 to 2026: **12,504**

Winchester District
Non-PUSH Sub-Area
SEP Winchester District Requirement p.a.
SEP Non-PUSH Area Requirement p.a.

Source: NLP Analysis

The CLG 2008-based household projections show a level of household growth for Winchester district equivalent to 555 dwellings per annum between 2008 and 2026. Para 33 of PPS3 indicates that local planning authorities should take account of such projections in determining the level of housing provision. In this respect, the CLG projections reinforce the validity of Scenario A shown above.

NLP has also modelled a zero net-migration scenario to test the assumption put forward by Blueprint. Unsurprisingly, such an assumption leads to a housing requirement below that of the South East Plan. However, it would give rise to a demographic structure in the district that was increasingly elderly, with a significant fall in the number of economically active residents. The consequences for both the district and Winchester City would be severe, losing employment in the district and costing the local economy almost £6.5 billion. The district would find its ability to deliver a sound business base and services in lower paid sectors (including health and residential care, which become more important with an elderly population) compromised.

The information accompanying Blueprint fails to identify the monetary implications of different housing provision flowing from the New Homes Bonus

being introduced by Government. Using the Government's own calculator, a zero-net migration scenario would generate £62m less than the South East Plan figures, and £89m less than if the Council adopted a housing target that was aligned to economic forecasts used in its Economic and Employment Land Study. An approach that sought to fully meet the affordable housing needs of the district would generate circa £156-204m for the Council.

The wider national policy objectives in PPS3 and the Local Growth White Paper will only be addressed by achieving reasonable levels of housing provision. Scenarios C (economic growth) and D (housing need) clearly help achieve headline national planning policy objectives in terms of providing for housing needs, delivering affordable housing, improve sustainability and reduce the need to travel, and support economic growth by balancing housing growth with employment needs.

The evidence clearly points to the significant benefits to Winchester of making adequate provision for its future housing needs and of the serious implications of it failing to do so.

1.0 Introduction

1.1 This report has been prepared by Nathaniel Lichfield and Partners (NLP) on behalf of CALA Homes (South) Ltd. It sets out the potential scale of future housing requirement in Winchester district for the period 2010-2026 based upon a range of housing, economic and demographic factors. It is intended to support representations by CALA Homes to the 'Blueprint' consultation process launched by Winchester City Council in October 2010 for determining local housing needs.[1]

1.2 The report is prepared in the context of CALA Homes' interests in land at Barton Farm, Winchester, but does not consider site-specific issues.

Policy Context for Assessing Housing Needs

1.3 The Coalition Government's policy approach to planning has been focused on applying principles of 'localism' to give local planning authorities greater autonomy in planning for housing, and in particular setting local housing requirements in their development plans.

1.4 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 successful legal challenge by CALA Homes, the Chief Planning Officer wrote to all local planning authorities on 10 November 2010 confirming that RS are re-instated as part of the development plan (although the legal status of this letter is now in abeyance), but that the Government intends to abolish these through the forthcoming Localism Bill.

1.5 The implication of the possible removal of regionally-set housing requirements, if passed by Parliament, is that responsibility for establishing housing requirement figures for Local Development Frameworks (LDFs) will ultimately fall to local councils. The Secretary of State has confirmed that local housing targets may be tested through the LDF process and local authorities will need to collect and use reliable information to justify housing policies and defend them at examination. The policy provisions of Planning Policy Statement 3 (Housing) continue to remain in place, including that the planning system should deliver *"a sufficient quantity of housing taking into account need and demand and seeking to improve choice."*[2]

Methodology

1.6 At the present time there is no commonly agreed approach for local planning authorities to follow in setting local housing requirements. In response, NLP has developed an analytical framework for defining the quantum of housing that

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[1] Winchester City Council Blueprint consultation, http://www.community-blueprint.co.uk/
[2] PPS3, paragraph 10

should be planned for through Local Development Frameworks. The framework provides the basis for assembling and presenting evidence on local housing requirements in a transparent manner.

1.7   A central component of the framework is an understanding of the role of housing in ensuring that the future population of a locality can be accommodated (taking account of the dynamics of housing markets and other material factors) and the extent to which housing plays a crucial role in securing the economic well-being and housing needs of a local area. The framework, as it relates to the work NLP has been commissioned to carry out for Winchester is set out in Figure 1.1 below.

Figure 1.1   Analytical Framework for Assessing Future Housing Needs in Winchester
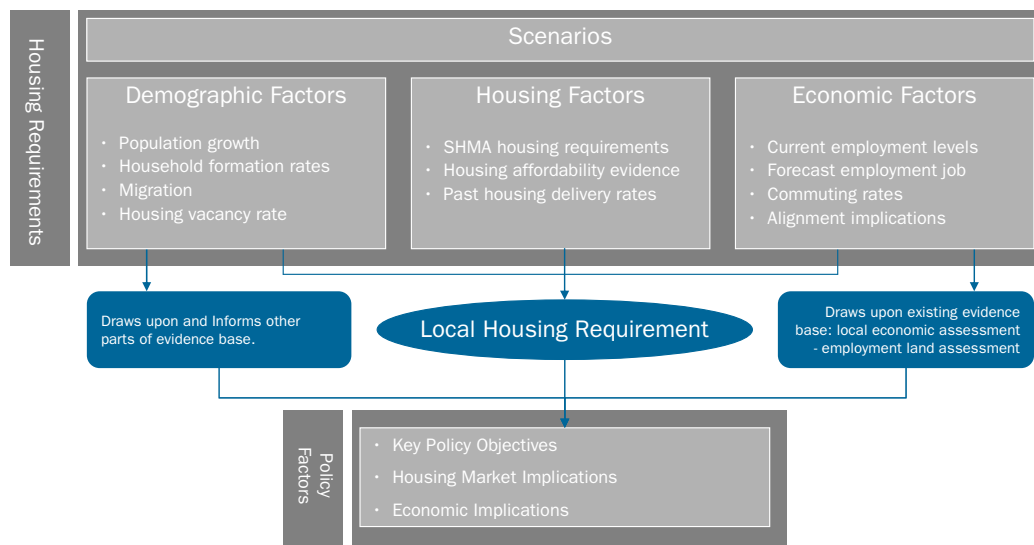
Source: NLP

Purpose of the Report

1.8   This report presents the findings of NLP's analysis of demographic, housing and employment factors and of the headline policy considerations for different levels of housing supply. These take the form of a number of scenarios, the basis for which is set out in the relevant sections of the report. These represent long term scenarios for the potential quantum of housing that Winchester district may require in the future.

1.9   The main outputs of the study are identified for the period up to 2026, reflecting the period that Winchester City Council are set to plan for through their Core Strategy. These outputs are annualised across many data strands for ease of comparison. Due to the 'lumpy' nature of some of the projected trends there are marginal differences between the same scenarios when annualised, whilst others remain the same as trends and are uniform (i.e. a straight line). All outputs from relevant demographic modelling are identified as annual changes and therefore the outputs (contained within the appendices) can be assessed across varying time periods if necessary.

1.10   It should be noted that the analysis draws upon a wide range of existing data sources, including the Office for National Statistics (ONS) and Hampshire County Council (HCC), and existing evidence on housing issues in Winchester such as the 2010 *Winchester Housing Market and Housing Need Assessment* prepared by DTZ on behalf of the Council.[3] These data sources and input assumptions are detailed at Appendix 1. Many of the modelled assumptions take account of datasets (particularly those demographically-driven) that are updated annually.

Spatial Definitions

1.11   The Winchester Housing Market and Need Assessment prepared to inform the Winchester LDF identifies that Winchester district lies within two housing market areas – 'Central Hampshire' and 'South Hampshire' defined as follows:

- Central Hampshire – comprising Basingstoke & Deane, the majority of East Hampshire, Test Valley and the northern wards of Winchester district (including Winchester City and its rural hinterland);

- South Hampshire – comprising Portsmouth, Southampton, Gosport, Fareham, Eastleigh and Havant, and the southern wards of East Hampshire, Test Valley and Winchester district.

1.12   Integrating the southern wards of Winchester district, the South Hampshire market area correlates with the Partnership for Urban South Hampshire (PUSH) sub-region. This is compatible with the South Hampshire sub-region defined by Policy SP1 of the South East Plan (SEP). The rest of Winchester district, including the City, not included within the PUSH area (i.e. non-PUSH) forms part of the Central Hampshire market area. This lies within the 'Rest of Hampshire' area defined by Policy AOSR2 of the South East Plan.

1.13   The analysis in this report considers housing needs across Winchester district as a whole, and where data allows, presents results for Winchester district and the non-PUSH area which includes Winchester City. It should be recognised that modelling demographics at sub-district geographies has limitations greater than those applicable at a district level.

Report Structure

1.14   The analysis in the report is set out under the following headings:

- Housing Market Dynamics in Winchester (Section 2.0) – reviews the key drivers and determinants of the housing market in Winchester, namely demographic, economic and affordability factors, drawing on the district Council's Housing Market and Need Assessment and other NLP analysis.

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[3] Winchester Housing Market and Housing Need Assessment Update, Final Report, August 2010

- Future Scale of Housing Need (Section 3.0) – outlines the scenarios for possible housing requirements based on housing, economic and demographic factors, drawing upon demographic modelling tools using ONS and HCC data and economic scenarios contained in the Winchester Employment Land Study.[4]

- Implications of Future Change (Section 4.0) – identifies the relevant policy considerations for interpreting the scenarios.

- Conclusions and Implications for the Core Strategy (Section 5.0) – draws together the evidence to identify the potential range for an appropriate local housing requirement and implications for the emerging Winchester Core Strategy.

1.15   The appendices set out the relevant assumptions used for the scenarios that have been modelled.

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[4] Winchester Economic and Employment Land Study, SQW, November 2007

2.0 Housing Market Dynamics in Winchester

2.1   This section provides an overview of the key drivers and determinants of the housing market in Winchester, namely demographic, economic and affordability factors. It draws on the outputs of the Winchester Housing Market and Housing Need Assessment (a Strategic Housing Market Assessment (SHMA) for the purposes of PPS3), which forms part of the evidence base for the emerging Core Strategy, supplemented by NLP analysis where appropriate.

Housing Market Geographies

2.2   The analysis in the SHMA distinguishes between two housing market areas that operate across Winchester district – 'Central Hampshire' and 'South Hampshire' (Figure 2.1).

Figure 2.1   Definition of Hampshire Housing Market Areas

Source: Based on Winchester SHMA, 2010 (Figure 2.1, page 3)

2.3   The non-PUSH area (which includes Winchester City) has the majority share of the district's population, with circa 79,500 residents (68.7% of the total), compared to the PUSH part of the district with a population of circa 36,200 residents (31.3% of the total) (Table 2.1).

2.4   According to the SHMA[5], Central Hampshire functions as an area with a number of localised housing markets, of which Winchester City is one, reflecting the dispersal of its main settlements across a relatively large rural area. This contrasts with the highly integrated market in South Hampshire, where the settlements in the southern fringes of Winchester district are characterised by strong relationships with Southampton and Portsmouth.

Table 2.1   Population Split by Area, 2009

Area	Population	%
Non-PUSH	79,499	68.7
Winchester City	c. 37,000	c. 32.1%
PUSH	36,211	31.3
District total	115,710	100.0

Source: Hampshire County Council SAPF (best fit output areas / wards for Winchester City)

Drivers of Housing Need

Population and households

2.5   The population of Winchester has grown by about 6% over the past decade, rising from 106,900 in 1998 to 112,700 in 2008. This is consistent with the growth rates in the Central and South Hampshire market areas more widely.

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[5] Winchester SHMA (2010) para 2.2

Figure 2.2   Winchester Household and Population Trends, 1981-2009
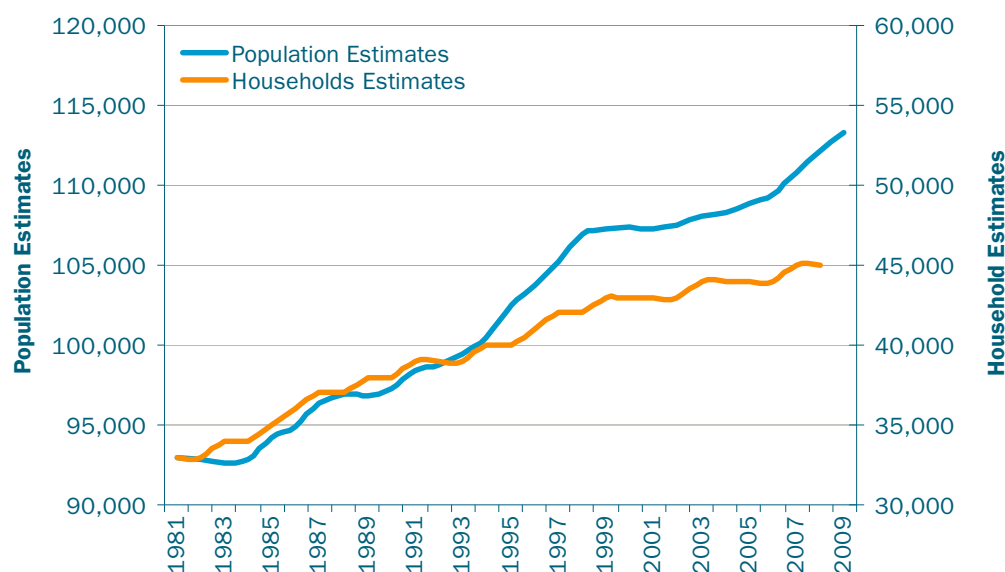
Source: ONS Mid-Year Population and Household Estimates

2.6   There were circa 31,300 households in 1981, which had grown to 45,000 in 2008, an increase of 44%. This was greater than the Hampshire growth over the same period (38%). Figure 2.3 illustrates that the average household size in Winchester has declined from 2.82 in 1981 to 2.49 in 2008 reflecting national trends towards smaller household sizes (although the household size in Winchester district is above the South East average of 2.40 in 2008).

Figure 2.3   Winchester Average Household Size, 1981-2006
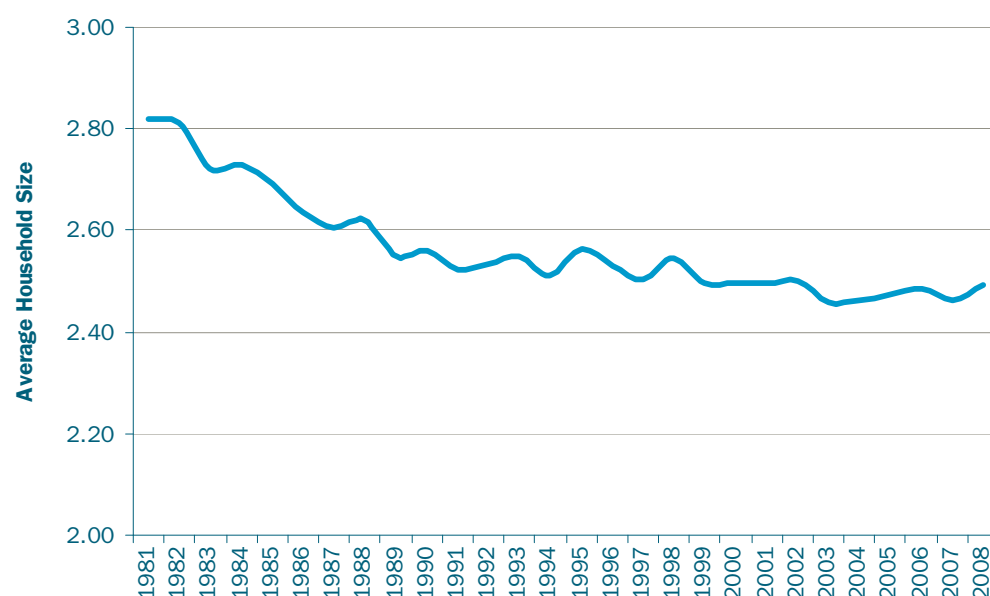
Source: ONS Mid-Year Population and Household Estimates

2.7   The structure of households in Winchester district is similar to the wider Central Hampshire housing market area, although there is a higher proportion of single older households (18% compared to 14%) and a lower proportion of family households (27% compared to 32%). The SHMA reports that Winchester City in particular has a high proportion of single households (34%), comprising both single older people (18%) and other single adults (15%). Related to this, is a relatively high proportion of multi-person (shared households) which is likely to result from single adults choosing to share to reduce accommodation costs and Winchester's students who continue to form shared households in the early stages of their careers after graduating. Conversely, there are fewer family-type households within the City (27% compared to the Central Hampshire average of 32%).

2.8   In terms of age profile, about 27% of the current population of Winchester is within the 45-64 age cohort, which is consistent with the Central Hampshire average (Figure 2.4). This group has driven most of Winchester's population growth over the past decade in absolute terms (13%), alongside considerable growth of the 75+ age cohort (16%).

2.9   In contrast to the rest of the Central and South Hampshire market areas, Winchester has also experienced growth in the 0-14 age cohort, potentially indicating that the district is also a popular location for young families, but has seen only very modest growth in the 15-24 age group and a decline in the 25-44 age group.

Figure 2.4   Population Age Change, 1998-2008
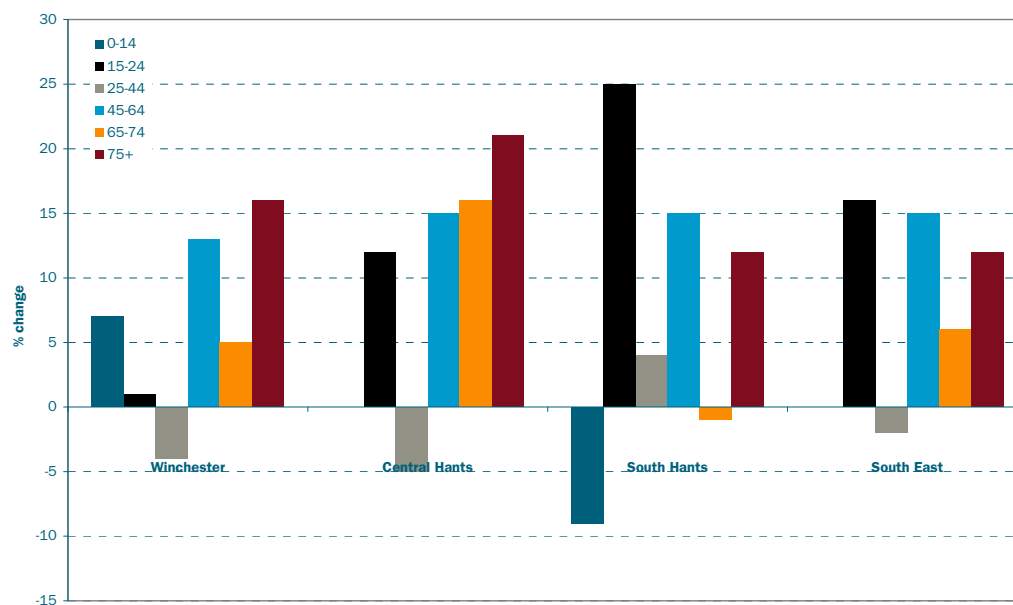
Source: ONS Mid-Year Population Estimates / Winchester SHMA

Migration flows

2.10   Winchester experiences net in-migration of people and households from the other Central and South Hampshire local authorities. Collectively, net in-migration from these neighbouring authorities accounted for 340 persons in 2008, with the largest net inflow from Southampton (150 persons) followed by Portsmouth (130 persons). However, if individual flows from London authorities are aggregated into a Greater London total (combined local authorities), it becomes the most significant source of in-migrants to Winchester.

2.11   Analysis of migration flows over the longer 2005-2009 period indicates that flows of in-migrants from Greater London are consistently high on an annual basis. It should be noted that Greater London is also an important destination in terms of out-migration flows from Winchester, but there is a net in-flow overall (Table 2.2 and Figure 2.5).

Table 2.2   Greater London Migration Flows (aggregated) to/from Winchester, 2005-2009

	2005	2006	2007	2008	2009	Average 2005-09
Inflow	910	910	920	910	1,070	944
Outflow	650	690	620	610	810	676
Net	+ 260	+ 260	+ 300	+ 300	+ 260	+ 268

Source: ONS Migration Statistics Unit / NLP analysis

2.12   The implication is that a considerable number of households are moving into Winchester from areas of higher house prices. The SMHA suggests that households moving into Winchester from areas of higher house prices are likely to have greater equity and potentially earnings than existing residents, giving them greater purchasing power in the housing market. This suggests that restricting housing supply in Winchester is likely to have greater negative impacts on the ability of lower-income indigenous residents forming households or seeking to move into or up the housing market than it will on deterring in-migrants from moving to Winchester. At the same time, there is no evidence to suggest that restricting housing supply in Winchester will reduce the propensity of those from outside the district to in-migrate.

Figure 2.5   Internal Migration Flows (2005-2009)
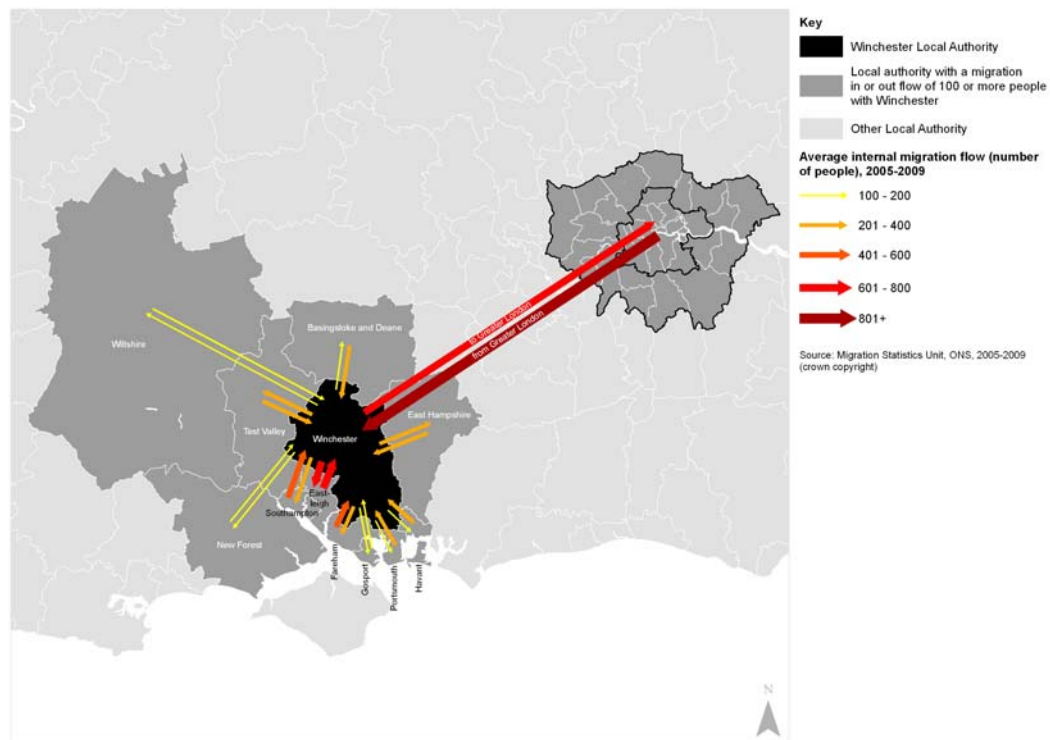
Source: ONS Migration Statistics Unit / NLP analysis

2.13   Furthermore, the latest CLG 2008-household projections project higher levels of household growth in London than housing targets currently provided for in the draft Replacement London Plan, which are equivalent to about 87% of the overall level of growth indicated by the ONS household projections.[6] The implication is that there is no reason to assume that the housing offer in London will deliver either the quantum or type of accommodation that will stem the flow of migrants from Greater London to Winchester and it would be reasonable to assume that such flows will continue.

Employment and commuting

2.14   Employment levels and job growth are important drivers of demand for housing. In both the Central and South Hampshire market areas, the number of jobs exceeds the number of households, although the ratio is highest within Winchester district (Table 2.3). Based on Annual Business Inquiry (ABI) data, there were 66,200 workplace jobs in Winchester in 2008, compared to 46,000 households.

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[6] GLA Intelligence Unit, DMAG Briefing Note, Nov 2010; Table 3.1 draft Replacement London Plan

Table 2.3   Comparison of Jobs and Households

	No. of Jobs (2006) *	No. of Households (2006) **	Ratio of Households:Jobs
Winchester	64,000	45,700	1 : 1.4
Central Hampshire	186,600	161,500	1 : 1.12
South Hampshire	446,900	423,900	1 : 1.13

Source: Winchester SHMA based on ABI * / Hampshire County Council ** (Figure 4.3, page 18)

2.15   However, Winchester has experienced relatively limited employment growth of about 3% over the past 10 years. Annual Business Inquiry data indicates that the total number of workplace jobs in Winchester district grew by just 3.2% (2,034 jobs) over the period 1998-2008. This implication is that while the Winchester population increased by an average of 580 people per annum over the period 1998-2008, the number of workplace jobs in the district increased by an average of 210 per annum over the same period.

2.16   The district is a net exporter of labour, with about 45% of resident employees out-commuting at the time of the 2001 Census, an increase from the 35% of residents who out-commuted at the time of the 1991 Census (based on a 10% sample).[7] The most significant destinations for out-commuters in 2001 were Southampton (2,782), Eastleigh (2,675) and Greater London (2,157). More recent data from the 2008 Annual Population Survey records out-commuting equivalent to 42.9% of Winchester's total working-age residents, but is based on sample-based survey data so might be considered less accurate than the 2001 Census data. However, this data confirmed the main commuting outflows are to Fareham, Eastleigh, Southampton and Test Valley.

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[7] 2001 Census, UK travel flows via NOMIS; 1991 Census Travel to Work Statistics, Volume 2

Figure 2.6   Winchester Commuting Flows (2001)
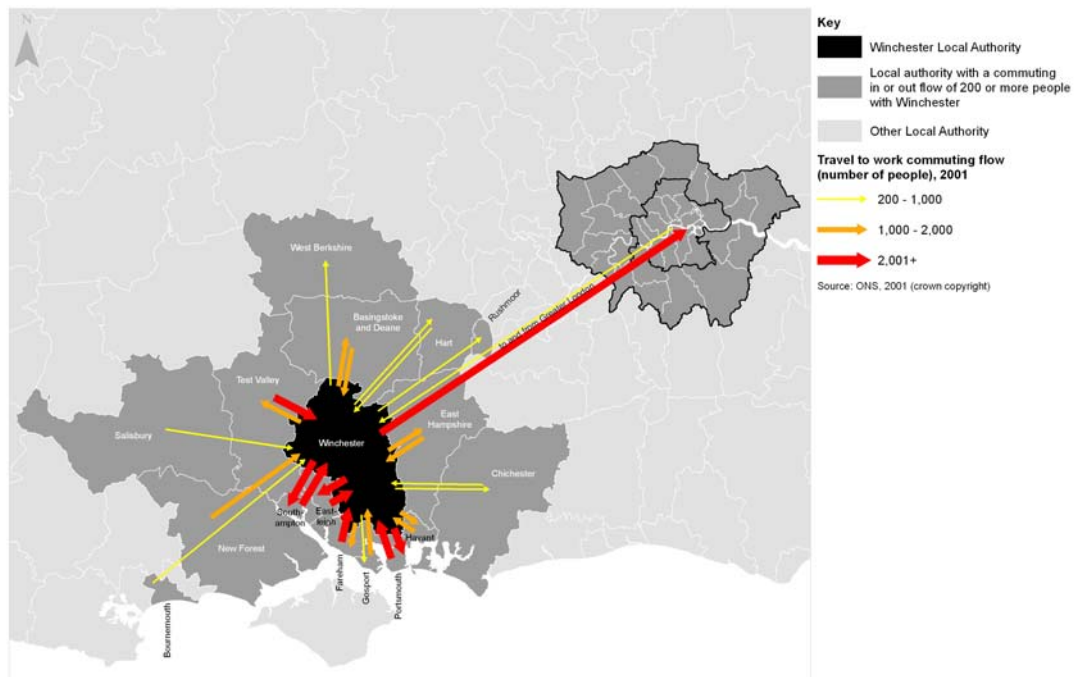
Source: 2001 Census / NLP analysis

2.17   At a more localised level, the City of Winchester is the largest economic centre within the district. According to the Winchester Economic and Employment Land Study, Winchester hosts circa 30,000 jobs, of which about 11,500 (38%) are taken by people resident in Winchester, with the remaining 18,000 in-commuting into the town (mainly from Eastleigh and Southampton). At the same time, around 8,600 residents of Winchester City are commuting to workplaces elsewhere, with the largest outflow to Greater London of circa 1,070 persons (12% of out-commuters).[8]

Housing supply

2.18   Annual monitoring reports indicate that a total of 4,076 dwellings have been completed in Winchester since 2001, averaging circa 510 per annum. Compared to the total housing stock of 44,300 in Winchester recorded at the time of the 2001 Census, this suggests that the district's housing stock has increased by about 9% since 2001 (just over 1% per annum).

[8] Winchester Economic and Employment Land Study, November 2007, para 3.10

Table 2.4   Housing Completions, 2001-2009

Year	Sub-Area	Completions
2001/02		366
2002/03		506
2003/04		603
2004/05		694
2005/06		490
2006/07	PUSH	142
	Non-Push	354
2007/08	PUSH	222
	Non-Push	340
2008/09	PUSH	108
	Non-Push	251
Total since 2001		**4,076**

Source: Winchester City Council Annual Monitoring Report

2.19   Affordable housing completions in Winchester district over the past three years have been dominated by smaller dwellings (1 and 2 bed properties). In the most recent year (2009/10), 26% (30 dwellings) were delivered as 3 and 4 bedroom properties.

Table 2.5   Winchester Affordable Housing Provision, 2007-2010

Year	1-bed	2-bed	3-bed	4-bed	5-bed	Total (net)
2009/10	**39**	**47**	**22**	**8**	**0**	**116**
Social rented	33	36	22	8	00	99
Intermediate	6	11	0	0		17
2008/09	**41**	**20**	**6**	**0**	**0**	**67**
Social rented	27	10	6	0	0	43
Intermediate	14	10	0	0	0	24
2007/08	**62**	**79**	**15**	**0**	**0**	**156**
Social rented	20	27	10	0	0	57
Intermediate	42	52	5	0	0	99

Source: Winchester SHMA based on Winchester City Council data (Figure 5.8, page 32)

Note: Includes social rented and intermediate, flats and houses

2.20   The annual net need for social rented affordable housing identified within the Winchester SHMA is 375 dwellings to address the backlog of housing need and needs of newly arising households[9]. The SHMA does, however, acknowledge that affordable housing need in Winchester is likely to be even more acute than this. It notes that the Central Hampshire SHMA (2007) suggested that there were relatively fewer people on Winchester's housing waiting lists than might be expected which potentially reflected the rurality of the district and the perceptions held that there would be little opportunity of accessing affordable housing through the waiting lists.[10]

2.21   This suggests that the scale of housing need may be even greater than the SHMA identifies. In addition to this, household applicants in band 5 of the waiting list are excluded from Government's definition of households 'in need'. Despite this, by virtue of their application, they are still likely to be facing significant problems accessing housing on the open market. The SHMA identifies that if these band 5 applicants are included in the housing need calculation the requirement for affordable housing would be as high as 445 per annum.

Affordability and housing outcomes

2.22   Analysis contained in the SHMA compares house prices in Winchester with average earnings to provide an indication of the relative affordability of housing within the district.

2.23   Lower quartile house price within Winchester in 2010 Q2 were £211,200. On the assumption that households require a minimum of 10% deposit to access mortgage finance and are able to borrow up to three times their household income, households in Winchester need to have a minimum income of £63,400 in order to purchase a property in the district. This significantly exceeds the average earnings of residents (£34,000 in 2009), and the mean average household income (£47,100 in 2009). Therefore, the vast majority of residents (84%) would be unable to purchase a property within the district based on current income levels. The situation is most acute in Winchester City and the Central Hampshire area (i.e. non-PUSH area) where the proportion of residents unable to afford to buy is higher at 88% and 96% respectively. The affordability of housing in Winchester City is likely to be more acute than average lower quartile house prices suggest given the profile of stock which is skewed towards smaller dwellings than in the rest of the district, where the SHMA reports that 36% of dwellings are 1-2 bed in Winchester City compared with 28% in the rest of the non-PUSH area and 26% of the district as a whole[11].

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[9] Winchester SHMA (2010) Figure 1.7

[10] Winchester SHMA (2010) Para. 7.5.

[11] Winchester SHMA (2010) Figure 5.4

Table 2.6   Purchase Income Thresholds for Winchester

	Average Lower Quartile House Price *	Minimum Deposit (10%)	Income Required (90% loan-to-value ratio)	Proportion of Winchester Residents Unable to Afford to Buy
Winchester	**£211,200**	**£21,100**	**£63,400**	**84%**
Winchester City	£229,400	£22,900	£68,800	88%
Part in Central Hampshire	£271,400	£27,100	£81,400	96%
Part in South Hampshire	£218,500	£21,900	£65,600	85%

Source: Winchester SHMA, 2010 based on Hometrack / CACI (Figure 6.7, page 37)

2.24   The implication of this analysis is that properties within the district are purchased by Winchester households on above average incomes or with access to equity, and those with higher incomes or access to equity moving in from outside of the district. A similar situation applies to the private rented sector, where the SHMA concludes that between 30-45% of Winchester households are unable to afford to rent a 2-bedroom property in the open market, on the assumption that households can typically afford to spend between 25-33% of their income on housing rental costs. Based on the Government's preferred measures of housing affordability, Winchester has become less affordable over time and is now one of the least affordable districts in Hampshire, having the third highest ratio of lower quartile house price to lower quartile earnings in the County[12].

2.25   The shortfall of affordable housing is reflected in current housing waiting lists. The SHMA reports that in 2010 there were 2,605 households registered on Winchester City Council's housing waiting list, equivalent to 5% of all households within the district. This includes households who are:

- homeless or have insecurity of tenure;

- overcrowded;

- living in property too difficult to maintain;

- living in accommodation where they lack/share facilities such as a kitchen or bathroom;

- living in unsuitable dwellings without the means to repair or adapt; and

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[12] CLG Live Table 576

- in social need due to harassment or threats of harassment which cannot be resolved except through a move.

2.26   Some 94% of Winchester's housing list applicants earn incomes less than £20,000 and therefore are unlikely to be to afford low cost home ownership options (Figure 2.7). They will therefore only be in a position to secure housing in Winchester if the supply of affordable accommodation (most likely to be social rented) increases.

Figure 2.7   Annual Income of Winchester Housing Waiting List Applicants
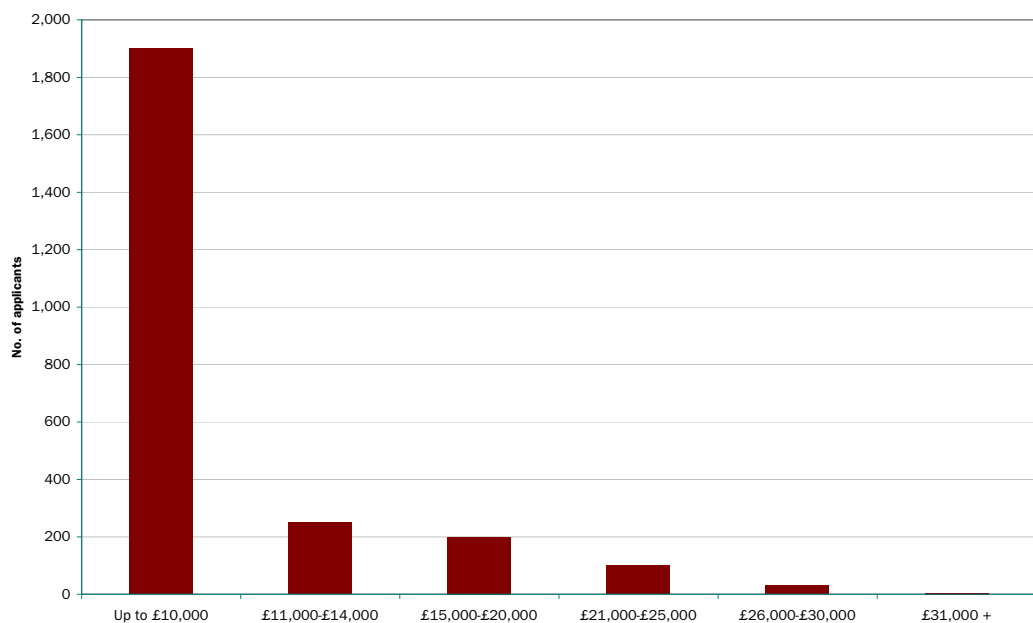
Source: Winchester SHMA based on Winchester City Council (Figure 7.2, page 45)

Synthesis

2.27   Based on technical evidence prepared to support the emerging Winchester Core Strategy, the drivers of housing need in Winchester can be summarised as follows:

- Winchester City (as part of the Central Hampshire housing market area) is distinct from the South Hampshire (PUSH) housing market area, and therefore provision of new housing in the PUSH part of Winchester district area will not substantially contribute to meeting housing needs in the non-PUSH area;

- recent population growth in Winchester district has been at a comparable rate to the Central and South Hampshire average, growing by 6% over the past decade;

- Winchester's population growth has been focused in the 45-64 and 75+ age groups, set against declines in the 25-44 age group and modest growth of the 15-24 age group;

- Winchester experiences net in-migration of people and households from the Greater London area, and neighbouring Central and South Hampshire authorities;

- the number of workplace jobs in Winchester exceeds the number of households, although household growth has exceeded overall job growth over the past decade;

- a significant proportion of Winchester's resident employees commute outside of the district for work, with the main destinations including Southampton, Eastleigh and London;

- acute housing affordability issues exist in Winchester, with 84% of residents unable to purchase a property within the district based on current ratios of property prices and income levels.

- there is a backlog of affordable housing provision in the district, equivalent to 375-445 dwellings per annum, and recent affordable housing completions have been dominated by 1 and 2-bed properties; and

- in 2010 there were 2,605 households registered on Winchester City Council's housing waiting list, equivalent to 5% of all households within the district. Some 94% of Winchester's housing list applicants earn incomes less than £20,000 and therefore are unlikely to be to afford low cost home ownership options.

3.0   Future Scale of Housing Need

3.1   This section sets out a range of scenarios to help inform judgements about the future housing scale of housing to provide for in Winchester district. Three scenarios have been developed using the PopGroup demographic modelling and forecasting tool, and one is based on affordable housing requirements identified by the 2010 Winchester Housing Market and Need Assessment. The four scenarios are:

- Scenario A: Baseline Population using the ONS Sub-National Population Projections (SNPP);

- Scenario B: Zero Net Migration based on equalising the 2008-based ONS SNPP projections of internal and international migration;

- Scenario C: Economic Growth using Cambridge Econometrics LEFM baseline employment projections contained in the 2007 Winchester ELR;

- Scenario D: Affordable Housing Needs based on the level of affordable housing need identified in the 2010 Winchester SHMA.

Components of Population Change

3.2   Projected population changes in Winchester comprise of two main sources natural change and net (national and international) migration. The scale of each of these components is what will drive changes in the size and profile of population within the district.

3.3   NLP has adopted several scenarios within the demographic modelling to illustrate the implications of different population changes upon the requirement for dwellings, the demographic structure of the population and the implications for the local economy in terms of the labour force. These scenarios are based upon a range of shared inputs assumptions which are set out in Appendix 1. These inputs are sourced from the Office of National Statistics (ONS) data and Hampshire County Council (HCC) demographic data sets, ensuring an up-to-date but locally specific base for the modelling. The detailed modelling outputs for Scenarios A-C are included at Appendix 2.

3.4   Each scenario has been modelled at both district-wide level as well as sub-district level looking at the requirements associated with the non-PUSH part of the district only, which forms part of the 'Rest of Hampshire' area defined by Policy AOSR2 of the South East Plan. The split of the Policy H1 housing requirements set out in the South East Plan amounts to 275 dwellings p.a. in the non-PUSH area, and 337 dwellings p.a. in the PUSH area. As noted in section 2, the Winchester Housing Market and Need Assessment highlights that the PUSH and non-PUSH areas operate are distinct in housing market terms, indicating limited scope to meet the housing needs of the non-PUSH area through provision in the PUSH area.

Scenario A – Baseline Population

3.5   This scenario mirrors the likely demographic change as forecast by the 2008-based ONS Sub-National Population Projections (SNPP), but using an updated 2009 base, reflecting the availability of more up-to-date baseline data. Using a 2009 population base from Hampshire County Council's Sub Area Population Forecasts (SAPF) and actual data on births, deaths and migration in 2009, NLP has modelled future population change based upon the following core assumptions:

- Migration flows (gross in and out, domestic and overseas) as forecast in the ONS 2008-based SNPP; and

- Natural change fertility and mortality rates as forecast in the ONS 2008-based SNPP.

3.6   This is modelled at both district level and sub-district non-PUSH area level with the headline changes between 2010 and 2026 shown in Table 3.1 below.

Table 3.1   Baseline Population Scenario Headline Results

	Winchester District				Non-Push Part of District Only			
	2010	2026	Change	Annual	2010	2026	Change	Annual
Population	116,864	130,341	+13,477	+842	80,296	90,110	+9,814	+613
Households	48,177	56,809	+8,632	+540	32,035	38,033	+5,998	+375
Dwellings	**49,667**	**58,566**	**+8,899**	**+556**	**33,025**	**39,209**	**+6,184**	**+387**
Indigenous Labour Force	55,521	56,196	+675	+42	38,320	39,176	+856	+54
Jobs supported at existing job density	68,527	70,574	+2,047	+128	47,328	49,199	+1,871	+117

Source: NLP analysis using PopGroup, HouseGroup and LabGroup

3.7   At the district level forecast population is set to rise by circa 13,500 people. This equates to an additional 10,600 households over the period to 2026, reflecting shifts in household composition leading to smaller household sizes. Applying age specific economic activity rates to the forecast population shows that this scenario would maintain a relatively static indigenous labour force, which at the existing ratio of workers to jobs in the district would support very modest job growth equivalent to 128 additional jobs per annum.

3.8   These district forecasts are slightly below the 2008-based ONS SNPP which forecast a growth of 15,000 people between 2010 and 2026, equivalent to 13.1% growth, compared with 11.5% population growth through the PopGroup modelling. These levels of growth are broadly in line with the forecasts national growth for England, which forecast and 11.8% increase in population over the same period.

3.9   Apportioning migration in-line with the proportional split in the existing population between the PUSH and non-PUSH area, the sub-district modelling shows an increase in the population of the non-PUSH area, including Winchester City, of circa 9,800 people. This increase in population, as well as changes in the population profile, gives rise to 6,000 additional households within the non-Push area to 2026, with a requirement for almost 6,200 homes to support this.

3.10   The CLG 2008-based household projections show a similar level of household growth for Winchester district equivalent to 555 dwellings per annum between 2008 and 2026. Para 33 of PPS3 indicates that local planning authorities should take account of such projections in determining the level of housing provision. In this respect, the CLG projections reinforce the validity of Scenario A as a baseline.

> **Key implications:** This scenario would involve a requirement for 556 new dwellings per annum in the district, slightly below the previous South East Plan requirement of 612 p.a, but with a higher requirement for the non-PUSH area. This would only support modest economic growth of 128 jobs per annum, significantly below the 538 jobs p.a. adopted through the ELR base scenario.

Scenario B – Zero Net Migration

3.11   This scenario illustrates a theoretical situation where migration is balanced with the same number of people moving in and moving out, hence there is zero <u>net</u> migration. This would mean the majority of population change would come from natural change (i.e. births and deaths) although population churn (e.g. different people moving in as move out) would also drive changes in population. In reality, a zero net migration scenario is unlikely, given past trends in migration which show that net migration has not fallen below a level of 200 net in-migrants over the period for which ONS migration statistics are available (since 1998).

3.12   The zero net migration assumption has been achieved by taking the 2008-based ONS SNPP projections of internal and international migration and equalising them (i.e. taking an average of in and out flows and applying it for both). This achieves a zero net migration, but also takes account that there will still be movements of people into and out of the district which has the effect of changing its composition given different migration propensities across age cohorts. The outputs are shown in Table 3.2.

Table 3.2   Zero Net Migration Scenario Headline Results

	Winchester District				Non-Push Part of District Only			
	2010	2026	Change	Annual	2010	2026	Change	Annual
Population	116,864	116,339	-525	-33	80,296	80,740	+444	+28
Households	48,177	51,835	+3,658	+229	32,035	34,718	+2,683	+168
Dwellings	**49,667**	**53,438**	**+3,771**	**+236**	**33,025**	**35,792**	**+2,767**	**+173**
Indigenous Labour Force	55,521	48,773	-6,748	-422	38,320	34,218	-4,102	-256
Jobs supported at existing job density	68,527	61,252	-7,275	-455	47,328	42,972	-4,356	-272

Source: NLP analysis using PopGroup, HouseGroup and LabGroup

3.13   At the district-level, projected population would to fall by circa 500 people as deaths are forecast to exceed births. Despite this, changes in household composition associated with an ageing population profile are leading to smaller household sizes and a growth in the overall number of households. This means that even a zero net migration scenario would generate a requirement for 236 dwellings per annum across the district. Applying age specific economic activity rates to the forecast population shows that this scenario would have a major negative impact on the indigenous labour force, with a loss of circa 6,700 economically active people, even taking account of future changes to the pension age. Unless the rate of in-commuting substantially increases (with resultant commuting impacts), the implication is that Winchester district could fail to support up to 7,300 jobs within its existing business base, resulting in increased business relocations out of Winchester.

3.14   Apportioning migration to the PUSH and non-PUSH area, using the same approach in Scenario A, the modelling shows an increase in the population of the non-PUSH Sub-Area, including Winchester City, of circa 400 people. This increase in population, as well as changes in the population profile, gives rise to 2,700 additional households within the non-PUSH area to 2026, with a requirement for almost 2,800 homes to support this. The disparity in growth between the district-wide and non-PUSH area can be attributed to the difference in the profile of the population identified in the Hampshire CC SAPF, with the non-PUSH area having a slightly younger profile than Winchester district as a whole, meaning proportionally less deaths and more births.

3.15   This zero net migration scenario is distinct from the scenario included in the Winchester City Council 'Blueprint' consultation, which uses Hampshire County Council's small area population forecasts applying *"population change in proportion to the zero net-migration scenario"*. The Blueprint briefing material is unclear as to the inputs and assumptions and how the zero net-migration scenario is calculated, However, it is noted that the Hampshire CC forecasts are, in part, based upon projected dwelling completions to 2016, which is not

necessarily reflective of natural change. In addition, the Hampshire CC forecasts adopt a range of different assumptions on fertility and mortality rates, which are national rates (from Government's Actuary Department) which are subject to 'ward level correction factors' applied by Hampshire CC. By contrast, the PopGroup based zero-net migration scenario is based upon projected fertility and mortality rates from the ONS 2008-based SNPP and are specific to Winchester, with no constraint placed on population growth through the future anticipated supply of housing to 2016.

> **Key implications:** This scenario would involve a relatively static population base, but would necessitate 236 new dwellings per annum in the district due to shifting household composition. The main implication of this scenario is the major detrimental impact upon the labour supply within the district with the loss of circa 6,700 economically active people from the labour pool, which would have serious implications for the maintenance of a business and service base within Winchester district.

Scenario C – Economic Growth

3.16   Paragraph 33 of PPS3 indicates that local planning authorities should take into account the needs of the economy and economic growth forecasts in determining the level of housing provision. Scenario C utilises Winchester district Council's own adopted scenarios for job growth in the district to identify the necessary labour force to support this and the population and housing implications, based upon an understanding of the relationship between housing and employment. Although there are a complex set of issues involved in matching labour markets and housing markets (with different occupational groups having a greater or lesser propensity to travel to work), there are some straightforward metrics that can explore the basic alignment of employment, demographic and housing change, notably the amount of housing needed to sustain a given labour force assuming certain characteristics of commuting and employment levels.

3.17   Ensuring a sufficient supply of homes within easy access of employment opportunities represents a central facet of an efficiently functioning economy and can help to minimise housing market pressures and unsustainable levels of commuting (and therefore congestion and carbon emissions). If employment growth is to be realised within Winchester district, then it will generally need to be supported by an adequate supply of suitable housing. The challenge of meeting employment needs is clearly given a heightened importance as a result of the need to secure economic growth out of recession.

3.18   The basis for assessing the implications of likely future economic growth are the economic forecasts under Cambridge Econometrics LEFM forecasts for Winchester, using a 2007 baseline, taken from the Winchester ELR.[13] These

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[13] Local Economy Forecasting Model (LEFM), Cambridge Econometrics

forecasts are below the level of employment growth subsequently assumed by the City Council for the purposes of the emerging Core Strategy, and exclude any 'policy-on' adjustments made to reflect potential economic development strategy interventions. Therefore, despite being prepared before the recent national economic recession, they remain a reasonable and cautious (not over-optimistic) basis for estimating the district's future economic potential. These forecasts identify an average employment growth of 538 jobs per annum over the forecast period at the district level. These forecasts take into consideration the sector growth implications of an increasingly elderly population (e.g. health and residential care). The results of applying these projections to the demographic modelling are shown in Table 3.3.

Table 3.3   Economic Growth Scenario Headline Results

	Winchester District				Non-Push Part of District Only			
	2010	2026	Change	Annual	2010	2026	Change	Annual
Population	116,864	139,931	+23,067	+1,442	80,296	96,997	+16,701	+1,044
Households	48,177	60,306	+12,129	+758	32,035	40,495	+8,460	+529
Dwellings	**49,667**	**62,171**	**+12,504**	**+782**	**33,025**	**41,748**	**+8,723**	**+545**
Indigenous Labour Force	55,521	81,459	+5,938	+371	38,320	42,897	+4,577	+286
Jobs supported at existing job density	68,572	77,182	+8,610	+538	47,328	53,872	+6,544	+409

Source: NLP analysis using PopGroup, HouseGroup and LabGroup

3.19   At a district level supporting job growth of 538 jobs per annum (8,610 over 2010 to 2026) would require an increase in the labour force of circa 5,900 people, with the remainder of jobs being filled by new in-commuters, with the proportional rate of commuting remaining the same. To achieve an increase in the indigenous labour force of 5,900 people would necessitate a population increase of 23,000 people. This substantially outstrips the necessary number of workers because of the ageing profile of existing residents in Winchester district meaning that as people retire, greater numbers of economically active people are required. In addition, it would not be just economically active people migrating into the district, but also those who are economically inactive, such as their children or other family members.

3.20   Overall, to support growth of 538 jobs per annum, Winchester district would require substantial in-migration with necessary housing required to support this totalling 782 dwellings per annum.

3.21   Splitting job growth between the PUSH and non-PUSH area gives a sub-district picture. ABI (2008) data identifies that circa 76% of jobs in Winchester are within the non-PUSH area, which when applied to the forecast job growth for the district would mean 409 new jobs per annum within the non-PUSH area. Using

the same approach, the non-PUSH sub-area would require a population of increase of 16,700 people to support this job growth which would give rise to a requirement for 8,723 new dwellings over 2010 to 2026, equivalent to 545 per annum, higher than the South East Plan requirement.

> **Key implications:** This scenario would enable Winchester district to meet its economic potential and support the job growth as adopted through the ELR base scenario. This scenario would necessitate 782 new dwellings per annum in the district which would support sufficient population growth to enhance the labour force available in order to underpin a larger business base. This implies a significantly higher housing requirement than the South East Plan for the non-PUSH part of the district.

Scenario D – Affordable Housing Need

3.22   The annual net need for social rented affordable housing identified within the Winchester SHMA is 375 dwellings to address the backlog of housing need and needs of newly arising households.[14]

3.23   Assuming the district's overall affordable housing target of 30-40% of new provision is affordable (depending on the location), this implies between 940 – 1,250 dwellings per annum are required to deliver the necessary level of social affordable housing.

3.24   The SHMA acknowledges that affordable housing need in Winchester is likely to be even more acute than this. As noted in Section 2.0, the SHMA suggests that the scale of housing need may therefore be greater. For example if household applicants in band 5 of the waiting list (likely to be facing significant problems accessing housing on the open market) are included in the housing need calculation, the requirement for affordable housing would be as high as 445 per annum over the period. This would increase the total amount of housing required further (1,113-1,483 dwellings per annum).

3.25   The split of identified need between the PUSH and non-PUSH areas of the district is not considered within the Winchester SHMA. However, the Winchester Housing Needs Survey (2002) suggests that the majority of housing need is focussed in Winchester City, with circa 47% of surveyed households expressing a locational preference for Winchester. Splitting this survey data between PUSH and non-PUSH sub-areas would lead to a split of 63% of homes delivered in the non-PUSH area (c. 592-788 pa) and 37% in the PUSH area.[15] Set against the context of the non-PUSH area being where the majority of the population is and also Winchester City being where the most affordability problems are found, this split would seem a reasonable and logical basis for meeting future need. This may be an underestimate as it reflects people's perceptions about where new housing can actually be delivered (which in

[14] Winchester SHMA (2010) Figure 1.7

[15] Winchester Housing Needs Survey (2002) Table 8.1 Locational Preferences

Winchester has tended to be concentrated in the PUSH area) and not necessarily their aspirations.

3.26   Providing a level of housing provision below identified need will mean that the backlog of housing need (i.e. those existing Winchester district residents who are on the housing register awaiting a house) and newly arising needs will not be met. Given affordability challenges in the district, affordable housing options are likely to be the only way that these Winchester residents would be able to meet their housing needs and if they cannot due to an undersupply this would have negative housing and social outcomes.

> **Key implications:** This scenario would involve a significantly greater level of housing provision (circa 940-1,250 pa) and enable Winchester district to meet the housing needs of its existing resident base as well as newly arising housing need in the future.

Summary of Scenarios

3.27   Overall the four scenarios show a wide variance in the required housing provision. The baseline scenario, based upon Hampshire CC existing population data and forecast components of demographic change from ONS, identifies a need for housing to support population change in Winchester district at a level slightly below the South East Plan requirement but this is before considering the sub-district split between PUSH and non-PUSH areas, considered below in para 3.26). Both the economic scenario (C) and the SHMA housing need scenario (D) show housing requirements in excess of the SEP requirement.

3.28   At a sub-district level the analysis indicates that the majority of housing requirement in Winchester district is arising from the non-PUSH part of the district. Given that the PUSH and non-PUSH housing markets are distinct it is reasonable to assume that housing requirements arising from the non-PUSH sub-area should be accommodated within the non-PUSH area. The modelling shows that for the baseline scenario (A), despite an overall requirement slightly below the SEP requirement, the sub-district need in the non-PUSH area is more acute and exceeds the SEP residual requirement for the non-PUSH area (i.e. when the PUSH requirement is taken from the district requirement). This is illustrated in Figure 3.1.

Figure 3.1   Summary of Scenarios
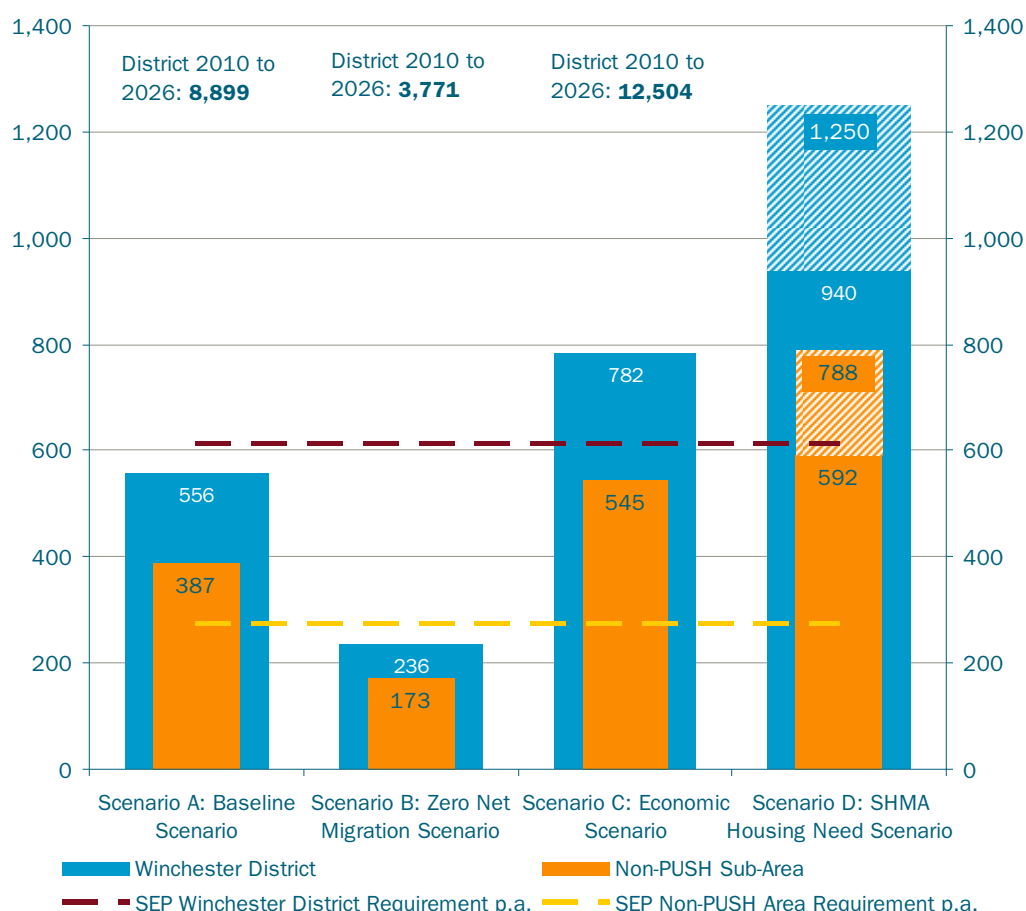
Source: NLP Analysis

3.29   Overall, the requirement for new housing should be considered to be at a minimum in line with the baseline scenario (A). However, in consideration of the economic factors and the adopted position through the ELR employment growth scenario, combined with the housing need position as evidenced in the SHMA, it is clear that the gross requirement for new housing within Winchester district ought to sit some way above the SEP requirement if these objectives (to address employment growth and housing need) are to be met.

Portrait of the Population

3.30   Different outcomes in terms of the structure of the population will have a range of implications for the type of place Winchester district will become in the future. Figure 3.2, Figure 3.3 and Table 3.4 illustrate the population impacts of the three scenarios (baseline, zero net migration and economic) tested.

3.31   Figure 3.2. shows the implications of an ageing population within Winchester on the number of households within the district. With older age cohorts having a higher headship rate the rise in the number of elderly people will drive household growth. In all scenarios the broad shift (towards an ageing population) by 2026 remains similar. However, the zero net migration scenario

(Scenario B) does show a markedly smaller amount of 20-40 year olds in comparison to the economic led scenario (Scenario C). This is illustrative of the impact that a zero net migration scenario would have upon the working age population in Winchester district, with significantly fewer younger adults within the indigenous labour force and an increasingly 'top heavy' population, with more elderly people to be supported by a smaller working age population.

3.32   Figure 3.3. illustrates the scale of population profile change that would arise from each scenario, benchmarking this against forecast change in the wider South East profile from the ONS 2008-based SNPP. At 2010 the profile of population in Winchester is broadly similar with the South East, albeit with slightly greater proportions of elderly population and slightly lower proportions mid-twenty to forty year olds. Whilst the population profile change in the South East represents a shift towards a more elderly population at 2026, this is much more pronounced in Winchester, where all three scenarios show lower proportions of working age populations and higher proportions of elderly population. This is particularly marked in the zero net migration scenario where the profile change occurs mainly through a much smaller proportion of 25 to 49 year olds, well beyond the shift exhibited more widely in the South East. This is combined with a much higher proportion residents aged 55 or more, again much more acute than the shift exhibited at a regional level. This zero net migration scenario would therefore lead to some major imbalances in the population profile of Winchester district, the potential implications of which are considered in Section 4.0.

3.33   The marked decline in the proportion of the younger adult population is in part due to the inability of these people to meet their housing aspirations within Winchester (due to affordability and constrained supply), but also due to the large increase in the elderly population, with more in-migrants in this age bracket due to their greater ability to afford homes in Winchester. Combined, these migratory patterns contribute to what should be regarded as an unsustainable population change, which increasing housing supply could go some way to alleviate.

Figure 3.2   Population Outcomes of Different Scenarios
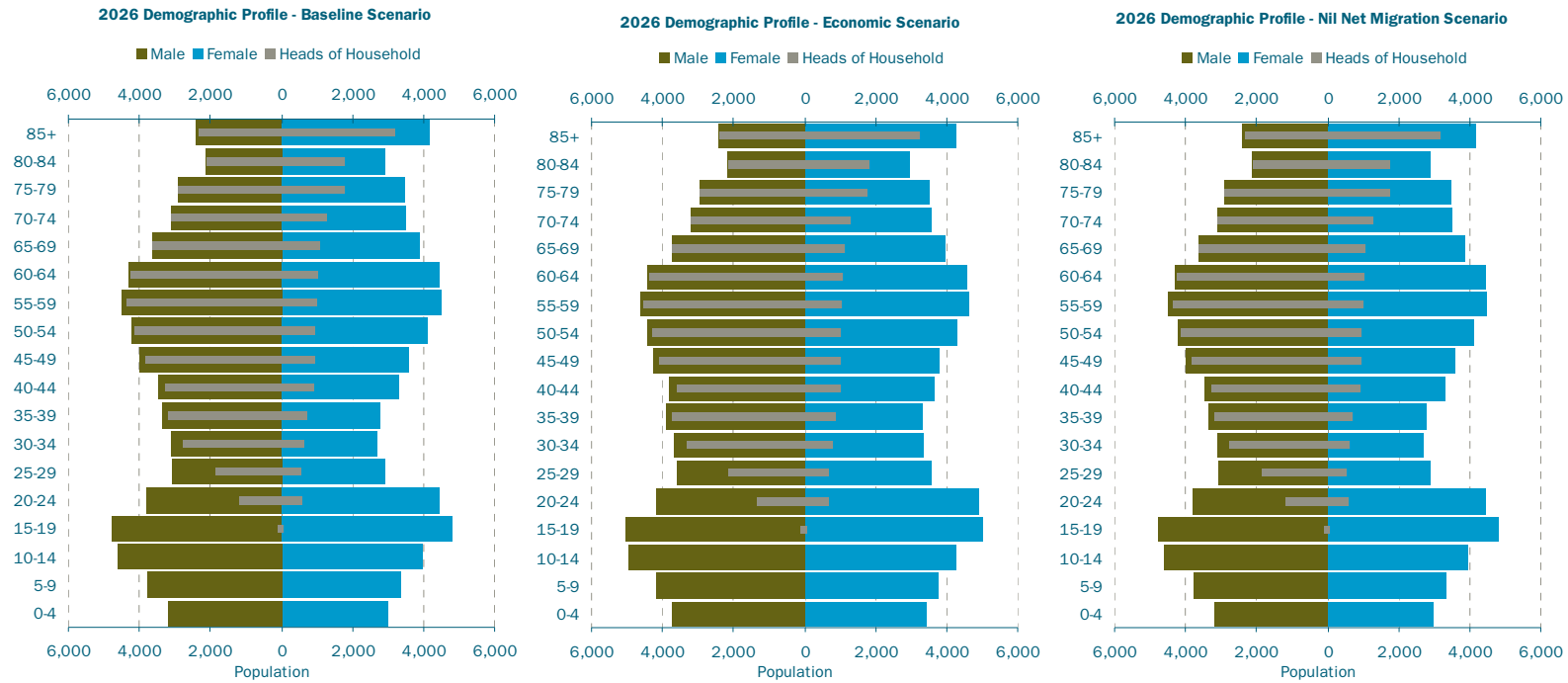
Source: NLP Analysis using PopGroup

Figure 3.3   Population Profile of Winchester compared with the South East (2010 and 2026)

Legend:
- Winchester 2010
- Winchester Baseline Scenario 2026
- Winchester Economic Scenario 2026
- Winchester Zero Net Migration 2026
- South East 2010 (ONS SNPP)
- South East 2026 (ONS SNPP)
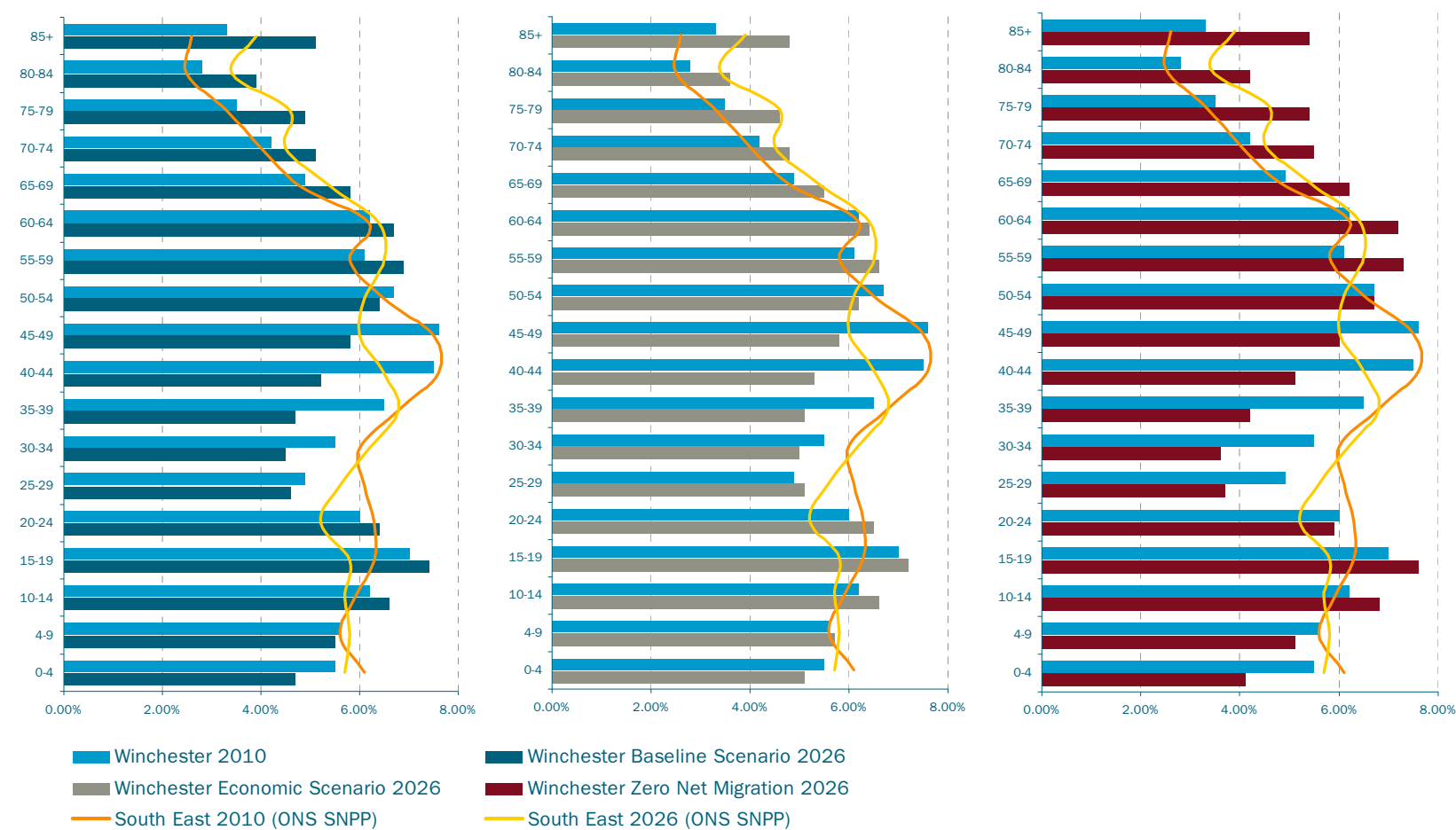
Source: NLP Analysis using PopGroup and ONS 2008-based Sub National Population Projections (SNPP)

Table 3.4   Population Profile and Change (2010-2026)

Scenario	Existing Winchester Pop.		Baseline Scenario			Economic Scenario			Nil Net Migration Scenario			Existing South East Pop		ONS Population Projection		
Year	2010		2026			2026			2026			2010		2026		
Age	Total	Profile	Total	Profile	Change from 2010 (Percentage Points)	Total	Profile	Change from 2010 (Percentage Points)	Total	Profile	Change from 2010 (Percentage Points)	Total	Profile	Total	Profile	Change from 2010 (Percentage Points)
0-4	6,379	5.5%	6,177	4.7%	-0.7%	7,132	5.1%	-0.4%	4,757	4.1%	-1.4%	515,700	6.1%	543,300	5.7%	-0.4%
5-9	6,599	5.6%	7,125	5.5%	-0.2%	7,939	5.7%	0.0%	5,963	5.1%	-0.5%	477,800	5.6%	555,400	5.8%	0.2%
10-14	7,248	6.2%	8,601	6.6%	+0.4%	9,169	6.6%	+0.4%	7,853	6.8%	+0.5%	500,200	5.9%	549,500	5.7%	-0.2%
15-19	8,183	7.0%	9,594	7.4%	+0.4%	10,043	7.2%	+0.2%	8,875	7.6%	+0.6%	537,900	6.3%	559,300	5.8%	-0.5%
20-24	7,047	6.0%	8,285	6.4%	+0.3%	9,085	6.5%	+0.5%	6,816	5.9%	-0.2%	531,600	6.3%	502,500	5.2%	-1.0%
25-29	5,769	4.9%	5,998	4.6%	-0.3%	7,158	5.1%	+0.2%	4,251	3.7%	-1.3%	519,300	6.1%	534,000	5.6%	-0.5%
30-34	6,384	5.5%	5,816	4.5%	-1.0%	7,063	5.0%	-0.4%	4,217	3.6%	-1.8%	508,400	6.0%	596,700	6.2%	0.2%
35-39	7,648	6.5%	6,141	4.7%	-1.8%	7,189	5.1%	-1.4%	4,876	4.2%	-2.4%	579,600	6.8%	653,200	6.8%	0.0%
40-44	8,763	7.5%	6,774	5.2%	-2.3%	7,440	5.3%	-2.2%	5,971	5.1%	-2.4%	645,300	7.6%	621,600	6.5%	-1.1%
45-49	8,838	7.6%	7,594	5.8%	-1.7%	8,074	5.8%	-1.8%	6,949	6.0%	-1.6%	640,900	7.5%	574,400	6.0%	-1.6%
50-54	7,811	6.7%	8,354	6.4%	-0.3%	8,718	6.2%	-0.5%	7,845	6.7%	+0.1%	554,100	6.5%	581,000	6.1%	-0.5%
55-59	7,184	6.1%	8,959	6.9%	+0.7%	9,250	6.6%	+0.5%	8,530	7.3%	+1.2%	492,300	5.8%	623,900	6.5%	0.7%
60-64	7,237	6.2%	8,738	6.7%	+0.5%	8,962	6.4%	+0.2%	8,376	7.2%	+1.0%	529,100	6.2%	615,300	6.4%	0.2%
65-69	5,732	4.9%	7,535	5.8%	+0.9%	7,705	5.5%	+0.6%	7,217	6.2%	+1.3%	407,200	4.8%	517,800	5.4%	0.6%
70-74	4,854	4.2%	6,629	5.1%	+0.9%	6,750	4.8%	+0.7%	6,380	5.5%	+1.3%	339,500	4.0%	433,900	4.5%	0.5%
75-79	4,051	3.5%	6,394	4.9%	+1.4%	6,473	4.6%	+1.2%	6,229	5.4%	+1.9%	282,400	3.3%	437,100	4.6%	1.2%
80-84	3,248	2.8%	5,042	3.9%	+1.1%	5,099	3.6%	+0.9%	4,902	4.2%	+1.4%	216,500	2.5%	324,400	3.4%	0.8%
85+	3,885	3.3%	6,587	5.1%	+1.7%	6,682	4.8%	+1.5%	6,331	5.4%	+2.1%	219,700	2.6%	377,500	3.9%	1.3%
Total	116,864		130,341			139,931			116,339			8,497,500		9,600,600		
Children (0-15)*	21,780	18.6%	23,823	18.3%	-0.4%	26,239	18.8%	+0.1%	20,398	17.5%	-1.1%	1,493,700	17.6%	1,648,200	17.2%	-0.4%
Working Age (16-64)*	73,313	62.7%	74,333	57.0%	-5.7%	80,985	57.9%	-4.9%	64,883	55.8%	-7.0%	5,538,500	65.2%	5,861,900	61.1%	-4.1%
Elderly (65+)	21,770	18.6%	32,186	24.7%	+6.1%	32,708	23.4%	+4.7%	31,058	26.7%	+8.1%	1,465,300	17.2%	2,090,700	21.8%	4.5%

Source: Hampshire CC Base Population, ONS Natural Change and Migration Data for 2009 and NLP Modelling using PopGroup - *NOTE: Bands for SE are 0-14 and 15-64

3.34   The core population impacts of each scenario seek to illustrate the potential population outcomes of providing different levels of housing. For each scenario the key implications are as follows:

- Baseline (Scenario A) – a moderate increase in total population with the majority of this growth occurring in the 65+ age band, reflecting an ageing indigenous population and the propensity to migrate to Winchester of older age cohorts. Working age population stays broadly static in absolute terms, but decreases in terms of its proportion of the overall population.

- Zero Net Migration (Scenario B) – a large decline in children and working age population, replaced by an increasingly elderly population with 26.7% of the population being 65 years old or over (an increase of 8.1 percentage points). The population profile would have serious implications for sustaining the existing economic base, with social implications of having to provide care for an elderly population, with a reduced workforce and service base with which to do it.

- Economic (Scenario C) – a larger increase in total population, with absolute increases in all age cohorts. The profile of population is still increasingly elderly, but in-migration of younger people, including working age, means that the population is able to support economic growth and also provide a more rounded population profile, with a greater proportion of working age people to support the older population.

3.35   Although many of these characteristics of population change reflect wider demographic changes in the population at a regional and national level, the evidence shows that this would be much more pronounced in Winchester, in part because of the structure of the existing population, but also because of the characteristics of migration which are in part driven by the affordability and supply characteristics of housing within Winchester district. Particularly a Zero Net Migration scenario, constraining housing supply to level which only caters for population churn and natural change, would create a population profile skewed heavily towards an ageing population and is unlikely, therefore, to be a credible nor sustainable option for future planning, given potential negative impacts upon the Winchester economy, and a skewed socio-demographic profile meaning younger people and families are unable to meet their housing needs within Winchester.

4.0   # Implications of Future Change

4.1   This section identifies the relevant headline policy considerations for interpreting the scenarios set out in Section 3. These relate to how providing for different levels of housing provision in the future will align with other policy objectives, as well as other implications in terms of the economic impacts and potential revenue from the Government's planned New Homes Bonus.

Policy Alignment

4.2   The alignment of housing provision with wider strategic policy aims and objectives within a local area is central to a robust and deliverable development strategy. This is particularly important in the context of the wider implications of housing on the demography and economic potential of an area. NLP has therefore benchmarked the level of housing provision within the four scenarios outlined in Section 3 for the non-PUSH area against the overarching objectives and aims of the planning system as set out in Planning Policy Statements (PPS) and the Local Growth White Paper. A traffic light system has been adopted as follows:

- Red represents a level of housing provision that wholly fails to meet the policy objective;

- Orange represents a level of housing which goes part way to meeting the policy objective; and

- Green represents a level of housing which would substantially meet the achievement of the policy objective.

4.3   The overarching alignment with policy of each scenario for the non-PUSH area is as follows in Table 4.1.

Table 4.1   Alignment of Scenarios with Headline Policy Objectives for non-PUSH area

National Policy / Strategy Objective	Reference	Benchmark Indicator	Non-PUSH A 387 dwgs p.a. Scenario	Non-PUSH B 173 dwgs p.a. Scenario	Non-PUSH C 545 dwgs p.a. Scenario	Non-PUSH D 592-788 dwgs p.a. Scenario
A sufficient quantity of housing taking into account need and demand and seeking to improve choice	PPS3, para 10 (iii)	Demographic factors	🟠 Amber	🔴 Red	🟠 Amber	🟢 Green
A mix of housing, both market and affordable, particularly in terms of tenure and price, to support a wide variety of households in all areas	PPS3, para 10 (ii)	SHMA Affordable Housing Need Figure (592-788 p.a.)	🟠 Amber	🔴 Red	🟠 Amber	🟢 Green
To create sustainable, inclusive, mixed communities in all areas, both urban and rural	PPS3, para 9 (iv)	Increased housing choice for all age cohorts	🟠 Amber	🔴 Red	🟢 Green	🟢 Green
Addressing the causes and potential impacts of climate change – through policies which reduce energy use, reduce emissions (for example, by encouraging patterns of development which reduce the need to travel by private car	PPS1 Climate Change Supplement, para 13 (ii)	Reduced commuting rates	🟠 Amber	🔴 Red	🟢 Green	🟢 Green
Supporting growth and development through ensuring a responsive supply of land that supports business growth and increases housing supply	Local Growth White Paper, Box 2.A, p. 12	Housing balanced with forecast trends in employment growth (409 jobs p.a.)	🟠 Amber	🔴 Red	🟢 Green	🟢 Green

Source: NLP analysis

References: Planning Policy Statement 3: Housing (June 2010); Planning Policy Statement 1: Planning and Climate Change Supplement (December 2007); Local growth: realising every place's potential, HM Government White Paper (October 2010).

4.4   Scenario B – zero net migration – at 173 dwellings p.a. would result in a large decline in children and working-age population for the non-PUSH area, replaced by an increasingly elderly population. The principal implication of this scenario is the major detrimental impact upon the labour supply within the district with the loss of circa 4,300 economically active people from the labour pool in the non-PSUH area, which would have serious implications for the maintenance of a business and service base, and likely cause an increase in rates of in-commuting to the district if existing workplace jobs in Winchester are to be maintained. The scenario would also not contribute to the meeting the identified backlog of affordable housing, exacerbating existing affordability pressures and increasing the number of local residents unable to access local housing. Overall, this scenario fails to support any of the overarching national policy objectives

4.5   Scenario A – the baseline – at 387 dwellings p.a. results in a moderate increase in total population for the non-PUSH area with the majority of this growth occurring in the 65+ age band, reflecting an ageing indigenous population and the propensity to migrate to Winchester district of the older age cohorts. Working age population stays broadly static in absolute terms, but decreases in terms of its proportion of the overall population. This goes someway to meeting the affordable housing needs, but is significantly below the level of population growth required to help Winchester achieve its economic potential as envisaged in the baseline economic projections set out in the Winchester Economic and Employment Land Study.

4.6   Scenario C – the economic led scenario – at 545 dwellings p.a. implies a larger increase in total population for the non-PUSH area, with absolute increases across all age cohorts. The profile of population is still increasingly elderly, but in-migration of younger people, including working age, means that the population is able to support economic growth and also provide a more rounded population profile, with a greater proportion of working age people to support the older population. It would represent a significant step-change in the level of development in the non-PUSH area, where annual average completions over the past three years equated to 315 dwellings p.a. However, it would make a greater contribution to meeting the past backlog and newly-arising need for affordable housing identified by the Winchester SHMA, and help provide for a more balanced population and labour force to support future growth.

4.7   Scenario D – the affordable housing-led approach (592 – 788 dwellings p.a.) – would enable the non-PUSH area and Winchester district overall to meet the affordable housing needs of its existing resident base as well as newly arising housing need in the future. It represents the largest step-change in development levels, requiring at least twice the annual average level of completions achieved in recent years. However, it is the only scenario that would both fully address the current shortage and future requirements for affordable housing in the non-PUSH area, as well as meeting other policy objectives.

Economic Implications

4.8 Assessing the economic implications for Winchester district overall, it is estimated that baseline demographic change (Scenario A) over the period to 2026 (equating to 556 dwellings per annum) would limit growth in the district's labour force growth to just 42 employees per year, equivalent to 128 occupied jobs assuming that the employment density within the district – the number of economically active persons per job, which takes into account the levels of in-commuting – remains constant. This would amount to 2,048 jobs in total in Winchester district over the period to 2026. A zero net migration (Scenario B) approach would result in a reduction in the number of jobs that can be supported by the local labour force equivalent to 455 jobs per year, or some 7,280 jobs in total by 2026.

4.9 By contrast, the baseline employment projection contained in the Winchester Economic and Employment Land Study (2007) indicates growth in the local economy to secure average employment increases of 538 jobs per annum at the Winchester district level over the forecast period. This suggests forecast economic job growth of circa 8,810 jobs in Winchester district to 2026.

4.10 The implications of a housing-led constraint in the labour supply could be multiple, depending on different outcomes, as follows:

a **Potential job growth in Winchester district would be constrained** – as identified, providing for just the baseline demographic scenario would constrain the economic growth potential of Winchester district to circa 2,048 new jobs, as without the labour force to support additional jobs, they may not be created at a rate which would be achievable otherwise, with businesses potentially choosing to not locate in Winchester district as they cannot meet their labour supply needs. If the constraint placed on the labour supply, due to constrained delivery of housing, means only 2,048 additional jobs can be supported, this would be constraining job growth to less than one third of what baseline economic forecasts indicate could be achieved, with circa 6,560 jobs not coming forward.

Using an average productivity rate per job for Winchester district[16] this constraint could cost the local economy between circa £181.8m and £314.2m per annum at 2026 (in 2007 prices), equivalent to between 5.7% and 9.9% of the current total Winchester economy. Over the Core Strategy period 2010 to 2026 the economic output gap between a zero net migration scenario and an economic growth led scenario could be as high as £6,467m (almost £6.5 billion). This is illustrated at district and non-PUSH area in Table 4.2 below.

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[16] Productivity Per Capita (employee) in 2007 was £47,899 for the NUTS3 area within which Winchester District is located. GVA Per Capita (total population) for Winchester District was £27,707 in 2007 (UK Competitiveness Index 2010)

Table 4.2   Economic Impact of Housing Scenarios, 2010-2026

	District (2010-2026)		Non-PUSH (2010-2026)	
	£	%	£	%
Additional Value of Scenario A: Baseline	£833m	1.6%	£761m	2.0%
Additional Value of Scenario B: Zero Net Migration	-£2,962m	-5.8%	-£1,774m	-4.6%
Additional Value of Scenario C: Economic	£3,505m	6.9%	£2,664m	6.9%
Value of Maintaining Existing Job Levels	£50,699m		£38,542m	

Source: NLP analysis

b   **Jobs are taken by new in-commuters** – if jobs are created but there is not the local labour force with the necessary skill base to fill these employment opportunities it may increase the level of in-commuting. A much higher rate of in-commuting would place additional pressure on infrastructure and would represent an unsustainable imbalance in the local labour market.

4.11   Perhaps most realistic is a combination of the above, with some jobs not being created in Winchester district due the constraint on housing supply and some opportunities being filled by employees commuting into the district.

4.12   Constrained housing supply, and inter alia, continued affordability pressures in Winchester district could have a significant impact on the ability of residents to take up lower-paid jobs and hence limit the prospects for business to create or maintain these jobs in Winchester. This is because these workers are at greatest risk of being priced out of the market.

4.13   In this regard, Figure 4.1 provides a comparison of median house prices and median annual earnings for workplace jobs by local authority across the South East region. With a median house price of £255,000 and median annual income of £22,905 for jobs based in the district, Winchester has significantly above average house prices relative to the South East average (£203,000) but average earnings for local jobs only marginally higher than the South East (£22,519). This suggests that Winchester district's local economy will face proportionately greater challenges for recruiting local labour (within its district boundary) than most other South East authorities. Furthermore, locations south of Winchester (such as Eastleigh, Southampton, Fareham and Portsmouth) which influence the South Hampshire market, have considerably lower median house prices. As reflected in the SHMA[17] this suggests that median house prices in the non–PUSH area of Winchester district are likely to be higher still than those in the PUSH area, implying an even greater gap between house prices and median earnings, and that neighbouring authorities offer lower cost housing options.

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[17] Winchester SHMA (2010) Section 6

Figure 4.1   Comparison of Median House Prices and Earnings by Local Authority, 2009
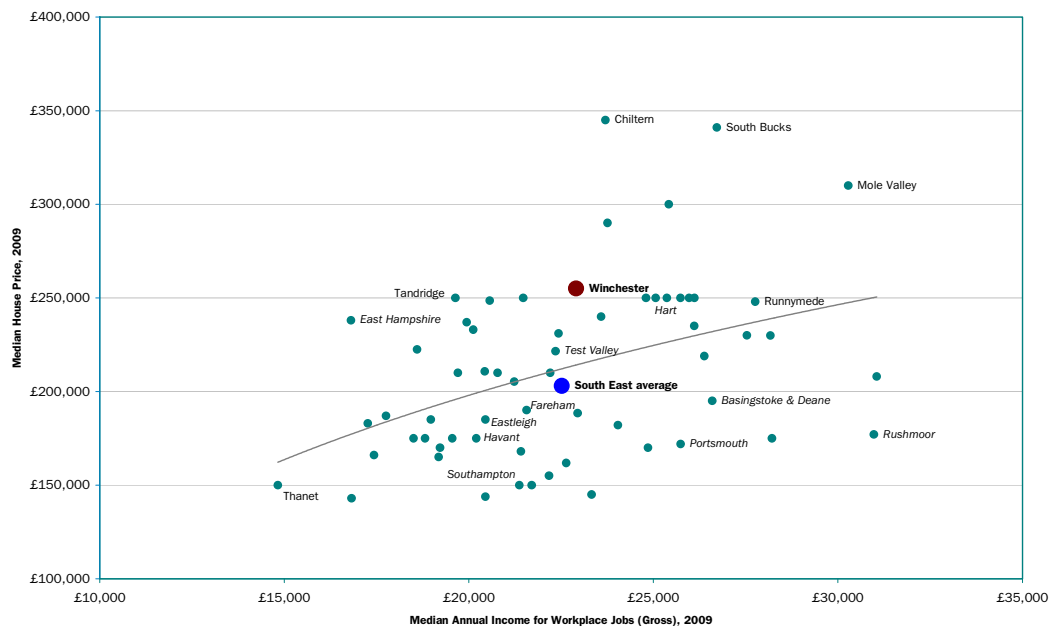
4.14   Figure 4.2 compares the relative annual earnings levels of different employment sectors in Winchester district. In total, about 25,490 (39%) of workplace jobs in Winchester district were at below median earning levels in 2009, including food and beverage activities, retail trades, residential care activities and many public sector activities such as education and health. These sectors have an important role in supporting the functioning of the local economy, with a number of sectors (e.g. residential care activities, human health activities) essential for meeting the needs of an ageing population.

Figure 4.2   Median Earnings by Sector for Workplace Jobs in Winchester, 2009
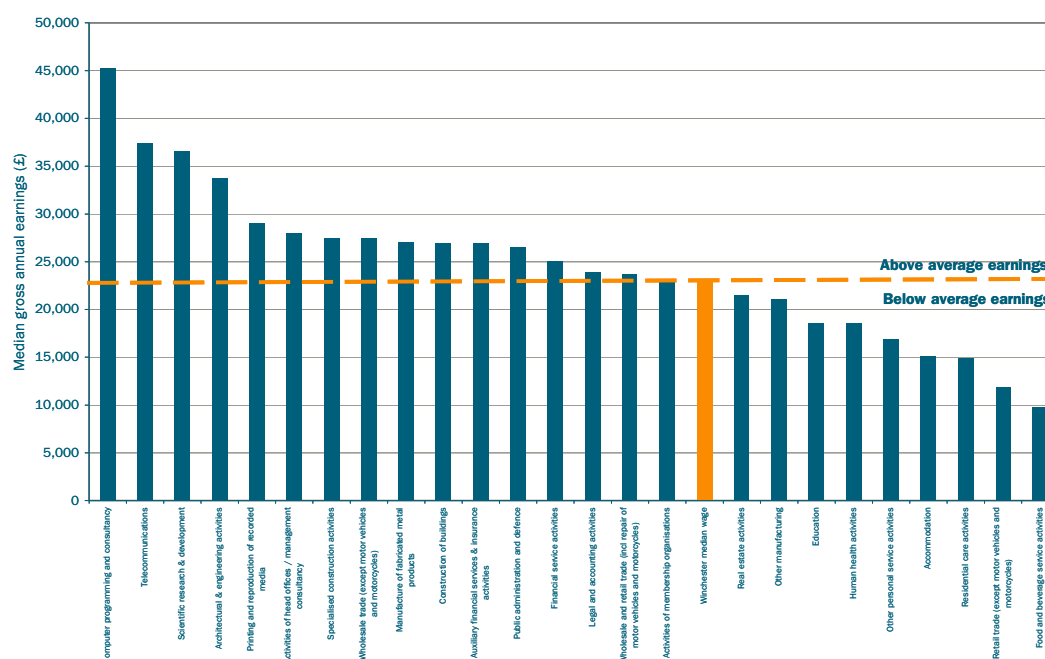
Source: Annual Survey of Hours & Earnings / NLP analysis   Note: includes sectors with > 500 employees only; based on benchmarking against South East median earnings by sector

4.15   Taken together, this analysis suggests labour shortages and/or increased long distance commuting could arise if the gap between house prices and local earnings increases further, particularly in those lower-income sectors where workers are unable to afford housing locally within Winchester (and indeed where the propensity to commute is lower).

House Building Incentives

4.16   A major element of the Government's approach to the promotion of localism in respect of residential development is the establishment of a system of match funding whereby the Government will match, pound-for-pound, the Council Tax revenue received on all new homes for a period of six years, based on the national average for each band for each new home built. The implication is that local authorities would receive additional income that might otherwise be cancelled out by reductions in the local government funding formula. The implication, with a scheme that is likely to be cost neutral, is that the national cost of bonus payments will come from the local government funding pot – in effect, those who build are rewarded at the expense of those who do not. The information made available by the Council on the Blueprint process fails to make any reference to the implications of this major plank of Government policy for housing provision.

4.17   Using the CLG New Homes Bonus calculator (but inputting the figure for the full plan period figure – recognising the limitations of this in terms of the operation of the scheme beyond the current spending review period), it is possible to

provide indicative estimates of the payments local authorities could receive for building new homes.[18] An estimate of the potential financial implications of the scenarios outlined in Section 3 is set out in Table 4.3.

Table 4.3   Council Tax Match Funding Implications

Scenario	Dwellings p.a.	Total 2010-2026	Total financial benefit arising from NHBS
South East Plan target	612	9,792	£99,84m
A: Baseline	556	8,899	£90.74m
B: Zero Net Migration	236	3,771	£38.45m
C: Economic Growth	782	12,504	£127.49m
D: SHMA Affordable Housing Need *	940 – 1,250	15,040 – 20,000	£156.475– 203.92m

Source: CLG New Homes Bonus Calculator / NLP analysis * Note: includes additional bonus of £350 per unit per annum for 6,000 affordable units

4.18   The monetary benefit for the City Council of delivering new homes is significant, with circa £100m for the level of housing delivery proposed in the South East Plan. For comparison, this would be £38m if the Council were to adopt the Zero Net Migration scenario (Scenario B), but as high as circa £127m if the Economic Growth target (Scenario C) was adopted. These figures assume a c.30% of new homes are affordable (and therefore qualify for the additional £350 unit per annum). Scenario D would generate additional bonus payments worth up £156-204m.

4.19   Therefore, there is a clear financial incentive for the Council to deliver more homes and greater levels of delivery. The corollary of low supply is that New Homes Bonus will be taken from the formula grant announced, so that areas that fail to build are likely to see their formula grant reduced as they, in effect, pay for the bonus for those authorities that do build. It is not clear that this has been specifically considered as part of the City Council's 'Blueprint' consultation process.

Synthesis

4.20   The implications of the different scenarios considered in this assessment can be summarised as follows:

- only Scenarios C (economic growth) and D (housing need) clearly help achieve headline national planning policy objectives in terms of providing for housing needs, delivering affordable housing, improve sustainability and reduce the need to travel, and support economic growth by balancing housing growth with employment needs in the non-PUSH area and Winchester district overall;

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[18] New Homes Bonus gross payment calculator, CLG, November 2010 (http://www.communities.gov.uk/documents/housing/xls/1767709.xls)

- the zero net migration scenario (236 dwellings p.a.) substantially fails to provide for any of the planning policy objectives, and would lead to a cost to the Winchester economy of almost £6.5 billion by 2026 from lost employment growth; and

- the potential monetary benefits for the City Council of delivering new homes is significant, with circa £100m for the level of housing delivery proposed in the South East Plan. For comparison, this would be £38m if the Council were to adopt the Zero Net Migration scenario (Scenario B), but as high as circa £127m if the Economic Growth target (Scenario C) was adopted. Scenario D would generate even higher figures. At a time of economic uncertainty for local government, and when the New Homes Bonus is a major plank of Government planning policy, this is a significant factor which does not appear to have been considered as part of the Blueprint consultation process.

5.0   Conclusions and Implications for the Core Strategy

5.1   This section draws together the evidence to identify the potential range for an appropriate local housing requirement and implications for the emerging Winchester Core Strategy.

Winchester district comprises two distinct housing market areas

5.2   Winchester City, and the Central Hampshire housing market area more widely, is distinct in market terms from the South Hampshire/PUSH area. This provides an evidential basis for the PUSH/non-PUSH area split of the Winchester housing requirement defined by the South East Plan, and has been carried through into the Council's most recent evidence (the 2010 SHMA). This means that provision of new housing in the PUSH area will not significantly contribute to meeting housing needs in the non-PUSH area.

Winchester experiences significant in-migration of people and households, and this is set to continue

5.3   Winchester experiences net in-migration of people and households from the Greater London area, and neighbouring Central and South Hampshire authorities. The implication is that a considerable number of households are moving into Winchester from areas of higher house prices and the expectation is that this is set to continue.

5.4   The SMHA suggests that households moving into Winchester from areas of higher house prices are likely to have greater equity and potentially earnings than existing residents. This means that restricting housing supply has greater impacts on lower-income residents than it does on in-migrants.

Through a lack of past delivery, Winchester has a backlog of affordable housing, which exacerbates the affordability issues in the district

5.5   There is a backlog of affordable housing provision in the district, equivalent to 375-445 dwellings per annum, while in 2010 there were 2,605 households registered on Winchester City Council's housing waiting list, equivalent to 5% of all households within the district. Acute housing affordability issues exist in Winchester, with 84% of residents unable to purchase a property within the district based on current ratios of property prices and income levels.

Scenarios considered through this assessment identify a need to plan for higher housing number than the South East Plan requirement, particularly in the non-PUSH area

5.6   The four scenarios outlined in this study show a wide variance in the required housing provision. The baseline scenario, based upon Hampshire CC existing population data and forecast components of demographic change from ONS,

identifies a need for housing to support population change in Winchester district at a level slightly below the South East Plan requirement but this is before considering the sub-district split between PUSH and non-PUSH areas, considered below in para 5.7). Both the economic scenario (C) and the SHMA housing need scenario (D) show housing requirements in excess of the SEP requirement.

5.7   At a sub-district level the analysis indicates that the majority of housing requirement in Winchester district is arising from the non-PUSH area. Given that the PUSH and non-PUSH housing markets are distinct it is reasonable to assume that housing requirements arising from the non-PUSH area should be accommodated within the non-PUSH area. The modelling shows that for the baseline scenario (A), despite an overall requirement slightly below the SEP requirement, the level of need in the non-PUSH area is more acute and exceeds the SEP residual requirement for the non-PUSH area (i.e. when the PUSH requirement is taken from the district requirement). Moreover the modelling identifies that the need arising is concentrated in the non-PUSH area rather than the PUSH area of Winchester district, which runs counter to the distribution of future housing provision set out in policies contained within the South East Plan.

Under providing for housing would result in unsustainable population outcomes, resulting in negative impacts on the Winchester economy

5.8   Although many of these characteristics of population change reflect wider demographic changes in the population at a regional and national level, the evidence shows that this would be much more pronounced in Winchester district, in part because of the structure of the existing population, but also because of the characteristics of migration which are in part driven by the affordability and supply characteristics of housing within Winchester district.

5.9   In particular, a zero net migration scenario, constraining housing supply to level which only caters for population churn and natural change, would create a population profile skewed heavily towards an ageing population and is unlikely, therefore, to be a credible nor sustainable option for future planning, given potential negative impacts upon the district's economy, and a skewed socio-demographic profile meaning younger people and families are unable to meet their housing needs locally.

Only higher levels of housing provision will help Winchester (both non-PUSH and PUSH areas) meet headline national planning policy objectives.

5.10   The alignment of housing provision with wider strategic policy aims and objectives within a local area is central to a robust and deliverable development strategy. This is particularly important in the context of the wider implications of housing on the demography and economic potential of an area.

5.11   The zero net migration scenario results in a large decline in children and working-age population, replaced by an increasingly elderly population. The main implication of this scenario is the loss of circa 6,700 economically active

people from the district's labour pool (of which 4,300 in the non-PUSH area), which would have serious implications for the maintenance of a business and service base within Winchester district, and likely cause an increase in rates of in-commuting to the district if existing workplace jobs in Winchester are to be maintained. The scenario would also not contribute to the meeting the identified backlog of affordable housing, exacerbating existing affordability pressures and increasing the number of local residents unable to access local housing. Overall, this scenario fails to support any of the overarching national policy objectives

5.12   The baseline scenario results in a moderate increase in total population with the majority of this growth occurring in the 65+ age band, reflecting an ageing indigenous population and the propensity to migrate to Winchester of the older age cohorts. Working age population stays broadly static in absolute terms, but decreases in terms of its proportion of the overall population. This goes someway to meeting the affordable housing needs, but is significantly below the level of population growth required to help Winchester achieve its economic potential as envisaged in the baseline economic projections set out in the Winchester Economic and Employment Land Study.

5.13   The economic scenario implies a larger increase in total population, with absolute increases across all age cohorts. The profile of population is still increasingly elderly, but in-migration of younger people, including working age, means that the population is able to support economic growth and also provide a more rounded population profile, with a greater proportion of working age people to support the older population. It would represent a significant step-change in the level of development in the non-PUSH area of Winchester district, where annual average completions over the past three years equated to 315 dwellings p.a. However, it would make the biggest contribution to meeting the past backlog and newly-arising need for affordable housing identified by the Winchester SHMA, and help provide for a more balanced population and labour force to support the district's future growth.

Adequate provision for housing has a major role in supporting an efficient labour market, which is critical to securing sustainable economic growth

5.14   Providing for just the baseline demographic scenario would constrain the economic growth potential of Winchester district to circa 2,048 new jobs, as without the labour force to support additional jobs, they may not be created at a rate which would be achievable otherwise, with businesses potentially choosing to not locate in Winchester district as they cannot meet their labour supply needs. If the constraint placed on the labour supply, due to constrained delivery of housing, means only 2,048 additional jobs can be supported, this would be constraining job growth to less than one third of what baseline economic forecasts indicate could be achieved, with circa 6,560 jobs not coming forward.

5.15   This can be measured in direct economic terms. The zero net migration scenario substantially fails to provide for any of the planning policy objectives,

and could lead to a cost to the Winchester economy of almost £6.5 billion by 2026 from lost employment growth.

5.16   If jobs are created but there is not the local labour force with the necessary skill base to fill these employment opportunities it may increase the level of in-commuting. A much higher rate of in-commuting would place additional pressure on infrastructure and would represent an unsustainable imbalance in the local labour market.

5.17   Constrained housing supply in Winchester district could have a significant impact on the ability of residents to take up lower-paid jobs because these workers are at greatest risk of being priced out of the market. Analysis suggests that about 25,490 jobs (39%) of total jobs in Winchester are at below median earning levels in 2009, including food and beverage activities, retail trades, residential care activities and many public sector activities such as education and health. These sectors have an important role in supporting the functioning of the local economy. Labour shortages and/or increased long distance commuting could arise in these sectors where workers are unable to afford housing locally within Winchester district, resulting in those sectors experiencing problems, damaging businesses and the provision of important local services. In particular, the demand for health and residential care activities are likely to increase as a result of the growing elderly population. A failure to support those sectors of the economy in Winchester district could lead to significant adverse outcomes for Winchester residents.

There are clear financial incentives for the Council to deliver more homes and greater levels of delivery

5.18   Based on the CLG New Homes Bonus calculator, it is possible to provide indicative estimates of the payments the City Council could receive for building new homes.

5.19   This would amount to circa £98m for the level of housing delivery proposed in the South East Plan. For comparison, this would be £38m if the Council were to adopt the Zero Net Migration scenario (Scenario B), but as high as circa £127m if the Economic Growth target (Scenario C) was adopted. Scenario D would deliver circa £156-200m. On the basis that the New Homes Bonus comes from a ring fenced budget, if Winchester builds substantially less than other localities, it stands to lose a greater amount from its formula grant. It is not clear that this has been specifically considered as part of the City Council's 'Blueprint' consultation process.

The analysis put forward by the Council as part of the 'Blueprint' consultation fails to properly reflect the drivers of future housing need or the consequences of under-provision

5.20   Blueprint only considers two scenarios – 'natural change' (which assumes zero net migration) and 'SE Plan Housing'. There is no consideration of any demographic projections or the impacts of alternative migration assumptions, while the scenarios presented are reliant on Hampshire County Council data

about housing supply over the period 2009-2016 (i.e. are essentially housing supply based). More detailed analysis of the components of change would be important in helping the City Council to potentially frame alternative scenarios and in identifying the outcomes these could produce. Therefore, it is not considered that the two scenarios provide a sufficiently wide basis for understanding long-term population change in Winchester district, and the different housing implications arising from these.

5.21   Furthermore, the Blueprint analysis presented only takes limited account of the evidence presented in the 2010 Winchester SHMA which highlights the pressing affordability issues that exist within the district, and the scale of need in relation to both backlog and newly arising affordable housing needs, and how the level of future delivery will be impacted by the scenarios considered (or their alternatives). It therefore fails to properly interpret the SHMA findings in terms of alternative levels of housing provision.

5.22   Perhaps most significantly, the Blueprint consultation does not assess the implications of the different housing options for the Winchester economy, and how the future projections of employment growth set out in the Winchester Economic and Employment Land Study can be met. In particular the inter-relationships between the future working-age population and labour force growth, and implications in terms of commuting patterns and the ability of lower-paid workers to access housing within Winchester are not explored. In this regard, Blueprint does not take a balanced approach to meeting the future requirements of either the non-PUSH area or the district overall and the constraint that limiting housing supply may place on the district's ability to sustain future economic growth.

5.23   On this basis, it is considered that the wider range of scenarios considered through this study and the more detailed assessment of the policy choices and trade-offs, economic and fiscal impacts that will result, helps to provides a more informed basis for making decisions about the future level of housing to plan for in both the non-PUSH and PUSH areas of Winchester district than is currently provided by Blueprint.

Appendix 1　　Data Sources

Component	Scenario A – Baseline	Scenario B – Nil Net Migration	Scenario C – Economic Growth
Population			
Baseline Population	A 2009 baseline population is taken from Hampshire County Council Environment Department's 2009 based Small Area Population Forecasts which splits population by age cohort and gender. Where age cohorts are grouped, these have been equally split into single year age cohorts (http://www3.hants.gov.uk/district_gender_level_forecast-2.xls).		
Births	A Total Fertility Rate (TFR) is applied to the population forecast using projected TFRs for Winchester District from the ONS 2008-based Sub-National Population Projections (SNPP). The TFR for each year is derived through PopGroup using the total births forecast for each year in Winchester to 2031 from the SNPP (SNPP Table 5) and working back from this to identify what the TFR is for that year. The analysis shows the TFR is reducing over time within Winchester, which is consistent with the Age Specific Fertility Rates (ASFR) for Winchester which underpin the ONS modelling (prior to adjustment/controlling to national births).		
Deaths	A Standard Mortality Rate (SMR) is applied to the population forecast using projected SMRs for Winchester District from the ONS 2008-based Sub-National Population Projections (SNPP). The SMR for each year is derived through PopGroup using the total births forecast for each year in Winchester to 2031 from the SNPP (SNPP Table 5) and working back from this to identify what the SMR is for that year. The analysis shows the SMR is reducing over time within Winchester (i.e. increasing life expectancy), which is consistent with the Age Specific Mortality Rates (ASMR) for Winchester which underpin the ONS modelling.		
Internal Migration	Gross domestic in and out migration flows are adopted based on forecast migration in Winchester from the ONS 2008-based SNPP for 2010 to 2033. This is the sum of internal migration (elsewhere in England) and cross-border migration (elsewhere in the UK) (SNPP Table 5) Sub-district scenario migration is split proportionally as per baseline population distribution.	Gross domestic in and out migration flows are adopted based on forecast migration in Winchester from the ONS 2008-based SNPP for 2010 to 2033 (SNPP Table 5). To achieve nil net migration the difference between in and out flows is split to equalise the in and out flows at the middle point of the two. Sub-district scenario migration is split proportionally as per baseline population distribution.	Internal migration is flexed to achieve the necessary number of economically active people to underpin the economy in Winchester.

Component	Scenario A – Baseline	Scenario B – Nil Net Migration	Scenario C – Economic Growth
International Migration	Gross international in and out migration flows are adopted based on forecast migration in Winchester from the ONS 2008-based SNPP for 2010 to 2033. (SNPP Table 5) Sub-district scenario migration is split proportionally as per baseline population distribution.	Gross international in and out migration flows are adopted based on forecast migration in Winchester from the ONS 2008-based SNPP for 2010 to 2033 (SNPP Table 5). To achieve nil net migration the difference between in and out flows is split to equalise the in and out flows at the middle point of the two. Sub-district scenario migration is split proportionally as per baseline population distribution.	Gross international in and out migration flows are adopted based on forecast migration in Winchester from the ONS 2008-based SNPP for 2010 to 2033. (SNPP Table 5)
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 Winchester over the previous five years. This is based upon NHSCR data from ONS on Internal Migration by Local Authorities in England and Wales (http://www.statistics.gov.uk/statbase/Product.asp?vlnk=15148). An average total level of migration for each age cohort is taken from mid-2004 to mid-2009 and then used to identify a migration rate for each age cohort within Winchester (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 Winchester District and forecast over the period to 2031 are taken from the government data which was used to underpin the 2006-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 gender and age cohort. 2008-based CLG household forecasts were released in November 2010, but the headship assumptions underpinning this are not available at the time of writing. Therefore, the 2006-based headship rates remain the most up-to-date available. Compared to the 2006-based household projections for Winchester, the 2008-based projections are marginally higher suggesting 55,000 households by 2026 compared with 54,000 for the 2006-based estimates, albeit the shifts in average household sizes for Winchester between the two are comparable: 2006-based suggesting 2.44 in 2006 falling to 2.33 in 2026 and 2008-based suggesting 2.50 in 2006 falling to 2.35 in 2026. This highlights that the assumptions underlying the two data sets are comparable and unlikely to significantly impact overall outcomes and therefore it is reasonable to use the 2006-based headship rates.		

Component	Scenario A – Baseline	Scenario B – Nil Net Migration	Scenario C – Economic Growth
Concealed Households Rate	The concealed household rate is similarly taken from the assumptions used to underpin the 2006-based CLG household forecasts. No change is assumed in the rate of concealed households from the CLG identified rate, however, if these households were to become unconcealed (i.e. they could meet their housing aspirations) this would be in addition to the forecast households rates (with additional dwelling requirements associated).		
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/second home rate in Winchester District totals 3% (estimated using ONS 2008 Vacant Dwellings Data for Hampshire as Winchester specific rate is not available). This is held constant over the forecast period as it is already below the South East average (4%) and is not considered likely to substantially improve.		
Economic			
Economic Activity Rate	Age and gender specific economic activity rates are used. The basis for this is ONS Labour Force Projections (1998) which have been rebased from their 2010 estimate using a uniform adjustment to all age cohorts to meet current total economic activity in the District from the 2008 Annual Population Survey (APS). These are assumed to remain static going forward with the exception of an adjustment to take account of changing pension ages (see technical appendix).		
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 Winchester District data from the 2008 Annual Population Survey (APS) and 2008 Annual Business Inquiry (ABI) identifies an LF ratio of 0.77 (51,800 employed people ÷ 66,900 jobs). This has not been flexed over the forecasting period with no assumed increase or reduction in net commuting rates.		
Unemployment	The unemployment rate is taken from the ONS Annual Population Survey model based estimate for March 2010 (5%). A reduction in unemployment of 0.1% is assumed each year down to 3.1%, reflecting the fact that 5.0% unemployment is the highest recorded in Winchester in since 2004 (when the APS data begins) and that as the economy grows out of recession unemployment will fall back to rate similar rate as seen pre-recession.		

Appendix 2 Modelling Outputs

Winchester District Baseline Scenario

Population Estimates and Forecasts   NLP Winchester

Components of Population Change   Winchester District

Year beginning July 1st ....

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Births																						
Male	606	641	638	630	626	619	613	607	599	592	585	579	570	565	604	602	598	597	596	593	591	545
Female	572	604	602	594	591	584	578	573	566	559	552	547	537	533	570	568	564	564	562	559	557	514
All Births	1,178	1,245	1,240	1,224	1,217	1,203	1,191	1,180	1,165	1,151	1,138	1,126	1,107	1,098	1,174	1,171	1,163	1,161	1,158	1,151	1,148	1,059
TFR	1.79	1.90	1.92	1.92	1.93	1.92	1.91	1.90	1.88	1.86	1.84	1.82	1.78	1.75	1.85	1.82	1.78	1.75	1.72	1.68	1.65	1.50
Births input																						
Deaths																						
Male	473	491	487	483	480	477	477	476	475	473	520	521	523	522	525	527	529	531	580	581	582	583
Female	557	585	581	578	574	570	567	562	558	554	605	602	601	597	598	597	599	601	656	656	658	660
All deaths	1,030	1,076	1,069	1,061	1,054	1,047	1,044	1,038	1,033	1,027	1,125	1,123	1,123	1,119	1,124	1,129	1,237	1,236	1,237	1,240	1,243	
SMR: males	81.9	82.5	79.7	77.1	74.8	72.5	70.3	68.0	65.8	63.7	67.8	65.9	64.3	62.3	60.7	59.0	57.4	55.7	58.8	57.2	55.7	54.2
SMR: females	81.9	82.9	80.4	78.2	76.1	74.0	71.8	69.5	67.3	65.0	69.1	67.0	65.1	62.9	61.1	59.2	57.3	55.3	58.2	56.4	54.8	53.1
SMR: male & female	81.9	82.7	80.1	77.7	75.5	73.3	71.1	68.8	66.6	64.4	68.5	66.5	64.7	62.6	60.9	59.1	57.3	55.5	58.5	56.8	55.2	53.6
Expectation of life	82.3	82.3	82.5	82.7	82.9	83.1	83.3	83.5	83.7	83.9	83.4	83.6	83.8	83.9	84.1	84.2	84.4	84.6	84.2	84.4	84.5	84.7
Deaths input																						
In-migration from the UK																						
Male	4,100	4,179	4,237	4,239	4,281	4,273	4,262	4,298	4,279	4,268	4,261	4,298	4,291	4,287	4,328	4,317	4,354	4,388	4,430	4,423	4,461	4,462
Female	4,500	4,721	4,763	4,761	4,819	4,827	4,838	4,902	4,921	4,932	4,939	5,002	5,009	5,013	5,072	5,083	5,146	5,212	5,270	5,277	5,339	5,338
All	8,600	8,900	9,000	9,000	9,100	9,100	9,100	9,200	9,200	9,200	9,200	9,300	9,300	9,300	9,400	9,400	9,500	9,600	9,700	9,700	9,800	9,800
SMigR: males	70.2	70.7	71.3	71.1	71.7	71.4	71.1	71.6	71.2	71.0	70.7	71.3	70.9	70.5	70.6	69.9	69.9	69.9	70.0	69.3	69.2	68.7
SMigR: females	75.4	78.3	78.8	78.6	79.3	78.9	78.5	79.0	78.8	78.6	78.4	79.2	78.9	78.4	78.4	77.6	77.7	77.9	78.0	77.4	77.7	77.1
Migrants input																						
Out-migration to the UK																						
Male	3,700	3,749	3,807	3,808	3,800	3,785	3,778	3,814	3,787	3,771	3,761	3,752	3,749	3,753	3,803	3,798	3,829	3,859	3,860	3,898	3,938	3,945
Female	3,900	4,251	4,293	4,292	4,300	4,315	4,322	4,386	4,413	4,429	4,439	4,448	4,451	4,447	4,497	4,502	4,571	4,640	4,640	4,702	4,762	4,755
All	7,600	8,000	8,100	8,100	8,100	8,100	8,100	8,200	8,200	8,200	8,200	8,200	8,200	8,200	8,300	8,300	8,400	8,500	8,500	8,600	8,700	8,700
SMigR: males	63.4	63.5	64.1	63.9	63.6	63.2	63.0	63.5	63.1	62.7	62.4	62.2	61.9	61.7	62.1	61.5	61.5	61.4	61.0	61.1	61.1	60.7
SMigR: females	65.3	70.5	71.0	70.8	70.7	70.6	70.1	70.7	70.7	70.6	70.5	70.4	70.1	69.5	69.5	68.7	69.0	69.4	68.7	69.0	69.3	68.7
Migrants input																						
In-migration from Overseas																						
Male	303	405	407	409	410	410	410	409	407	406	405	404	403	403	403	402	402	401	401	401	401	402
Female	297	395	393	391	390	390	390	391	393	394	395	396	397	397	397	398	398	399	399	399	399	398
All	600	800	800	800	800	800	800	800	800	800	800	800	800	800	800	800	800	800	800	800	800	800
SMigR: males	76.8	101.7	101.6	101.3	101.1	100.8	100.6	100.5	100.4	100.4	100.3	100.3	100.0	99.6	99.1	98.4	97.6	96.7	95.8	94.8	94.0	93.2
SMigR: females	76.8	101.7	101.6	101.3	101.1	100.8	100.6	100.5	100.4	100.4	100.3	100.3	100.0	99.6	99.1	98.4	97.6	96.7	95.8	94.8	94.0	93.2
Migrants input																						
Out-migration to Overseas																						
Male	303	507	509	511	512	512	563	562	560	558	557	556	555	554	554	553	552	552	552	551	552	552
Female	297	493	491	489	488	488	537	538	540	542	543	544	545	546	546	547	548	548	548	549	548	548
All	600	1,000	1,000	1,000	1,000	1,000	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100
SMigR: males	76.8	127.1	127.0	126.6	126.4	126.0	138.3	138.2	138.1	138.0	137.9	137.9	137.6	137.0	136.3	135.3	134.2	133.0	131.7	130.4	129.2	128.1
SMigR: females	76.8	127.1	127.0	126.6	126.4	126.0	138.3	138.2	138.1	138.0	137.9	137.9	137.6	137.0	136.3	135.3	134.2	133.0	131.7	130.4	129.2	128.1
Migrants input																						
Migration - Net Flows																						
UK	+1,000	+900	+900	+900	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,000	+1,100	+1,100	+1,100	+1,100	+1,100	+1,100	+1,100	+1,200	+1,100	+1,100	+1,100
Overseas	0	-200	-200	-200	-200	-200	-300	-300	-300	-300	-300	-300	-300	-300	-300	-300	-300	-300	-300	-300	-300	-300
Summary of population change																						
Natural change	+148	+169	+171	+164	+163	+156	+146	+142	+132	+124	+12	+4	-16	-21	+51	+47	+34	+29	-78	-86	-91	-184
Net migration	+1,000	+700	+700	+700	+800	+800	+700	+700	+700	+700	+700	+800	+800	+800	+800	+800	+800	+800	+900	+800	+800	+800
Net change	+1,148	+869	+871	+864	+963	+956	+846	+842	+832	+824	+712	+804	+784	+779	+851	+847	+834	+829	+822	+714	+709	+616

Summary of Population estimates/forecasts

Population at mid-year

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
0-4	6,394	6,380	6,453	6,506	6,515	6,598	6,637	6,575	6,507	6,442	6,368	6,298	6,233	6,158	6,086	6,107	6,138	6,177	6,239	6,316	6,291	6,267	6,159		
5-10	7,805	8,034	8,148	8,359	8,616	8,739	8,873	8,942	9,024	9,066	9,069	9,142	9,169	9,089	8,995	8,906	8,806	8,714	8,614	8,524	8,546	8,578		
11-15	7,306	7,366	7,457	7,510	7,525	7,544	7,641	7,784	8,002	8,267	8,487	8,597	8,591	8,695	8,765	8,780	8,888	8,932	8,852	8,768	8,682	8,587	8,496		
16-17	3,194	3,149	3,154	3,152	3,148	3,260	3,280	3,317	3,321	3,215	3,285	3,392	3,391	3,748	3,755	3,812	3,751	3,696	3,845	3,956	3,921	3,882	3,846		
18-59Female, 64Male	66,185	66,467	66,454	66,409	66,394	66,408	66,432	66,454	66,417	66,467	66,421	66,181	66,084	66,016	66,130	66,226	66,193	66,184	66,069	66,048	66,068	66,151	66,182		
60/65 -74	13,955	14,283	14,655	15,027	15,395	15,762	16,037	16,319	16,608	16,905	17,208	17,316	17,443	17,582	17,733	17,895	18,250	18,616	18,991	19,367	19,749	19,978	20,242		
75-84	7,205	7,300	7,398	7,530	7,691	7,876	8,086	8,301	8,521	8,740	8,957	9,381	9,795	10,196	10,584	10,958	11,194	11,436	11,683	11,912	12,141	12,178	12,227		
85+	3,672	3,885	4,014	4,111	4,184	4,243	4,401	4,542	4,675	4,805	4,936	5,136	5,340	5,547	5,761	5,978	6,288	6,587	6,877	7,108	7,331	7,825	8,301		
Total	115,716	116,864	117,733	118,604	119,468	120,431	121,387	122,233	123,075	123,908	124,731	125,444	126,247	127,031	127,809	128,661	129,507	130,341	131,170	131,993	132,707	133,415	134,031	+14,625	+18,315

Population impact of constraint

Number of persons

Housing

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2009-2026	2009-2031
Number of households	47,507	48,177	48,724	49,256	49,734	50,235	50,892	51,439	51,987	52,492	53,016	53,560	54,086	54,602	55,111	55,601	56,206	56,809	57,390	57,914	58,400	58,974	59,567	+9,301	+12,060
Change over previous year		+669	+547	+533	+478	+501	+657	+547	+548	+505	+524	+544	+527	+515	+509	+490	+604	+603	+581	+525	+486	+574	+593	+547	+548
Concealed families	261	261	271	273	271	279	281	280	279	282	284	289	290	295	299	306	311	317	327	335	344	354	361	
Number of dwellings	48,977	49,667	50,231	50,780	51,272	51,789	52,466	53,030	53,595	54,116	54,656	55,216	55,759	56,290	56,815	57,321	57,944	58,566	59,165	59,706	60,206	60,798	61,409	+9,589	+12,432
Change over previous year		+690	+564	+549	+493	+517	+677	+564	+565	+520	+540	+560	+543	+531	+525	+506	+623	+622	+599	+541	+501	+592	+611	+564	+565
Households (inc Concealed)	47,768	48,438	48,995	49,529	50,006	50,514	51,173	51,719	52,267	52,774	53,300	53,849	54,376	54,896	55,410	55,907	56,517	57,126	57,717	58,250	58,744	59,328	59,927	+9,647	+12,536
Dwellings	49,245	49,936	50,510	51,061	51,552	52,076	52,755	53,318	53,883	54,406	54,949	55,515	56,058	56,594	57,124	57,637	58,265	58,892	59,502	60,051	60,561	61,163	61,781		
		+691	+575	+551	+491	+524	+679	+563	+565	+523	+542	+566	+543	+537	+529	+513	+628	+628	+610	+549	+509	+602	+618		

Labour force

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2009-2026	2009-2031
Size of labour force, persons	55,256	55,521	55,603	55,646	55,684	55,818	55,882	55,925	55,910	55,885	55,929	55,904	55,955	55,996	56,077	56,178	56,181	56,196	56,269	56,387	56,406	56,508	56,595		
Change over previous year		+266	+82	+43	+39	+133	+64	+44	-15	-25	+44	-25	+51	+41	+81	+100	+4	+15	+73	+117	+20	+102	+87	+55	+61
Number of jobs	68,172	68,572	68,746	68,871	68,991	69,228	69,380	69,507	69,561	69,603	69,730	69,772	69,908	70,031	70,206	70,404	70,482	70,574	70,739	70,959	70,984	71,112	71,221		
Change over previous year		+400	+173	+125	+120	+238	+152	+127	+54	+42	+127	+42	+136	+124	+175	+199	+78	+91	+165	+220	+25	+128	+110	+141	+139

This report was compiled from a forecast produced on 26/11/2010 using POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

Non-PUSH Sub-Area Baseline Scenario

Population Estimates and Forecasts NLP Winchester

Components of Population Change Winchester District

Year beginning July 1st …………..

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Births																						
Male	606	467	467	462	459	454	449	444	437	430	423	415	405	397	420	414	408	405	403	401	401	371
Female	572	441	440	435	433	428	424	419	413	406	399	392	382	374	396	391	385	382	381	378	378	350
All Births	1,178	908	907	897	893	882	873	863	850	836	822	807	786	771	816	806	793	787	784	779	779	720
TFR	2.45	1.90	1.92	1.92	1.93	1.92	1.91	1.90	1.88	1.86	1.84	1.82	1.78	1.75	1.85	1.82	1.78	1.75	1.72	1.68	1.65	1.50
Births input																						
Deaths																						
Male	462	326	324	321	319	317	317	316	315	314	345	345	346	346	347	348	350	351	383	384	384	385
Female	568	401	399	397	395	392	391	387	384	381	416	413	411	408	408	407	408	408	445	445	445	446
All deaths	1,030	728	723	718	714	710	708	703	699	695	761	758	758	754	755	756	758	759	828	828	830	831
SMR: males	116.7	82.5	79.7	77.1	74.8	72.5	70.3	68.0	65.8	63.7	67.8	66.0	64.3	62.3	60.7	59.1	57.4	55.7	58.8	57.2	55.7	54.2
SMR: females	116.7	82.9	80.4	78.2	76.1	74.0	71.8	69.5	67.2	65.0	69.1	67.0	65.1	62.9	61.0	59.1	57.2	55.3	58.2	56.4	54.8	53.1
SMR: male & female	116.7	82.7	80.1	77.7	75.5	73.3	71.1	68.8	66.6	64.4	68.5	66.5	64.7	62.6	60.9	59.1	57.3	55.5	58.5	56.8	55.2	53.6
Expectation of life	79.4	82.3	82.5	82.7	82.9	83.1	83.3	83.5	83.7	83.9	83.5	83.6	83.8	84.0	84.1	84.3	84.4	84.6	84.2	84.4	84.6	84.7
Deaths input																						
In-migration from the UK																						
Male	2,661	2,761	2,806	2,815	2,850	2,851	2,851	2,879	2,869	2,865	2,860	2,891	2,888	2,890	2,918	2,913	2,934	2,953	2,978	2,967	2,990	2,982
Female	3,074	3,175	3,196	3,188	3,218	3,217	3,218	3,257	3,266	3,270	3,276	3,311	3,314	3,313	3,351	3,356	3,402	3,450	3,491	3,502	3,546	3,553
All	5,735	5,935	6,002	6,002	6,069	6,069	6,069	6,135	6,135	6,135	6,135	6,202	6,202	6,202	6,269	6,269	6,336	6,402	6,469	6,469	6,536	6,536
SMigR: males	64.7	66.2	66.9	66.8	67.5	67.4	67.3	68.0	67.9	67.9	67.9	68.7	68.6	68.6	69.0	68.5	68.3	68.2	68.1	66.8	66.5	65.7
SMigR: females	71.7	73.7	74.3	74.2	74.9	74.8	74.5	75.1	75.1	75.0	75.1	76.0	76.0	75.7	76.0	75.3	75.6	75.7	75.5	74.2	74.1	73.5
Migrants input																						
Out-migration to the UK																						
Male	2,344	2,461	2,507	2,517	2,521	2,520	2,525	2,553	2,538	2,531	2,521	2,519	2,520	2,528	2,563	2,562	2,594	2,612	2,610	2,629	2,657	2,631
Female	2,725	2,874	2,895	2,885	2,881	2,882	2,877	2,916	2,931	2,938	2,948	2,950	2,949	2,941	2,972	2,973	3,008	3,057	3,059	3,106	3,145	3,171
All	5,068	5,335	5,402	5,402	5,402	5,402	5,402	5,469	5,469	5,469	5,469	5,469	5,469	5,469	5,535	5,535	5,602	5,669	5,669	5,735	5,802	5,802
SMigR: males	57.0	59.0	59.8	59.8	59.7	59.5	59.6	60.3	60.1	60.0	59.8	59.9	59.9	60.0	60.6	60.2	60.4	60.4	59.7	59.2	59.1	58.0
SMigR: females	63.5	66.7	67.3	67.2	67.1	67.0	66.6	67.2	67.4	67.4	67.6	67.7	67.6	67.2	67.4	66.7	66.8	67.1	66.2	65.8	65.7	65.6
Migrants input																						
In-migration from Overseas																						
Male	201	269	270	271	272	273	273	273	272	272	271	271	270	270	270	269	269	269	269	269	269	269
Female	199	265	264	263	262	261	260	261	261	262	263	263	263	264	264	264	264	264	264	265	265	265
All	400	534	534	534	534	534	534	534	534	534	534	534	534	534	534	534	534	534	534	534	534	534
SMigR: males	71.6	94.6	94.5	94.2	94.2	94.1	94.2	94.5	94.7	95.1	95.4	95.4	95.8	96.1	96.1	96.1	95.8	95.3	94.6	93.6	92.0	90.6
SMigR: females	71.6	94.6	94.5	94.2	94.2	94.1	94.2	94.5	94.7	95.1	95.4	95.8	96.1	96.1	96.1	95.8	95.3	94.6	93.6	92.2	90.6	89.5
Migrants input																						
Out-migration to Overseas																						
Male	201	336	337	339	340	341	375	375	374	374	373	372	371	371	371	371	370	370	370	370	370	370
Female	199	331	330	328	327	326	358	359	359	360	361	362	362	362	363	363	363	363	364	364	364	364
All	400	667	667	667	667	667	734	734	734	734	734	734	734	734	734	734	734	734	734	734	734	734
SMigR: males	71.6	118.3	118.1	117.8	117.8	117.7	129.5	129.9	130.3	130.7	131.2	131.8	132.1	132.2	132.2	131.7	131.0	130.0	128.7	126.7	124.6	123.0
SMigR: females	71.6	118.3	118.1	117.8	117.8	117.7	129.5	129.9	130.3	130.7	131.2	131.8	132.1	132.2	132.2	131.7	131.0	130.0	128.7	126.7	124.6	123.0
Migrants input																						
Migration - Net Flows																						
UK	+667	+600	+600	+600	+667	+667	+667	+667	+667	+667	+667	+734	+734	+734	+734	+734	+734	+734	+800	+734	+734	+734
Overseas	0	-133	-133	-133	-133	-133	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200	-200
Summary of population change																						
Natural change	+148	+180	+184	+179	+179	+173	+165	+160	+150	+141	+61	+49	+29	+18	+61	+50	+35	+28	-44	-49	-51	-111
Net migration	+667	+467	+467	+467	+534	+534	+467	+467	+467	+467	+467	+534	+534	+534	+534	+534	+534	+534	+600	+534	+534	+534
Net change	+815	+647	+651	+646	+712	+706	+632	+627	+617	+608	+527	+583	+562	+551	+594	+583	+569	+562	+556	+485	+483	+423

Summary of Population estimates/forecasts

Population at mid-year

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
0-4	4,360	4,798	4,901	4,984	5,039	5,171	4,840	4,799	4,750	4,698	4,635	4,569	4,502	4,422	4,338	4,314	4,294	4,278	4,281	4,302	4,262	4,233	4,159		
5-10	5,150	5,246	5,350	5,535	5,781	5,883	6,459	6,647	6,765	6,847	6,904	7,037	6,639	6,584	6,513	6,438	6,350	6,260	6,156	6,046	6,001	5,962	5,927		
11-15	4,980	4,980	4,969	4,971	4,939	4,952	4,976	5,021	5,205	5,466	5,663	5,800	6,375	6,516	6,624	6,699	6,870	6,423	6,371	6,310	6,242	6,161	6,076		
16-17	2,242	2,161	2,189	2,184	2,115	2,153	2,159	2,189	2,184	2,075	2,120	2,187	2,269	2,452	2,568	2,618	2,547	3,046	3,243	2,824	2,806	2,782	2,760		
18-59Female, 64Male	45,648	45,876	45,910	45,908	45,966	45,999	46,022	46,027	45,999	46,026	45,984	45,775	45,598	45,598	45,594	45,705	45,752	45,688	46,283	46,409	46,574	46,699			
60/65 -74	9,390	9,592	9,833	10,073	10,311	10,549	10,725	10,905	11,089	11,278	11,470	11,527	11,595	11,670	11,752	11,841	12,062	12,288	12,521	12,754	12,991	13,146	13,324		
75-84	5,065	5,003	5,051	5,122	5,211	5,318	5,446	5,579	5,714	5,850	5,984	6,266	6,541	6,807	7,065	7,314	7,471	7,630	7,792	7,941	8,090	8,101	8,120		
85+	2,646	2,640	2,739	2,816	2,877	2,926	3,030	3,122	3,209	3,295	3,381	3,507	3,636	3,768	3,905	4,045	4,242	4,433	4,620	4,768	4,911	5,237	5,553		
Total	79,481	80,296	80,943	81,593	82,239	82,951	83,657	84,289	84,916	85,533	86,141	86,668	87,251	87,813	88,364	88,958	89,542	90,110	90,672	91,228	91,712	92,195	92,618	+10,629	+13,137

Population impact of constraint
Number of persons

Housing

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
Number of households	31,746	32,035	32,447	32,844	33,203	33,574	34,054	34,445	34,829	35,179	35,540	35,915	36,268	36,601	36,933	37,240	37,633	38,033	38,410	38,749	39,047	39,515	39,916	+6,286	+8,170
Change over previous year		+288	+412	+398	+359	+371	+479	+391	+384	+350	+361	+375	+353	+333	+332	+307	+393	+400	+378	+338	+298	+468	+401	+370	+371
Concealed families	178	178	185	187	186	191	193	192	191	192	192	195	194	196	198	201	203	207	214	219	224	237	242		
Number of dwellings	32,728	33,025	33,450	33,860	34,230	34,613	35,107	35,510	35,906	36,267	36,639	37,026	37,390	37,733	38,075	38,392	38,797	39,209	39,588	39,947	40,255	40,737	41,151	+6,481	+8,422
Change over previous year		+297	+425	+410	+370	+383	+494	+404	+396	+361	+372	+387	+364	+343	+342	+317	+406	+412	+389	+308	+482	+414		+381	+383
Households (inc Concealed)	31,924	32,213	32,632	33,031	33,389	33,766	34,247	34,637	35,020	35,372	35,732	36,110	36,462	36,797	37,130	37,441	37,837	38,240	38,624	38,967	39,271	39,752	40,158	+6,511	+8,489
Dwellings	32,911	33,209	33,641	34,053	34,422	34,810	35,306	35,708	36,103	36,466	36,837	37,227	37,590	37,935	38,279	38,599	39,007	39,422	39,819	40,172	40,486	40,981	41,400		
Change over previous year		+298	+432	+412	+369	+388	+496	+402	+395	+362	+371	+390	+363	+345	+344	+320	+408	+415	+396	+354	+313	+495	+419	+383	+386

Labour force

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
Size of labour force, persons	38,127	38,320	38,436	38,494	38,534	38,625	38,685	38,718	38,702	38,655	38,675	38,626	38,617	38,653	38,730	38,811	38,800	39,176	39,290	39,438	39,517	39,724	39,850		
Change over previous year		+193	+116	+58	+40	+91	+60	+33	-16	-47	+20	-48	-9	+36	+77	+82	-11	+376	+114	+148	+79	+208	+125	+62	+78
Number of jobs	47,039	47,328	47,521	47,643	47,742	47,906	48,030	48,121	48,152	48,143	48,218	48,208	48,246	48,341	48,488	48,640	48,677	49,199	49,393	49,631	49,730	49,991	50,149		
Change over previous year		+288	+193	+122	+99	+163	+124	+91	+31	-9	+75	-10	+38	+95	+147	+152	+36	+522	+194	+237	+99	+261	+158	+127	+141

This report was compiled from a forecast produced on 29/11/2010 using POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

Winchester District Zero Net Migration Scenario

Population Estimates and Forecasts NLP Winchester

Components of Population Change Winchester District

Year beginning July 1st ....

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Births																						
Male	606	641	628	610	596	578	560	544	527	510	494	480	461	448	470	461	451	444	437	429	423	387
Female	572	604	593	576	563	545	528	514	497	481	466	452	435	423	444	435	426	419	413	405	399	365
All Births	1,178	1,245	1,221	1,186	1,159	1,122	1,088	1,058	1,024	992	961	932	897	871	914	896	877	863	850	834	823	752
TFR	1.79	1.90	1.92	1.92	1.93	1.92	1.91	1.90	1.88	1.86	1.84	1.82	1.78	1.75	1.85	1.82	1.78	1.75	1.72	1.68	1.65	1.50
Births input																						
Deaths																						
Male	473	491	486	481	477	473	472	469	467	464	509	508	509	507	508	509	510	510	556	555	554	554
Female	557	585	580	574	569	563	558	552	546	541	590	585	582	577	576	575	576	576	628	627	628	629
All deaths	1,030	1,076	1,066	1,055	1,045	1,036	1,030	1,021	1,013	1,005	1,099	1,093	1,091	1,084	1,085	1,084	1,086	1,086	1,184	1,182	1,182	1,183
SMR: males	81.9	82.5	79.7	77.1	74.8	72.5	70.3	68.0	65.8	63.7	67.8	65.9	64.3	62.3	60.7	59.0	57.3	55.7	58.8	57.2	55.7	54.1
SMR: females	81.9	82.9	80.4	78.2	76.1	74.0	71.8	69.5	67.3	65.0	69.1	67.0	65.1	62.9	61.1	59.2	57.3	55.4	58.3	56.5	54.8	53.1
SMR: male & female	81.9	82.7	80.1	77.7	75.5	73.3	71.1	68.8	66.6	64.4	68.5	66.5	64.7	62.6	60.9	59.1	57.3	55.5	58.5	56.8	55.2	53.6
Expectation of life	82.3	82.3	82.5	82.7	82.9	83.1	83.3	83.5	83.7	83.9	83.4	83.6	83.8	83.9	84.1	84.2	84.4	84.6	84.2	84.4	84.5	84.7
Deaths input																						
In-migration from the UK																						
Male	4,100	3,968	4,035	4,045	4,071	4,071	4,065	4,106	4,090	4,083	4,078	4,093	4,087	4,084	4,124	4,113	4,147	4,179	4,197	4,212	4,249	4,248
Female	4,500	4,482	4,515	4,505	4,529	4,529	4,535	4,594	4,610	4,617	4,622	4,657	4,663	4,666	4,726	4,737	4,803	4,871	4,903	4,938	5,001	5,002
All	8,600	8,450	8,550	8,550	8,600	8,600	8,600	8,700	8,700	8,700	8,700	8,750	8,750	8,750	8,850	8,850	8,950	9,050	9,100	9,150	9,250	9,250
SMigR: males	70.2	67.2	68.5	69.1	70.1	70.7	71.3	72.6	73.0	73.5	74.0	74.9	75.2	75.6	76.5	76.5	77.2	77.9	78.3	78.7	79.3	79.3
SMigR: females	75.4	74.4	75.6	76.2	77.3	77.9	78.4	79.7	80.3	80.8	81.4	82.6	83.1	83.4	84.3	84.2	85.2	86.2	86.7	87.3	88.4	88.5
Migrants input																						
Out-migration to the UK																						
Male	3,700	3,960	4,032	4,044	4,070	4,065	4,065	4,108	4,083	4,070	4,063	4,077	4,077	4,082	4,132	4,124	4,151	4,179	4,201	4,216	4,255	4,259
Female	3,900	4,490	4,518	4,506	4,530	4,535	4,535	4,592	4,617	4,630	4,637	4,673	4,673	4,668	4,718	4,726	4,799	4,871	4,899	4,934	4,995	4,991
All	7,600	8,450	8,550	8,550	8,600	8,600	8,600	8,700	8,700	8,700	8,700	8,750	8,750	8,750	8,850	8,850	8,950	9,050	9,100	9,150	9,250	9,250
SMigR: males	63.4	67.0	68.5	69.1	70.1	70.6	71.3	72.7	72.9	73.2	73.7	74.6	75.0	75.5	76.7	76.7	77.3	77.9	78.4	78.8	79.4	79.5
SMigR: females	65.3	74.5	75.7	76.2	77.3	78.0	78.3	79.6	80.4	81.0	81.7	82.9	83.3	83.4	84.1	84.0	85.1	86.2	86.6	87.3	88.3	88.3
Migrants input																						
In-migration from Overseas																						
Male	303	456	459	462	463	465	491	491	490	489	488	488	487	488	487	487	487	487	486	486	487	488
Female	297	444	441	438	437	435	459	459	460	461	462	462	463	462	463	463	463	463	464	464	463	462
All	600	900	900	900	900	900	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950
SMigR: males	76.8	114.4	115.7	116.8	118.1	119.5	127.7	129.3	130.8	132.4	133.9	135.4	136.8	137.9	138.8	139.3	139.7	139.9	139.9	140.0	140.1	140.2
SMigR: females	76.8	114.4	115.7	116.8	118.1	119.5	127.7	129.3	130.8	132.4	133.9	135.4	136.8	137.9	138.8	139.3	139.7	139.9	139.9	140.0	140.1	140.2
Migrants input																						
Out-migration to Overseas																						
Male	303	456	459	462	463	465	491	491	490	489	488	488	487	488	487	487	487	487	486	486	487	488
Female	297	444	441	438	437	435	459	459	460	461	462	462	463	462	463	463	463	463	464	464	463	462
All	600	900	900	900	900	900	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950
SMigR: males	76.8	114.4	115.7	116.8	118.1	119.5	127.7	129.3	130.8	132.4	133.9	135.4	136.8	137.9	138.8	139.3	139.7	139.9	139.9	140.0	140.1	140.2
SMigR: females	76.8	114.4	115.7	116.8	118.1	119.5	127.7	129.3	130.8	132.4	133.9	135.4	136.8	137.9	138.8	139.3	139.7	139.9	139.9	140.0	140.1	140.2
Migrants input																						
Migration - Net Flows																						
UK	+1,000	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
Summary of population change																						
Natural change	+148	+169	+155	+131	+114	+87	+58	+37	+11	-13	-138	-161	-194	-213	-171	-187	-209	-223	-333	-348	-359	-432
Net migration	+1,000	0	0	0	0	-0	+0	+0	0	-0	0	0	0	-0	0	-0	+0	+0	0	0	-0	0
Net change	+1,148	+169	+155	+131	+114	+87	+58	+37	+11	-13	-138	-161	-194	-213	-171	-187	-209	-223	-333	-348	-359	-432

Summary of Population estimates/forecasts

Population at mid-year

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031		2009-2026	2009-2031
0-4	6,394	6,380	6,412	6,412	6,359	6,359	6,300	6,136	5,965	5,796	5,622	5,454	5,292	5,123	4,963	4,880	4,812	4,757	4,729	4,716	4,636	4,563	4,437			
5-10	7,805	8,034	8,116	8,291	8,508	8,584	8,668	8,686	8,705	8,674	8,592	8,562	8,466	8,254	8,029	7,809	7,581	7,365	7,150	6,939	6,817	6,716	6,630			
11-15	7,306	7,366	7,428	7,454	7,444	7,437	7,509	7,632	7,827	8,062	8,249	8,327	8,282	8,344	8,360	8,309	8,331	8,275	8,083	7,881	7,681	7,474	7,273			
16-17	3,194	3,149	3,106	3,073	3,057	3,149	3,153	3,179	3,172	3,064	3,126	3,223	3,403	3,539	3,531	3,571	3,501	3,441	3,569	3,638	3,566	3,489	3,410			
18-59Female, 64Male	66,185	66,467	65,961	65,404	64,858	64,269	63,687	63,176	62,608	62,121	61,541	60,775	60,082	59,418	58,927	58,417	57,778	57,162	56,449	55,762	55,173	54,630	54,027			
60/65 -74	13,955	14,283	14,628	14,987	15,301	15,626	15,854	16,090	16,334	16,584	16,842	16,906	16,983	17,071	17,170	17,279	17,574	17,876	18,186	18,489	18,799	18,960	19,150			
75-84	7,205	7,300	7,382	7,499	7,645	7,816	8,013	8,217	8,423	8,628	8,830	9,237	9,629	10,005	10,366	10,711	10,918	11,131	11,348	11,544	11,743	11,758	11,783			
85+	3,672	3,885	4,002	4,087	4,148	4,193	4,337	4,463	4,581	4,695	4,810	4,991	5,176	5,364	5,560	5,760	6,051	6,331	6,602	6,814	7,019	7,485	7,933			
Total	115,716	116,864	117,033	117,188	117,319	117,433	117,520	117,578	117,615	117,626	117,612	117,474	117,313	117,119	116,906	116,735	116,548	116,339	116,116	115,782	115,434	115,075	114,643		+623	-1,073

Population impact of constraint
Number of persons

Housing

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
Number of households	47,507	48,177	48,506	48,807	49,043	49,259	49,606	49,871	50,129	50,337	50,560	50,782	50,958	51,117	51,264	51,391	51,613	51,835	52,034	52,139	52,239	52,409	52,593	+4,328	+5,085
Change over previous year		+669	+329	+302	+235	+217	+347	+265	+258	+208	+223	+222	+176	+159	+147	+126	+222	+222	+199	+106	+100	+170	+184	+255	+231
Concealed families	261	261	268	266	261	264	262	257	252	251	248	248	245	245	244	247	247	248	253	255	259	263	265		
Number of dwellings	48,977	49,667	50,006	50,317	50,559	50,783	51,140	51,413	51,679	51,894	52,124	52,353	52,534	52,698	52,850	52,980	53,209	53,438	53,643	53,752	53,855	54,030	54,219	+4,462	+5,242
Change over previous year		+690	+339	+311	+242	+223	+357	+273	+266	+215	+229	+229	+181	+164	+152	+130	+229	+229	+205	+109	+103	+175	+189	+262	+238
Households (inc Concealed)	47,768	48,438	48,774	49,074	49,304	49,523	49,868	50,127	50,381	50,589	50,808	51,031	51,203	51,363	51,509	51,637	51,860	52,083	52,287	52,395	52,498	52,672	52,858	+4,448	+5,247
Dwellings	49,245	49,936	50,282	50,592	50,829	51,055	51,410	51,678	51,940	52,153	52,380	52,610	52,787	52,951	53,102	53,234	53,464	53,694	53,904	54,015	54,121	54,301	54,493	+4,462	+5,239
		+691	+346	+309	+237	+226	+355	+268	+262	+214	+227	+230	+177	+164	+151	+133	+229	+230	+210	+111	+106	+179	+192	+262	+239

Labour force

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
Size of labour force, persons	55,256	55,521	55,186	54,806	54,418	54,059	53,623	53,229	52,778	52,316	51,921	51,458	51,015	50,561	50,144	49,746	49,253	48,773	48,349	47,900	47,406	46,976	46,521	-6,482	-8,734
Change over previous year		+266	-335	-380	-389	-359	-436	-393	-451	-462	-395	-463	-443	-454	-417	-399	-492	-480	-425	-448	-494	-431	-455	-381	-397
Number of jobs	68,172	68,572	68,230	67,832	67,422	67,047	66,576	66,156	65,664	65,158	64,733	64,223	63,736	63,235	62,778	62,344	61,791	61,252	60,781	60,280	59,658	59,116	58,544	-6,921	-9,628
Change over previous year		+400	-342	-398	-410	-374	-472	-419	-492	-506	-425	-510	-487	-501	-456	-434	-553	-539	-470	-501	-622	-542	-572	-407	-438

This report was compiled from a forecast produced on 26/11/2010 using POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

Non-PUSH Sub-Area Zero Net Migration Scenario

Population Estimates and Forecasts   **NLP Winchester**

Components of Population Change   **Winchester District**

Year beginning July 1st …………..

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Births																						
Male	606	467	460	448	438	425	412	401	387	374	360	347	331	318	331	321	311	305	301	296	293	269
Female	572	441	434	422	414	401	389	378	365	352	340	328	312	300	312	303	294	288	284	279	277	254
All Births	1,178	908	894	870	852	826	801	779	752	726	700	675	644	619	643	624	605	594	585	575	570	523
TFR	2.45	1.90	1.92	1.92	1.93	1.92	1.91	1.90	1.88	1.86	1.84	1.82	1.78	1.75	1.85	1.82	1.78	1.75	1.72	1.68	1.65	1.50
Births input																						
Deaths																						
Male	462	326	323	320	317	315	314	312	310	308	338	337	337	336	337	337	337	337	367	367	367	366
Female	568	401	398	395	392	388	385	381	377	373	406	402	399	395	394	393	393	392	427	426	425	426
All deaths	1,030	728	721	715	709	702	699	693	687	681	744	739	737	731	731	729	730	730	794	793	792	792
SMR: males	116.7	82.5	79.7	77.1	74.8	72.5	70.3	68.0	65.8	63.7	67.8	66.0	64.3	62.3	60.7	59.0	57.4	55.7	58.8	57.2	55.7	54.2
SMR: females	116.7	82.9	80.4	78.2	76.1	74.0	71.8	69.5	67.2	65.0	69.1	67.0	65.1	62.9	61.1	59.2	57.2	55.3	58.2	56.4	54.8	53.1
SMR: male & female	116.7	82.7	80.1	77.7	75.5	73.3	71.1	68.8	66.6	64.4	68.5	66.5	64.7	62.6	60.9	59.1	57.3	55.5	58.5	56.8	55.2	53.6
Expectation of life	79.4	82.3	82.5	82.7	82.9	83.1	83.3	83.5	83.7	83.9	83.5	83.6	83.8	83.9	84.1	84.2	84.4	84.6	84.2	84.4	84.5	84.7
Deaths input																						
In-migration from the UK																						
Male	2,661	2,621	2,672	2,686	2,711	2,716	2,719	2,749	2,742	2,740	2,736	2,752	2,751	2,753	2,781	2,775	2,793	2,810	2,818	2,822	2,844	2,833
Female	3,074	3,014	3,030	3,016	3,024	3,019	3,016	3,053	3,060	3,062	3,066	3,083	3,084	3,082	3,121	3,127	3,176	3,225	3,251	3,280	3,325	3,336
All	5,735	5,635	5,702	5,702	5,735	5,735	5,735	5,802	5,802	5,802	5,802	5,835	5,835	5,835	5,902	5,902	5,969	6,035	6,069	6,102	6,169	6,169
SMigR: males	64.7	62.9	64.2	64.9	65.9	66.6	67.3	68.8	69.4	70.0	70.7	71.9	72.5	73.1	74.3	74.4	74.9	75.5	75.6	75.1	75.4	75.1
SMigR: females	71.7	70.0	71.3	71.9	73.0	73.6	74.2	75.6	76.2	76.9	77.7	78.9	79.6	80.1	81.2	81.2	82.3	83.2	83.3	83.0	83.5	83.5
Migrants input																						
Out-migration to the UK																						
Male	2,343	2,600	2,655	2,674	2,700	2,706	2,716	2,747	2,734	2,729	2,721	2,735	2,738	2,748	2,784	2,781	2,811	2,826	2,838	2,839	2,867	2,831
Female	2,725	3,035	3,047	3,028	3,035	3,029	3,019	3,055	3,068	3,073	3,081	3,100	3,097	3,087	3,118	3,121	3,158	3,209	3,231	3,263	3,302	3,338
All	5,068	5,635	5,702	5,702	5,735	5,735	5,735	5,802	5,802	5,802	5,802	5,835	5,835	5,835	5,902	5,902	5,969	6,035	6,069	6,102	6,169	6,169
SMigR: males	57.0	62.4	63.8	64.6	65.6	66.3	67.2	68.7	69.2	69.8	70.3	71.4	72.1	73.0	74.4	74.6	75.4	75.9	76.1	75.6	76.0	75.0
SMigR: females	63.5	70.5	71.7	72.2	73.2	73.8	74.2	75.6	76.4	77.1	78.0	79.3	80.0	80.2	81.1	81.1	81.8	82.8	82.8	82.5	82.9	83.6
Migrants input																						
In-migration from Overseas																						
Male	201	302	304	306	308	309	328	328	328	327	327	327	326	327	327	326	326	326	326	326	326	326
Female	199	298	296	294	292	291	306	306	306	307	307	307	308	307	307	308	308	308	308	308	308	308
All	400	600	600	600	600	600	634	634	634	634	634	634	634	634	634	634	634	634	634	634	634	634
SMigR: males	71.6	106.4	107.5	108.5	109.8	111.3	119.3	121.1	122.9	124.8	126.7	128.6	130.6	132.2	133.7	134.6	135.3	135.5	135.4	134.7	133.5	132.9
SMigR: females	71.6	106.4	107.5	108.5	109.8	111.3	119.3	121.1	122.9	124.8	126.7	128.6	130.6	132.2	133.7	134.6	135.3	135.5	135.4	134.7	133.5	132.9
Migrants input																						
Out-migration to Overseas																						
Male	201	302	304	306	308	309	328	328	328	327	327	327	326	327	327	326	326	326	326	326	326	326
Female	199	298	296	294	292	291	306	306	306	307	307	307	308	307	307	308	308	308	308	308	308	308
All	400	600	600	600	600	600	634	634	634	634	634	634	634	634	634	634	634	634	634	634	634	634
SMigR: males	71.6	106.4	107.5	108.5	109.8	111.3	119.3	121.1	122.9	124.8	126.7	128.6	130.6	132.2	133.7	134.6	135.3	135.5	135.4	134.7	133.5	132.9
SMigR: females	71.6	106.4	107.5	108.5	109.8	111.3	119.3	121.1	122.9	124.8	126.7	128.6	130.6	132.2	133.7	134.6	135.3	135.5	135.4	134.7	133.5	132.9
Migrants input																						
Migration - Net Flows																						
UK	+667	-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
Summary of population change																						
Natural change	+148	+180	+172	+156	+143	+124	+103	+86	+65	+45	-44	-64	-93	-112	-88	-105	-124	-136	-210	-218	-222	-269
Net migration	+667	-0	-0	0	0	0	+0	+0	0	0	+0	0	0	0	0	0	-0	0	+0	0	+0	-0
Net change	+815	+180	+172	+156	+143	+124	+103	+86	+65	+45	-44	-64	-93	-112	-88	-105	-124	-136	-210	-218	-222	-269

Summary of Population estimates/forecasts

Population at mid-year

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
0-4	4,360	4,798	4,872	4,918	4,926	4,996	4,606	4,494	4,372	4,249	4,117	3,986	3,854	3,712	3,572	3,484	3,403	3,332	3,284	3,253	3,184	3,130	3,049		
5-10	5,150	5,246	5,330	5,492	5,712	5,784	6,314	6,464	6,537	6,566	6,561	6,619	6,150	6,002	5,840	5,676	5,501	5,328	5,149	4,968	4,843	4,730	4,627		
11-15	4,980	4,980	4,951	4,937	4,889	4,885	4,894	4,929	5,096	5,335	5,510	5,624	6,152	6,260	6,327	6,353	6,459	5,963	5,688	5,542	5,384	5,227			
16-17	2,242	2,161	2,159	2,133	2,058	2,084	2,080	2,103	2,091	1,982	2,021	2,082	2,154	2,320	2,418	2,456	2,381	2,843	3,011	2,601	2,556	2,505	2,454		
18-59Female, 64Male	45,648	45,876	45,578	45,231	44,931	44,560	44,178	43,828	43,447	43,116	42,719	42,163	41,685	41,194	40,803	40,491	40,106	39,754	39,301	39,408	39,121	38,860	38,547		
60/65 -74	9,390	9,592	9,815	10,036	10,252	10,463	10,610	10,752	10,917	11,077	11,240	11,268	11,305	11,348	11,397	11,452	11,634	11,820	12,011	12,198	12,390	12,501	12,633		
75-84	5,065	5,003	5,040	5,101	5,182	5,280	5,400	5,525	5,652	5,779	5,903	6,173	6,434	6,685	6,925	7,155	7,293	7,433	7,576	7,704	7,833	7,830	7,834		
85+	2,646	2,640	2,732	2,801	2,854	2,894	2,988	3,071	3,148	3,223	3,298	3,412	3,529	3,649	3,774	3,903	4,088	4,266	4,440	4,575	4,707	5,015	5,313		
Total	79,481	80,296	80,477	80,649	80,804	80,948	81,072	81,174	81,260	81,326	81,371	81,327	81,263	81,170	81,058	80,970	80,864	80,740	80,604	80,395	80,177	79,954	79,685	+1,259	+204

Population impact of constraint
Number of persons

Housing

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
Number of households	31,746	32,035	32,304	32,549	32,747	32,930	33,201	33,404	33,594	33,746	33,904	34,063	34,182	34,277	34,367	34,432	34,570	34,718	34,844	34,907	34,955	35,147	35,279	+2,971	+3,533
Change over previous year		+288	+269	+246	+198	+182	+272	+203	+190	+152	+158	+159	+118	+95	+90	+65	+138	+148	+126	+63	+48	+191	+133	+175	+161
Concealed families	178	178	183	183	179	181	180	176	173	172	168	168	164	163	161	162	161	162	165	166	169	177	179		
Number of dwellings	32,728	33,026	33,303	33,556	33,760	33,948	34,228	34,437	34,633	34,790	34,953	35,117	35,239	35,337	35,430	35,497	35,639	35,792	35,922	35,987	36,037	36,234	36,371	+3,063	+3,642
Change over previous year		+297	+277	+253	+204	+188	+280	+209	+196	+157	+163	+164	+122	+98	+93	+67	+143	+152	+130	+65	+49	+197	+137	+180	+166
Households (inc Concealed)	31,924	32,213	32,487	32,732	32,927	33,111	33,382	33,580	33,767	33,918	34,073	34,231	34,346	34,440	34,528	34,593	34,731	34,879	35,010	35,074	35,124	35,323	35,458	+3,047	+3,644
Dwellings	32,911	33,209	33,492	33,744	33,945	34,135	34,414	34,619	34,811	34,967	35,127	35,290	35,408	35,505	35,596	35,663	35,805	35,958	36,092	36,159	36,210	36,416	36,555		
Change over previous year		+298	+283	+252	+201	+190	+279	+205	+192	+155	+160	+163	+118	+97	+91	+67	+142	+153	+134	+66	+52	+205	+139	+179	+166

Labour force

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
Size of labour force, persons	38,127	38,320	38,156	37,930	37,684	37,446	37,170	36,911	36,604	36,266	35,995	35,656	35,320	35,028	34,774	34,525	34,187	34,218	33,999	33,767	33,499	33,339	33,094		
Change over previous year		+194	-164	-226	-247	-238	-275	-260	-307	-338	-272	-339	-336	-292	-254	-249	-338	+31	-219	-232	-267	-160	-245	-230	-229
Number of jobs	47,039	47,328	47,175	46,945	46,689	46,442	46,149	45,875	45,541	45,168	44,876	44,500	44,127	43,807	43,535	43,268	42,889	42,972	42,741	42,493	42,157	41,956	41,647		
Change over previous year		+289	-153	-230	-256	-246	-293	-274	-333	-373	-292	-376	-373	-319	-272	-267	-380	+84	-231	-248	-336	-201	-308	-239	-245

This report was compiled from a forecast produced on 30/11/2010 using POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

Winchester District Economic Scenario (538 jobs p.a. 2010-2026)

Population Estimates and Forecasts — NLP Winchester

Components of Population Change — Winchester District

Year beginning July 1st …………..

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Births																						
Male	606	641	645	644	647	647	648	649	648	648	648	648	643	643	694	697	696	698	700	697	697	643
Female	572	604	608	607	610	610	611	613	612	611	611	611	607	607	654	657	657	659	660	658	658	607
All Births	1,178	1,245	1,253	1,251	1,258	1,257	1,259	1,262	1,260	1,259	1,258	1,259	1,250	1,250	1,348	1,354	1,352	1,357	1,360	1,355	1,355	1,250
TFR	1.79	1.90	1.92	1.92	1.93	1.92	1.91	1.90	1.88	1.86	1.84	1.82	1.78	1.75	1.85	1.82	1.78	1.75	1.72	1.68	1.65	1.50
Births input																						
Deaths																						
Male	473	491	488	484	482	480	481	480	479	478	526	527	530	530	534	536	539	542	592	594	596	597
Female	557	585	582	579	577	573	571	567	564	560	613	610	609	606	607	607	609	611	667	668	669	672
All deaths	1,030	1,076	1,070	1,064	1,058	1,053	1,052	1,047	1,043	1,038	1,139	1,137	1,139	1,136	1,140	1,143	1,149	1,153	1,260	1,262	1,265	1,269
SMR: males	81.9	82.5	79.7	77.1	74.8	72.5	70.3	68.0	65.9	63.7	67.8	66.0	64.3	62.3	60.7	59.0	57.4	55.7	58.8	57.2	55.7	54.2
SMR: females	81.9	82.9	80.4	78.2	76.1	74.0	71.8	69.5	67.2	65.0	69.1	67.0	65.1	62.9	61.1	59.2	57.2	55.3	58.2	56.4	54.8	53.1
SMR: male & female	81.9	82.7	80.1	77.7	75.5	73.3	71.1	68.8	66.6	64.4	68.5	66.5	64.7	62.6	60.9	59.1	57.3	55.5	58.5	56.8	55.2	53.6
Expectation of life	82.3	82.3	82.5	82.7	82.9	83.1	83.3	83.5	83.7	83.9	83.5	83.6	83.8	83.9	84.1	84.3	84.4	84.6	84.2	84.4	84.6	84.7
Deaths input																						
In-migration from the UK																						
Male	4,100	4,348	4,403	4,401	4,440	4,429	4,416	4,451	4,430	4,420	4,412	4,451	4,444	4,442	4,484	4,476	4,515	4,551	4,578	4,573	4,568	4,573
Female	4,500	4,913	4,958	4,960	5,021	5,032	5,045	5,110	5,131	5,141	5,149	5,210	5,217	5,219	5,277	5,285	5,346	5,410	5,447	5,452	5,457	5,452
All	8,600	9,261	9,361	9,361	9,461	9,461	9,461	9,561	9,561	9,561	9,561	9,661	9,661	9,661	9,761	9,761	9,861	9,961	10,025	10,025	10,025	10,025
SMigR: males	70.2	73.6	73.6	72.8	72.8	72.0	71.2	71.2	70.4	69.6	69.0	69.1	68.3	67.6	67.5	66.5	66.2	65.8	65.5	64.6	63.7	63.1
SMigR: females	75.4	81.5	81.4	80.6	80.7	79.8	78.8	78.8	78.1	77.4	76.8	77.1	76.4	75.5	75.1	74.0	73.8	73.6	73.1	72.3	71.6	70.9
Migrants input																						
Out-migration to the UK																						
Male	3,700	3,749	3,802	3,798	3,786	3,767	3,758	3,793	3,764	3,748	3,739	3,730	3,728	3,733	3,784	3,782	3,816	3,848	3,850	3,891	3,933	3,944
Female	3,900	4,251	4,298	4,302	4,314	4,333	4,342	4,407	4,436	4,452	4,461	4,470	4,472	4,467	4,516	4,518	4,584	4,652	4,650	4,709	4,767	4,756
All	7,600	8,000	8,100	8,100	8,100	8,100	8,100	8,200	8,200	8,200	8,200	8,200	8,200	8,200	8,300	8,300	8,400	8,500	8,500	8,600	8,700	8,700
SMigR: males	63.4	63.5	63.6	62.9	62.1	61.2	60.6	60.7	59.8	59.1	58.5	57.9	57.3	56.8	56.9	56.2	55.9	55.7	55.1	54.9	54.8	54.4
SMigR: females	65.3	70.5	70.6	69.9	69.3	68.7	67.8	67.9	67.5	67.0	66.6	66.1	65.5	64.6	64.3	63.3	63.3	63.3	62.4	62.5	62.5	61.8
Migrants input																						
In-migration from Overseas																						
Male	303	481	483	484	485	486	485	483	482	480	479	477	476	476	475	475	474	474	474	474	474	475
Female	297	469	467	466	465	464	465	467	468	470	471	473	474	474	475	475	476	476	476	476	476	475
All	600	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950	950
SMigR: males	76.8	120.8	119.6	118.2	117.0	115.7	114.3	113.4	112.4	111.6	110.7	109.9	109.0	107.9	106.7	105.4	104.1	102.7	101.3	99.9	98.7	97.7
SMigR: females	76.8	120.8	119.6	118.2	117.0	115.7	114.3	113.4	112.4	111.6	110.7	109.9	109.0	107.9	106.7	105.4	104.1	102.7	101.3	99.9	98.7	97.7
Migrants input																						
Out-migration to Overseas																						
Male	303	507	509	510	511	511	562	560	558	556	554	553	552	551	550	550	549	549	549	548	549	550
Female	297	493	491	490	489	489	538	540	542	544	546	547	548	549	550	550	551	551	551	552	551	550
All	600	1,000	1,000	1,000	1,000	1,000	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100	1,100
SMigR: males	76.8	127.1	125.9	124.4	123.1	121.7	132.5	131.3	130.2	129.2	128.2	127.3	126.2	124.9	123.6	122.1	120.5	119.0	117.3	115.7	114.3	113.2
SMigR: females	76.8	127.1	125.9	124.4	123.1	121.7	132.5	131.3	130.2	129.2	128.2	127.3	126.2	124.9	123.6	122.1	120.5	119.0	117.3	115.7	114.3	113.2
Migrants input																						
Migration - Net Flows																						
UK	+1,000	+1,261	+1,261	+1,261	+1,361	+1,361	+1,361	+1,361	+1,361	+1,361	+1,361	+1,461	+1,461	+1,461	+1,461	+1,461	+1,461	+1,461	+1,525	+1,425	+1,325	+1,325
Overseas	0	-50	-50	-50	-50	-50	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150
Summary of population change																						
Natural change	+148	+169	+183	+187	+199	+204	+207	+215	+218	+221	+120	+122	+111	+115	+207	+211	+204	+204	+100	+93	+89	-19
Net migration	+1,000	+1,211	+1,211	+1,211	+1,311	+1,311	+1,211	+1,211	+1,211	+1,211	+1,211	+1,311	+1,311	+1,311	+1,311	+1,311	+1,311	+1,311	+1,375	+1,275	+1,175	+1,175
Net change	+1,148	+1,380	+1,394	+1,398	+1,510	+1,515	+1,418	+1,426	+1,429	+1,432	+1,331	+1,433	+1,422	+1,426	+1,518	+1,522	+1,515	+1,515	+1,475	+1,368	+1,264	+1,156

Summary of Population estimates/forecasts

Population at mid-year

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
0-4	6,394	6,380	6,485	6,577	6,632	6,770	6,871	6,879	6,882	6,886	6,882	6,879	6,881	6,867	6,854	6,941	7,036	7,133	7,249	7,375	7,377	7,367	7,252		
5-10	7,805	8,034	8,177	8,421	8,712	8,871	9,042	9,150	9,277	9,373	9,438	9,583	9,690	9,698	9,691	9,688	9,673	9,663	9,641	9,616	9,704	9,798	9,894		
11-15	7,306	7,366	7,482	7,559	7,596	7,636	7,753	7,917	8,160	8,452	8,701	8,840	8,861	8,996	9,103	9,164	9,330	9,442	9,438	9,428	9,417	9,390	9,365		
16-17	3,194	3,149	3,177	3,193	3,198	3,321	3,351	3,397	3,409	3,306	3,384	3,500	3,710	3,879	3,897	3,966	3,912	3,863	4,027	4,158	4,150	4,136	4,126		
18-59Female, 64Male	66,185	66,467	66,824	67,157	67,531	67,936	68,354	68,774	69,135	69,590	69,946	70,107	70,413	70,748	71,271	71,777	72,155	72,561	72,853	73,218	73,625	74,041	74,410		
60/65 -74	13,955	14,283	14,672	15,061	15,449	15,838	16,136	16,441	16,754	17,075	17,404	17,537	17,690	17,856	18,035	18,226	18,615	19,016	19,430	19,844	20,267	20,530	20,832		
75-84	7,205	7,300	7,407	7,548	7,716	7,908	8,124	8,346	8,572	8,798	9,022	9,454	9,877	10,287	10,685	11,071	11,318	11,572	11,831	12,071	12,311	12,356	12,413		
85+	3,672	3,885	4,019	4,122	4,202	4,266	4,430	4,577	4,716	4,853	4,989	5,196	5,407	5,620	5,839	6,062	6,377	6,681	6,977	7,211	7,437	7,936	8,418		
Total	115,716	116,864	118,244	119,638	121,036	122,546	124,061	125,479	126,905	128,334	129,766	131,096	132,529	133,951	135,376	136,895	138,416	139,931	141,446	142,921	144,289	145,554	146,709	+24,215	+30,993

Population impact of constraint

Number of persons

Housing

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
Number of households	47,507	48,177	48,889	49,596	50,255	50,943	51,804	52,559	53,322	54,045	54,791	55,574	56,339	57,096	57,849	58,585	59,446	60,306	61,144	61,919	62,652	63,453	64,273	+12,798	+16,766
Change over previous year		+669	+712	+706	+659	+689	+860	+756	+763	+723	+746	+782	+765	+757	+754	+736	+861	+860	+838	+775	+734	+800	+820	+753	+762
Concealed families	261	261	274	278	279	290	295	296	299	305	310	319	322	330	338	348	357	365	378	390	401	414	422		
Number of dwellings	48,977	49,667	50,401	51,129	51,809	52,519	53,406	54,185	54,971	55,717	56,486	57,293	58,081	58,862	59,639	60,397	61,284	62,171	63,035	63,834	64,590	65,415	66,261	+13,194	+17,284
Change over previous year		+690	+734	+728	+679	+710	+887	+779	+786	+745	+769	+807	+789	+781	+777	+758	+887	+886	+864	+799	+756	+825	+846	+776	+786
Households (inc Concealed)	47,768	48,438	49,163	49,874	50,534	51,233	52,098	52,856	53,621	54,350	55,101	55,893	56,661	57,426	58,187	58,933	59,802	60,671	61,522	62,308	63,053	63,867	64,695		
Dwellings	49,245	49,936	50,684	51,416	52,097	52,818	53,710	54,490	55,279	56,031	56,805	57,621	58,413	59,202	59,987	60,756	61,652	62,547	63,425	64,235	65,003	65,842	66,696	+13,302	+17,451
		+691	+748	+733	+681	+721	+892	+781	+789	+751	+775	+816	+792	+789	+785	+769	+896	+895	+878	+810	+768	+838	+854	+782	+793

Labour force

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
Size of labour force, persons	55,256	55,521	55,911	56,266	56,621	57,075	57,466	57,838	58,152	58,457	58,834	59,143	59,528	59,904	60,324	60,764	61,106	61,459	61,872	62,315	62,664	63,052	63,429		
Change over previous year		+266	+389	+355	+355	+454	+391	+372	+314	+306	+376	+309	+385	+376	+420	+440	+341	+353	+413	+443	+350	+387	+377	+365	+372
Number of jobs	68,172	68,572	69,126	69,638	70,151	70,788	71,347	71,884	72,350	72,806	73,351	73,813	74,371	74,919	75,523	76,153	76,660	77,182	77,781	78,420	78,860	79,347	79,822		
Change over previous year		+400	+554	+512	+513	+637	+559	+537	+466	+456	+545	+462	+558	+548	+603	+630	+507	+522	+599	+638	+440	+488	+475	+530	+530

This report was compiled from a forecast produced on 01/12/2010 using POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

Non-PUSH Sub-Area Economic Scenario (409 jobs p.a. 2010-2026)

Population Estimates and Forecasts   **NLP Winchester**

Components of Population Change   **Winchester District**

Year beginning July 1st ………….

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Births																						
Male	606	467	472	472	475	475	475	476	474	471	469	466	458	454	484	482	477	476	476	475	476	441
Female	572	441	445	445	448	448	448	449	447	445	442	439	432	428	457	455	450	450	449	448	449	416
All Births	1,178	908	917	917	923	923	924	924	921	916	911	905	890	882	941	936	928	926	926	923	924	857
TFR	2.45	1.90	1.92	1.92	1.93	1.92	1.91	1.90	1.88	1.86	1.84	1.82	1.78	1.75	1.85	1.82	1.78	1.75	1.72	1.68	1.65	1.50
Births input																						
Deaths																						
Male	462	326	324	322	320	319	319	319	318	317	349	350	352	351	354	355	357	359	392	393	394	396
Female	568	401	400	399	397	395	394	391	389	386	422	419	418	418	415	415	416	417	455	455	455	456
All deaths	1,030	728	724	721	718	714	713	710	707	704	771	769	770	767	769	770	773	776	847	848	849	852
SMR: males	116.7	82.5	79.7	77.1	74.8	72.5	70.3	68.0	65.9	63.7	67.9	66.0	64.3	62.3	60.7	59.1	57.4	55.7	58.9	57.3	55.7	54.2
SMR: females	116.7	82.9	80.4	78.2	76.1	74.0	71.8	69.5	67.2	65.0	69.0	66.9	65.0	62.8	61.0	59.1	57.2	55.3	58.2	56.4	54.7	53.1
SMR: male & female	116.7	82.7	80.1	77.7	75.5	73.3	71.1	68.8	66.6	64.4	68.5	66.5	64.7	62.6	60.9	59.1	57.3	55.5	58.5	56.8	55.2	53.6
Expectation of life	79.4	82.3	82.5	82.7	82.9	83.1	83.3	83.5	83.7	83.9	83.5	83.6	83.8	84.0	84.1	84.3	84.4	84.6	84.2	84.4	84.6	84.7
Deaths input																						
In-migration from the UK																						
Male	2,661	2,908	2,950	2,956	2,989	2,988	2,987	3,013	3,002	2,998	2,991	3,023	3,021	3,023	3,052	3,049	3,071	3,092	3,118	3,109	3,133	3,127
Female	3,074	3,343	3,368	3,362	3,396	3,397	3,398	3,438	3,449	3,453	3,460	3,495	3,497	3,495	3,533	3,536	3,581	3,626	3,667	3,676	3,719	3,725
All	5,735	6,251	6,318	6,318	6,385	6,385	6,385	6,451	6,451	6,451	6,451	6,518	6,518	6,518	6,585	6,585	6,652	6,718	6,785	6,785	6,852	6,852
SMigR: males	64.7	69.7	69.9	69.2	69.3	68.7	68.2	68.3	67.8	67.3	66.8	67.3	66.8	66.4	66.4	65.6	65.2	64.8	64.4	62.9	62.4	61.5
SMigR: females	71.7	77.6	77.6	77.0	77.1	76.4	75.6	75.7	75.2	74.6	74.3	74.7	74.2	73.6	73.4	72.5	72.3	72.1	71.6	70.1	69.7	68.9
Migrants input																						
Out-migration to the UK																						
Male	2,344	2,461	2,502	2,509	2,509	2,505	2,509	2,535	2,519	2,511	2,501	2,500	2,501	2,509	2,545	2,545	2,580	2,599	2,598	2,619	2,648	2,625
Female	2,725	2,874	2,900	2,893	2,893	2,896	2,893	2,934	2,950	2,957	2,967	2,969	2,968	2,959	2,990	2,990	3,022	3,070	3,070	3,116	3,154	3,177
All	5,068	5,335	5,402	5,402	5,402	5,402	5,402	5,469	5,469	5,469	5,469	5,469	5,469	5,469	5,535	5,535	5,602	5,669	5,669	5,735	5,802	5,802
SMigR: males	57.0	59.0	59.3	58.8	58.2	57.6	57.3	57.5	56.9	56.4	55.9	55.6	55.3	55.1	55.4	54.8	54.8	54.5	53.7	53.0	52.8	51.6
SMigR: females	63.5	66.7	66.8	66.2	65.7	65.1	64.3	64.6	64.3	63.9	63.7	63.5	63.0	62.3	62.2	61.3	61.1	61.0	60.0	59.4	59.1	58.7
Migrants input																						
In-migration from Overseas																						
Male	201	294	295	296	297	297	298	297	296	296	295	294	294	293	293	293	293	293	292	292	292	292
Female	199	290	289	288	287	287	286	287	288	288	289	290	290	291	291	291	291	292	292	292	292	292
All	400	584	584	584	584	584	584	584	584	584	584	584	584	584	584	584	584	584	584	584	584	584
SMigR: males	71.6	103.6	102.6	101.3	100.4	99.5	98.7	98.2	97.7	97.3	96.9	96.7	96.3	95.7	95.2	95.2	94.4	93.4	92.3	91.0	89.3	87.5	86.0
SMigR: females	71.6	103.6	102.6	101.3	100.4	99.5	98.7	98.2	97.7	97.3	96.9	96.7	96.3	95.7	95.2	94.4	93.4	92.3	91.0	89.3	87.5	86.0
Migrants input																						
Out-migration to Overseas																						
Male	201	336	337	338	339	340	374	373	372	371	370	369	369	368	368	368	368	368	367	367	367	367
Female	199	331	330	329	328	327	360	360	361	362	363	364	365	365	366	366	366	366	366	366	366	366
All	400	667	667	667	667	667	734	734	734	734	734	734	734	734	734	734	734	734	734	734	734	734
SMigR: males	71.6	118.3	117.1	115.7	114.7	113.6	124.0	123.3	122.7	122.2	121.8	121.4	120.9	120.3	119.6	118.5	117.3	115.9	114.3	112.1	109.9	108.1
SMigR: females	71.6	118.3	117.1	115.7	114.7	113.6	124.0	123.3	122.7	122.2	121.8	121.4	120.9	120.3	119.6	118.5	117.3	115.9	114.3	112.1	109.9	108.1
Migrants input																						
Migration - Net Flows																						
UK	+667	+916	+916	+916	+983	+983	+983	+982	+982	+982	+982	+1,049	+1,049	+1,049	+1,050	+1,050	+1,050	+1,049	+1,116	+1,050	+1,050	+1,050
Overseas	0	-83	-83	-83	-83	-83	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150	-150
Summary of population change																						
Natural change	+148	+180	+192	+196	+205	+209	+210	+214	+214	+212	+139	+135	+121	+116	+172	+166	+155	+150	+79	+75	+75	+5
Net migration	+667	+833	+833	+833	+900	+900	+834	+833	+833	+833	+833	+900	+900	+900	+900	+900	+900	+900	+967	+900	+900	+900
Net change	+815	+1,013	+1,025	+1,029	+1,106	+1,109	+1,044	+1,047	+1,046	+1,045	+972	+1,035	+1,021	+1,015	+1,072	+1,066	+1,055	+1,050	+1,046	+975	+975	+905

Summary of Population estimates/forecasts

Population at mid-year

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2009-2026	2009-2031
0-4	4,360	4,798	4,927	5,041	5,131	5,307	5,016	5,027	5,031	5,030	5,019	5,003	4,983	4,946	4,903	4,924	4,946	4,967	5,005	5,057	5,034	5,018	4,943		
5-10	5,150	5,246	5,370	5,576	5,848	5,974	6,588	6,807	6,962	7,086	7,192	7,383	7,031	7,041	7,035	7,025	6,999	6,968	6,919	6,871	6,884	6,895		
11-15	4,980	4,980	4,986	5,005	4,987	5,014	5,052	5,111	5,311	5,593	5,812	5,972	6,588	6,755	6,894	7,006	7,226	6,811	6,816	6,812	6,800	6,774	6,742		
16-17	2,242	2,161	2,208	2,216	2,152	2,198	2,210	2,247	2,248	2,139	2,189	2,264	2,351	2,547	2,675	2,667	3,197	3,413	2,984	2,988	2,987	2,989		
18-59Female, 64Male	45,648	45,876	46,172	46,438	46,773	47,085	47,387	47,674	47,927	48,239	48,479	48,551	48,752	48,932	49,220	49,597	49,905	50,241	50,461	51,377	51,801	52,274	52,715		
60/65 -74	9,390	9,592	9,845	10,098	10,350	10,603	10,992	11,193	11,399	11,608	11,682	11,767	11,861	11,961	12,071	12,314	12,564	12,823	13,082	13,348	13,529	13,738		
75-84	5,065	5,003	5,058	5,135	5,231	5,343	5,476	5,614	5,754	5,895	6,035	6,323	6,605	6,878	7,144	7,402	7,567	7,735	7,907	8,065	8,223	8,242	8,268		
85+	2,646	2,640	2,744	2,826	2,891	2,945	3,053	3,150	3,243	3,333	3,424	3,556	3,691	3,828	3,970	4,115	4,317	4,513	4,704	4,856	5,003	5,337	5,660		
Total	79,481	80,296	81,309	82,334	83,364	84,469	85,578	86,622	87,669	88,715	89,760	90,733	91,768	92,788	93,804	94,876	95,942	96,997	98,047	99,093	100,068	101,044	101,949	+17,516	+22,468

Population impact of constraint
Number of persons

Housing

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030		2009-2026	2009-2031
Number of households	31,746	32,035	32,562	33,082	33,568	34,072	34,696	35,234	35,770	36,274	36,792	37,336	37,858	38,360	38,863	39,342	39,916	40,495	41,052	41,572	42,048	42,711	43,303	+8,749	+11,557
Change over previous year		+288	+528	+520	+486	+504	+623	+539	+535	+504	+518	+545	+521	+502	+503	+479	+574	+579	+556	+520	+477	+663	+592	+515	+525
Concealed families	178	178	187	191	192	199	203	204	205	209	211	216	217	221	225	230	235	240	250	256	264	280	287		
Number of dwellings	32,728	33,025	33,569	34,105	34,607	35,126	35,769	36,324	36,876	37,396	37,930	38,491	39,029	39,546	40,065	40,559	41,151	41,748	42,321	42,857	43,349	44,032	44,642	+9,019	+11,914
Change over previous year		+297	+544	+536	+501	+519	+643	+555	+552	+520	+534	+561	+537	+518	+519	+493	+592	+597	+574	+536	+491	+683	+610	+531	+542
Households (inc Concealed)	31,924	32,213	32,750	33,273	33,760	34,271	34,899	35,438	35,975	36,483	37,002	37,552	38,074	38,581	39,088	39,572	40,151	40,735	41,301	41,828	42,313	42,991	43,590		
Dwellings	32,911	33,209	33,762	34,302	34,804	35,331	35,978	36,534	37,087	37,611	38,147	38,714	39,252	39,774	40,297	40,796	41,393	41,995	42,578	43,122	43,621	44,320	44,938	+9,084	+12,026
		+298	+553	+539	+503	+527	+647	+556	+553	+524	+536	+567	+538	+522	+523	+499	+597	+603	+583	+543	+500	+699	+617	+534	+547

Labour force

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030		2009-2026	2009-2031
Size of labour force, persons	38,127	38,320	38,654	38,934	39,199	39,518	39,809	40,075	40,291	40,476	40,729	40,915	41,139	41,410	41,725	42,045	42,269	42,897	43,253	43,648	43,978	44,452	44,845	4,771	6,718
Change over previous year		+193	+334	+280	+264	+319	+292	+265	+217	+185	+253	+185	+224	+271	+315	+320	+225	+628	+356	+395	+329	+474	+393	+281	+305
Number of jobs	47,039	47,328	47,791	48,188	48,566	49,012	49,426	49,807	50,128	50,411	50,779	51,063	51,397	51,789	52,237	52,692	53,029	53,872	54,375	54,929	55,343	55,940	56,435	6,833	9,396
Change over previous year		+288	+463	+397	+378	+447	+413	+381	+321	+282	+368	+284	+333	+392	+448	+455	+337	+844	+503	+554	+414	+597	+495	+402	+427

This report was compiled from a forecast produced on 01/12/2010 using POPGROUP software developed by Bradford Council, the University of Manchester and Andelin Associates

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